



AGROMETEOROLOGICAL CONDITIONS

Expert group for the common organisation of agricultural
markets, Arable crops

26 June 2025

JRC MARS Bulletin

Crop monitoring in Europe

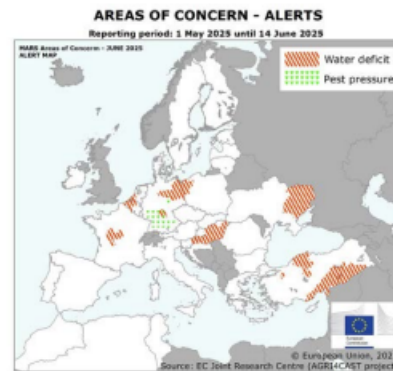
June 2025

Good winter cereals yields sustained by the south

Water deficit keeps threatening crops in the north

Overall good yield prospects at the EU level are sustained by exceptionally high expectations in Spain, Portugal, Romania, Bulgaria, Greece and also the Baltics. A persisting water deficit is increasingly affecting yields in western Belgium, central France, eastern Germany, western Poland, and Hungary, particularly for spring and summer crops. In contrast, yield reductions due to rainfall excess are expected for winter crops in northern Italy, while, in southern and central Germany, pest outbreaks threaten root and tuber crops.

Distinct regional variations in crop development are being monitored across the EU and neighbouring areas. In eastern Ukraine, Türkiye, Cyprus and the western Maghreb, the irreversible impacts of prolonged drought and heat have led to a significant reduction in winter crop outcomes. Despite a delayed sowing campaign, rice is benefiting from improved water availability, with yield forecasts above the five-year average.



Crop	Yield t/ha				
	Avg 5yrs	May Bulletin	MARS 2025 Forecasts	%25/5yrs	% Diff May
Total cereals	5.40	5.67	5.70	+6	+1
Total wheat	5.55	5.85	5.86	+6	+1
Soft wheat	5.77	6.04	6.08	+5	+1
Durum wheat	3.43	3.77	3.75	+9	-1
Total barley	4.76	5.14	5.23	+10	+2
Spring barley	4.66	4.86	4.90	+5	+1
Winter barley	4.81	5.28	5.38	+12	+2
Grain maize	7.10	7.45	7.46	+5	+0
Rye	4.19	4.19	4.19	+0	+0
Triticale	4.37	4.45	4.44	+2	-0
Rape and turnip rape	3.16	3.17	3.18	+1	+1
Potatoes	36.4	37.4	37.1	+2	-1
Sugar beet	75.6	77.9	76.3	+4	-2
Sunflower	2.02	2.09	2.11	+5	+1
Soybeans	2.67	2.82	2.85	+7	+1
Field beans	2.76	2.83	2.84	+3	+0
Field peas	2.22	2.33	2.36	+6	+1
Rice	6.31	—	6.64	+5	—

Issued: 23 June 2025

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1. Agrometeorological overview
2. Remote sensing (Arable land | Grasslands & fodder)
3. Rice analysis
4. Country analysis (EU | Black Sea Area | Maghreb)
5. Crop yield forecast
6. Atlas

Covers the period from 1 May until 14 June

Content

1. Agrometeorological overview
2. Weather synthesis
3. Areas of concern
4. Remote sensing – canopy conditions
5. Grassland and fodder
6. Focus on rice
7. Crop yield forecast

JRC [MARS Bulletin](#).

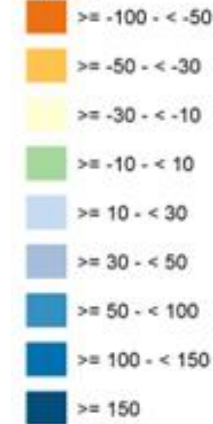
1. Agrometeorological overview

- **Rain surplus:** most of the Baltic states, central Romania and the Alps region, as well as in southernmost Sicilia and eastern Kriti. In most of these areas, the total rainfall, exceeding the LTA by 100–150 %
- **Rain deficit:** the Loire Valley in France, southern Italy and northern Sardegna, eastern Slovenia, northernmost Croatia, central Hungary and parts of the western Balkans. In most of these regions, cumulative rainfall corresponded to half of the LTA or less.

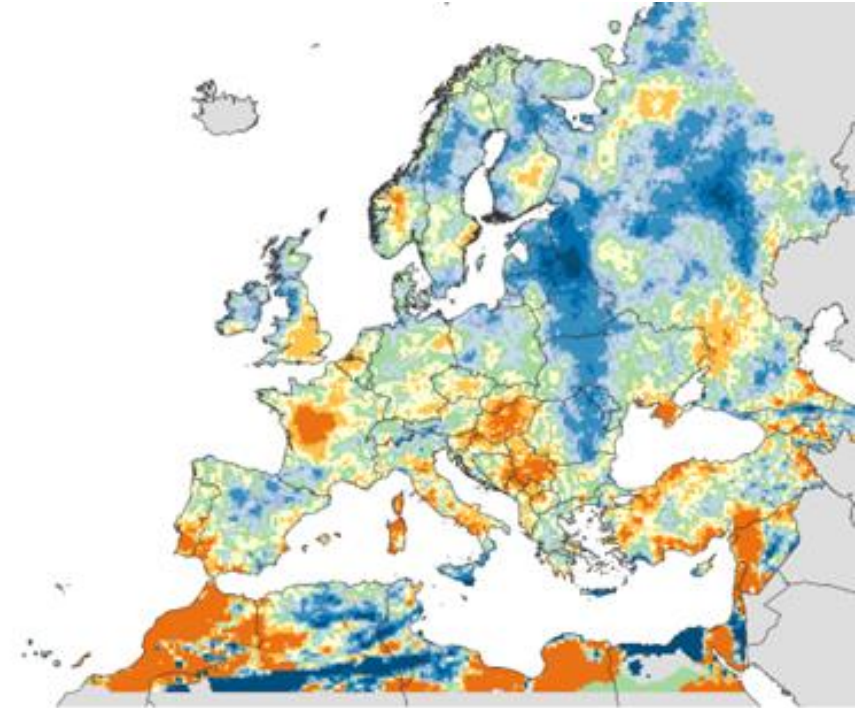
from: 01 May 2025
to: 14 June 2025

Deviation:
Year of interest - LTA

Units: %



17/06/2025
Resolution: 10 x 10 km



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Source: EC Joint Research Centre (AGRI4CAST project)

1. Agrometeorological overview

AVERAGE DAILY TEMPERATURE

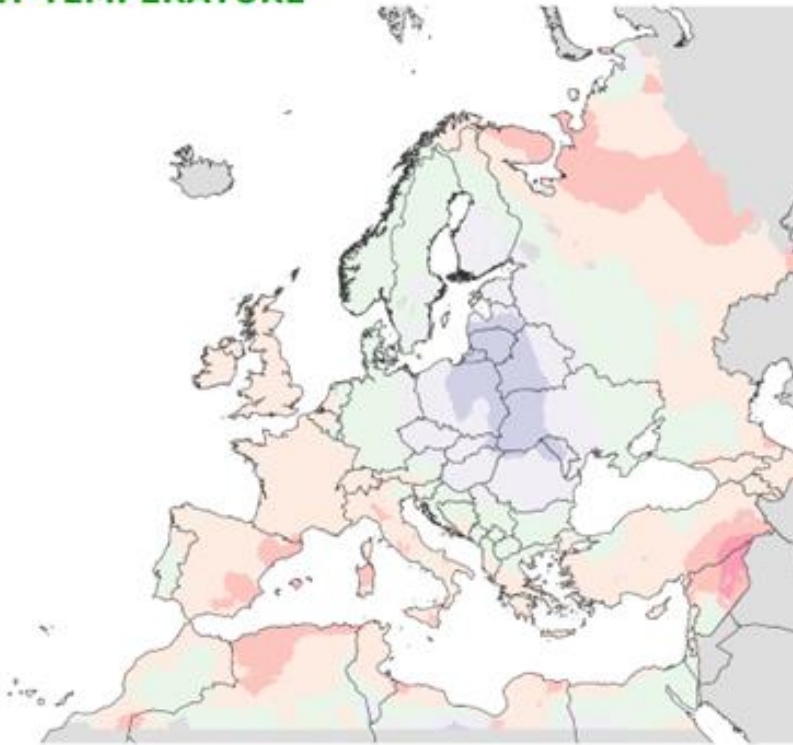
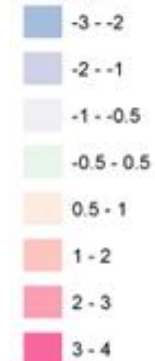
Averaged values

from: 01 May 2025
to: 14 June 2025

Deviation:

Year of interest - LTA

Units: °C



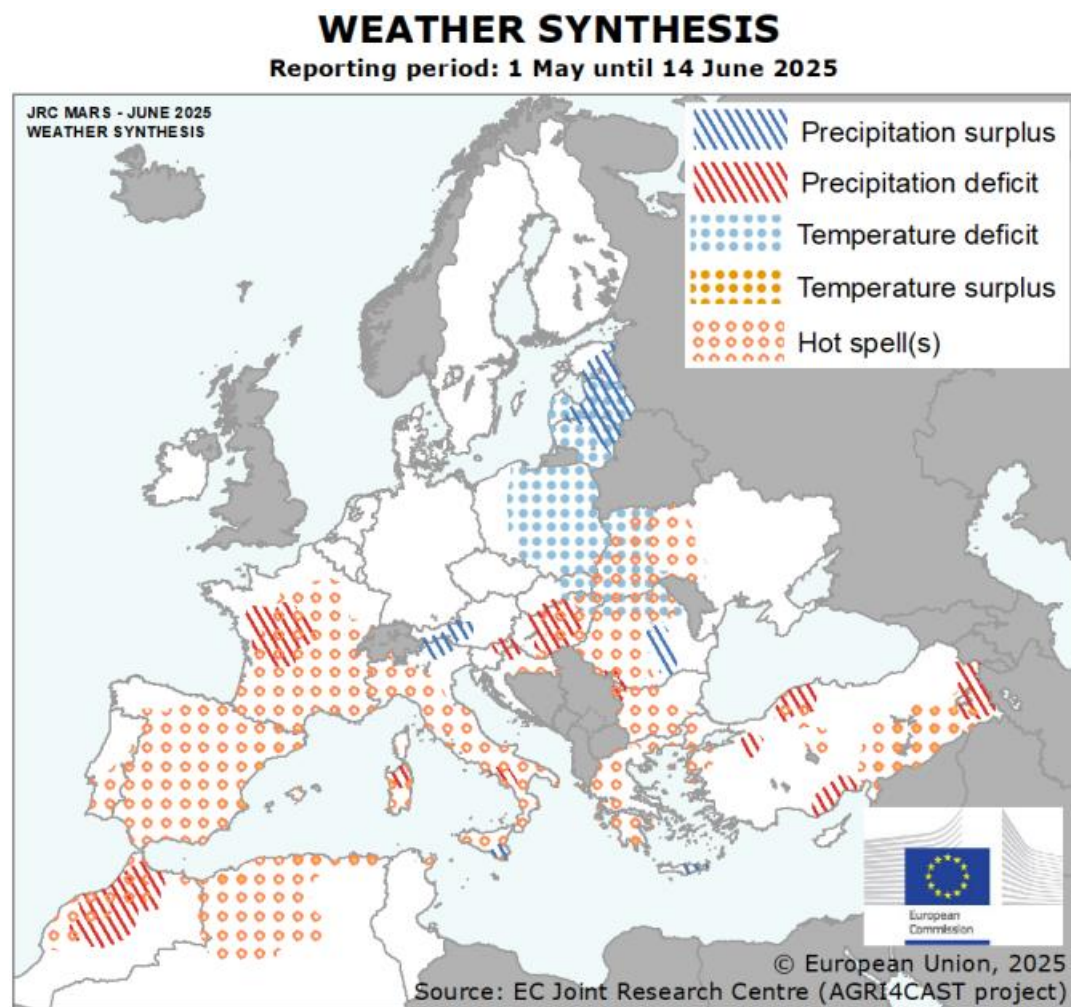
17/06/2025
Resolution: 10 x 10 km



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Source: EC Joint Research Centre (AGRI4CAST project)

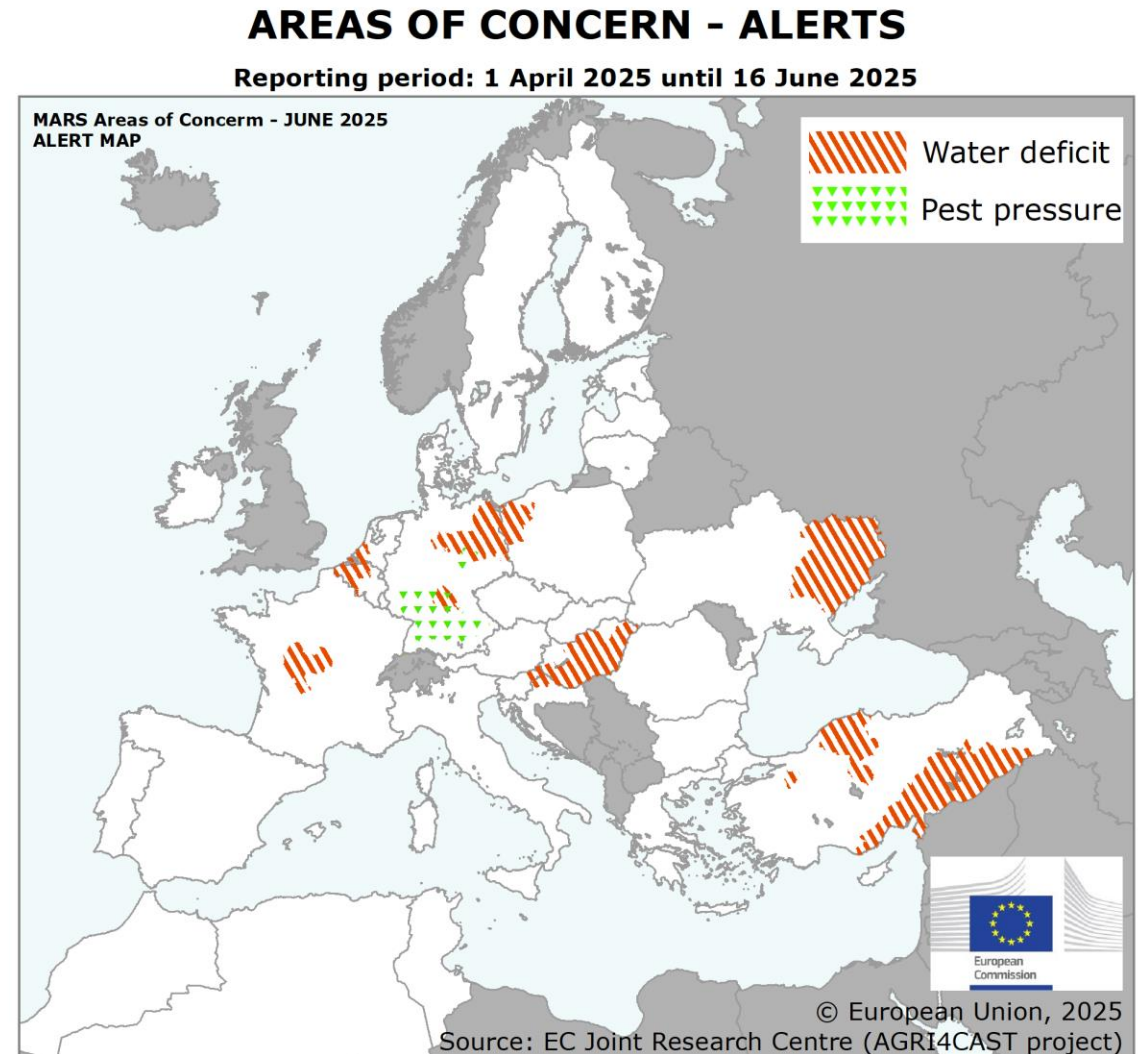
- **Above average temperatures:** Sardegna, along the Mediterranean coast of Spain, in southernmost Greece, where temperature sums exceeded the LTA by 10–20 %
- **Hot spells:** most of the Iberian peninsula, France and Italy, eastern Hungary, western Ukraine and Romania, most of the Balkan peninsula, with up to 25 days above 30 °C.
- **Temperature deficit:** Romania and easternmost Hungary and Slovakia, as well as in most of Poland, Lithuania and Latvia, with average daily temperatures were 2–3 °C below the LTA and minimum daily temperatures were down to – 5 °C. In most of Latvia, parts of north-eastern Poland, north-western Ukraine and the Carpathian region in southwestern Ukraine and Romania, there were more freezing nights than average.

2. Weather synthesis



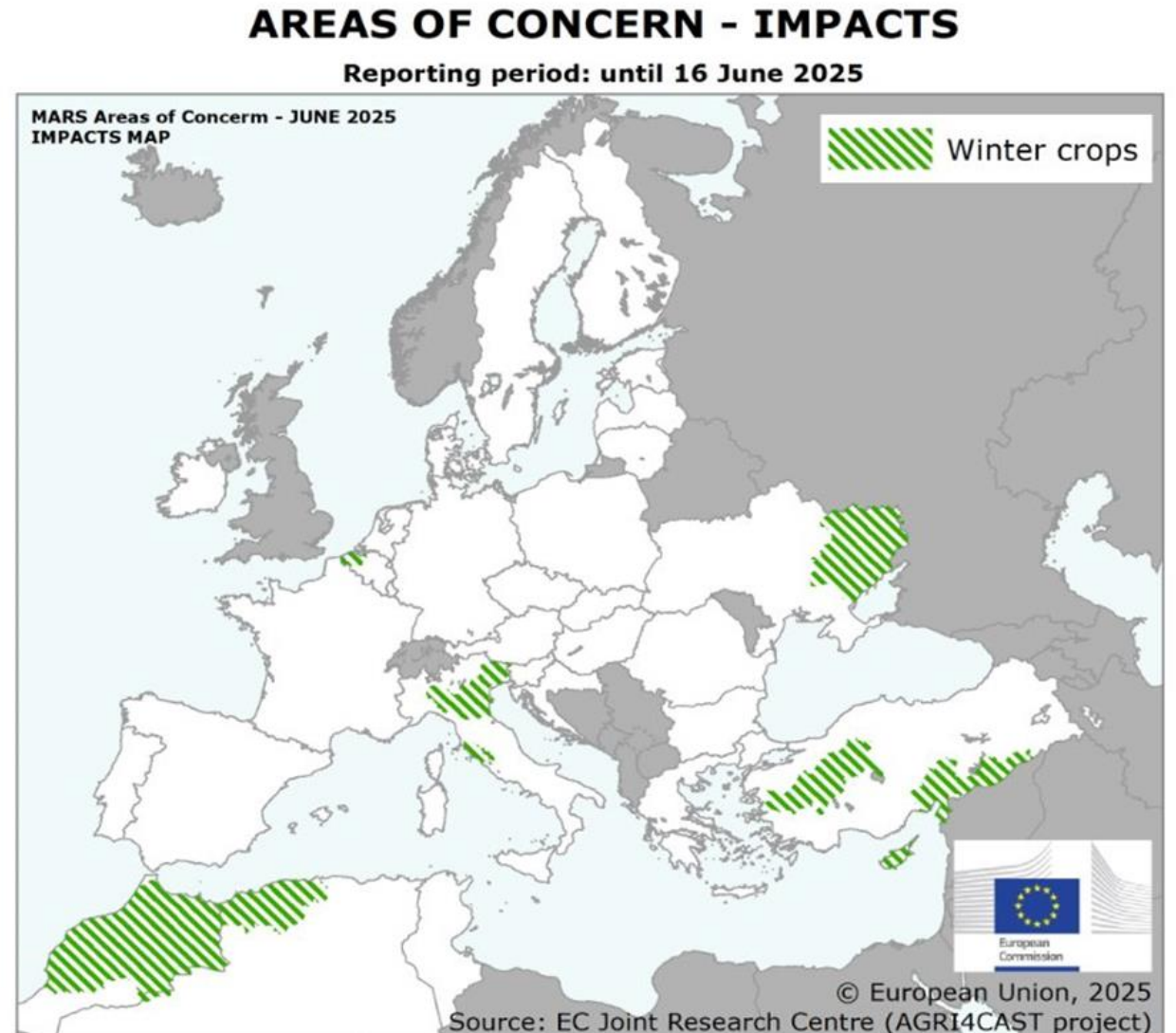
3. Areas of concern - alert

- Dryness is still the main concern
- Grain filling of cereals has been negatively affected, and summer crops are under pressure
- Rainfall mitigated concerns in western-EU but less for **western Belgium, southern Netherlands, eastern Germany and western Poland**
- Emerging concerns for central **France** **eastern Slovenia** and **Hungary**
- Reinforced concerns for eastern Ukraine and Türkiye,
- Strong pressure from pests in Germany



3. Areas of concern- crops impacts

- Emerging impacts:
 - northern Italy: outcome of a too wet spring
- Confirmed impacts (too dry):
 - Cyprus
 - Western Belgium

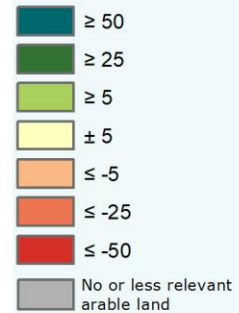


4. Remote sensing – canopy conditions

Cumulative fAPAR comparison

Current year - Medium term average (MTA / 2015-2024)
Considered period: 01 April - 20 May 2025

Relative differences (%)
compared to MTA

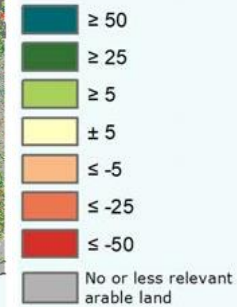


Mask: Rainfed arable land mask based on CLC 2018 and GlobCover2009
Data source: MARS remote sensing database / MODIS

Cumulative fAPAR comparison

Current year - Medium term average (MTA / 2015-2024)
Considered period: 01 May - 10 June 2025

Relative differences (%)
compared to MTA



Mask: Rainfed arable land mask based on CLC 2018 and GlobCover2009
Data source: MARS remote sensing database / MODIS

5. Grassland and fodder

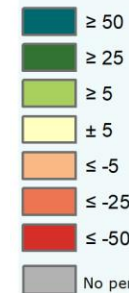
Positive conditions continue to prevail across EU

- Above-average signals in most of Europe
- Slightly negative signal in northern France/Benelux because of continued dry conditions
- Growth slowed in FI/LT/northern PL (temperature accumulation deficit)
- Excessive rainfall in northern IT leads to below average biomass accumulation
- Start of summer dormancy in southernmost EU
- Very positive production signals remain in ES and PT

Cumulative fAPAR comparison

Current year - Medium term average (MTA / 2015-2024)
Considered period: 01 May - 10 June 2025

Relative differences (%)
compared to MTA



Mask: Grassland mask based on Copernicus HRL 2018
Data source: MARS remote sensing database / MODIS

6. Focus on rice

- A favourable start to the season, despite sowing delays
- Sowing delays but good water availability due to frequent rain events in April and May
- Increase in sown area:
 - IT: +3% compared to 2024
 - ES: +20% compared to 2024
- Forecasts: mainly based on historical trends, projected to be +5% above the five-year average.

7. Crop yield forecast

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- Positive outlook for cereals, fair for oilseeds
- Winter crops yields revised upwards by 1-2% compared to last month, except for durum wheat (-1%)
- Winter cereals yields now forecast above the five-year average, mainly thanks to high yield expectations in southern EU and in the Baltics,
- Fair yield outlook for rapeseed
- Fair start to the summer crop season overall, in particular in southern EU,
- Sugar beet exposed to disease pressure in central and southern DE.

Please send us your national ag-meteo data ‘on the ground’ (i.e. areas, yields, significant meteo events, and impacts)

→ Your data are useful to improve accuracy of JRC analysis (i.e., vs JRC satellite and other observations).

During GREX or any time to

AGRI-E4@ec.europa.eu

Thank you



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