MED-Amin
Mediterranean Agricultural Market Information Network

MED-Amin Bulletin 2025 – 3

Winter crops outlook at 10 June 2025

Dry conditions, mixed yields outlook

The May–June period was marked by drier conditions, with varying impacts across regions. On the one hand, it confirmed the exceptional outlook in Spain and southern Italy, as well as very good prospects in Tunisia and Greece. On the other hand, it exacerbated already dry conditions in northern France, central and southeastern Türkiye, and Lebanon, leading to downward revisions of the outlook since the second bulletin—particularly for winter barley. The impact was limited in Morocco and Algeria, where conditions remain mixed.

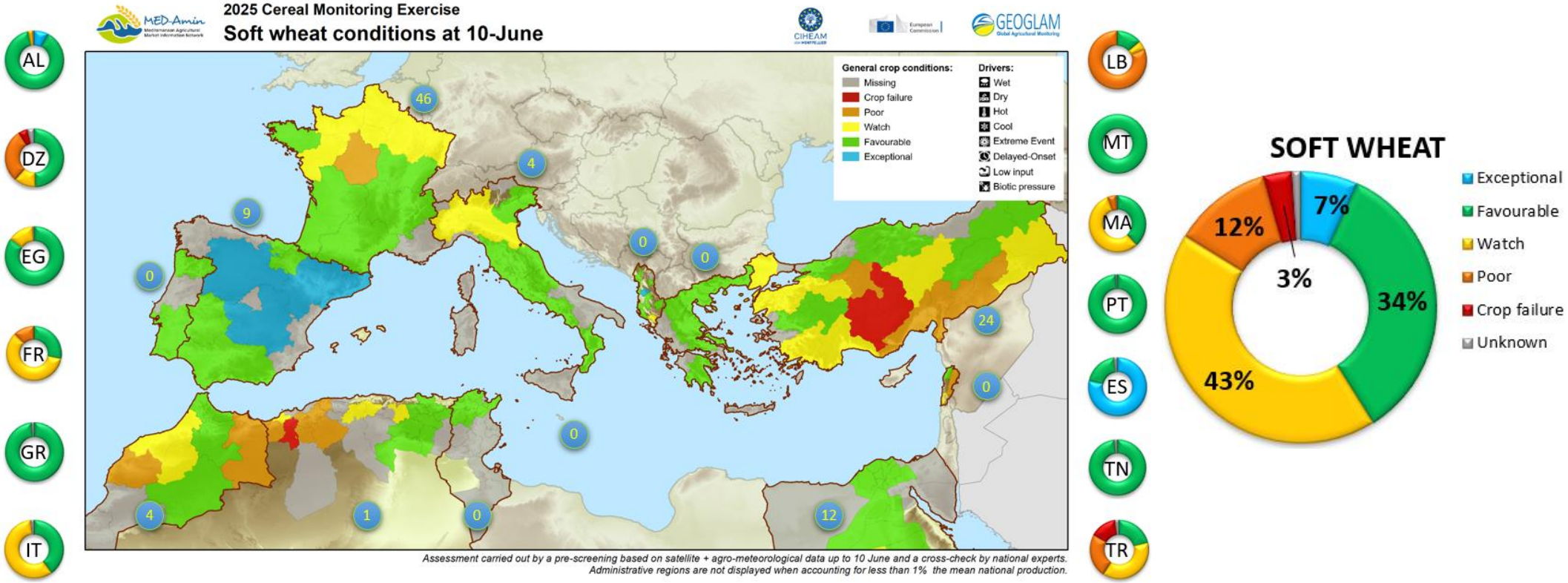
The present **bulletin** gives an outlook about the progress of cereal crops in the Mediterranean region. It provides **early qualitative forecasting** of the **2024-2025 campaign**, with particular focus on soft wheat, durum wheat and barley. This **first outlook** reviews crop conditions from the sowing up to **10 June 2025**, with a specific **focus on the 10 May - 10 June period**.

This crop monitoring and early warning initiative was progressively **developed since 2016 by the MED-Amin network in collaboration with the Joint Research Centre (JRC) of the European Commission**, providing an **early qualitative** assessment of crop condition and yield potential of **three winter cereals** (soft wheat, durum wheat, barley) based on a GEOGLAM-like approach but with a **two-steps methodology** using remote sensing and feedback from national Focal Points which enabled to identify **hot-spots** of concerns at **subnational** level using nomenclature and pie-charts similar to GEOGLAM for AMIS (Agricultural Market Information System) and to disseminate corresponding **warnings.** [1]

[1] MED-Amin network, gathering 13 Mediterranean countries and coordinated by the CIHEAM (International Centre for Advanced Mediterranean Agronomic Studies), aims to reduce prices volatility in agricultural markets. This initiative lays the foundation for an early warning system strengthening food security in the region. For more info: http://www.med-amin.org, http://ec.europa.eu/jrc/en/mars and http://cropmonitor.org .

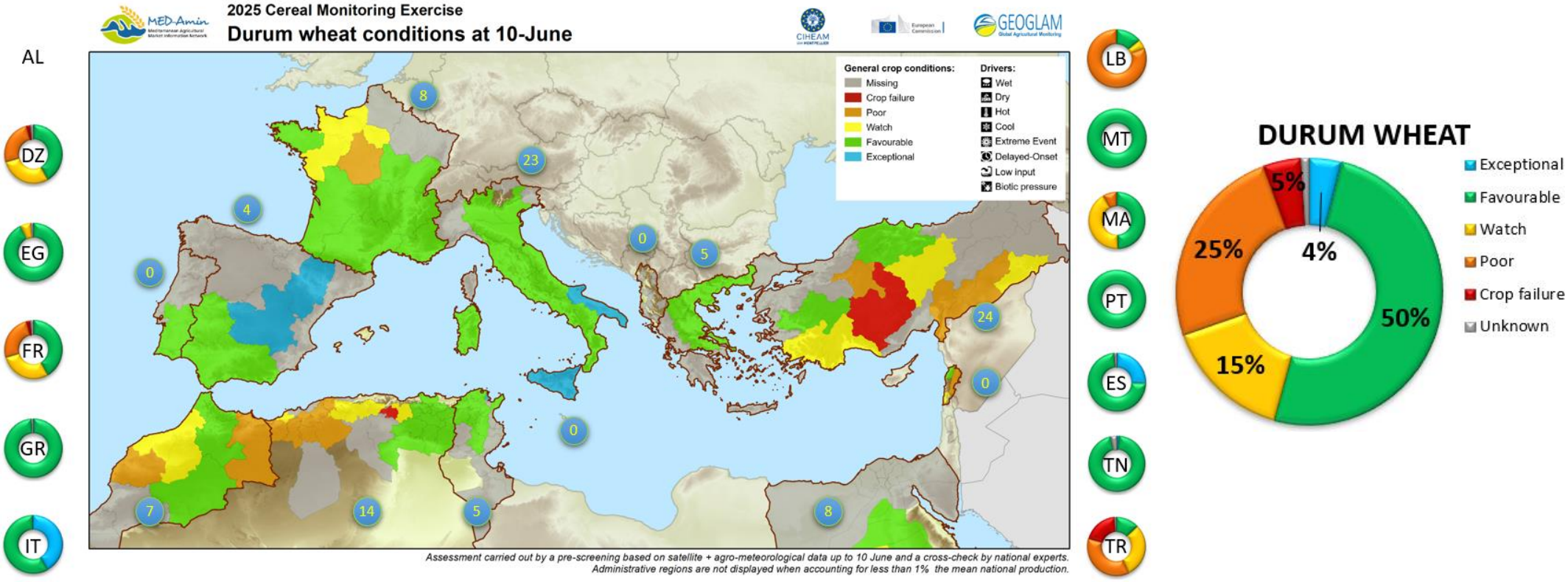
The regional outlook for Soft Wheat remains mixed overall and has been slightly revised downward. Currently, only 41% of the cultivated area is classified as being in 'favourable' or better condition, with yields are projected to be below average or well below average across substantial areas - 43% and 15% of the total area, respectively. These figures are largely driven by the situations in **France** and, to a lesser extent, **Türkiye** (representing respectively 46% and 24% of total MED-Amin production). Both countries have experienced widespread dry conditions, which deteriorate – particularly in *Central Anatolia* and northern France. In France, the share of soft wheat rated as good to very good has declined slightly, from 71% to 69%, although this remains an improvement over the previous year. Conditions are also mixed in northern **Italy**, where below-average yields are expected, and remain poor in **Lebanon** (*Bekaa*), western **Algeria** and **Morocco** (despite a notable improvement compared to the previous campaign). Elsewhere, the outlook is good or very good, particularly in **Spain**, where above-average yields are expected, and to a lesser extent in **Tunisia**. Southern **Egypt** has experienced some heat stress.

Please see the National Highlights section of this bulletin.



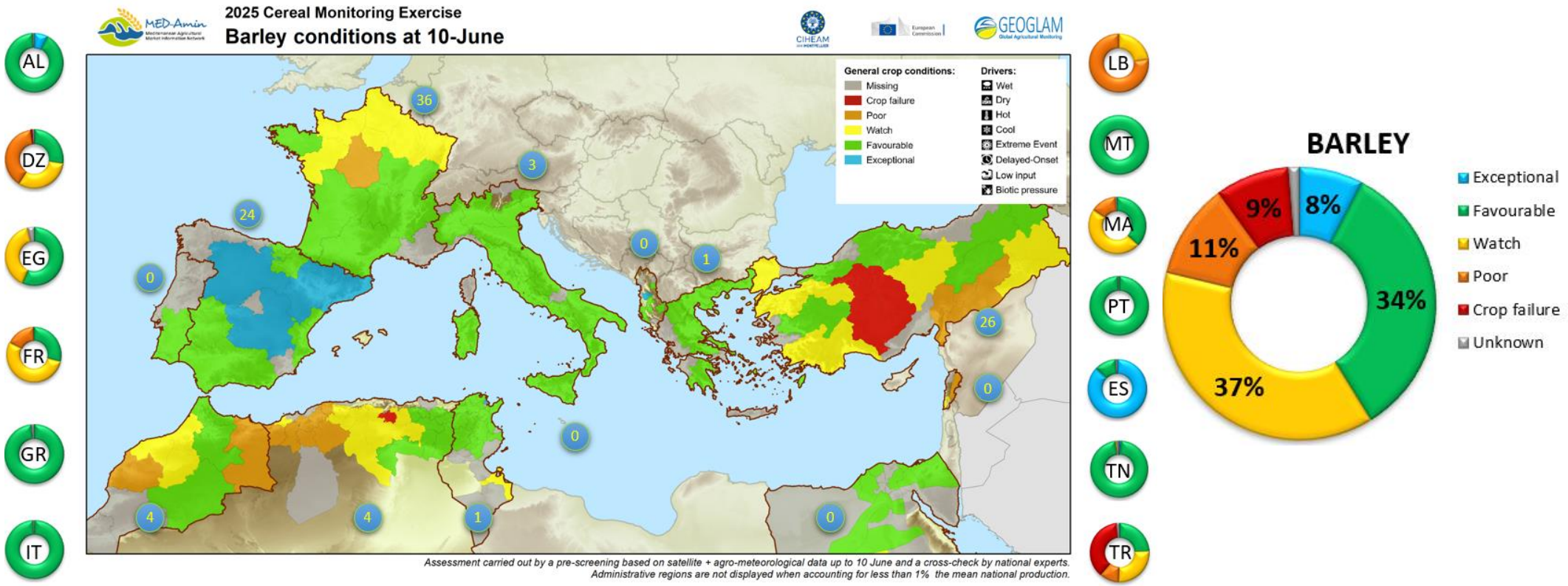
Durum Wheat is a typical Mediterranean crop, accounting for nearly half of global production. The overall outlook has been significantly revised downward, with the share of cultivated area classified as being in 'favourable' or 'exceptional' condition dropping from 71% to 54%. While exceptional or very good conditions have persisted in key producing areas of southern **Italy** (which account for 23% of MED-Amin production nationally), as well as in **Spain**, **Greece** and **Tunisia**, persistent drought has continued to negatively impact rainfed areas in Central and Southeastern **Türkiye** (which represents 24% of MED-Amin production), resulting in a poor outlook. In **France**, the outlook has also been revised downward, particularly in the *Centre-Val de Loire* region. The situation remains stable in **Algeria** and **Morocco** (representing 14% and 7% of MED-Amin production, respectively), although marked regional disparities contribute to an overall mixed outlook.

Please refer to the National Highlights section of this bulletin.



Barley presents a situation similar to that of soft wheat, with the share of cultivated area classified as being in 'favourable' or better condition revised downward from 48% to just 42%. Additionally, a significant proportion of the crop (9%) is reported under 'crop failure' conditions. The situation has deteriorated notably in **Türkiye** (26% of total MED-Amin production), where yields are expected to be well below average across large areas. A downward revision has also been made for **France** (36% of total MED-Amin production), where barley has been severely affected by drought conditions, resulting in only 65% of winter barley areas now rated in 'good' or 'very good' condition. Conversely, the outlook has improved in Spain (24% of total MED-Amin production), confirming an exceptional campaign thanks to sustained favourable conditions. Elsewhere, the situation remains stable with a good outlook in **Italy**, **Tunisia**, **Portugal** and **Albania**, while the outlook ranges from mixed to poor outlook in **Morocco**, **Algeria** and **Lebanon**.

Please refer also to the National Highlights section.



National highlights

Albania: As of 10 June, crop conditions for winter cereals are generally favourable with limited rainfalls and adequate temperatures. The overall outlook is positive across the country, reflecting stable agrometeorological conditions, including well-distributed rainfall and mild temperatures during key growth periods. No major meteorological anomalies, pest outbreaks, or changes in agricultural practices have been reported, except in *Dibër*, where localized signs of weeds and pests such as leaf beetle and rust were observed, though without significant impact. Heterogeneity is minimal, though micro-variations exist due to topography and localized climate (e.g., late frost in high-altitude areas). Irrigation use remains stable and traditional, with no major technological shifts. In summary, the 2025 winter cereal campaign is progressing well, with solid yield prospects and no major risk to production. The season's performance is expected to surpass the previous year.

As of 10 June, crop phenological stages range from late grain filling to harvesting. Most lowland regions, such as *Shkodër*, *Elbasan*, and *Tirana*, have entered full maturity or harvest phases, while cooler areas like *Korçë* show a slight delay, still in grain filling or early maturity. Overall, crops are developing slightly ahead of seasonal norms.

Algeria: Conditions vary markedly across the country, and are more favourable in the eastern regions. In the western wilayas (*Tlemcen*, *Mascara*, *Sidi Bel Abbes*, *Ain Temouchent*, *Relizane*, *Tiaret*), high temperatures combined with significantly below-average rainfall have prevented crop recovery. Consequently, satellite indicators show biomass accumulation well below the long-term average, and poor yields are expected. In the central and northern wilayas (*Ain Defla*, *Médéa*, *Bouira*), insufficient rainfall has hindered vegetative growth, resulting in below-average yield expectations, though outcomes are likely to be better than in the previous campaign. In the northeastern wilayas (*Setif*, *Mila*, *Constantine*, *Souk-Ahras*), favourable agrometeorological conditions and irrigation have supported crop development, leading to above-average biomass accumulation. As a result, yields are expected to exceed the long-term average, with potential local records. Overall, the national outlook is mixed, with yields expected to be close to average, though it remains difficult to determine whether they will fall slightly below or above the average.

As of 10 June, winter cereals have reached maturity and harvesting is underway.

Egypt: Crops in the *Delta* and *Middle Egypt* (e.g., *Sharkia*, *Menia*, and *Behera*) followed typical development patterns with minimal deviation from historical norms, reaching maturity and harvest on schedule. No significant biotic stresses (e.g., pests or diseases) or extreme weather events have been reported during this period. In southern regions (*Assiut*, *Aswan*, *New Valley*, *Luxor*), higher-than-normal temperatures have been recorded, particularly affecting barley – with minor delays in grain filling observed - and the late stages of wheat development. This has led to a slight yield risk, though partially mitigated by irrigation. In *Assiut*, the outlook remains favourable thanks to more effective irrigation, while in *Aswan* and *New Valley*, heat stress was more pronounced, and yields are expected to be slightly below average.

With the exception of isolated issues in the far south, the overall outlook for cereal crops nationwide is stable to slightly above average, supported by adequate irrigation and the absence of serious pest or disease outbreaks. As of 10 June, barley has reached the harvest stage, while both soft and durum wheat are mostly in the maturity to harvest stages in the main grain-producing regions (e.g., *Menia*, *Sharkia*).

France: The May–June period was marked by contrasting weather conditions between northern and southern France. At the national level, rainfall was approximately 20% below average, with a significant water deficit in the northern half of the country, where cumulative precipitation in some areas remained below 25% of seasonal norms. In contrast, several southern regions (including the Mediterranean area and the southwest) experienced markedly above-average rainfall. Temperatures were also well above normal, with national averages +1.1 °C above the climatological norm, and sunshine levels exceeding the average by 10%. While groundwater levels remain generally adequate, they have been declining since February. Only 46% of monitoring stations currently report above-normal levels, compared to 70% at the same time in 2024. In the north, the combination of dry and warm conditions has led to rapid heading and a reduced density, increasing risks for grain filling and thousand-kernel weight (TKW). Localised thunderstorms and hailstorms were reported, but no significant pest outbreaks have occurred.

As a result, crop conditions across the country are mixed, with increasing regional disparities. As of 9 June, 69% of soft wheat and 74% of durum wheat are rated in good to very good condition. Soft wheat is particularly affected in northern regions, while durum wheat continues to perform well in the south. Barley has been severely affected by drought conditions and only 65% of winter barley areas are rated in good or very good condition. Spring barley is performing slightly better, with 71% of areas rated good or better. Thus, the outlook is worsening in the northern half of the country, particularly in *Centre-Val de Loire* (with only 52% of soft wheat and 55% of winter barley areas rated good or better) and *Grand Est* regions. In contrast, conditions remain more stable in the southern half, with only slight declines observed in *Occitanie* and *Nouvelle-Aquitaine*. Overall, crop conditions are better than last campaign, but remain below the five-year average.

As of 10 June, nearly all winter crops have reached the heading stage, with a slight delay of about three days for soft wheat and barley. Harvesting of winter barley has just begun. For summer crops, grain maize has been planted early and irrigation is already widely underway in several regions. Future rainfall will be a key determinant of summer crop yields.

Greece: Favourable conditions throughout the year continued into the May–June period, with moderate rainfall and optimal temperatures benefiting crops during the ripening stage—particularly in *Central Macedonia*, where conditions have been exceptional, and to a lesser extent in *Thessaly*. Although late outbreaks of wild oats caused slight delays to harvesting, and some localised lodging was observed in *Thessaly*, along with weed and fungal pressure (Septoria, rust) in parts of *Western Macedonia* (*Kastoria*), overall prospects remain positive. As a result, winter crop yields are expected to exceed both last year's levels and the five-year average at a national scale.

As of 10 June, all winter crops have reached maturity and harvesting is underway across most regions, on schedule.

Italy: Northern Italy (e.g., *Piemonte*, *Lombardia*, *Emilia-Romagna*) continued to experience substantial rainfall throughout May which delayed both the maturation stage and the harvest period. These conditions negatively affected soft wheat yields, which are expected to decrease by 10–15% compared to 2024. Nevertheless, grain quality appears to be satisfactory. Conversely, conditions have remained favourable for the ripening of early-developing crops in southern Italy (e.g., *Sicily*, *Puglia*). As a result, durum wheat conditions in *Sicily* have been significantly better than last year, with yields expected to increase by approximately 15% and excellent quality reported. A similar situation is observed in *Puglia*, where both yield and quality are comparable to those in *Sicily*.

Lebanon: Dry conditions have persisted, with no rainfall recorded during the May–June period, reinforcing already poor yield expectations in the *Bekaa* Valley due to a prevailing dry spring. Crops are showing signs of stress, exacerbated by limited irrigation water, and have desiccated prematurely. Isolated instances of crop abandonment have also been reported in the southern regions of the country. In contrast, crop development in northern regions has been more favourable, supported by slightly higher and more consistent rainfall throughout the campaign. Nevertheless, yields of both common and durum wheat are expected to be below average at the national level, particularly in the *Bekaa* region. Barley has shown slightly better performance; however, it remains under hydric stress.

As of 10 June, crops in the *Bekaa* are sufficiently dry to allow for a slightly earlier than usual harvest this year.

Malta: No or very small cereal production.

Morocco: Dry conditions prevailed during the May–June period, with rainfall significantly below average and high temperatures, particularly in the northern part of the country. However, these conditions had limited impact on winter crops, which were already nearing maturity despite earlier delays. Three distinct zones can be identified. In the northern regions (*Tanger–Tétouan–Al Hoceima*, *Fès–Meknès*), satellite indicators show biomass accumulation close to the long-term average, and yields are expected to align with historical norms. In *Casablanca–Settat*, *Rabat–Salé–Kénitra*, and *Béni Mellal–Khénifra*, conditions are less favourable, with biomass levels below average—though still improved compared to the previous campaign. Notably, in *Rabat–Salé–Kénitra*, winter crops have shown partial recovery, benefiting from late rains. In contrast, the outlook remains negative in *Marrakech–Safi*, *Souss–Massa*, and *Oriental*, where biomass accumulation is low and yields are expected to be significantly below the long-term average. At the national level, production is expected to rebound compared to the previous campaign but remain well below the long-term average.

As of 10 June, winter cereals have reached maturity and harvesting is underway.

Portugal: The country experienced hot and dry conditions during the review period. In *Alentejo*—the main cereal-producing area—crop conditions are heterogeneous, and average yields are expected to be lower than last campaign, by approximately 5% to 10%. Conversely, in the *Trás-os-Montes*, cereal crops are developing well, with good grain weight observed, despite excess water earlier in the season. Yields are expected to be close to last year's levels. Higher productivity is anticipated in *Lisboa e Vale do Tejo* (except for barley), although some wheat areas have been affected by root asphyxiation. Overall, the outlook is positive, with yields expected to match those of last campaign, except for barley (-5%).

As of 10 June, crops are between the grain-filling stage and harvest in the southern regions (*Alentejo*, *Lisboa e Vale do Tejo*), with some delays in barley due to meteorological conditions. In the northern regions (*Trás-os-Montes*), crop development is delayed compared to last year, with crops currently at the spike stage.

Spain: High precipitation and favourable temperatures during spring have supported the development for winter crops and contributed to increased yield expectations. However, heatwaves in May negatively affected potential yields, lowering what had initially been forecast as a record national production and causing harvest delays in several regions, including Aragón, Andalusia, Extremadura and Castilla-La Mancha (central and eastern parts). Additionally, localised hailstorms caused crop losses in parts of Castilla-La Mancha, Andalusia, and Aragón. Despite these setbacks, the overall outlook remains excellent, and total winter crop production is expected to exceed both last year's results and the five-year average.

Winter crops are currently at the maturity stage across most regions, with harvesting already underway in Andalucía. In Castilla-La Mancha and other areas, harvest has been delayed due to prolonged spring rainfall and high humidity, and then, by heatwaves.

For summer crops, ample water availability has supported a rebound in the maize sown areas.

Tunisia: Limited rainfall and warm conditions have characterized the review period, creating favourable conditions for crop maturation. The north-eastern part of the country experienced a heat wave in early June, with temperatures nearing 40°C, which may impact the final stages of crop development. Overall, the outlook is very positive and even exceptional in some regions (e.g. *Ariana*). In contrast, conditions are slightly below average in the southern and arid regions (e.g., *Gafsa*); however, these areas contribute only marginally to national production.

High yields are expected, surpassing both last year's results and the five-year average. Crops have reached maturity and harvesting is underway.

Türkiye: Unfavourable conditions persisted during the May–June period in *Western* and *Central Anatolia*, as well as in the *Southeastern* regions, while the *Black Sea* area benefited from consistent and sufficient rainfall throughout May, allowing crops to recover from earlier water stress and develop better than expected. In Central Anatolia (e.g., *Konya*, *Kırıkkale*), below-average rainfall in May hampered grain filling and adversely affected yields. Combined with ongoing abiotic stress factors throughout the campaign—early drought, below-normal temperatures, and high diurnal temperature variation—yields are expected to be poor and below the long-term average for rainfed crops, and in some areas (such as *Konya*), well below the long-term average. In several locations, barley has failed completely.

In the Southeastern regions, below-average rainfall in May coupled with rising temperatures and June heatwaves (approaching 38°C) disrupted the maturation stages, especially in *Şanlıurfa*, *Diyarbakır*, *Gaziantep*, and *Mardin*, leading to significantly below-average yield expectations in non-irrigated fields. In contrast, conditions in the *Black Sea* region have recently improved, leading to a more positive outlook with above-average biomass accumulation. Meanwhile, in the *Aegean* and *Marmara* regions (e.g., *Aydın*, *Tekirdağ*), the continued lack of precipitation suggests slightly below-average yield prospects.

Overall, the national outlook for rainfed crops is negative, with widespread impacts from abiotic stress in Central and Southeastern regions. Irrigated fields may perform better, but their share in total production remains limited.

As of 10 June, winter barley has reached maturity, while most wheat crops are at the grain-filling stage.

General methodology: *The forecasting methodology is based on the monitoring of crop conditions using indicators derived from Earth observation (e.g. fAPAR or NDVI), carried out jointly by the CIHEAM-IAMM and the Joint Research Centre of the European Commission (EC-JRC). Reflecting out-of-average biomass accumulation vs the medium-term average (2014-2023) allows us detecting areas of concern, which are characterized using the GEOGLAM scale and nomenclature (see below). These pre-screened areas of concern, defined at a sub-national level, are then analyzed, validated or completed by each National Focal-points of the MED-Amin network, taking into account feedbacks from field observation and local experts.*

Crop conditions legend (GEOGLAM scale and nomenclature):

- *Exceptional: Conditions are much better than average at the time of reporting. This label can only be used between the grain-filling stages to the harvest stage.*
- *Favourable: Conditions range from slightly below to slightly above average at the time of reporting.*
- *Watch: Conditions are not far from average but there is a potential risk to final production. Between planting/early-vegetative stage and vegetative/reproductive stages, it is considered that crops might still recover if conditions improve.*
- *Poor: Conditions are well below average and are very likely to impact production with a harvest clearly below average.*
- *Crop failure: Crops have been strongly damaged, low yield and area reduction will strongly impact the production.*

Crop conditions Drivers (adapted from GEOGLAM nomenclature):

- ***Wet:*** *Above-average accumulated total precipitation;*
- ***Dry:*** *Little or no rainfall period;*
- ***Hot:*** *Unusually above-average temperatures;*
- ***Cold:*** *Unusually below-average temperatures;*
- ***Extreme events:*** *Occurrence of extreme weather events;*
- ***Delayed onset:*** *Delayed onset and operations of the crop year;*
- ***Biotic stress:*** *Crop impact caused by living organisms, specifically viruses, bacteria, fungi, nematodes, insects, and weeds;*
- ***Low Input:*** *limited use of inputs (fertilizers, pesticides, etc.) that could end in moving the outlook for the future harvest (yield, quality).*

Disclaimer

The geographic borders in the present bulletin are purely a graphical representation and are only intended to be indicative. The boundaries do not necessarily reflect the official position of CIHEAM-IAMM and of the European Commission.

Follow the evolution of the harvest forecasting throughout the campaign:

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