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Press Release

Harvest forecast 2025: modest cereal recovery, stable outlook for oilseeds, and positive protein crop results despite reduced area

The experts of the Copa and Cogeca Working Parties for Cereals, Oilseeds and Protein Crops expect a modest improvement for EU cereals in 2025, a mixed but relatively stable year for oilseeds, and a positive outcome for protein crops despite a decline in sown area. However, the overall situation remains weatherdependent, and the coming weeks will be decisive.

EU-27 cereal production is forecast to reach 275.2 million tonnes in 2025, marking a 6.9% increase compared to 2024. This recovery is driven by a 2.2% rise in sown area and a 4.6% improvement in yields. After a challenging 2024, key cereal crops are showing signs of rebound: common wheat production is expected to rise by 9.6%, barley by 9.2%, and maize by 4.7%, all supported by better yield conditions. Durum wheat, however, faces a sharp decline of 32% due to significantly lower yields (-33.7%).

Among other cereals, triticale (+7.4%), oats (+6.4%), and rye (+2.8%) are also expected to record production increases. In contrast, sorghum faces a significant decline (-19.9%) due to a sharp reduction in sown area (-31.1%). Geographically, the recovery remains uneven across Member States: while some regions show clear signs of improvement, localised challenges such as summer heatwaves continue to pose concerns.

It is important to underline that while the 2025 cereal harvest marks a clear improvement over 2024 and aligns closely with the five-year trimmed average (276.6 million tonnes), this average itself reflects a period of below-par harvests. The past five seasons have consistently fallen short of historical benchmarks, meaning that even this year's 'recovery' remains well below levels seen in earlier decades. In this context, 2025 should be viewed as a relative stabilisation following a period of chronic underperformance.





CONSOLIDATED CEREAL CROPS PRODUCTION FORECAST (MILLION TONNES) 2025 VS 2024 VS 5-Y TRIM AVERAGE

For oilseeds, the 2025 outlook is relatively stable, with total EU-27 production expected to reach 31.1 million tonnes, representing a slight decline of 0.8% compared to 2024. The overall oilseed area is up marginally by 0.5%, while yields are forecast to remain fairly steady, declining by 1.3%. A small increase in rapeseed production (+0.1%) is offset by a decrease in sunflower production (-4.5%), mainly due to lower yields. In contrast, soya production is projected to grow by 5.9%, driven by both expanded area and improved yields. Country-specific developments show varied trends, with some regions benefiting from favorable early spring conditions, while others continue to face persistent soil moisture deficits and volatility in input markets.

Protein crops offer the most positive results in this year's outlook. Despite a -3% decrease in total area, EU-27 production is expected to reach 3.82 million tonnes, a robust +8% increase compared to 2024. This growth is largely due to better yields, especially for peas (+21%) and beans (+11%). Lupin production, however, declines sharply (-66%) due to both lower area and yields.





CONSOLIDATED OILSEED AND PROTEIN CROPS PRODUCTION FORECAST (MILLION TONNES) 2025 VS 2024 VS 5-Y TRIM

While early indications are broadly encouraging, continued heat events or rainfall deficits during grain filling and harvesting could impact final results. Close monitoring of crop conditions across Member States is essential, as the coming weeks will be critical to determining the final outcome of the 2025 harvest.

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Information on the harvest data 2025 can be found <u>HERE</u>.

Translations will be available in DE, ES, FR, IT, PL and RO on the Copa-Cogeca website soon.

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