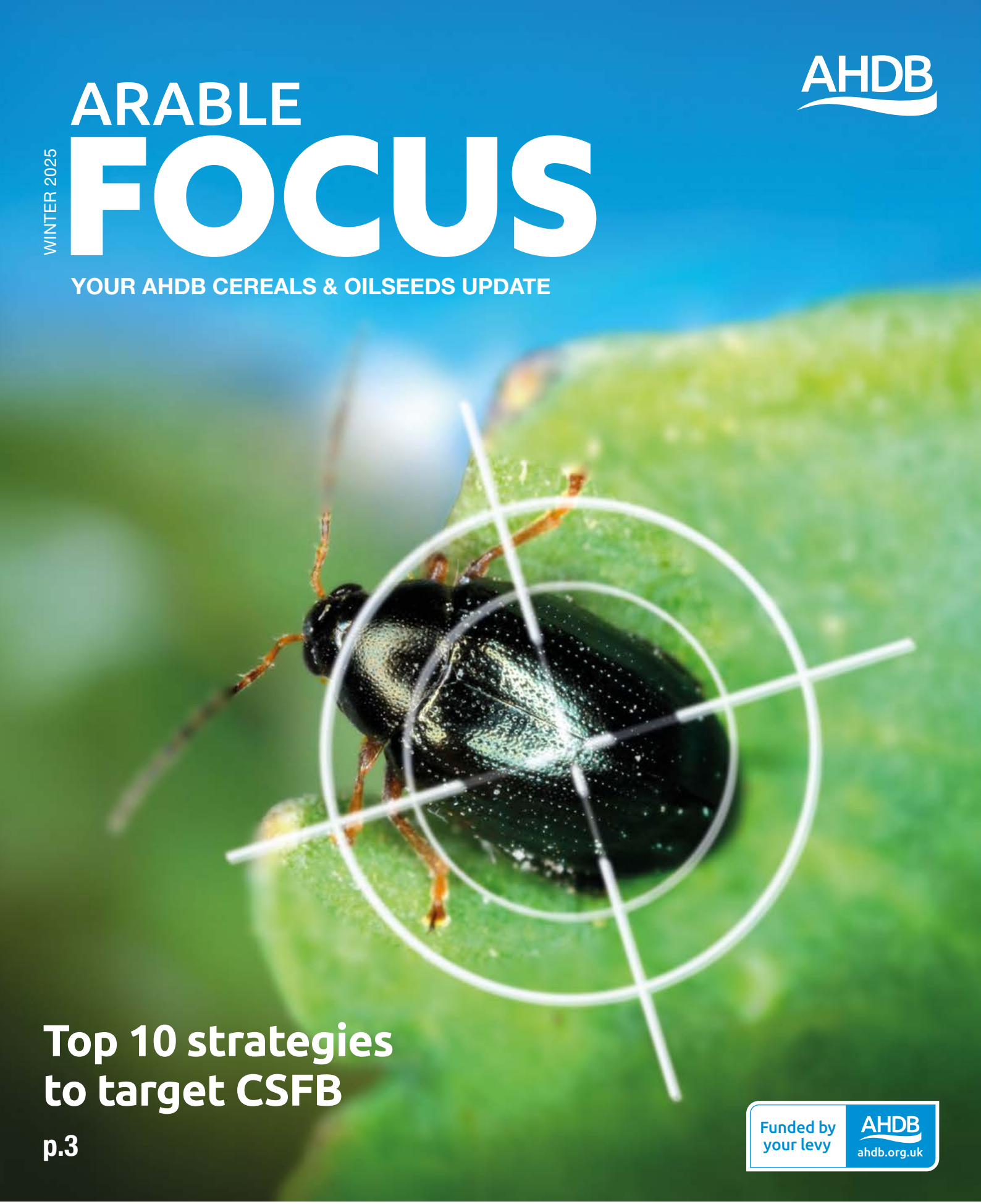
AHDB

WINTER 2025

ARABLE FOCUS

YOUR AHDB CEREALS & OILSEEDS UPDATE



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AHDB is a statutory levy board, funded by farmers, growers and others in the supply chain. We equip the industry with easy to use, practical know-how which they can apply straight away to make better decisions and improve their performance. For further information, please visit **ahdb.org.uk**

Welcome

Our sector continues to face significant challenges, from this year's extreme weather that impacted yields, to generally pressured prices and subdued demand (see page 9). Following a disappointing 2024 harvest due to albeit alternative but still extreme weather, we had hoped for a more positive outcome in 2025. However, with unprecedented heatwaves, we have continued to suffer from both the financial and emotional toll of another incredibly difficult year and subsequent poor harvest.

Against this backdrop of challenge and change, it is important to build resilience – something we put at the front and centre of our investment decisions. We are now in a stronger position to do this, thanks to your input.

Research activity in this edition has been better targeted because of your input, and we continue to invest in projects that will make a positive difference to farming practices and outcomes. The work we do at AHDB is pivotal to securing solutions that can help farmers financially, as well as providing hope for a better, brighter future.

We recognise the importance, now more than ever, that the work we do is relevant and communicated to levy payers efficiently in order to make the biggest impact.

Change can also bring opportunity with it, and I am delighted to welcome the new Chair of AHDB, Emily Norton, and the new Interim CEO, Janet Swadling (following Graham Wilkinson's departure as CEO in August).

The new leadership, partnered with our continued investment into the topics that mean the most to you, will drive AHDB forward, as we unlock and demonstrate the value for levy payers. With your support, we can prioritise our work together and deliver results to make the business of farming more rewarding and more profitable.

Tom Clarke
Cereals & Oilseeds Sector Council Chair and AHDB Board Member

More focus

If Arable Focus whets your appetite, head to our website for more content. **ahdb.org.uk/arable-focus**

More people

Discover the team behind Arable Focus and much more. **ahdb.org.uk/meet-the-team**

Stay connected on social media

For real-time updates delivered directly to your news feed, be sure to follow us on social media:

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Join us at an event near you

Our Engagement team hosts meetings across the UK, where you can learn about a variety of topics and connect with our team in person. Book onto an event: **ahdb.org.uk/events**

Top 10 CSFB management strategies

A unique industry partnership has compiled a top 10 list of cabbage stem flea beetle (CSFB) management strategies to provide confidence in growing oilseed rape.

1. **Ditch the date.** Do not stick to traditional calendar dates to avoid the peak migration period (which usually occurs during late August to mid-September).
2. **Chase perfection at establishment.** Always wait for adequate moisture (present or forecast) before sowing, use the best seed, promote good seed-to-soil contact, ensure adequate nutrition and select varieties with appropriate vigour for the sow date.
3. **Keep your distance.** Any distance (space and time) between oilseed rape crops will improve the chance of success.
4. **Improve larval tolerance.** Fewer, bigger plants will stand up better to larval attack.
5. **Make use of muck.** Apply organic materials, which can reduce beetle damage and support crop growth.
6. **Park the pyrethroids.** Resistance is real and pyrethroids can harm beneficial insects.
7. **Create companions.** Companion cropping (e.g. with oats, buckwheat and berseem clover) and intercropping (e.g. with faba beans) can help shield crops from CSFB.
8. **Build brassica buddies.** Use sacrificial strips of brassica (e.g. turnip rape) or OSR volunteer trap crops to lure beetles away.
9. **Stir it up post-harvest.** Lightly cultivate OSR stubble soon after harvest to hit emerging CSFB.
10. **Unlock hidden gems.** Discover the many other tactics to layer in an integrated approach to deliver multiple blows and suppress CSFB populations.

For further information on the application of the strategies and the OSR Reboot partnership, visit **ahdb.org.uk/csfb-tips**

Major CSFB investment

A major new phase of CSFB research got underway this autumn. CSFB Research+ will run for nearly five years and:

- Provide data on the field performance of novel control products (such as insecticides/ seed treatments, biopesticides and synergists)
- Improve guidance on cultural control methods and their effectiveness (including the cultivation of OSR stubbles and the use of brassica species to lure beetles away from OSR cash crops)
- Generate information on CSFB traits (including how the pest responds to its environment) to target monitoring and cultural, biological and chemical control
- Provide guidance on the impact of natural enemies on CSFB control (and how to encourage them)
- Deliver a comprehensive crop management programme for CSFB (including guidance on how to layer approaches)

CSFB Research+ has a total project value approaching £750,000. A third of this investment is from cash and in-kind contributions from an extensive network of project partners.

ahdb.org.uk/csfb-research

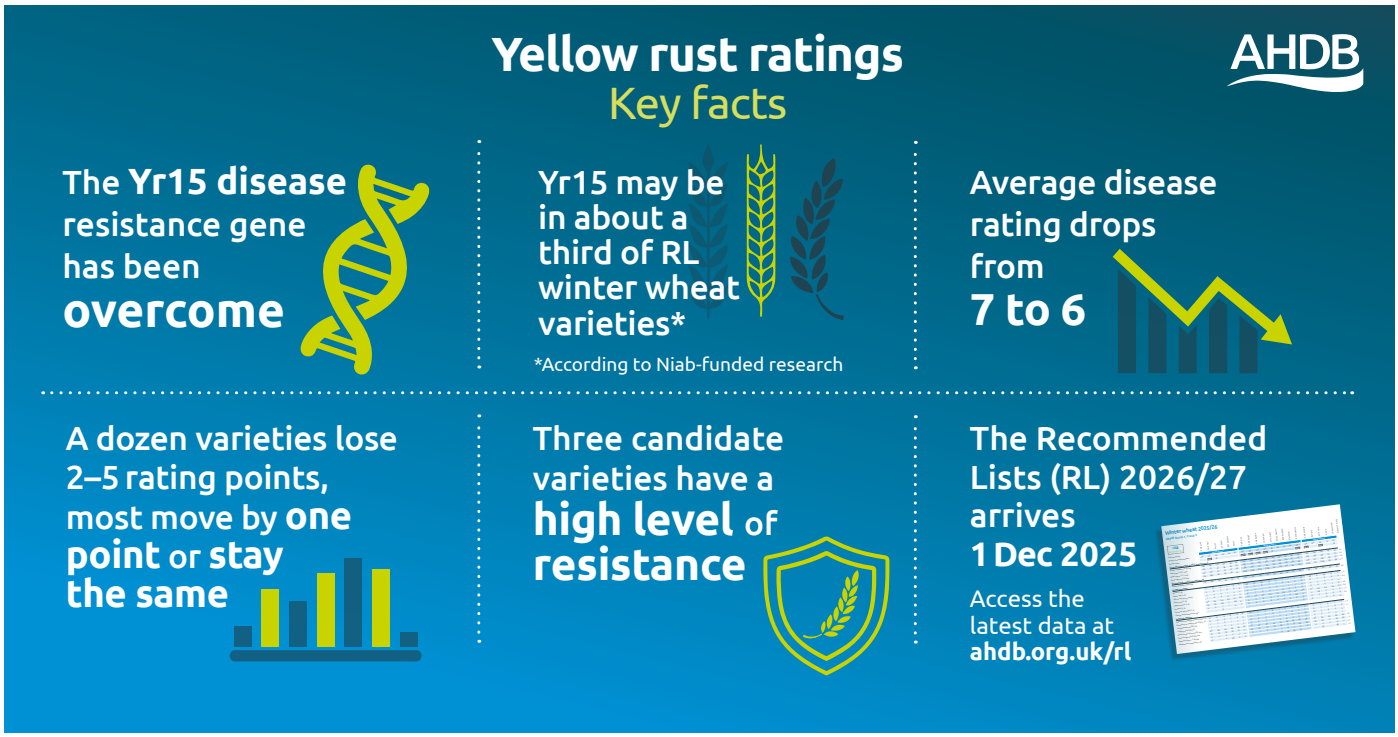
Yellow rust data released early

We released the Recommended Lists (RL) yellow rust disease ratings for 2026/27 in August.

Ratings for rusts (yellow and brown) usually use data from three trial years. Since RL 2021/22, the data has been weighted to give more recent results a greater influence on the ratings, which makes them more sensitive to rust-population changes.

However, the widespread emergence of a new yellow rust strain in 2025, which has overcome a major resistance gene (Yr15), meant we needed to limit the RL 2026/27 ratings to harvest 2025 data (which best captures the current situation).

The Yr15 gene played an important role in many commercial varieties, with some losing as many as five points in the new ratings. The new strain is also highly likely to impact resistance at the young plant stage, with most varieties expected to be classified as susceptible (s) in the full RL 2026/27 (due online on 1 December 2025).



Get the latest ratings via **ahdb.org.uk/yellow-rust-ratings-2025**

Low-input variety data

Two new projects got underway this autumn to deliver variety data to reduce artificial input use.

A four-year project (AHDB cost: about £250,000) will run trials to compare the performance of wheat varieties grown as blends (multiple varieties) against varieties in single stands. The researchers will use the AHDB variety blend tool, experience and conversations with millers to select hard wheat milling varieties (UKFM Groups 1 and 2) with suitable characteristics for drilling in the trials (in autumn 2025, 2026 and 2027). Blends increase field genetic diversity, which could reduce the severity of several diseases (including yellow rust) and increase yield and yield stability (across years and environments).

A 30-month project (AHDB cost: about £50,000) will use a network of commercial farm trials to produce information on winter wheat variety traits associated with weed competition. Some crop species are more competitive than others (e.g. barley is more competitive than wheat against black-grass), and this new research will extend understanding to the variety level.

Input from levy payers (from the latest major RL project review) was used to develop these new research projects. Learn more at **ahdb.org.uk/variety-research**

© Kevin Milner

Ergot: Keeping it clean

A comprehensive review of ergot has identified four key strategies to tackle the disease by targeting the pathogen's life cycle.

Claviceps purpurea can infect major UK cereals and certain grass species during flowering, causing hard, dark ergots to develop in place of grain.

As ergot alkaloids (mycotoxins) are highly toxic when ingested (by humans and livestock), Great Britain has contractual limits for ergot by weight for feed grain and zero tolerance for all other grain. In 2022, the EU implemented stricter levels for specific cereals and products traded in the EU (including Northern Ireland), introducing maximum levels (MLs) for ergot alkaloids for the first time. Adoption into UK law is being considered.

The ADAS-led review identified practical steps to drive down disease pressures, limit crop infection and keep grain clean.

© Kristina Grenz

Ergot management strategies

1. **Reduce the amount of ergot and its ability to produce primary spores.** Higher-impact interventions include the strategic use of cultivations and drilling high-quality, clean seed. Cultivations should bury ergots to at least 5 cm for at least a year. Although ploughing is best, any cultivation is more effective than direct drilling.
2. **Grow lower-risk crops to reduce infection events.** Higher-impact interventions include rotational adaptations, such as growing a non-cereal crop or a less susceptible cereal crop (in order of decreasing susceptibility: rye, triticale, wheat, barley and oats). Although information on varietal risk is limited, higher risk is associated with varieties that are open-flowering, flower for longer or produce more late tillers.
3. **Do not allow grasses to become a source of secondary spores.** Higher-impact interventions are based on integrated weed management approaches. Ergot affects a wide range of grass species (including those within margins). As black-grass flowers earlier than cereals, it is a key target for management.
4. **Know where ergot is and manage infected grain.** Higher-impact interventions require careful management of high-risk fields or areas (such as headlands and tramlines) and grass margins. It is particularly important to harvest infected areas separately and keep contaminated grain away from other grain. Although it is possible to clean grain to some degree, it is not always completely effective, especially as some ergot fragments are extremely small.

Details on all interventions are published at **ahdb.org.uk/ergot**

Oat mycotoxin research

Fusarium langsethiae is the main fusarium species that infects oats, causing fusarium head blight and producing HT-2 and T-2 mycotoxins. UK dietary exposure to these toxins from oat products is very low. However, strict legal limits on these mycotoxins in EU Member States and Northern Ireland mean it is important to understand risk and to prepare for potential new GB legislation.

Continuous investment in this area by AHDB for many years has demonstrated that combined HT-2 and T-2 concentrations are typically higher (with greater variability) in winter oats than in spring oats. The latest phase of the research (until 2027) is quantifying the HT-2 and T-2 content in all RL oat varieties for six harvest years. The results will ultimately guide variety choice, as part of an integrated strategy to manage mycotoxin risks.

Learn more at **ahdb.org.uk/oat-mycotoxins-2021-27**

New fungicide investments

The provision of independent performance data on conventional and novel fungicide products has been secured, thanks to new investments in UK trials.

Fungicide performance

In 1996, we published the first dose-response curves as part of the fungicide performance project. It marked the start of a long-running project series, which will continue for the next three years, as part of a new AHDB-funded contract.

With almost £1m (£821,755) invested in the new phase, the project is one of our largest after the RL. It provides at-a-glance information on the relative performance of key fungicides for the major foliar and ear/pod diseases of cereal and oilseed crops. The efficacy data can be used to build commercial fungicide programmes, based on mixtures of active ingredients and products appropriate to the local disease-threat profile. As agronomists use the results to develop bespoke field recommendations, which also account for fungicide resistance risks, the main annual data set is released at the Agronomy Conference each year.

The latest phase of the research is led by the established and highly experienced project consortium, which includes ADAS, Harper Adams University, Niab and Scotland's Rural College (SRUC).

Visit the website for further information
ahdb.org.uk/fungicide-performance-2025-28

Save the date

Agronomy Conference – 9 December 2025 (Solihull).

Biofungicide performance

Biopesticide plant protection products – based on microbes, pheromones, semiochemicals, plant extracts and other novel sources – are used most frequently in high-value horticultural markets. Although they have good potential for the arable sector, clear usage guidance is needed.

Due to their biological nature, biopesticide performance is influenced by many factors, including humidity, temperature and pest-population specifics. This is why we have invested in an exciting series of biopesticide trials. These will focus on biofungicides in winter wheat, due to the economic importance of major wheat diseases, the availability of potential biofungicides and a high number of preliminary research findings. The pilot, which will include a focus on septoria tritici control, involves many of the same organisations behind the fungicide performance trials and will build upon these foundations.

Over two cropping years (2025/26 and 2026/27), multiple trial sites will test several biofungicide products, including as part of conventional winter wheat fungicide programmes. The trials will assess the impact on disease levels and yield and consider practical implications (including costs). As products will be applied in line with the manufacturer's recommendations, the trials will not produce dose-response curves, but will develop guidance on the use of biofungicides in spray programmes.

By working closely with the agrochemical industry, the most promising pre-commercial products will be identified and tested. This will prime the release of product information soon after the appropriate authorisations for use have been secured (in a similar manner to the fungicide performance project).

Find out more about the project at
ahdb.org.uk/biofungicide-research

More glyphosate-resistance cases

With several cases of glyphosate resistance in UK weed populations confirmed, it is critical to manage and monitor the threat.

Earlier this year, the Weed Resistance Action Group (WRAG) confirmed the first three cases of glyphosate resistance in the UK (in Kent, Gloucestershire and North Yorkshire). The affected populations – all Italian rye-grass from very high-risk resistance situations – demonstrated significantly reduced control from appropriate doses of glyphosate. Another population (Essex) had decreased glyphosate sensitivity.

Following widespread publicity, ten more Italian rye-grass samples (from 8 farms) were identified this year, with live plant samples potted up and sprayed with appropriate glyphosate doses. This identified a high risk of resistance at three of these farms, which will be confirmed via further tests on population offspring. All resistance cases probably evolved from independent selections (i.e. resistance was not physically spread). In spring 2026, ADAS will screen more high-risk populations in the work funded by Bayer Crop Science.

Visit the dedicated page for tips on how to manage and monitor glyphosate resistance at **ahdb.org.uk/glyphosate**

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Nutrient management planning

New AHDB guidance will boost the use of nutrient management plans.

This year, the number of farm holdings with a nutrient management plan in place jumped to two-thirds (64%), following little change for several years. The adoption jump was supported by recent incentives, including the Farming Rules for Water (applies to England), which emphasises the need to have a written management plan to justify nutrient applications, whether via bagged fertiliser or organic materials.

The main objective in any plan is to match nutrient supplies to crop requirements as closely as possible, which includes following guidance, such as that published in the AHDB Nutrient Management Guide (RB209) or nutrient planning software.

Production costs are anticipated to climb for harvest 2026, with fertilisers playing a key role in the projected rise. Carefully planning how much and when to apply nutrients not only makes good business sense but it will reduce diffuse-pollution risks too.

If you would like to join the growing numbers of farmers recording their planning process, then the AHDB website provides guidance to get you started at **ahdb.org.uk/nutrient-plans**

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Environment Baselining Pilot (one year on)

Intensive measurements at the 170 Environment Baselining Pilot farms during 2025 are setting farm-specific baselines and the overall direction for the five-year project.

Covering our four sectors, the pilot is redefining how farmers are recognised for delivering both food and environmental goods. It includes the use of technology to determine the scale and potential of carbon stocks and sequestration:

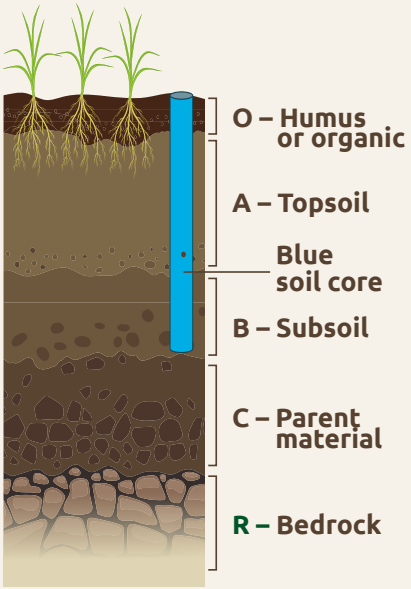
- Light detection and ranging (LiDAR) scans (by plane or drone) are delivering farm-specific maps of carbon-storing vegetation, such as trees and hedges (which also reveal land at higher risk of soil erosion and nutrient run-off)
- Soil cores (36 mm diameter) to 1 m depth or where soil meets the rock (the C-horizon) are determining stores of soil organic carbon (SOC) and providing other key measurements (such as soil texture, pH and nutrient levels)
- Carbon audits are underpinning farm-specific action plans associated with the management of environmental goods

The measurements (especially at the start and near the end of the project) will quantify the impact of management changes. Ultimately, the work is informing debate about the industry's progress towards net-zero greenhouse gas (GHG) emissions and ways to reward farmers for their contributions. By providing more precise farm-level (or local-average) data, the pilot will also start to reduce reliance on international/national GHG emission averages, which are often used in accounting and miss farm-specific nuances.

For further information, visit **ahdb.org.uk/baselining-lessons-2025**

The pilot is supported by Quality Meat Scotland (QMS).

Soil core example



Agri-environment scheme impact

Our annual Planting and Variety Survey is capturing information beyond cropping areas.

© Ana Reynolds

Over half of respondents to this year's spring survey in England (56.1%) reduced arable cropping areas to participate in agri-environment schemes for harvest 2025. This figure was mainly driven by Sustainable Farming Incentive (SFI) options. Schemes are less mature in devolved nations, with relatively little impact recorded in Scotland (6%), Wales (3%) and Northern Ireland (0%). These differences are likely to reduce as other schemes (including private nature markets) develop and are implemented. Farms in traditionally intensive arable farming were the most likely to shift cropped land to the schemes.

Most farms (53%) reduced their cropping areas by less than 10%, with less productive or marginal land typically sacrificed first.

Read the full article at **ahdb.org.uk/agri-environment-scheme-impact-2025**

Mixed outlook for UK crops

Our annual Agri Market Outlook has delivered a snapshot of market conditions and prospects for the cropping sector.

The outlooks explain the key drivers that influence market dynamics, which cover production and consumption trends, weather impacts and policy shifts. This autumn, we issued the outlooks for cereals and oilseeds to help you make business decisions with greater confidence.

Key points for UK cereals

- A global grain deficit is predicted, although demand is uncertain
- Overall demand for UK cereals for human and industrial consumption is expected to decline this season, with particularly sluggish usage by brewers, maltsters and distillers
- Although UK wheat production (harvest 2025) is due to recover (to about 12.25 Mt), it is not expected to be above the 10-year average (13.98 Mt)

Key points for UK oilseeds

- The estimated rapeseed area for harvest 2025 is at a 40-year low (about 242,000 ha)
- Average rapeseed yields bounced back for harvest 2025 (estimated about 3.7 t/ha) with significant variation across farms
- Overall, rapeseed production is expected to increase in 2025 (compared with 2024) and this may lead to fewer imports during the 2025/26 season
- Lower global demand has put pressure on rapeseed prices since the start of the 2025/26 season

The full series of outlooks covers:

- Six sectors – cereals, oilseeds, pork, beef, lamb and dairy
- Three inputs – fertiliser, hay and straw, and animal feed

Get the outlooks at **ahdb.org.uk/agri-market-outlook**

Make data-driven decisions with Farmbench

Farmbench is a free tool that offers valuable insights for all farmers – not just benchmarking experts.

© SE Photography

The online benchmarking tool lets you compare your enterprise production costs with those from similar businesses (using regional and national benchmarks) and highlight improvement areas. For example, you can use it to reveal the crops that perform best in your rotation and prioritise the costs to focus on. In addition to combinable crops, Farmbench also covers sugar beet, beef and lamb enterprises.

Arable Business Groups

While you can use Farmbench independently, there are over 40 AHDB-supported UK Arable Business Groups (ABGs) where farmers discuss Farmbench results. Consider signing up to an ABG to:

- Learn from and alongside your peers
- Take part in expert-led topical discussions
- Develop business management skills
- Receive bespoke performance data (including enterprise production costs)
- Identify best business practices (including tried-and-tested methods)
- Investigate marketing strategies
- Improve business efficiency

Lessons learned

Following discussions of harvest 2024 data at ABGs, 111 attendees provided feedback on the value of the meetings. Over 60% of respondents had already made changes and were considering making more.

Changes made related to crop and rotation management, succession planning, labour and staffing reviews, data-driven decision-making and cost savings.

Planned changes included tighter cost control (variable and overhead costs), reviewing business enterprises (including rotational plans) and examining machinery costs and replacement policies.

Big benchmarking benefits

Farmbench annually provides a source of anonymised data that can yield valuable insights into the performance of arable businesses through being part of an ABG.

For example, a recent Grain Market Daily article analysed cost-of-production data for cereals (winter wheat, winter barley and spring barley – grown to feed specification) and winter oilseed rape. It homed in on the middle 50% performing farms that are part of the ABGs in Farmbench (in terms of full economic net margin) and used other data sources to compare production costs associated with recent harvests (2023 and 2024) with projections for harvests 2025 and 2026.

It showed that production costs had reduced from the recent high in 2023, but signalled that overall costs are likely to increase again for harvest 2026 crops. For example, it indicated a 3% increase for winter wheat (compared with 2025 estimates), putting the potential full economic cost of production at £1,659/ha for the harvest 2026 crop.

Rising variable costs (mainly fertiliser price increases) were cited as the main driver. The forecast hinted at just a small increase in overhead costs in 2026 – with potential rises (rental value, administration costs and labour) largely offset by declines in other costs (machinery/equipment, property, energy and finance). Naturally, the impact on net margins will depend greatly on grain prices and yields.

Such analyses on the national picture are useful, but the biggest value is discussing what it means for businesses at an ABG meeting.

Read the full article at **ahdb.org.uk/farmbench-2025**

For information on Farmbench, ABGs or to contact a regional Farmbench manager, visit **ahdb.org.uk/farmbench**

Farmer network strengthened

We are extending our farmer network to provide fresh perspectives on the business of producing cereals and oilseeds.

New Monitor Farms

The UK Monitor Farm network has been going strong since 2014. This year, new entrants add a substantial environmental focus. For example, Ryan McCormack at Dennington Hall Farms (East Suffolk) is passionate about regenerative farming and boosting biodiversity. At Shore Hall Estate (Essex), Freddy Grant supports farm productivity by weaving in environmental management options. During their three-year tenure, every aspect of their businesses will be scrutinised to identify improvements – big and small.

New Strategic Cereal Farm

Will Oliver (pictured) at Osbaston House Farm is hosting Strategic Cereal Farm Midlands (2025–2031). An initial task was to identify the topics for the on-farm trials: maize management to support the following wheat crop, nutrient performance of poultry manure (produced on site) and inorganic fertilisers, and technology to improve nitrogen applications, fungicide usage and crop health.

Big topics – big experts – big impact

This autumn/winter, more events will add value to the traditional meeting line-up, providing topic-focused discussions, tailored to the region. Some topics echo those discussed at Monitor Farms, including fine-tuning nitrogen, whereas many are novel. For several of these meetings, we are working in partnership with other organisations to provide you with definitive answers to the biggest challenges.

The programme of events includes three national roadshows (November to March):

- Eight **Resistance Roadshow** events (with Defra) to deliver practical tips on protecting plant protection product efficacy (covering pests, weeds and diseases)
- Eight **Smart Nutrition Roadshow** events (various partners) for an evidence-based discussion on nutrient use to underpin crop health
- Five **Resilient Farm Roadshow** events (with Agricology) to future-proof businesses against climate, market and biological pressures

To find an event near you, visit **ahdb.org.uk/cereals-oilseeds-ke-events**

Farm Assurance Review action

Following the independent review of farm assurance schemes in the UK (see Arable Focus – Summer 2025), new AHDB research will provide robust information on the status of farm assurance for cereals and oilseeds, covering domestic supply and imports from commercially important origins.

Led by our in-house analysts, it will examine farm assurance systems (including associated standards), contractual requirements and UK legislation.

It will also cover requirements for imported grain. Critically, it will define the similarities and the differences and consider how legislative and contractual requirements could be met if farm assurance gets adapted.

Access the latest information online at **ahdb.org.uk/farm-assurance-review**

Get to the root of the problem

- Tell us what you need to know via the AHDB letterbox
- Whether it's a knowledge gap, a practical challenge or a long-term concern - your questions and ideas guide what we do
- The activities in Arable Focus were shaped by your ideas

Feed back at **ahdb.org.uk/letterbox**

MEET LONG JOHN SLITHER

This giant worm met levy payers at summer events and gathered investment ideas.

Discover the top topics at ahdb.org.uk/LJS