AHDB ARABLE CROP REPORT

Friday 28 November 2025

EXECUTIVE SUMMARY

Nationally, drilling conditions were much better than last year and so far, prospects for the 2026 winter crops are reported to be very good.

Overall, summer 2025 was hot, sunny, and relatively dry. As a result, soils entered the drilling window very dry and hard, enabling good access for drilling machinery but low seedbed moisture.

September was wetter than average across most of the UK, helping to soften seedbeds, and drilling continued without disruption.

October began warmer than average and was generally wet, although with some regional rainfall variation. All in all, it's reported that drilling progressed well in all regions and countries of the UK.

November started mild and wet. Storm Claudia brought additional rainfall in mid-month, with little impact other than rebalancing the soil moisture deficit, arriving after the drilling campaign and with most spraying completed. Late November then saw widespread snow, ice, and sub-zero temperatures, bringing any remaining drilling to a close.

A large carryover of nitrogen from fertiliser applied between April and June has been reported, which may have contributed to this season's rapid crop development so far. Management of dense, forward crops may be required if mild conditions persist throughout the winter.

Crop potential for harvest 2026 looks promising, and there is hope that higher yields will help offset current low prices. However, it's important to remember that farmers have experienced two very difficult financial years. Low margins are a challenge, with depressed malting and milling premiums adding pressure.

Local highlights

- West Midlands – drilling is nearly complete, with a very small amount of wheat remaining.
- East Midlands – drilling is mostly complete, with more taking place in September than in previous years. Minor re-drilling has been required due to black grass in some fields.
- Eastern – drilling is mostly complete, except where sugar beet lifting was delayed.
- Yorkshire & North East – early-drilled wheat struggled in dry ground and crops took a long time to emerge. Once moisture arrived, drilling and emergence improved significantly.
- Northern Ireland – drilling progress was reasonably good, but there are viability concerns for some crops due to heavy rain following dry spells.
- Scotland – it was a very easy drilling campaign overall. Conditions were drier in northern Scotland than in southern Scotland.

The information in this report was captured up to Monday 24 November 2025 for AHDB by RSK ADAS Ltd.

CROP CONDITION AND GROWTH STAGES

Crop Condition ratings have been undertaken using the USDA methodology. The national (GB) scores are provided here, with regional ratings on the AHDB website.

Crop condition definitions:

Very poor: Extreme degree of loss to yield potential, complete or near crop failure.

Poor: Heavy degree of loss to yield potential, which can be caused by excess soil moisture, drought, disease etc.

Fair: Less than normal crop condition. Yield loss is a possibility, but the extent is unknown.

Good: Yield prospects are normal. Moisture levels are adequate and disease, insect damage and weed pressure are minor.

Excellent: Yield prospects are above normal. Crops are experiencing little or no stress. Disease, insect damage and weed pressures are insignificant.

GB crop condition ratings

	Very poor	Poor	Fair	Good	Excellent	Crops not yet planted or emerged
Winter wheat	0%	2%	10%	46%	37%	5%
Winter barley	0%	1%	10%	46%	43%	0%
Winter oats	0%	1%	11%	44%	43%	1%
Winter OSR	0%	4%	14%	37%	45%	0%

Data on GB crop conditions captured up to Monday 24 November 2025.
Source: AHDB, data captured by RSK ADAS Ltd
Note: Figures may not sum to 100% due to rounding

WHEAT

Crop development

For winter wheat, drilling is almost complete (97%) with 41% drilled in September, 50% in October, and 6% in November. It's reported that this is the best crop establishment seen for many years. The earliest crops are at the tillering stage.

Nutrition

Some P and K applications have been carried out when conditions allow. Manganese deficiencies have been reported, especially in the South East where crops are forward and require more manganese than usual.

Pest, weed and disease pressures

Pre-emergence herbicides were applied to crops with black-grass or rye-grass pressure. Where both pre- and post-emergence herbicides were applied, generally crops are currently clean, with very little black-grass present. However, more black-grass and brome have been reported in crops following some Sustainable Farming Incentive (SFI) options.

Low aphid and slug pressure is reported. Some gout fly has been reported, but this is mainly in early-drilled wheat. Frit fly is more common in second wheat and in wheat following oats.

Due to participation in the SFI scheme, many farms in England have been using fewer insecticides. Limited treatments have been applied for aphids, and efforts to preserve natural predators appear to be paying off.

The main disease pressure is from mildew on the most advanced crops, but this has been curtailed by recent frost. Yellow rust has been reported on some varieties.

Prospects
Prospects for the 2026 wheat crop are reported to be very good, with 83% of the crop rated good-to-excellent. In comparison last November, when 18% of crops had yet to be planted or emerge, just 44% of the crop was rated good-to-excellent.

WINTER BARLEY

Crop development
Drilling is complete; 64% was drilled in September, 34% in October, and 2% in November. It's reported that establishment is good, and an estimated 54% of crops nationwide are now tillering.

Nutrition
Like winter wheat, manganese is needed on many crops.

Pest, weed and disease pressures
There is good weed control overall, with only a few crops containing broadleaf weeds where no herbicides were applied. Grass weeds have been reported, but fields with very high infestations have been re-drilled where necessary.

Gout fly and aphids have been reported, but any impacts on the crop have yet to be seen.

Net blotch has been reported at low levels. Mildew has also been reported; in the South West it's more prevalent in winter barley than wheat.

Prospects
Like winter wheat, prospects for 2026 winter barley are reported to be very good, with 89% of the crop rated good-to-excellent. A year ago, just 57% of winter barley was rated good-to-excellent, with drilling almost complete.

WINTER OATS

Crop development
All of the intended winter oat area has been drilled; of which, 34% was completed in September, 65% in October, and 1% in November.

Nutrition
Similar to winter wheat and winter barley, manganese deficiencies have been reported for some crops.

Pest, weed and disease pressures
Broadleaf weeds are starting to emerge. However, with the use of diflufenican/flufenacet being permitted again this season, there are few broadleaf weeds in general.

Pest pressure is also generally low. There is less gout fly activity in oats compared to wheat and barley and there are generally no slug problems. Aphids have been reported but are not widespread.

Mildew is present in the most forward and thicker crops.

Prospects

Very good prospects have been reported for winter oats with 88% of the crop in good-to-excellent condition and just 1% left to emerge. This is a marked improvement compared from the 52% rated good-to-excellent in November 2024, when 11% of the crop had yet to emerge.

WINTER OILSEED RAPE

Crop development

An estimated 72% of the winter oilseed rape (WOSR) area was drilled in August, with 27% in September, and 1% in October.

Despite dry conditions during drilling, establishment has been remarkably good and much better than in recent years. However, it's reported in the Eastern region that earlier crops are not as good as later drilled.

Nutrition

Some WOSR crops are showing manganese and potassium deficiencies in places.

Pest, weed and disease pressures

Most crops have some broadleaf weeds and grass weeds, but the large canopies are effectively shading them out. Grass weeds are currently being targeted with propyzamide. Thistles, mayweed, and groundsel have been observed.

Cabbage stem flea beetle (CSFB) and winter stem weevil adults are reported, with CSFB particularly noted in Yorkshire. Slug grazing has occurred in pockets rather than on a large scale. Fortunately, pigeons have yet to cause any significant problems.

Phoma is apparent on older leaves but has not reached treatable levels, though it is now too late to consider treating as plants are large. Mildew was around for a few weeks but has mostly dried up now. There is also minimal light leaf spot present.

Prospects

Following good yields in 2025 there has been an increase in WOSR area for 2026 harvest. Prospects are looking optimistic currently for WOSR crops, with 82% of the crop rated good-to-excellent. A year ago, 73% of the crop was rated good-to-excellent.