

Early Bird Survey of Planting and Planting intentions for harvest 2025



13 December 2024

The Early Bird Survey (EBS) of planting intentions shows a fall in winter cropping for harvest 2025. At a national level, wheat, winter barley and oilseed rape areas are all set to fall this harvest, with increases intended to the areas of spring wheat, spring barley and spring oats.

Please note this survey captures early plantings and planting intentions as of early November. Most data was collected by 11 November, though submissions were received up to 15 November. It does not take into account subsequent weather conditions and economics may change the harvest area estimates. Autumn drilling conditions have been poor in many parts of the UK but good in others. Some drilling intentions changed last minute; most were simply delayed.

Thousand hectares	Defra June Survey for harvest 2024	Final EBS forecast for harvest 2025	% year-on-year change
All wheat	1,531	1,614	5%
Winter barley	384	381	-1%
Spring barley	810	702	-13%
Oats	182	188	3%
Other cereals*	59	55	-8%
OSR	293	244	-17%
Other oilseeds**	24	19	-19%
Pulses	224	209	-7%
Uncropped arable land	616	932	51%
Other crops on arable land***	706	698	-1%
TOTAL	4,830	5,042	

*crops included rye, triticale and mixed grains

**crops included linseed and borage

***crops included sugar beet, potatoes, vegetables, maize (33%) and temporary grass (20%)

Source: Defra, The Andersons Centre for the AHDB

There have been some small changes to the forecasts for the main crops compared to the provisional release, reflecting the inclusion of official data on cropped areas in 2024.

Typically, adjustments are made to the final EBS forecasts to allow for any weighting differences (crop mix or regions) between the survey area and official data. However, the large changes in cropped areas and uncropped land for harvest 2024, plus another challenging autumn planting period this year means there is greater uncertainty over some figures. Against this backdrop, unadjusted figures are presented to better show the cropping intentions for the main crops in arable rotations for harvest 2025.

REGIONAL DIFFERENCES IN CROPPING INTENTIONS

Yesterday, Defra released its full estimates for the 2024 UK arable crop areas. This allows us to look at the results of our Early Bird Survey of planting intentions on a regional level for the four main crops: wheat, barley, oats and oilseed rape (OSR).

WHEAT

The overall wheat area is forecast to rise by 5%, all within the winter crop, after last autumn's challenging weather sharply reduced the area. Spring wheat is expected to nearly halve after last year's rise due to the wet conditions, though the crop accounts for a very small proportion of the total wheat area.

However, at 1,614 Kha, the projected area remains below the 2019 – 2023 average of 1,705 Kha.

Rises are forecast across all regions in England, plus for Northern Ireland and Wales, amid highly variable [weather conditions again this autumn](#). Delays harvesting late-planted crops for harvest 2024 also caused bottlenecks for farmers, with harvesting overlapping into drilling windows.

The largest rises are forecast across northern England, and in the East Midlands (+14%) where some of the steepest falls in area were recorded in 2025. There were also periods of better planting conditions in northern England this autumn, helping crops here to establish well.

However, there are limited recoveries in area for the South East (+1%), West Midlands (+1%) and Eastern England (+3%). No recovery is projected for the South West.

In contrast, Scotland is expected to see a further 3% fall in wheat plantings, to 95 Kha, which would be the smallest area since 2020.

Wheat			
<i>Thousand hectares</i>	Defra June Survey for harvest 2024	Final EBS forecast for harvest 2025	% change from 2024
South East	188	190	1%
South West	135	135	0%
Eastern	398	409	3%
East Midlands	267	304	14%
West Midlands	136	137	1%
Yorkshire & The Humber	194	214	10%
North East	58	62	8%
North West	27	33	22%
Scotland	98	96	-3%
Wales & NI	31	34	10%
UK	1,531	1,614	

Source: Defra, The Andersons Centre for the AHDB

BARLEY

The total barley area is forecast to fall 9% year-on-year to 1,083 Kha with declines in both winter and spring sown crops. The forecasted total winter barley area is down 1% on the year at 381 Kha, while the area of spring barley is forecast to fall 13% from harvest 2024 to 702 Kha.

There is notable variation in winter barley areas across England, with the largest rises in the West Midlands and North West. The largest falls are recorded for Eastern England, South East and North East.

Meanwhile, the Scottish winter barley area is forecast slightly (+3%) up. The area in Wales and Northern Ireland combined is expected to be broadly stable.

Winter Barley			
Thousand hectares	Defra June Survey for harvest 2024	Final EBS forecast for harvest 2025	% change from 2024
South East	31	28	-10%
South West	42	43	3%
Eastern	84	68	-19%
East Midlands	47	51	7%
West Midlands	27	40	47%
Yorkshire & The Humber	60	57	-5%
North East	22	19	-10%
North West	13	15	23%
Scotland	43	44	3%
Wales & NI	16	16	0%
UK	384	381	

Source: Defra, The Andersons Centre for the AHDB

Following the large rises in 2024 due to the extreme weather conditions, the UK spring barley area is expected to drop back for harvest 2025. However, at 702 Kha, the total area would still be above the levels recorded in 2022 and 2023.

All regions of England are forecast to reduce their spring barley areas for harvest 2025. The largest percentage declines are forecast in the West Midlands (-43%), Yorkshire & The Humber (-37%), East Midlands (-33%) and North West (-33%). The smallest decline is expected in the South West (less than 1%).

In Scotland, a key spring barley producer, the area of spring barley is anticipated rise further, by around 4Kha, versus harvest 2024. If the intention is realised, this would mean the largest Scottish spring barley area since 2014 (274 Kha).

Notable falls in the spring barley area are also expected for Wales and Northern Ireland.

Spring Barley			
Thousand hectares	Defra June Survey for harvest 2024	Final EBS forecast for harvest 2025	% change from 2024
South East	76	69	-10%
South West	89	88	0%
Eastern	121	110	-9%
East Midlands	96	65	-33%
West Midlands	30	17	-43%
Yorkshire & The Humber	68	43	-37%
North East	17	13	-24%
North West	27	18	-33%
Scotland	258	262	2%
Wales & NI	29	17	-41%
UK	810	702	

Source: Defra, The Andersons Centre for the AHDB

OATS

The UK oat area for harvest 2024 is estimated to rise a further 3% from harvest 2024 to 188 Kha. Within the total, there is a slightly greater increase in winter oats, which is expected to account for a slightly larger proportion of the national area. Changes in crop rotations due to the unusual weather conditions plus, the comparatively strong yields and quality of oats 2024, seem likely to be factors.

Smaller oat areas are intended in northern England, where the largest recoveries in wheat plantings are expected, plus the West Midlands where the spring barley area is expected to fall sharply. Conversely rises in oat areas are expected across southern and eastern areas of England.

In Scotland, the intended oat area is up 12% year-on-year to 31 Kha. If realised, this would be the largest since 2021.

Oats			
Thousand hectares	Defra June Survey for harvest 2024	Final EBS forecast for harvest 2025	% change from 2024
South East	27	29	5%
South West	24	27	12%
Eastern	27	28	5%
East Midlands	25	28	10%
West Midlands	20	18	-8%
Yorkshire & The Humber	11	10	-8%
North East	9	6	-31%
North West	5	4	-31%
Scotland	28	31	12%
Wales & NI	6	7	22%
UK	182	188	

Source: Defra, The Andersons Centre for the AHDB

OILSEED RAPE

After another challenging year for OSR, the area again is predicted to fall a further 17% for harvest 2025. While OSR prices are now higher than at this time last year, most of the rises didn't take place until after planting was completed. At 244 Kha the area estimate for harvest 2025 is slightly higher than the provisional estimate from this survey but would still be the smallest in 42 years.

Oilseed Rape			
Thousand hectares	Defra June Survey for harvest 2024	Final EBS forecast for harvest 2025	% change from 2024
South East	36	27	-25%
South West	28	22	-20%
Eastern	51	46	-9%
East Midlands	48	43	-10%
West Midlands	30	25	-17%
Yorkshire & The Humber	39	30	-24%
North East	15	13	-14%
North West	4	2	-47%
Scotland	37	27	-25%
Wales & NI	7	9	30%
UK	293	244	

Source: Defra, The Andersons Centre for the AHDB

Markedly lower areas of OSR are expected in all areas of England, with the sharpest falls estimated for the North West (-47%), South East (-25%) and Yorkshire & The Humber (-24%). The Eastern region records the smallest fall in the area of OSR (-9%), followed by the East Midlands (-10%).

A sharp (-25%) fall is also recorded for Scotland to an estimated 27 Kha.

Together Wales and Northern alone record an expected rise in OSR area, though the overall area remains small compared the rest of the UK.

ADDITIONAL INFORMATION

There have been slight changes in area expectations compared to the provisional results released in November 2024. The raw data sample is unchanged, but the official 2024 crop area estimates have been included.

The Early-Bird Survey (EBS) is undertaken each autumn to assess national cropping intentions. It is carried out by The Andersons Centre with help from agronomists from the Association of Independent Crop Consultants (AICC) and the Agricultural Industries Confederation (AIC); independents and nationals alike.

In total, over 70 agronomists took part in the survey contributing 600 Kha of arable land across the UK to establish cropping changes on farms as a representation for the national change in cropping. The survey was struck during early November, with most data collected by 11 November, though submissions were received up to 15 November.

Crops of smaller area had a lesser area coverage in the survey, so these results will be subject to greater uncertainty.

This survey is focused on the arable farm rotation rather than all arable land which would include grass and forage rotations. For this reason, an estimate of the total area of these crops is included in the figure for 'other crops on arable land'.

Figures in all tables are subject to rounding and may not add up exactly to national figures.

The survey carries a track record of accurate figures. Nonetheless, the survey only represents a snapshot at a given point in time and therefore, should be interpreted carefully. The reliability of the estimates for larger crops is greater, as are estimates for the winter crops as they are based on actual plantings, compared with planting intentions for spring crops.