

Early Bird Survey of Planting and Planting Intentions – November 2025



13 November 2025

Please note, official Defra UK area information is yet to be published for 2025. The 2025 area data used in this release is the official provisional estimates for England and Scotland, combined with estimated areas for Wales and Northern Ireland. Please see the 'Additional information' section below for more information.

OILSEED RAPE AREA RISES

The provisional results from AHDB's Early Bird Survey (EBS) are shown in the table below and have been extrapolated from provisional 2025 survey data to produce forecasted crop areas.

Please note that this survey (EBS) captures early plantings and planting intentions as of early November. In recent years, planted and harvested areas have differed because of weather events, including for harvest 2025, our base year for this survey, meaning some uncertainty is accordingly built into these results.

The forecasts for harvest 2026 show a rise in the oilseed rape area from last years' low level, along with a small increase in wheat plantings, but lower areas for barley and oats.

Autumn drilling conditions were generally good in 2025, contrasting with the wet start to the autumn drilling window last year and extremely wet conditions in autumn 2023. However, the market environment is challenging with lower prices for cereals and lower milling and malting premiums, plus increased costs for all crops. Against this backdrop, oilseed rape likely benefited from a more favourable margin outlook compared to other crops, as well as the good yields achieved in 2025. The poor cereal yields of the past two years, along with ongoing commitments to [agri-environment schemes](#) and rotation needs are also likely to be influencing 2026 planting plans.

The total UK **wheat** area is forecast to increase slightly (+1%) to 1,675 Kha, though with variation across the country. We'll be able to share the regional breakdown in December, after official 2025 UK area data is published. While spring wheat remains a small part of the total area, it's important to note a sharp drop in planned spring wheat plantings from the elevated levels in 2025. The forecast wheat area would remain below the 2021-2025 average of 1,704 Kha.

The **winter barley** area is estimated to fall a further 2% to 356 Kha, while **spring barley** plantings are expected to decline sharply (-15%) to 610 Kha. If realised, this would put the total UK barley area for harvest 2026 at 965 Kha, the lowest level since 2010.

The **oats** area is also expected to decline, down 14% to a projected 170 Kha, which would be just above the area seen in 2023.

Oilseed rape is the stand out for 2026, with a 30% rise to 316 Kha. While this is a significant year-on-year rise, the rise is from the forty-two years low recorded in 2025 and the 2026 projection would still be clearly below 2023's 391 Kha.

As is often the case when the oilseed rape area rises, the area of **pulses** is expected to fall for harvest 2026 by an estimated 12%.

The area of **other combinable cereals** is forecast up 7% from 2025. However, crops of smaller area had a lesser area coverage in the survey, so these results will be subject to greater uncertainty.

The last 'catch-all' category '**other crops on arable land**' gains 4% and includes sugar beet, potatoes, vegetables and other crops that appear in the arable farm rotation such as temporary grass and maize. 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 that appear in the arable rotation are used in this figure.

After the area declined in 2025, the survey also points to an 8% increase in **uncropped arable land** in 2026. This category would include non-productive land requiring options under the Sustainable Farming Incentive (SFI) in England, as well as rotational fallow and more.

Provisional results from the Early Bird Survey (EBS) of cropping intentions

Thousand hectares	2025 UK area estimates*	Provisional EBS forecast 2026^	% year-on-year change
Wheat	1,664	1,675	+1%
Winter Barley	361	356	-2%
Spring Barley	720	610	-15%
Oats	198	170	-14%
OSR	243	316	+30%

* Official provisional UK area estimates for 2025 are not available. Official estimates are for England and Scotland only. AHDB have carried forward the 2024 areas for Wales and Northern Ireland, which have been combined with the provisional England and Scotland figures to produce UK area estimates.

^survey of agronomists up to early November 2025.

Source: Defra, the Scottish Government, The Andersons Centre for the AHDB.

ADDITIONAL INFORMATION

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, nearly 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 mainly struck during late October, with most data collected by 01 November, though submissions were received up to 07 November.

In previous years, the survey has been an accurate estimate of planted areas and therefore a strong indication of harvest areas for the following year. Final adjusted results including a breakdown of regional data for the main crops will be published following publication of the final UK June survey results for 2025, which is scheduled for release in mid-December.

No provisional national crop area figures are published. So we amalgamated data from [Defra's 2025 June Survey results for England](#) and the [Scottish Government's 2025 June Agricultural Census](#), and carry forward 2024 areas for Wales and Northern Ireland.

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.