Planting and Variety Survey 2025

10/06/2025

Only partial wheat area recovery

The results of the 2025 AHDB Planting and Variety Survey shows the UK wheat area at 1,623 Kha, up 6% on the year.

This is a slightly bigger recovery than growers had intended in AHDB's Early Bird Survey last November, potentially linked to improved weather in England and Wales in the latter part of last autumn. But the area remains below the historically low 2020–2024 average after a wet start to the autumn.

"Growers had to fight the weather again last autumn to try to get back to their desired rotations after being forced to change the previous year, but this survey indicates it's not been possible for everyone" says AHDB's Lead Analyst Millie Askew.

She adds "the larger wheat area will help to mitigate the impact on 2025 production from the very dry spring we had this year. But there's a lot of uncertainty over the prospects for all crops, including wheat, after such a dry spring."

The wet weather last September and into October is also a factor in the 7% fall in winter barley area for harvest 2025, with crop economics and rotation needs also impacting growers' decisions. Combined with a 6% year-on-year decline in the spring barley area, the total barley area across Great Britian (GB) is estimated at 1,101 Kha, down 6% from 2024.

The exceptionally dry spring this year meant good planting conditions. In turn, this likely helped limit the decline in spring barley compared to earlier planting intentions and boost the overall oat area too. The UK oat area is estimated to rise 13% year-on-year to 207 Kha.

The closure of applications to the Sustainable Farming Incentive (SFI) in England in March may have also forced some growers to consider planting spring crops in fields planned for the scheme. The 2025 AHDB Planting and Variety Survey asked growers across the UK about their involvement with agri-environment schemes; this data will be released in the coming weeks.

Meanwhile, the GB area of oilseed rape (OSR) fell another 19% from the lowest level in over 40 years in 2024. The crop has suffered from pest pressure and poor weather reducing yields, plus seen poorer returns in recent years. These factors, combined with the availability of options under the SFI in England at planting, mean another double-digit fall in the OSR area for harvest 2025.

Key survey findings:

UK

- **Wheat**: The total wheat area is estimated at 1,623 Kha, a 6% increase from last year's four-year low. However, this remains slightly below the five-year (2020–2024) average of 1,648 Kha.

- **Oats:** Estimated at 207 Kha, the oat area is up 13% year-on-year, and the highest level since 2020.

GB

- **Barley:** The total area of barley is down 6% compared to last year, at 1,101 Kha. This is 6% below the five-year average of 1,176 Kha. Both spring and winter barley areas have declined year-on-year.
- **OSR:** The oilseed rape (OSR) area has dropped sharply, down 19% to 236 Kha. It is the smallest area since 1983 and is 32% below the five-year average of 346 Kha.
- **Total cereals**: Despite mixed changes for individual crops, the total GB cereals area edged up by 1% from 2024 to 2,918 Kha in 2025. It is still below the 2023 level of 2,991 Kha.
- **Cereals and oilseeds combined**: The combined area of cereals and oilseeds remains virtually unchanged, down just 0.5% to 3,154 Kha. This is still below the ten-year average of 3,498 Kha, largely due to the sharp decline in OSR planting.

The full AHDB Planting and Variety Survey results are available to download on the AHDB survey results page.

Wheat

The UK wheat area is projected to recover in 2025, rising 6% to 1,623 Kha. Improved weather in late autumn allowed slightly more wheat area than growers intended in the Early Bird Survey (EBS). But the total area remains below the 2023 level of 1,720 Kha reflecting the challenging start to the planting window.

Most parts of the UK saw a rebound in wheat area due to the improved planting conditions compared to the extremes of autumn 2023. This is except for the South West (-6%) where wet weather again hampered planting, and the South East (-1%).

Yorkshire and the Humber, and the East Midlands, which experienced some of the sharpest percentage declines in 2024, saw strong recoveries in 2025. Meanwhile, Northern Ireland and Scotland record above-average increases in area.

In terms of varieties, UK Flour Millers (UKFM) Group 1 varieties account for 19% of the 2025 GB wheat area, down five percentage points from last year. The Group 2 area has also declined to 17% from 19% in 2024. The Group 1 and 2 areas also declining in hectare terms. So with crops in poorer condition than a year ago, GB production of wheat suitable for bread-making could be lower than last year; final yields and quality will be key.

In contrast, the share of Group 3 wheat varieties has risen sharply from 2% to 7%, potentially driven by the introduction of a new higher-yielding variety.

Group 4 varieties (combined hard and soft) now account for 53% of the total wheat area, the largest share since 2016. KWS Dawsum, a Group 4 variety, remains the most widely grown wheat in GB, occupying 15% of the area.

For Group 1 wheat, Crusoe and Skyfall remain popular, with 7% and 6% of the area, respectively. Group 2 variety KWS Extase has seen its area fall by four percentage points to 10%.

Bamford, a Group 3 variety added to the 2024/25 AHDB Recommended List, covers 7% of the area in 2025.

Barley

The total barley area is down 6% from last year's elevated levels at an estimated 1.101 Mha. This represents a smaller year-on-year decline than growers intended (AHDB's Early Bird Survey), though the headline hides a bigger fall in winter barley and smaller drop in spring barley area than previously expected.

Very wet weather in September limited the area of winter barley across England and Wales and meant a poor start for some crops. In addition, the area faced pressure from the crop economics and the fall in OSR plantings, reducing the need for an earlier harvested crop to precede OSR.

Conversely, the good planting conditions this spring and changes to English farm policy likely encouraged growers to expand their spring cropping compared to earlier intentions.

The share of malting, brewing and distilling varieties is 65%, down from 68% in 2024. This change in varieties, together with the overall year-on-year fall in barley area, indicates a smaller area of barley suitable for malting, brewing and distilling. It places more emphasis on yields and quality to support availability for the malting, brewing and distilling sectors in the 2025/26 marketing season.

For the fifth year in a row, Laureate is the most prevalent barley variety with its popularity again rising from last year. Laureate accounts for 43% of the GB barley area in 2025.

Winter barley

After falling notably for harvest 2024, the GB winter barley area is down a further 7% on the year to an estimated 352 Kha in 2025. This is the smallest GB winter barley area since 2020.

Most areas show year-on-year declines, with the largest falls in the South East (-19%), East Midlands (-17%) and South West (-12%).

Only the North East and North West of England record larger winter barley areas than 2024, with a stable area overall in Scotland. Rainfall in these areas was closer to or below average during the key planting period.

Spring barley

In GB, the spring barley area fell 6% from 2024 to an estimated 750 Kha in 2025. However, this would still be the third largest spring barley area since 2006.

The largest declines in area are seen for Yorkshire and The Humber and the East Midlands, which also record some of the largest recoveries in wheat cropping.

On the flip side, the West Midlands and Wales, North West and South West all record year-on-year rises in spring barley area to varying degrees.

In key producer Scotland, the spring barley area is estimated to decline by 3% from 2024 to 251 Kha but remains above the level seen in 2023.

Oats

The UK oat area is likely to have been supported by improved weather in the latter part of last autumn and good spring planting conditions this year. Changes to English farm policy potentially also contributed. The oat area is expected to be 207 Kha, up 13% from last year and the largest area since 2020 (210 Kha).

Spring oat varieties account for an estimated 66% of the area, up slightly (1 percentage point) from 2024, with a corresponding decline in the share of winter oat varieties.

Most of the UK sees larger areas in 2025, with the strongest rises in Northern England, West Midlands and Wales, and Scotland. Meanwhile, Yorkshire and the Humber, and Northern Ireland, which have some of the largest recoveries in wheat area, see a year-on-year decline in oat area.

WPB Isabel remains the most prevalent oat variety with 27% of the area, followed by Mascani at 21%, Merlin at 16% and Canyon at 14% of the total area.

Oilseed rape

The OSR area in GB is estimated to fall by 19% year-on-year, to 236 Kha, the smallest cultivated area in over four decades. This represents a further reduction from the EBS estimate of 244 Kha, with some farmers reporting crop losses from pest damage.

The yearly decline is likely driven by a combination of variable weather and alternative options under the Sustainable Farming Incentive (SFI) scheme in England. In addition, variable crop performance in recent years and ongoing cost pressures from pest control continue to strain profitability.

All areas recorded declines, except for the South East, where a modest 3% recovery is estimated. The most significant reduction occurred in the East Midlands, down 46%, followed by a 27% decline in the South West.

For the fourth consecutive season, Aurelia remains the most widely planted variety, although its share has fallen from 18% in 2024 to 10%. It is followed by Ramses at 8% and Ambassador at 7%. Other varieties covering more than 5% of the area include Crome, Acacia, Attica, and the newly introduced Pi Pinnacle.

Additional information

- The survey had 1,192 valid responses which cover approximately 5% of the UK total cereals and oilseeds planted area in 2024. Growers were asked to submit intended harvest areas and the area harvested last year. Data for this survey was collected from 07 April to 16 May 2025.
- The following footnotes are used:

  1) Final 2024 Defra and Scottish Government area data. Please note, the North Scotland and South Scotland oilseed rape figures include 48.6 hectares of linseed. As a result, the Scottish, GB and UK figures differ slightly from the Defra published statistics.

  2) West Midlands and Wales have been combined for all crops due to confidentiality.

  3) The total Scotland figures are derived from the North and South Scotland breakdowns. As a result, the totals may differ slightly from the Defra published statistics due to rounding.

4) The UK figures are derived from the regional figures. As a result, the totals may differ slightly from the Defra published statistics due to rounding.

5) North East and North West have been combined for oats and oilseed rape due to confidentiality.

* Insufficient information to produce robust figure.

Regional breakdowns are based on the Nomenclature of Territorial Units for Statistics (NUTS) regions. North Scotland consists of the Highlands & Islands and the North East regions. South Scotland consist of Southern, Eastern and West Central regions.

Please note breakdown at regional levels are based on smaller sample sizes than at the national level and are therefore subject to more uncertainty.

AHDB Cereals & Oilseeds Planting Survey Results 2025

Source: AHDB, Defra, Scottish Government
Units: '000 hectares
Last updated: 10/06/2025

Region	Wheat			Spring barley			Winter barley			Total barley		
	Final 2024[1)]	Estimate 2025	% change on 2024	Final 2024[1)]	Estimate 2025	% change on 2024	Final 2024[1)]	Estimate 2025	% change on 2024	Final 2024[1)]	Estimate 2025	% change on 2024
North East	58	60	5	17	15	-10	22	22	2	38	37	-3
North West	27	28	7	27	30	8	13	14	14	40	44	10
Yorks and Humber	194	226	16	68	48	-29	60	58	-4	128	106	-17
East Mids	267	302	13	96	76	-21	47	39	-17	143	115	-20
Eastern	398	409	3	121	105	-13	84	80	-5	205	184	-10
South East	188	187	-1	76	74	-2	31	26	-19	107	100	-7
South West	135	127	-6	89	106	20	42	37	-12	130	143	10
West Mids and Wales[2)]	158	164	4	45	46	1	36	33	-7	81	79	-3
North Scotland	20	21	8	141	141	0	16	16	-3	157	157	0
South Scotland	79	88	11	117	109	-7	27	27	2	144	136	-5
England & Wales	**1,425**	**1,503**	**6**	**539**	**500**	**-7**	**335**	**309**	**-8**	**873**	**809**	**-7**
Scotland[3)]	**98**	**109**	**11**	**258**	**250**	**-3**	**43**	**43**	**0**	**300**	**293**	**-3**
Northern Ireland	**8**	**11**	**37**	**14**	*	*	**7**	*	*	**20**	*	*
GB	**1,523**	**1,612**	**6**	**796**	**750**	**-6**	**377**	**352**	**-7**	**1,173**	**1,101**	**-6**
UK[4)]	**1,531**	**1,623**	**6**	**810**	*	*	**384**	*	*	**1,194**	*	*

Region	Oats			Total cereals			Oilseed rape			Total cereals & oilseed rape		
	Final 2024[1)]	Estimate 2025	% change on 2024	Final 2024[1)]	Estimate 2025	% change on 2024	Final 2024[1)]	Estimate 2025	% change on 2024	Final 2024[1)]	Estimate 2025	% change on 2024
Northern[5)]	14	18	28	177	188	6	19	14	-25	195	202	3
Yorks and Humber	11	10	-12	333	341	3	39	37	-7	372	378	2
East Mids	25	28	9	436	445	2	48	26	-46	483	471	-3
Eastern	27	29	10	629	623	-1	51	42	-16	680	665	-2
South East	27	29	8	323	316	-2	36	37	3	359	353	-2
South West	24	26	7	290	296	2	28	21	-27	318	316	-0
West Mids and Wales[2)]	24	33	36	264	276	5	36	28	-23	300	304	1
North Scotland	8	*	*	185	*	*	13	*	*	198	*	*
South Scotland	19	*	*	241	*	*	23	*	*	265	*	*
England & Wales	**153**	**173**	**13**	**2,450**	**2,485**	**1**	**256**	**204**	**-20**	**2,706**	**2,688**	**-1**
Scotland[3)]	**28**	**32**	**16**	**426**	**433**	**2**	**37**	**33**	**-11**	**463**	**466**	**1**
Northern Ireland	**2**	**2**	**-1**	**30**	*	*	**1**	*	*	**31**	*	*
GB	**180**	**205**	**14**	**2,876**	**2,918**	**1**	**292**	**236**	**-19**	**3,169**	**3,154**	**-0**
UK[4)]	**182**	**207**	**13**	**2,907**	*	*	**293**	*	*	**3,200**	*	*

AHDB

AHDB wheat variety survey results 2025

Source: AHDB
Units: % and '000 hectares
Last updated: 10/06/2025

	UK flour groups by region (%)							Planting survey wheat area estimate	UK flour groups by region ('000 hectares)						
Region	Group 1	Group 2	Group 3	Group 4	Group 4 soft	Group 4 hard	Other		Group 1	Group 2	Group 3	Group 4	Group 4 soft	Group 4 hard	Other
North East	*	17%	19%	54%	15%	39%	*	**60**	*	10	12	32	9	24	*
North West	22%	12%	*	59%	*	*	*	**31**	7	4	*	18	*	*	*
Yorks and Humber	13%	18%	6%	59%	4%	55%	4%	**225**	30	39	13	133	10	123	10
East Midlands	17%	17%	5%	55%	3%	52%	5%	**303**	53	53	16	167	9	158	15
Eastern	19%	12%	9%	56%	4%	52%	4%	**409**	78	50	37	229	16	213	16
South East	35%	27%	6%	28%	*	*	4%	**189**	66	52	11	53	*	*	7
South West	17%	26%	*	51%	*	*	*	**127**	21	33	*	64	*	*	*
West Mids & Wales 1)	28%	18%	6%	42%	*	*	5%	**164**	47	30	11	70	*	*	8
Scotland	*****	**1%**	**13%**	**77%**	**32%**	**45%**	*****	**109**	*****	**2**	**14**	**84**	**35**	**49**	*****
Northern Ireland	*****	**28%**	*****	**65%**	*****	*****	*****	**11**	*****	**3**	*****	**7**	*****	*****	*****
GB	**19%**	**17%**	**7%**	**53%**	**5%**	**47%**	**4%**	**1,617**	**306**	**272**	**118**	**850**	**84**	**766**	**71**
UK	*****	**17%**	*****	**53%**	*****	*****	*****	**1,628**	*****	**275**	*****	**857**	*****	*****	*****

UK wheat varieties as a percentage of surveyed area

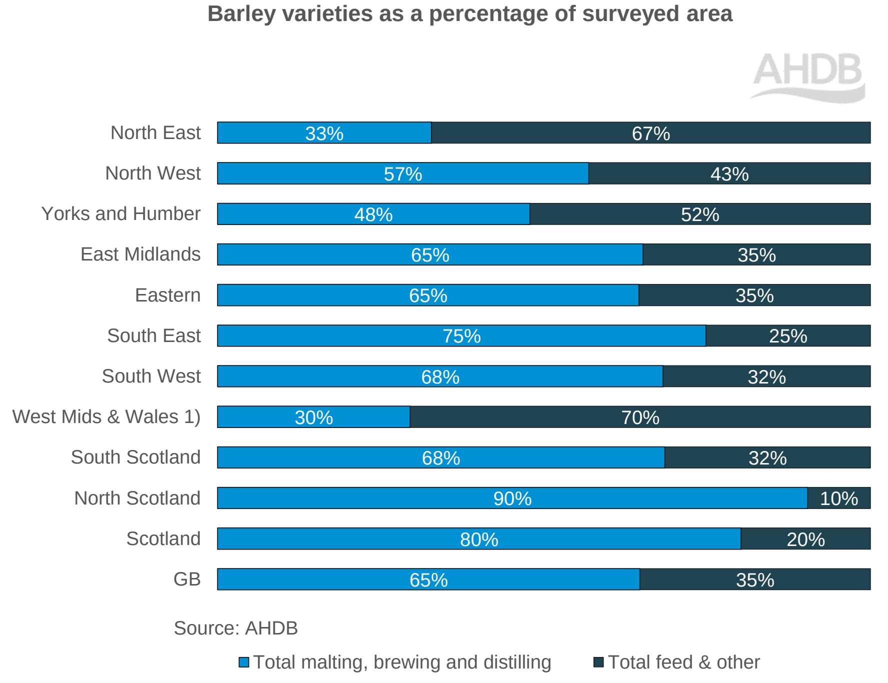
UK planting survey wheat area estimate: **1,628** Kha

Variety	UK flour group	% of total
KWS Dawsum	4H	15%
KWS Extase	2	10%
Champion	4H	10%
Crusoe	1	7%
Bamford	3	7%
Skyfall	1	6%
LG Typhoon	4H	5%
Other**		41%

Notes
The wheat variety survey area was approximately 80,000 hectares which represents 5% of the total 2025 UK area estimate.
Varieties are categorised as per the AHDB Recommended List 2024/25 (including Everlong). Other is the uncategorised varieties from the same guide.
Breakdown at regional levels are based on smaller sample sizes than at the UK level and are therefore subject to more uncertainty.
1) West Midlands and Wales have been combined due to confidentiality.
* Insufficient information to produce robust figure.
**Other varieties each make up less than 5% of the surveyed area.
Totals may not agree due to rounding.

AHDB barley variety survey results 2025

Source: AHDB
Units: %
Last updated: 10/06/2025



GB barley varieties as a percentage of surveyed area

GB planting survey barley area estimate:	**1,102**	Kha

Variety	% of total
Laureate	43%
KWS Tardis	10%
LG Caravelle	6%
RGT Planet	6%
Other*	34%

Notes
The barley variety survey area was approximately 50,000 hectares which represents 4% of the total 2025 GB area estimate.
Malting, brewing and distilling: Varieties with full approval only on the Malting Barley Committee's Approved List for harvest 2025 (including special use).
Breakdown at regional levels are based on smaller sample sizes than at the UK level and are therefore subject to more uncertainty.
1) West Midlands and Wales have been combined due to confidentiality.
*Other varieties each make up less than 5% of the surveyed area or do not meet the thresholds for publication.
Totals may not agree due to rounding.

AHDB oilseed rape variety survey results 2025

Source: AHDB
Units: %
Last updated: 10/06/2025

GB OSR varieties as a percentage of surveyed area

GB planting survey OSR area estimate:	236 Kha

Variety	% of total
Aurelia	10%
Ramses	8%
Ambassador	7%
Crome	6%
Acacia	6%
Attica	6%
Pi Pinnacle	5%
Other*	53%

Notes
The OSR variety survey area was approximately 13,000 hectares which represents 5% of the total 2025 GB area estimate.
*Other varieties each make up less than 5% of the surveyed area.

AHDB oat variety survey results 2025

Source: AHDB
Units: %
Last updated: 10/06/2025

UK Oat varieties as a percentage of surveyed area

UK planting survey oat area estimate:	**207** Kha

Variety	% of total
WPB Isabel	27%
Mascani	21%
Merlin	16%
Canyon Oats	14%
Cromwell	6%
Other*	16%

Notes
The oat variety survey area was approximately 9,000 hectares which represents 4% of the total 2025 UK area estimate.
*Other varieties each make up less than 5% of the surveyed area or do not meet the thresholds for publication.

AHDB Cereals & Oilseeds Planting Survey: Wheat and Oat planting estimates by crop type

Source: AHDB
Units: %
Last updated: 10/06/2025
Region: Great Britain

% area estimate of plantings				
Year	Spring wheat	Winter wheat	Spring oats	Winter oats
2019	*	*	57%	43%
2020	*	*	72%	28%
2021	8%	92%	66%	34%
2022	3%	97%	50%	50%
2023	3%	97%	59%	41%
2024	7%	93%	65%	35%
2025	6%	94%	66%	34%

Notes

The survey received 1,192 valid responses, representing approximately 5% of the total UK cereals and oilseeds planted area in 2024. Growers were asked to provide both their intended harvest areas for this year and the areas harvested in the previous year. Data collection took place between 07 April 2025 and 16 May 2025.

1) Final 2024 Defra and Scottish Government area data. Please note, the North Scotland and South Scotland oilseed rape figures include 48.6 hectares of linseed. As a result, the Scottish, GB and UK figures differ slightly from the Defra published statistics.

2) West Midlands and Wales have been combined for all crops due to confidentiality.

3) The total Scotland figures are derived from the North and South Scotland breakdowns. As a result, the totals may differ slightly from the Defra published statistics due to rounding.

4) The UK figures are derived from the regional figures. As a result, the totals may differ slightly from the Defra published statistics due to rounding.

5) North East and North West have been combined for oats and oilseed rape due to confidentiality.

* Insufficient information to produce robust figure.

The regional breakdowns for England are based on the International Territorial Levels.

The regional breakdowns for Scotland are based on Nomenclature of Territorial Units for Statistics (NUTS) regions. North Scotland: Highlands & Islands and North East. South Scotland: Southern, Eastern and West Central.

Please note breakdown at regional levels are based on smaller sample sizes than at the national level and are therefore subject to more uncertainty.

Disclaimer

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