

EXECUTIVE SUMMARY

The end of June saw more unsettled conditions and cooler temperatures. Cooler weather has reportedly slowed senescence, and grain filling is looking good for winter wheat and OSR.

Some areas experienced localised heavy rainfall, increasing lodging risk for some crops. Some lodging around headlands and fertiliser overlaps has been noted because of heavy rains, particularly for winter barley. However, overall, it is reported only a very small area of the cereal crop has been affected (less than 1% in most regions).

Going forward, leaning in some winter barley crops will be watched closely should there be further heavy rain. Some winter wheat crops where PGR applications were applied late, or during unfavourable weather conditions, also have an increased risk of lodging.

Disease pressure remains high in places, though recent rains are not considered likely to cause further problems in winter crops, considering the crop development stage. With heavy rain mostly post-flowering for many, ergot is reportedly unlikely to be a major problem.

Grass weeds are also reportedly troublesome, with bromes more prominent this year in most areas. This might be linked to dry weather late summer into autumn 2022 limiting the autumn weed flush, as well as shallower cultivation methods.

Winter cereal crops are generally in good condition, as harvest nears. Key watchpoints remain weed infestations, as well as crops which suffered from drought conditions especially in lighter soils. Lodging remains a key watchpoint for winter barley, though harvest is imminent, with combines expected to be starting up for winter barley next week. Winter wheat harvest is expected to start early August.

Spring cereal crops remain variable in development, down to drilling date and soil type especially. Later sown crops are reportedly struggling from dry weather, something to watch closely for yield prospects.

Winter oilseed rape crops remain variable, especially from CSFB damage. Desiccation is beginning, and harvest is reportedly expected to begin across regions in the south, east and midlands in w/c 17 July.

CROP CONDITION

Crop condition was assessed using the USDA approach. This classifies crops into one of five categories (see details below). The values are given as a percentage of the GB crop planted area for that crop, that fall into each of the categories – regional condition scores are available 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.

	Very Poor	Poor	Fair	Good	Excellent
Winter Wheat	0%	7%	17%	60%	16%
Winter Barley	0%	4%	12%	68%	16%
Winter Oats	0%	2%	24%	69%	5%
Winter OSR	3%	8%	26%	49%	14%
Spring Wheat	1%	9%	22%	65%	3%
Spring Barley	3%	14%	31%	46%	7%
Spring Oats	0%	4%	27%	55%	14%

Source: RSK ADAS

Note: Figures may not sum to 100% due to rounding

WHEAT

Crop conditions

Overall, winter wheat crops are in good condition. The majority of crops are now between growth stages (GS) 75 (medium milk development) and 85 (soft dough). This development stage is in line with July's report last year, though the July report this year is a little earlier in the month.

For the week ending Tuesday 04 July, 76% of the GB winter wheat crop was in good/excellent condition. This total remains unchanged from last month, though 1 percentage point (pp) more is classified as 'excellent' than last month. Compared to the same point last year, good/excellent conditions are 1 pp ahead (published 15 July 2022).

Dry weather for a long period has had an adverse impact on some crops on lighter land, though these are variable and localised.

Nutrition

All fertiliser applications have been completed.

Weed pressure

Grass weeds, particularly brome, blackgrass, and wild oats are major problems in several regions, including Yorkshire, the West Midlands, East of England, South West and Wales. In Yorkshire, weed wiping grass weeds are reportedly becoming more common, giving 60 - 70% control. However, broadleaved weed control has generally been effective.

Pest pressure

In general, there are no major issues of concern. There are reports of previously increasing aphid numbers now declining.

Disease pressure

Reportedly, recent rain events saw Septoria spread, but it is considered too late to materially impact yields. Rusts remains present in some crops, but at low levels and generally under control.

Prospects for the coming months

Overall, winter wheat crops generally look well. Going forwards, yield prospects will depend heavily on soil type, with crops on lighter land impacted by long dry periods. Future weather conditions and the impact of any grass weed infestations will also be important. Reportedly, harvest in some areas (East Midlands) is likely to start early August.

WINTER BARLEY

Crop conditions

Overall, GB winter barley is in good condition and near harvest. Most crops are now between GS 85 (soft dough) and 91 (grain hard - difficult to divide). Harvest is expected to begin next week (w/c 10 July) for most regions.

For the week ending Tuesday 04 July, 84% of winter barley was in good/excellent condition. This is up from 80% in July 2022, and near unchanged from last month, down only 1 pp from last month's report (though this may not match the table due to rounding). The proportion of the crop rated poor/very poor remained unchanged from last month, at 4%.

Reportedly, heavy rain caused some lodging around headlands and fertiliser overlaps. However, the impact is a small percentage of total area.

Nutrition

All fertiliser applications have been completed.

Weed pressure

Similar to wheat, grass weed control has been less effective. In Yorkshire, crops are reportedly experiencing the worst grass weed problems for many years, including incidences of blackgrass, bromes, wild oats, and ryegrass.

Pest pressure

Crops are senescing, though there are reports of birds feeding on ripe grain.

Disease pressure

Crops are senescing.

Prospects for the coming months

Overall, winter barley crops are in good condition where crops have not suffered from the drought. Lodging remains a key watchpoint, considering some impacted area as well as some leaning crops. Harvest is now imminent.

WINTER OATS

Crop conditions

Crops are developing well. Most crops are now at GS 75 (medium milk) – 85 (soft dough). There are no major concerns expressed around lodging, although the risk is slightly higher in Yorkshire. Scotland has more lodging observed than other crops, but it is not expected to be severe.

For the week ending Tuesday 04 July, 74% of GB's winter oat crop was in good/excellent condition. This is down from 75% last month, with a reduction seen in crops rated excellent by 2 pp. Good/excellent conditions continue to trail last year, which were at 83% in July 2022. 2% of the crop was in poor/very poor condition, unchanged from last month and in line with this point last season.

Nutrition

All fertiliser applications have been completed.

Weed pressure

Much like wheat, grass weeds are more of an issue. Broadleaved weeds have been well controlled.

Pest pressure

Like wheat, there are no major issues of concern, with aphid numbers declining.

Disease pressure

Crops are looking clean with little to no incidences of disease reported.

Prospects for the coming months

Winter oat crops look to be in good to excellent condition. The risk of lodging in some regions could become a concern, but the incidence will depend on weather conditions in the coming weeks.

WINTER OILSEED RAPE (OSR)

Crop conditions

Crop conditions remain variable. Damage from CSFB, pigeons and rape stem weevil are the main causes of variability. Furthermore, there have been reports of frost damage from earlier in the year, in some regions, impacting crop performance.

At week ending Tuesday 04 July, 63% of winter oilseed rape was in good/excellent condition. This remains unchanged from June's report but is down from 67% at the same point last season.

Some crops in good condition have reportedly had excellent seed filling conditions.

Desiccation with glyphosate will begin this week on early crops. Harvest is reportedly expected to begin during w/c 17 July across regions in the south, east and midlands.

Nutrition

All fertiliser applications have been completed.

Weed pressure

Weed control has been effective in the majority of crops. However, localised blackgrass problems have been reported in Yorkshire and the East of England. Broad leaved weeds have been limited to areas where the canopy has been opened by crop damage.

Pest pressure

No new pest pressures are being reported. However, where CSFB damage was high earlier in the season, crops are still showing the impact.

As detailed extensively in the previous crop report, CSFB has been the main cause of variability in crops for regions affected by CSFB. Where regions previously reported damage from pigeons (North West and West Midlands) or rape stem weevil (East Midlands and East of England), these crops seem to now be recovering.

Disease pressure

No major disease problems have been reported.

Prospects for the coming months

The outlook for yields remains mixed, though harvest looks to begin in around one week. Crops range from very poor to excellent based on earlier weather impact and pest impact, particularly CSFB and pigeon damage.

SPRING WHEAT

Crop conditions

Crop development remains variable across regions. In general, it seems earlier drilled crops have handled dry conditions far better than crops sown in mid to late April. Later drilled crops have tillered weakly for many and are generally thin.

Most crops range from GS 60 (ear emergence complete) to 75 (medium milk).

For the week ending 04 July, 69% of the spring wheat crop is reportedly in good/excellent condition (may not match table due to rounding). This is down from 70% in June's report, but ahead of the same point last year which was rated at 62%. 10% remain in poor/very poor condition, in line directly with last year.

Nutrition

All fertiliser applications have now been completed.

Weed pressure

Moderate grass weed control has been reported overall – with 60-70% of blackgrass killed. Some localised broad-leaved weed issues have been reported.

Pest pressure

There are no reports of pest issues exceeding threshold levels. However, some localised damage has been reported from gout fly and cereal leaf beetle.

Disease pressure

Yellow rust and mildew are reportedly under control. Septoria is understood to be at much lower levels than winter crops.

Prospects for the coming months

Crops range from below average to good condition, with a key factor in variable condition down to drilling date and how crops have fared from dry weather periods. Yield prospects for later drilled crops remains a key watchpoint.

SPRING BARLEY

Crop conditions

Spring barley crop development is variable across regions. Variability is a result of differences in drilling date, soil type, and the impact of recent weather conditions. Drilling dates especially saw large variability, ranging from Dec/Jan to May. Later sown crops are reportedly struggling from dry weather, much like wheat.

Some crops remain around GS45 (booting-swollen stage), while others have reached GS85 (soft dough) and beginning to reach GS91 (grain hardening).

For the week ending Tuesday 04 July, 52% of spring barley crops is rated good/excellent condition. This near unchanged from June (may not match the table due to rounding). This year's crop condition is well back from the same point last season, which was rated 75% good/excellent.

The percentage of the crop in poor/very poor condition remains unchanged from June at 17%, but very poor conditions are markedly back from last month (back 3 pp).

Nutrition

All fertiliser applications have been completed.

Weed pressure

Like spring wheat, moderate grass weed control has been reported as well as some localised broad-leaved weed issues. In the South East and South West, incidences of wild oats have been reported.

Pest pressure

Pest pressure remains low is reported so far. Though, in the West Midlands, reports of damage from cereal leaf beetle on the flag leaf and leaf number 2 have been noted.

Disease pressure

No major incidences of disease have been reported so far.

Prospects for the coming months

Spring barley crops remain variable, with many crops in average or good condition overall. However, earlier sown crops are generally in better condition than later sown crops, as later crops struggle from dry weather.

SPRING OATS

Crop conditions

Spring oat crops appear to be coping better than other spring crops. Though growth stages are also variable across the country. Most crops are now between GS60 (panicle completely emerged) and GS75 (medium milk).

For the week ending Tuesday 04 July, 69% of the crop remains in good/excellent condition, unchanged from June. Though this is back from 75% in good/excellent condition in July 2022. Poor/very poor condition remains at 4%, unchanged from last month and in line with last year.

Nutrition

All fertiliser applications have been completed.

Weed pressure

Same as wheat, moderate grass weed control has been reported overall with some localised broad-leaved weed issues. In the East of England and South West, higher numbers of wild oats have been seen in some crops.

Pest pressure

Pest pressure remains low. Some symptoms of BYDV remain visible, but the overall incidence is low. In the West Midlands, reports of damage from cereal leaf beetle have been noted.

Disease pressure

No major incidences of disease have been reported so far.

Prospects for the coming months

Similar or comparatively better than other spring cereals, the majority of spring oat crops are considered in good condition. Though dry weather remains a key concern for yield prospects.

SPRING OILSEED RAPE

Crop conditions

Due to there being so few spring OSR crops, information on the crop is based on very limited data and confidence in the data is low as a result.

Crop condition remains variable, depending on the timing of planting and soil type.

Nutrition

All fertiliser applications have been completed.

Weed pressure

It is reported weed control has been effective so far.

Pest pressure

Pest pressure generally remains low. As reported last month, most crops impacted by CSFB earlier, appear to be recovering.

Disease pressure

No major incidences of disease have been reported.

Prospects for the coming months

Overall, crop condition remains highly variable, ranging from very poor to good. So, yield prospects are also very variable.