AHDB ARABLE CROP REPORT

Friday 27 June 2025

EXECUTIVE SUMMARY

Following the very dry spring weather this year, for most crops the primary issue over the last month has been water stress rather than the effects of diseases or pests.

Welcome rainfall at the end of May and beginning of June led to improvements in crop condition scores across all winter crops surveyed, as well as spring wheat. However, the condition ratings of spring barley and spring oats have declined since the end of May. All crop scores aside from winter oilseed rape are also below the same point last season.

The late May/early June rainfall did provide some relief to crops. However, the variability of rainfall both within and between regions means that there remain some highly water stressed crops, and some that are still green and coping well. For spring crops, the rain came too late to support establishment, and as such, their root systems were likely unable to seek out water deeper in the soil profile.

The yield impact of water stress remains uncertain. Grain size is good, but with lower tiller numbers the total number of grains will be reduced. The weather conditions in the final few weeks of grain fill can have a big impact on final yield, especially for crops that are still green and coping well.

Tillering is reduced compared to normal, with both winter and spring crops affected. Crop height is highly variable, and spring crops in general are very short. Stressed plants have lost a significant amount of leaf area, which is important for straw yield.

In the worst affected fields on heavy land, crops are dying off, with heads turning white. On lighter land, crops are dying and turning brown.

In water stressed locations, there has been early senescence that is likely to result in slightly earlier harvest dates. On lighter soils in the south and east, winter barley harvest is likely to start mid-July, with heavier soils following later in the month.

WEATHER FOCUS

Rainfall was notably low throughout spring, with a UK average of just 128.2 mm. This accounts for 56% of the seasonal average. However, there was a shift towards the end of May and beginning of June, with some scattered showers and more overcast skies.

Rainfall brought relief to many farmers across the UK, but it was highly variable. Unsettled conditions have continued throughout June, with overall greater rainfall in the west, compared to drier conditions in the east. Overall rainfall this month has been lower than the long-term average.

Localised thunderstorms in the Eastern region saw up to 80mm of rain in some areas, while other received less than 10mm. However, the rain reportedly had little effect on alleviating the high soil moisture deficits and water stress in crops.

The West Midlands received a reasonable amount of rain. Much of this rainfall was absorbed into the soil rather than evaporating immediately, significantly benefitting crops. The rain also halted the early senescence that had been occurring in the region.

Parts of Yorkshire received around 25 mm of rain at the end of May and early June. However, again, this was variable, with some growers receiving as little as 5-10 mm.

Wales saw slightly higher levels of rainfall. Northern Ireland had a fair amount too, with crops generally looking good. Overall, the yield impact of water stress in most regions is uncertain, with conditions below where they were at a comparable time last season.

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
Winter wheat	4%	12%	46%	32%	6%
Winter barley	1%	6%	43%	42%	8%
Winter oats	1%	7%	37%	50%	5%
Winter OSR	3%	8%	34%	49%	6%
Spring wheat	3%	13%	33%	42%	9%
Spring barley	3%	14%	31%	44%	8%
Spring oats	1%	15%	45%	33%	5%

Data on GB crop conditions captured up to Monday 23 June 2025.
Source: AHDB, data captured by RSK ADAS Ltd
Note: Figures may not sum to 100% due to rounding.

WINTER WHEAT

Crop development

In late June, 38% of UK winter wheat crops were rated as being in excellent or good condition. This is up slightly from 36% at the end of May, but significantly lower than 56% at a similar point last season.

There is wide variation in crop condition depending on soil type and regional rainfall differences.

While crops across Great Britain are variable, conditions in Northern Ireland are overall good.

UK growth stages typically range between GS70 (finished flowering) and GS75 (medium milk).

Nutrition

Nitrogen uptake was delayed due to the dry spring conditions, with many crops not responding to applications until after the late May and early June rainfall.

However, forecasts suggest protein levels could benefit from late uptake of nitrogen and yield reductions.

Pest, weed and disease pressures

A thin canopy in most crops across the country, combined with the recent rainfall has resulted in a lot of late germinating weeds.

In the Eastern region, many fields will need pre-harvest glyphosate to keep the crop clean and aid harvest management.

Grass weeds are generally less prevalent in the East Midlands compared to previous years, with notably less blackgrass and ryegrass on some problem fields. However, brome has been appearing, with poor spring control with herbicides ineffective.

While blackgrass and ryegrass are present in Yorkshire, treatments have worked very well.

In Northern Ireland, good weed control was achieved through one effective pre-emergent autumn application, with a spring follow-up.

Aphids were the main concern last month, but levels rarely met the treatment threshold. Many English farmers have also signed up to the Sustainable Farming Incentive (SFI) option that prohibits insecticide use, and as such, would not have sprayed even if thresholds were met.

Despite a delay in T2 fungicide applications due to the dry weather, there is generally low disease pressure this year.

A new strain of yellow rust has been the main challenge in Yorkshire and the North East, though it hasn’t caused significant damage.

In the South East, barley yellow dwarf virus (BYDV), septoria, and brown rust have been observed in susceptible varieties.

In Wales, despite observations of septoria and some rust, dry weather slowed the spread, and timely spraying helped control it.

At present, the fusarium risk is low, as many crops had already passed the critical flowering stage when the rain occurred. Rainfall was often brief, and ears dried rapidly, reducing the risk of infection.

Again, due to the dry conditions, many T2 fungicide sprays were delayed and ended up being applied around the T3 timing. T3 applications were mainly maintained for milling wheat to preserve grain quality.

In Scotland, many T3 applications were applied too late, with some growers choosing not to apply a T3 at all due to the absence of septoria or yellow rust.

Meanwhile in Northern Ireland, due to a higher level of rainfall during the flowering period there was a higher fusarium risk. However, most growers applied T3 applications as normal.

WINTER BARLEY

Crop development

At the end of June, 50% of the winter barley crops were estimated to be in good to excellent condition, up from 48% last month, but well below the same point last season (69%).

Winter barley harvest is expected to begin in the next two to three weeks in South Eastern and Eastern regions.

In the Midlands, there is some variability in how crops have ripened and died off, with some ears fit for harvest, while others are still soft and need more time.

Harvest in the North East will be slightly earlier this season, with the crop colour almost changed, before being sprayed off with pre-harvest glyphosate. Very early-drilled crops are close to normal height but have low head counts – down approximately 50% per square metre.

Winter barley harvest is expected to begin within a fortnight in Wales, while harvesting likely won't start until early August in Scotland.

Growth stages now typically range from GS75 (medium milk) to GS85 (soft dough).

Pest, weed and disease pressures

Overall winter barley crops are clean, with low weed and disease pressure.

In Wales, there are reports of sterile brome, which has been difficult to control due to the dry weather. Some rhynchosporium and net blotch has also been reported, but at low levels.

WINTER OATS

Crop development

By the end of June, the proportion of winter oats in good to excellent condition climbed slightly to 55% from 52% last month. This rating is just below the 58% rating at this point last year. However, the proportion of the crop in very poor or poor condition is at 8% as of late June 2025, compared to 21% at this point last year.

Growth stages are typically between GS75 (medium milk) and GS85 (soft dough).

Pest, weed and disease pressures

Winter oat crops remain very clean overall, with little disease and just a few reports of pests in some regions.

A few aphids are present, mostly on leaves in the West Midlands, with very few reported on the panicles. In the North East, frit fly has been observed, causing some, but not significant damage.

WINTER OILSEED RAPE

Crop development

At the end June, the proportion of winter oilseed rape (WOSR) crop rated in excellent or good condition reached 55%, up from 52% last month, and 54% at a similar time a year earlier. However, this is below 2023 (63%) and 2022 (67%) levels.

Overall, the crop is performing better than cereals and pulses. For most crops, seeds are now full size and green.

The start of harvest will depend on whether crops are swathed or desiccated, but is expected in mid-late July in the South East and Eastern regions.

Pest, weed and disease pressures

There are no major weed issues, with good control earlier in the season. Although aphids have been observed, numbers have rarely reached treatment thresholds, and therefore few insecticide applications have been made.

Disease pressure also remains low. Dry conditions during flowering meant that sclerotinia levels were minimal. Occasional phoma cankers are present resulting from infections earlier in the season, but these are not expected to have significant impacts on lodging or yield.

SPRING WHEAT

Crop development

At the end of this month, 51% of spring wheat is rated in good or excellent condition, up slightly from 50% at the end of May, but back from 60% at the same point last season. It is also well below 69% at this month in 2023.

Spring wheat conditions are mixed depending on drilling dates and moisture levels.

In the West Midlands, crops have not done well in the dry conditions due to a lack of nutrient uptake.

In the North East and Yorkshire, spring wheat looks better than the later drilled winter wheats.

In the South East, spring wheat crops are variable, with some looking quite good, while others are patchy, thin and quite short.

Overall, weed pressure is low, but where herbicide applications were affected by dry conditions there are reports of broad-leaved weed issues. Frit fly and gout fly have also been observed in the South East.

Across the UK, growth stages currently range between GS60 (start of flowering) and GS70 (flowering complete).

SPRING BARLEY

Crop development

Spring barley crop conditions have worsened since last month’s report, with 52% of the crop rated in good or excellent condition, versus 54% a month earlier. This rating is also significantly below 71% at this time last year.

In the West Midlands, early sown crops are looking better than those sown later in the season.

In Northern Ireland, spring crops are generally looking good, but there is variability across the region depending on severity of dryness.

Across the UK, most growth stages currently range between GS70 (finished flowering) and GS75 (medium milk).

Pest, weed and disease pressures

Disease pressure is generally low.

In the West Midlands, some crops have experienced late net blotch, but farmers have generally managed with only one fungicide application. Some farmers mentioned BYDV but not at high levels.

BYDV has also been present in Northern Ireland in some spring crops but has not caused major yield impacts.

SPRING OATS

Crop development

At the end of June, 38% of crops are in good or excellent condition, compared to 42% a month earlier. However, this is down significantly on 2024 ratings which reached 77% at this point last year.

In the West Midlands, many crops are thin, patchy, open, and short. In the poorer areas, plants are stuck at 3 to 4 leaves and have been like that for six weeks, showing little growth.

In the North East and Yorkshire, spring oats appear to have fared better than other spring crops.

There have been occasional reports of aphids, with targeted use of insecticides in the South West in particular.

Crop conditions are well below the last few years. The proportion of crops in good or excellent condition was 69% in 2023 and 75% in 2022.

Growth stages currently range between GS45 (flag leaf sheath swollen) and GS70 (flowering complete).