AHDB ARABLE CROP REPORT

Friday 31 March 2023

EXECUTIVE SUMMARY

A mild autumn enabled crops to establish well and develop quickly, but a cold, dry winter has reduced some early gains. Autumn herbicides have generally been effective at providing good weed control. Additionally, cold and dry conditions have resulted in relatively low disease pressure. Temperatures have been variable throughout winter, with severe frosts occurring in December and January.

Furthermore, an exceptionally dry February resulted in soils becoming unusually dry allowing for early sowing of spring crops under good conditions, with some early drilling even on some heavier land. Though with cold weather since then, this has slowed the emergence of newly sown crops for some.

However, from that point, increased heavy rainfall throughout March has delayed drilling, as well as delaying fertiliser and pesticide applications in some regions. With March rain stopping field work, April will be busy catching up with late drilling, spraying and fertiliser applications.

Overall, winter grain crops look well, with the potential to deliver good yields. Though, it is noted this is providing disease pressure is effectively managed in winter barley crops. For winter oilseed rape, condition is variable, but there is still potential for good yields where crops have grown away from CSFB damage. Reports note that crop establishment of winter OSR has been variable, arising from slow establishment due to dry autumn condition and issues with cabbage stem flea beetle (CSFB) infestations. Though, most crops are reported to have either recovered, or have been replaced.

For spring crops, wet weather in March has delayed drilling for many. Though earlier sown spring wheat, barley and oat crops have good potential.

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	Crops not yet emerged
Winter Wheat	0%	1%	8%	67%	23%	0%
Winter Barley	0%	0%	8%	68%	24%	0%
Winter Oats	0%	1%	15%	68%	15%	0%
Winter OSR	2%	8%	21%	51%	19%	0%
Spring Wheat	0%	0%	4%	26%	0%	70%
Spring Barley	0%	0%	1%	9%	0%	90%
Spring Oats	0%	0%	1%	5%	0%	93%

Source: RSK ADAS

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

WHEAT

Crop establishment

As at the end of March, 90% of the GB's winter wheat crop was in good-excellent condition, ahead of 81% at the same point last year. Only 1% of the crop was said to be in poor-very poor condition, with 100% of the crop emerged.

Drilling was completed in November, with 35% was sown in September, 56% in October and 8% in November. It has been reported that overall, there has been very good crop establishment due to favourable autumn conditions. The majority of crops are now approaching growth stage 30-31 (Ear at 1cm GS30/first node detectable GS31).

There have been some localised reports of viability concerns due to high blackgrass populations and waterlogging in the South East. Moreover, in the West Midlands there have been reports of variability in establishment seen in crops where min-till and straw incorporation strategies have been used.

Nutrition

It is reported that the majority of crops have had their first application of nitrogen (N) and sulphur. However, N rates may be reduced to reflect the recent reduction in wheat prices, particularly for milling wheat.

The wet March has delayed N applications in some areas, so the first and second application are likely to be combined since the second application is due in many areas. Further to this, wet conditions have also increased concern about N leaching.

There has been local reporting in the West Midlands that the fluctuation in fertiliser and wheat prices has resulted in reductions in N use of around 20 kg/ha and up to 40 kg/ha. In the North West, manganese applications have been made to some wheat crops recently.

Weed pressure

In general, reports show that autumn herbicide applications have worked well. Most pre-emergence programmes have provided strong blackgrass control, where herbicides were applied on time. Further to that, broadleaf weed control reported to be generally good.

There has been reports of repeat spraying required this spring for blackgrass, bromes, and ryegrass in the East Midlands. However, the cold and wet weather conditions have delayed spring herbicide applications. In Yorkshire, where pre-emergence herbicides have been

applied on time, black-grass control is over 98%. But where the programme has been late or incomplete, this control is around 60-70%.

Pest pressure

There are reports of little to no pest pressure issues. However, there is some evidence of gout fly damage, particularly in September-sown crops, but not at high enough levels to affect yield. Aphids have not been a cause for concern, with overall incidence of BYDV being very low. However, in Yorkshire there has been some reports of small patches of BYDV occurring where no autumn insecticides were applied, but impact is expected to be minimal.

Disease pressure

Overall, low levels of disease has been reported. Septoria levels are generally low, and infections are mostly confined to older leaves as expected, but wet weather in March will increase risk to crops. Incidences of yellow rust have mostly been controlled by cold weather in February and March.

In the West Midlands, variable levels of take-all infection on second and third wheat has been noted, with eyespot apparent in some forward crops.

Prospects for the coming months

Overall winter wheat crops look well with the potential to deliver good yields.

WINTER BARLEY

Crop establishment

As at the end of March, 92% of winter barley was in good-excellent condition, up from 80% at the same point last season. 0% of the crop is in poor-very poor condition. With a speedy harvest 2022, 59% of winter barley was sown in September, 40% in October and 1% in November. Similar to winter wheat, favourable conditions throughout autumn have resulted in good crop establishment.

The majority of crops are now approaching growth stage 30-31 (Ear at 1cm GS30/first node detectable GS31).

Nutrition

As with wheat, the majority of crops have received their first N application and are now receiving their second. There has been some localised reports of yellowing seen in some crops in Yorkshire, that have not yet received any N. In the South East, there is the usual signs of manganese deficiency in crops.

Weed pressure

Autumn herbicides applications have generally provided good weed control. However, there is some concern over blackgrass, ryegrass, and brome populations in several regions and lack of spring herbicide options for control. In the South East, some early herbicide applications have been required due to issues with chervil.

Pest pressure

Similar to wheat, pest pressure is reported to be low. Localised incidences of BYDV across several regions, although the impact of this seems to be minimal so far. Several areas with gout fly infestation in crops, but yield losses are not expected.

Disease pressure

For disease, net blotch and rhynchosporium are present in most crops, with recent wet weather increasing disease pressure. Mildew has also been reported, mostly at low levels.

Rust incidence is reported to be low, though in Yorkshire, many hybrid varieties have been badly affected by brown rust.

Prospects for the coming months

Overall, 2023 barley crops have established well and appear to have good potential, if disease pressure is effectively managed.

WINTER OATS

Crop establishment

At the end of March, 83% of winter oats were in good-excellent condition, up on last year's figure of 78%. Winter oats drilling was completed in November, with 38% sown in September, 58% in October, 4% in November. Similar to winter wheat, the crop has seen good establishment and crops are well tillered.

Though in the South East, reports of some crop injury following delayed rolling after frost heave.

Nutrition

Most winter oat crops have received their first application of N and sulphur.

Weed pressure

Winter oats conditions are similar to winter wheat, with some concern over blackgrass, ryegrass, and brome populations. However, there hasn't been issues reported with broadleaf weeds. Regionally in the East of England there are reports of blackgrass, ryegrass, and brome present in early sown crops.

Pest pressure

Little to no pest problems have been reported. However, in Yorkshire, there has been reports of localised incidences of BYDV where no autumn aphicide was applied.

Disease pressure

The majority of crops are reported to be clean, with low incidences of mildew reported. No crown rust has been seen.

Prospects for the coming months

Overall, winter oat crops appear to be doing well overall. In Yorkshire, the biggest risk is from good tiller development and potential lodging risk.

WINTER OILSEED RAPE

Crop establishment

Oilseed rape crops were rated 70% good-excellent at the end of March, up from 64% at the same point last year. Drilling of OSR was complete at the end of September with 71% sown in August, 29% in September.

Variable crop establishment has been noted, arising from slow establishment due to dry autumn condition and issues with cabbage stem flea beetle (CSFB) infestations. Though, it is reported most have recovered or have been replaced.

There has been reporting from the West Midlands that severe frosts had a pronounced effect on OSR crops, but most have reportedly recovered.

Nutrition
Crops have almost all received their first N application and some second. The remainder is becoming overdue in several areas.

Weed pressure
Overall weed pressure appears to be low. Autumn herbicide applications have been effective, with severe frosts also helping to control charlock populations. Though some spring herbicide applications have been delayed due to wet weather. Delayed herbicide application in Yorkshire have reportedly resulted in grass weed issues, as well as mayweed control issues.

Pest pressure
CSFB is still the main concern for OSR, although reports of damage from CSFB larvae have ranged across the country from minimal to severe. Some pigeon damage has been seen, again with varying degrees of severity. There has been reports that pollen beetles are starting to appear.

Disease pressure
There has been reported incidences of phoma and light leaf spot in most crops. Although in general, the levels of disease are not a cause for concern yet.

Prospects for the coming months
Crop condition is variable, but there is still potential for good yields where crops have grown away from CSFB damage.

SPRING WHEAT
Crop establishment
As at the end of March, 26% of the UK's spring wheat crop was in good-excellent condition, ahead of 5% at the same point last year. 0% of the crop was said to be in poor-very poor condition. Important to note, 70% had either not yet been planted or emerged compared to 86% at the same time last year.

Spring wheat drilling is currently underway, with 37% of spring wheat sown in February but only 7% in March. This is due to wet weather through March and means the remainder of drilling is expected to start again in April, particularly where crops are being sown on heavier land. There has been slow emergence because of cold weather, but generally good establishment.

Nutrition
Some seedbed N has been applied, although not all crops have received this due to wet conditions in March.

Weed pressure
There has not been any reports of any weed issues so far. Any pre-emergence herbicides that have been applied, appear to be working effectively.

Pest pressure
There has been reports of crop damage from crows, where establishment has been slow, but this is not expected to be sufficient to impact yield. There are some regional reports in the South East that gout fly will become a threat to later-sown spring wheat.

Disease pressure
No reports of disease so far.

Prospects for the coming months
Earlier sown crops seem to have good potential.

SPRING BARLEY

Crop establishment
As at the end of March, 9% of the UK's spring barley crop was in good-excellent condition, ahead of 1% at the same point last year. 0% of of the crop was said to be in poor-very poor condition. At the same date, 90% had either not yet been planted or emerged, compared to 95% the same point last year.

Drilling is underway in most areas, with 19% of spring barley sown in February and 4% in March so far. Wet weather during March has delayed drilling in some areas. Early sown crops have been slow to emerge, but most have now established well under good conditions during February.

Nutrition
Where sown, most crops have received their first N application. It is noted that in Yorkshire, many growers are reportedly reducing rates of P and K.

Weed pressure
Overall, there is low weed pressure. Where pre-emergence herbicides have been applied, this has provided good control of grass weeds.

Pest pressure
Crow damage has been reported, which has been exacerbated by slow crop emergence. Though yield impacts not expected, except where damage is severe. There are reports that in the West Midlands, some resowing will be required due to high levels of crow damage.

Disease pressure
No disease pressure issues have been reported.

Prospects for the coming months
Crops sown to date are looking well and appear to have good yield potential.

SPRING OATS

Crop establishment
As at the end of March, 5% of the UK's spring oats crop was in good-excellent condition, ahead of 1% at the same point last year. 0% of the crop was said to be in poor-very poor condition. However, 93% had either not yet been planted or emerged, compared with 95% the same point a year earlier. It's reported that drilling is slow to get underway, with 16% was completed in February, and 5% in March.

In Yorkshire, it has been noted that spring oats that have been sown have been slow to emerge but have established well.

Nutrition
Seedbed N has been applied to drilled crops. Again, some reports of reduced P and K applications in Yorkshire.

Weed pressure
Very few crops have received a pre-emergence herbicide, due to limited options available. In Yorkshire, there has been reports of speedwells, volunteer OSR and cleavers beginning to emerge.

Pest pressure
Some reports of crow damage, but the impact is reportedly minimal.

Disease pressure
No disease issues reported.

Prospects for the coming months
Crops sown in February have established well and have good yield potential. Whereas it is reported later-drilled crops may have reduced yields.

SPRING OILSEED RAPE

Crop establishment
Very little spring OSR has been sown so far (less than 2%) and this has not yet emerged.

However, it has been reported that due to the recent pressure on the rapeseed market, it’s likely that may reduce the amount of spring oilseed rape grown.