

EXECUTIVE SUMMARY

Weather has been highly favourable so far this spring, providing excellent conditions for drilling. Most areas of the UK experienced little to no rain until 21 March, although most soils remained moist.

Drilling is progressing very well, with almost all lighter land already drilled. Some seedbeds are drier than ideal, hindering rapid and even germination. Drilling is currently underway on medium soils, but wetter, heavy soils are slightly delayed. In some regions of England, more than 70% of spring crops have already been drilled.

Drilling progress has been limited in Scotland by soil temperatures remaining low.

In Northern Ireland, farmers are being more cautious about drilling spring barley too early. Past challenges with early spring drilling have led many to deliberately delay planting, even when conditions are ideal.

February had warm daytime temperatures that were favourable for winter crop growth. But night frosts slowed development, keeping winter crops more or less at a normal growth stage for this time of year. Overall, winter barley is ahead in growth, winter oats show little difference, and winter wheat is slightly behind compared to last year.

Compared to other parts of the UK, winter crops in the East Midlands are behind their usual growth stage for this time of year, as they were drilled later than usual due to heavy rainfall, including some plantings in late November.

Meanwhile, the relatively low temperatures also slowed the growth of early-drilled spring crops.

January was colder than usual, which along with night time frosts since, has helped to control pests, weeds and diseases compared to last year's warmer temperatures. Last year, the warmer temperatures resulted in a higher prevalence of cereal diseases.

The information in this report was captured up to Monday 24 March 2025 for AHDB by RSK ADAS Ltd.

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	Crops not yet planted or emerged
Winter wheat	3%	7%	23%	59%	8%	0%
Winter barley	1%	3%	26%	61%	9%	0%
Winter oats	0%	4%	22%	66%	7%	0%
Winter OSR	3%	11%	29%	47%	10%	0%
Spring wheat	0%	0%	0%	10%	0%	90%
Spring barley	0%	0%	0%	7%	0%	93%
Spring oats	0%	0%	0%	2%	0%	98%
Spring OSR	0%	0%	0%	0%	0%	100%

Data on GB crop conditions captured up to Monday 24 March 2025.

Source: AHDB, data captured by RSK ADAS Ltd

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

WINTER WHEAT

Crop development

Overall, crop establishment is good for winter wheat, though late-drilled crops are slightly thinner and patchy due to the wet conditions.

In the East Midlands, November drilled crops are thinner due to wet conditions. In the West Midlands late September sown crops were patchy for the same reason.

In the South East, ploughed crops have come up well, direct drilled crops are poor, and cultivated crops fall in between, with some waterlogged areas lacking tillers.

Most crops are now approaching GS30.

At the end of March, 67% of the GB winter wheat crop is in excellent or good condition. This is much improved from 44% at the end of November and 33% at this point last year. But the proportion in excellent or good condition is still below the 90% recorded in March 2023 and 81% in March 2022.

Nutrition

Nitrogen and sulphur doses have been applied, with most second nitrogen/urea doses already completed. Urea is being applied early to meet the 31 March deadline.

Conditions in February allowed for early nitrogen applications, but these did not aid growth, as the cold overnight temperatures prevented a response.

Meanwhile, magnesium deficiencies are lower than in previous years, and soil consolidation is good.

Pest, weed and disease pressures

Autumn spray programs have provided good grassweed and broadleaf weed control, with residual weed control also effective. Two herbicide applications have ensured good control, and light soils remain clean by March, with lower levels of brome, ryegrass and black grass.

However, some phytotoxicity has been observed in crops treated with cinmethylin in late November, resulting in crop thinning.

Northern Ireland benefited from favourable autumn conditions, allowing well-timed pre-emergence treatments. In Wales, most crops are managing well with weeds, but some slower-growing crops are facing more weed problems and need extra treatment.

Gout fly is more widespread in earlier drilled crops than usual. In the West Midlands, gout fly damage has resulted in some fields experiencing up to 50% tiller loss, notably in wet fields with initially low tiller numbers.

Slug challenges persisted in Wales and Scotland during the autumn as crops were emerging.

Wheat bulb fly is rarely seen, and aphids have not been a cause for concern, with very low overall incidence of BYDV.

Overall, low disease levels are reported so far.

Septoria levels are typical for this time of year, mainly present on older leaves. Dry conditions are helping reduce the risk of spread.

In Wales and the South West of England septoria is commonly present, especially on dense canopy crops, and some BYDV has been reported in coastal areas.

Rust levels are low in some areas due to colder weather, with yellow rust initially appearing but disappearing after frost. Yellow rust has started to appear again in the second half of March, including in Yorkshire and the South East. However, in Scotland yellow rust is present along the eastern coast, requiring control measures.

Prospects

Despite the heavy rain in parts of the UK at the end of September through to mid-October, overall winter wheat condition is better than expected.

WINTER BARLEY

Crop development

In general, winter barley had good to very good establishment and over wintered well. An estimated 70% of winter barley crops are in good to excellent condition at the end of March, compared to just 38% a year ago and 57% in November. The proportion is still below March 2023 (92%) and in March 2022 (80%).

Most crops are now approaching GS30-31.

It's worth noting that in the East Midlands, winter barley was drilled later than usual due to heavy rainfall, with some not drilled until late November. The overall impact on the crop is not yet apparent.

Nutrition

Nitrogen and sulphur doses have been applied in most of England and Wales, with most second doses of nitrogen/urea also completed. In Northern Ireland, applications are a bit

behind, with the main dressings likely to start at the end of March. The first nitrogen application has been made in Scotland.

Manganese deficiencies are being reported in some areas, including in parts of Scotland.

Pest, weed and disease pressures

Autumn herbicide applications have generally provided good weed control.

Overall pest pressure is reported to be low. However, several areas have gout fly infestations in crops, reducing the number of tillers and potentially causing yield losses in affected areas. Also, in Yorkshire and The Humber, there are some reports of free-living nematodes on light land.

Net blotch levels are slightly higher than usual, while brown rust remains at normal levels. Net blotch is the most common issue in the South West of England and is slightly more prevalent than usual in the South East. In Wales there are some reports of BYDV in crops in coastal areas, while brown rust is present in Northern Ireland.

There are small amounts of rhynchosporium, but nothing unusual. Mildew is also reported, mostly at low levels.

Prospects

Winter barley has established well, and crops have good potential for strong yield performance.

WINTER OATS

Crop development

Winter oats had very good establishment, though some crops have not grown away well due to the colder temperatures.

Overall, 73% of winter oats were in in good to excellent condition at the end of March, up from 52% at end-November and 37% a year ago. While the proportion in good or excellent condition is below March 2022's 78% or March 2023's 83%, it's by a smaller margin than other winter cereals.

Nutrition

Good establishment conditions are expected to have promoted strong root structures, enhancing the ability to scavenge nitrogen. Only small amounts have been applied so far, mainly to weaker crops; full rates will be applied later, if needed.

In Wales, first nitrogen applications are being applied, though at reduced rates for forward-growing crops.

Pest, weed and disease pressures

Winter oat crops are very clean, even where no herbicides have been applied. Little to no pest problems are reported and disease pressure also is generally low so far.

Small amounts of mildew were being seen but these have mostly been controlled by frost. There is still some mildew observed in the South East of England and on thicker crops in the South West.

Some crown rust was observed in the South of England but that has also dried up.

Prospects

Winter oat crops are generally doing well, with good yields expected.

WINTER OILSEED RAPE

Crop development

Of all the crops reviewed, winter oilseed rape (WOSR) is the most variable and the most compromised so far.

Pigeons have been a bigger issue this year, grazing some crops down to the ground. Deer grazing is also a concern, with high numbers causing significant localised damage. Many crops are uneven as a result.

This sharp contrast in prospects is clearly seen in Scotland, where crops have either been untouched by pigeons or severely damaged. Some of those damaged are just starting to recover, though there are still many gappy crops, which are unlikely to yield more than 3t/ha.

In Wales, there was patchy establishment in later-sown crops.

Overall, 57% of WOSR is in a good to excellent condition at the end of March, down from 73% at end-November. This is still above the 31% seen at this point last year and below the levels seen in March 2022 (64%) and March 2023 (70%).

Nutrition

Nitrogen and sulphur have been applied now. Some polysulphate has also been used, but there is uncertainty about whether it will release enough sulphur in the dry conditions.

Pest, weed and disease pressures

Oilseed rape is becoming a lower-input crop due to risks to its viability, with farmers reducing pest and disease control compared to previous practices.

Weed pressure appears to be low overall. Herbicide applications have been effective, with propyzamide working well and grass weed control has been very good.

Cabbage stem flea beetle (CSFB) levels were low. But, while there was little adult flea beetle activity in autumn, extensive damage from larvae in stems is evident.

Pigeon damage has also been a bigger issue for WOSR. Deer grazing is also a concern, with high numbers causing significant localised damage.

There have been occasional reports of light leaf spot in England and Northern Ireland, though control is not yet required. In Wales, some light leaf spot reported on various crops, but favourable weather will allow fungicide applications as the soil dries. Light leaf spot is the dominant disease in Scotland, though overall pressure remains low.

Some unexpected cases of clubroot have been observed. Phoma levels were low in the autumn, and untreated crops have remained in good condition.

Prospects

Oilseed rape crop condition is variable, but there is still potential for good yields where pests have not caused major damage.

SPRING WHEAT

Drilling is well underway, with 82% of planned spring wheat sown to date. However, crops are slow to emerge due to cold weather. Crops in the South West of England are furthest ahead, with an estimated 22% emerged.

SPRING BARLEY

Spring barley drilling is underway in most areas, with 67% of spring barley sown nationally.

Crops in Eastern England are furthest ahead, with around 40% emerged and 10% tillering so far, followed by the South West (21%). Most crops are only just starting to emerge in the Midlands. There is limited progress yet in Scotland due to low soil temperatures.

The small areas of spring barley drilled early in January or February has emerged and is doing well. Crops planted in January and February normally receive early post-emergence herbicides, but few have had herbicides applied due to low weed pressure and some slow growth. Most will only receive herbicide at GS30.

Some crow damage has been reported, where emerging rows have been pulled up for the seed to be eaten.

SPRING OATS

Spring oats, in most cases, are being drilled last out of the spring cereals, with spring wheat and barley being prioritised. An estimated 57% of drilling is complete to date. However, it's too early to offer insight on crop conditions as spring oats are just starting to emerge.

SPRING OILSEED RAPE

Only a small amount of spring OSR has been sown so far, with 14% completed. Pest control challenges to enterprise viability are likely to reduce the area planted by farmers.