

## EXECUTIVE SUMMARY

The very dry spring this year is likely to have caused damage to many crops. Indeed, winter crop condition ratings have dropped notably from the end of April, while spring cereal ratings are lower than a year ago.

**Please note that while the information in this report was captured up to Monday 26 May 2025 for AHDB by RSK ADAS Ltd, the impact of the recent rainfall will not be fully captured in this report. Early indications are that some areas are likely to have had sufficient rain to be upgraded from poor to fair and from fair to good, which offers some room for hope as we look ahead.**

After a warm, dry and sunny April for all parts of the UK except for Northern Ireland, much of May was dominated by warm and dry conditions. This raised concerns about a possible drought and associated impacts including reduced crop growth, lower yields, and potentially crop failure.

Crop conditions vary widely depending on rainfall, which has been quite variable across the UK (see below), and soil type. Crop growth stages are 10–14 days ahead of the norm in many areas, driven by warm, sunny conditions and limited rainfall.

Crops on heavier soils with better water retention are holding up better, while those on lighter soils are struggling.

Dry weather has prevented the uptake of nitrogen and other nutrients in many crops, resulting in fewer tillers and shorter plants. Both winter and spring crops are exhibiting stunted growth and look thin in many areas of the UK, which could impact straw availability this year.

Reduced nitrogen uptake also gives rise to concern over potential grain nitrogen and protein levels. One small positive is that the lack of growth has meant that fewer applications of growth regulators has been required.

Spring cereal crops are struggling in the dry weather; in severe cases, they have stalled at the 3–5 leaf stage without tillering. Most crops have progressed rapidly through growth stages but remain thin and open, with poor nutrient uptake in dry soils significantly affecting development. However, early sown spring cereal crops with well-established roots are faring better.

Overall, moisture stress has reduced yield potential, and the effects will become more evident over the next four weeks.

Heavy rainfall returned in the final week of May, bringing much-needed relief and renewed optimism for many. That said, looking ahead is difficult and crop prospects depend heavily on future rainfall. For all crops rainfall in the next four weeks will be critical in determining final yields and quality.

## WEATHER FOCUS

In Eastern England only 20mm of rain had fallen since the start of March until a further 20mm was recorded in the final week of May.

Scotland has also been very dry, with some rain finally arriving in the last week of May after experiencing six weeks with a total of less than 10mm of rainfall. Some areas of spring barley have failed to germinate. Winter barley has been less affected, while winter wheat shows signs of stress with reduced tillering.

Meanwhile, in the South East of England, temperatures remained moderate through May, with some rainfall occurring around the middle of the month. Crops here are generally in fair condition, though performance varies depending on rainfall.

Wales also had occasional but highly localised showers. Spring crops are suffering the most, but early sown crops with well-established roots are faring better.

Northern Ireland is arguably the exception as spring brought favourable conditions overall. The country had 114% of the long-term average rainfall in April, with 16mm recorded in the northern region around mid-May. Overall crop conditions are better than last year and generally good across the country.

## 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%	13%	47%	30%	6%
Winter barley	1%	7%	43%	40%	8%
Winter oats	1%	8%	38%	47%	5%
Winter OSR	3%	8%	37%	46%	6%
Spring wheat	2%	16%	31%	39%	11%
Spring barley	2%	16%	27%	45%	9%
Spring oats	1%	20%	37%	34%	8%

Data on GB crop conditions captured up to Monday 26 May 2025.

Source: AHDB, data captured by RSK ADAS Ltd

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

## WINTER WHEAT

### Crop development

By late May, just 36% of winter crops across the country were in excellent or good condition. This is down sharply from the 60% at the end of April and is now not far above the 31% in late May 2020.

However, there is wide variation in crop condition.

Within the South East of England, the impact depends on the moisture available.

Crops are around 40% shorter than usual in the North East of England, and Yorkshire, with reduced green leaf areas.

In Scotland, winter wheat shows signs of stress with reduced tillering. Within the West Midlands, crop yields are expected to be reduced despite the recent rain and in the worst cases, winter wheat is dying due to drought stress.

Growth stages typically range between GS39 (flag leaf fully emerged) and GS60 (start of flowering).

### Nutrition

Nitrogen uptake has been suppressed by the dry conditions, and growers need to decide whether to apply more nitrogen to milling wheat.

In the South East of England and in Wales, a lot of nitrogen remains in the soil and is yet to be taken up by crops. Meanwhile, in the West Midlands some growers have reduced nitrogen inputs as nitrogen is still available in the soil.

In the East Midlands, protein boost applications have been switched from granular to foliar treatment.

### Pest, weed and disease pressures

Crops remain mostly clean as the dry conditions also retarded weed growth. With the return of rains and a thin canopy, weeds might start becoming a challenge.

Black grass beginning to appear in some crops in the East Midlands.

In the South-East, broad-leaved weeds are growing from cracks in the ground. Weed flushes are expected in thinner canopies following the rain, though for those crops already at GS59, it is too late for herbicide applications.

In Wales, winter crops are dense enough, but there are more weeds in spring crops with a thinner canopy.

There have been good spraying opportunities in Northern Ireland, though we are starting to see more ryegrass in winter crops.

Pest pressure is still low overall, though we are starting to see a few aphids, including in the North East & Yorkshire. While there are aphids around in wheat crops in the West Midlands, beneficial insects are also present. While crops are out in ear in the South East, no midges have been seen yet.

Yellow rust is the main reported disease currently. There are currently no signs of fusarium, though the risk could increase as crops are now flowering. One watch point is that with an improvement in soil moisture and if more nitrogen is taken up, disease prevalence may now increase.

Yellow rust is the main disease reported in Scotland, and it is also a serious issue in the North East. Meanwhile, in the East Midlands, yellow rust is controlled where it has been treated.

In Yorkshire, yellow rust is present in more vulnerable varieties, though septoria not an issue this year.

In the South East, yellow rust is also under control except where spray timings have been missed. Leaf sample testing has shown septoria DNA in leaf 4 and for September drilled crops, septoria DNA in leaf 3.

Some T2 spray timings have been delayed closer to a T3 timing in the West Midlands due to the dry conditions, and in these cases T3 is now unlikely to be applied.

In Northern Ireland, growers have had good spraying opportunities and in general, crops look clean.

## WINTER BARLEY

### Crop development

An estimated 48% of winter barley crops are in good to excellent condition at the end of May, now well below last month's 68% and 61% at this point last year. However, it remains above the 25% recorded in May 2020.

It's also worth noting that the proportion in poor or very poor condition currently remains low at 8%, with 43% in fair condition. At this point last year, 17% were in poor or very poor condition.

In the South East, winter barley crops have been heavily impacted by the dry conditions.

In the East of England, winter barley appears healthy at first glance but is thin on closer inspection due to tiller loss. Winter barley is also showing low tiller numbers in the North East and Yorkshire.

Impacts are apparent in Scotland too, though to a lesser extent than winter wheat.

Winter barley development remains notably ahead of recent years, and growth stages typically range from GS60 (start of flowering) to GS75 (medium milk). In late May 2025, 16% of crops have reached GS75, compared to none at the end of May 2024 and 6% in May 2023.

#### **Pest, weed and disease pressures**

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

In Wales, some rhynchosporium and net blotch are reported.

In the South East, there is some brown rust, but leaves are generally senescing rather than diseased. There are also some weeds present in thin crops.

## **WINTER OATS**

#### **Crop development**

Over the past month the proportion of winter oats in good to excellent condition has dropped from 72% to 52%. This rating is level with this point last year, after being well above in March and April. However, 9% of crops are rated as in poor or very condition as of late May 2025, compared to 21% at this point last year.

Growth stages are typically between GS39 and GS60.

#### **Pest, weed and disease pressures**

Winter oat crops remain very clean overall, with little disease and few to no pest problems reported. There have been some cases of crown rust in the South East, which have been treated with azoxystrobin and tebuconazole.

## **WINTER OILSEED RAPE**

#### **Crop development**

Winter oilseed rape (WOSR) has also deteriorated from last month, though to a lesser extent than other crops reported on. Overall, 52% of WOSR is in a good to excellent condition, down from 59% at the end of April. This is still slightly above the 49% seen at this point last year, but below the levels seen in May 2022 (70%) and May 2023 (66%).

Most crops are typically between 50% flowering and 100% potential pod set.

In the East of England, WOSR is showing promise. With pod development underway, moisture levels will be key for pod filling.

In the South East, WOSR seed numbers are now fixed, so yield depends on increasing seed weight.

#### **Pest, weed and disease pressures**

Overall, disease pressure is low.

Light leaf spot, rather than phoma, is present in Scotland, but is not causing many issues. Some light leaf spot was also reported earlier in the season in the South East

Pest damage from cabbage stem flea beetles, deer and pigeons all caused damage earlier in the growing season.

More recently, some mealy cabbage aphids have been seen in the South East and the West Midlands; though in the latter region, it's primarily on headlands.

## SPRING WHEAT

### Crop development

An estimated 50% of spring wheat is in good or excellent condition, compared to 60% at this point last year and 77% in May 2023. It also shows a marked drop from a month ago when 67% was in good or excellent condition, with an estimated 1% of crops yet to emerge.

In the South East, the impact on crops depends on the moisture level available. In the West Midlands, crops are reported to be struggling on heavy land. Yields are expected to be impacted in Scotland.

Nationwide, growth stages currently range between GS33 and GS39.

## SPRING BARLEY

### Crop development

The dry conditions have taken a notable toll on spring barley, with 54% of crops now in a good or excellent condition. This is down 20 percentage points from the end of April when with an estimated 1% of crops still to emerge, 74% of crops were in good or excellent condition.

The rating is broadly comparable to this point last year when 55% of crops were in good or excellent condition, but notably below May 2022 and 2023.

In Scotland some areas of spring barley have failed to germinate, and wider yield potential is likely impacted.

Crop potential is likely to be heavily affected by the dry conditions in the South East of England. Crops are also of variable height and overall are 10-15% shorter than average.

Across the UK, most growth stages currently range between GS20 (tillering) and GS39 (flag leaf fully visible). In the South East, flag leaves are out and, in some places, awns are visible too. Emerging awns are also reported in the West Midlands.

### Pest, weed and disease pressures

Overall, weed pressure is low and crops look clean. However, weeds could become an issue for crops with open canopies, such as in the South East.

## SPRING OATS

### Crop development

At the end of April, 69% of crops were in good or excellent condition, with just 2% of crops yet to emerge. However, this has now fallen to 42% in good or excellent condition and 21% of crops are rated as poor or very poor.

Crops on very heavy and light soils are struggling in the West Midlands. Conditions in the South East depend on the currently moisture level. But in the North East of England and Yorkshire, spring oats appear to be doing relatively well.

Crop conditions are well below the last few years. The proportion of crops in good or excellent condition was 73% in May 2024, 73% in May 2023 and 75% in May 2022.

Growth stages currently range between GS20 and GS37.