

## EXECUTIVE SUMMARY

The weather this season has shown substantial variation across GB. It has alternated between very wet and relatively long dry periods before turning wet again, affecting regions in different ways.

The East of England experienced favourable conditions, with drilling beginning in mid-September under dry weather and progressed well, with minimal re-drilling required. Heavy October rain, particularly around the Midlands was challenging, and has delayed drilling. Some areas of heavy land (e.g. Beds/Northants/Oxon) have not yet been drilled, while some drilled areas are currently underwater.

In the West of England, early drilling started well but was impacted by late September rainfall. The bulk of drilling took place from late October to early November under favourable conditions, with mild soil temperatures. Some re-drilling has been required.

In the South conditions were moderate, with most drilling starting in October.

Most northern crops were drilled early and are well-established. However, drilling on blackgrass-affected land started later.

In the South East and East Midlands, a number of farmers broadcasted their crops.

In Wales crop establishment has been excellent, although later sown crops may be vulnerable.

Northern Ireland had a favourable autumn with minimal rain and good drilling progress.

Late-planted crops for harvest 2024 caused bottlenecks for farmers, with harvesting overlapping into drilling time for next season's crops. However, overall conditions for drilling have improved compared to last year. There are also numerous reports of non-harvested crops, such as those required for some environmental / stewardship schemes, appearing in crop rotations.

Following storms Bert and Conall towards the end of November, there is uncertainty regarding crops yet to emerge.

The information in this report was captured up to Monday 25 November 2024 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	2%	7%	30%	39%	5%	18%
Winter Barley	1%	2%	33%	46%	11%	7%
Winter Oats	1%	3%	33%	44%	8%	11%
Winter OSR	2%	5%	21%	49%	24%	0%

Source: AHDB, data captured by RSK ADAS Ltd

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

## WHEAT

### Crop development

Winter wheat drilling is almost complete. 27% of winter wheat was drilled in September, 46% in October and 22% in November, leaving just 5% to be planted as of 25 November.

As at the end-November, 44% of the GB winter wheat crop was in excellent or good condition, with 9% rated as poor or very poor.

Early drilled winter wheat is now well established, but the later drilled crops have faced herbicide and flood damage.

There have been questions regarding the best drill to use, as disk drills are causing significant smearing. Some opted for tine drills, or a plough and combi-drill set up. However, some farmers experimented with broadcasting seed, using higher seed rates and these crops are looking promising.

### Nutrition

Manganese deficiencies have been reported in sandy and light soils.

### Pest, weed and disease pressures

Pre-emergence herbicides applied to early-drilled crops in dry conditions have been less effective, with crops often requiring additional treatments.

Blackgrass emergence has been lower than expected, although ryegrass is becoming a bigger issue, with post-emergence timings proving challenging. New broadleaved weeds, including those linked to cover crops, such as clovers and vetches, are emerging and will require management later in the season.

Post emergence herbicide timings have been compromised by the challenging weather conditions. Concerns have also been raised with regards to the performance of some products.

Slugs are a significant issue across all crops, but particularly following oilseed rape (OSR). There has been high usage of slug pellets due to elevated risk levels and ongoing leaf stripping. Second wheat crops and those planted after fallow have experienced less pressure.

Aphid populations have been evident but now reduced by frost. In Northern Ireland, many crops were treated, and aphid numbers were average to slightly-above-average.

Frit fly is increasingly evident in wheat following oats, especially where there was a short interval between harvesting the oats and planting the wheat.

Disease levels have been low so far, with mildew observed in some early-sown crops, but no action has been needed at this stage.

### 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

Drilling is almost complete; 54% of winter barley was drilled in September, 33% in October and 9% in November.

As at end-November 57% of the GB winter barley crop was in excellent/good condition, while 3% was in poor/very poor condition.

Early drilled crops have performed well, but later drillings have been heavily affected by slugs.

### Nutrition

Similar to winter wheat, manganese deficiencies have been reported, mainly in sandy and light soils.

### Pest, weed and disease pressures

Weed pressure is similar to that in winter wheat. The application of pre-emergence herbicides in dry conditions was less effective and crops have required top-ups. Ryegrass and broadleaved weeds are increasing, while black grass emergence is lower. However, in Yorkshire, black grass remains a challenge. Nationally, post-emergence herbicide challenges remain, similar to wheat.

Slug numbers are higher than usual, leading to a shortage of slug pellets due to the need for multiple (up to 6-7) applications. In Yorkshire, there are more slugs in winter barley this year than normal.

Some rhynchosporium has been observed on winter barley, but levels are typical and unlikely to cause significant impacts. In Northern Ireland, rhynchosporium is starting to be seen on barley, but does not yet warrant action.

There is little mildew on mid-September drilled crops, and treatment is not currently planned.

### Prospects

Given the heavy rain at the end of September through to mid-October, overall crop conditions are better than expected.

However, the area is under pressure, both from the economics of the crop but also linked to the decrease in OSR area. Winter barley is often used as an entry for OSR because of its early harvest; reduced plans for OSR mean less of a drive for planting winter barley.

## OATS

### Crop development

96% of the intended winter oats area has been drilled; 28% drilled in September, 46% in October and 22% in November. As at end-November, 52% of the GB winter wheat crop was rated in excellent to good condition, with 4% rated in poor to very poor condition.

Oats have established well. 1-3 leaves have emerged for early planted crops, while some later drilled crops are yet to emerge. Overall, oat crops are looking good.

### Nutrition

Similar to winter wheat and winter barley, manganese deficiencies have been reported on lighter soils.

### Pest, weed and disease pressures

Weed pressure is like that of wheat and barley. There are limited herbicide options, but crops are currently looking relatively clean. Broadleaved weeds have started to emerge and will be targeted in the spring.

Pest pressure for oats is thought to be low, with few problems reported. There has been little slug activity seen to date.

With the crop just emerging, there has been no diseases observed yet.

### Prospects

While it's still very early days, the prospects for the 2025 winter oat crop are good.

## OILSEED RAPE

### Crop development

Winter oilseed rape (OSR) drilling is now complete, though plantings are much lower than previous years. 75% was drilled in August, 23% in September and 2% in October. As at end-November 72% of the GB winter OSR crop was rated in excellent/good condition, while 7% was rated as poor/very poor.

Early drilled crops are looking good, while it is more mixed for later drilled crops with slug grazing an issue. In the West Midlands, OSR has been the best-established crop, with most sown in early August and all establishing very successfully. However, in the South West 16% of the OSR crop that was drilled has failed to establish.

Overall, the winter OSR crop is very advanced and is looking much better than last year's crop.

### Nutrition

The trade are advocating trace element applications, such as boron, alongside propyzamide herbicide treatments.

### Pest, weed and disease pressures

There are reports of more shepherd's purse than usual, but early herbicide applications have generally controlled it. In the North, soil temperatures have recently dropped, and

propryamide applications began in mid-November. In the South, some applications have already been made, but most are waiting to apply later in the season.

There have been reports of delays in herbicide applications. This is due to the need to protect OSR companion crops such as clover and buckwheat that are increasingly being grown for environmental / stewardship schemes.

Early drilled crops had little evidence of cabbage stem flea beetle (CSFB), with slugs were a greater issue.

Turnip sawfly and stem weevil have increased in pressure this year and have become more of an issue in some locations than CSFB.

Pigeons are an increasing issue this year – some very large flocks at present and some crops have been lost to them.

Regionally, to note, in the South East, stem weevil and CSFB larvae have been observed on plants. Also, huge flocks of pigeons have been seen on drilled fields.

In terms of disease pressure, phoma levels are high, particularly depending on the variety in the South, with slightly lower levels in the Midlands. Mildew is present on crops sown in late July to early August, mostly on the lower leaves, but it's not expected to significantly affect the crop. Minimal light leaf spot is present.

Crops in Northern Ireland are relatively clean, with low levels of light leaf spot.

### Prospects

There has been good establishment so far, with plenty of leaf cover, leading to encouraging prospects for OSR. However, the area planted to OSR is expected to be lower again this year, with crops planted for Sustainable Farming Incentive (SFI) options replacing OSR and beans in rotations. There are also reports of increased use of cover crops compared to previous years too.