

## EXECUTIVE SUMMARY

This autumn we have had very mild weather. Early autumn started off dry, but then getting much wetter into November. The early completion of harvest and favourable weather meant drilling began earlier than normal, and most of it was completed ahead of schedule. Almost all winter crops have now been planted. The moisture, and mild conditions, have enabled quick crop emergence and development, with crops generally faring well for this time of year.

While crops are faring well, there are a few challenges to note. The dry weather over the summer months led to a limited window for flushes of weeds in stale seedbeds, meaning there has been less opportunity to control them. Warmer weather has also created a larger window for pests and disease (e.g., aphids and BYDV), with implications on treatment programmes, particularly for early-treated crops that may now require additional treatment.

Volatile grain prices, combined with elevated input costs, could lead to some farmers reducing their application of nitrogen. The dry soils in late summer/early autumn also created more wear on equipment, with some growers switching to direct drilling or minimum tillage.

## 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%	11%	66%	21%	1%
Winter Barley	0%	1%	7%	60%	32%	0%
Winter Oats	0%	2%	8%	63%	26%	1%
Winter OSR	4%	6%	14%	58%	19%	0%

Source: RSK ADAS

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

## WHEAT

### Crop establishment

As at the end of November, 87% of the UK's winter wheat crop was in good-excellent condition, ahead of 84% at the same point last year. Only 1% of the crop was said to be in poor-very poor condition, and 1% had either not yet been planted or emerged.

Drilling is almost complete, with 37% of wheat being drilled in September, 55% in October, and 8% in November. Due to the favourable weather conditions over autumn, and some early harvesting of maize and root crops, there has been a slight increase in winter wheat area plantings. Overall, the crop has established well.

With more rain over the last few weeks, there has been reports of waterlogging in some parts of the West Midlands. The window for winter planting is fast closing and some small areas may not be planted until the spring.

### Nutrition

Due to continued high fertiliser prices, many growers will be reducing P & K application. Growers are also showing increased interest in applying organic manures as a cheaper alternative to inorganic fertilisers.

Manganese deficiency has reportedly been a problem on lighter land in Yorkshire but is less prevalent than normal in the West Midlands.

### Weed pressure

Variable results have been recorded concerning pre-emergence herbicide applications due to dry conditions earlier in the autumn reducing activity. The windy and wet conditions in late autumn have also delayed post-emergence herbicide applications in several regions, compromising weed control.

Blackgrass control has been variable depending on whether farmers have been able to apply herbicides. Ryegrass control has also generally been good where herbicides have been applied.

In the North East, there have been reports of some farmers topping up their herbicide applications due to higher soil temperatures reducing the longevity of herbicide efficacy. There has also been reports in the East of England that herbicide programmes are not working effectively enough to control some grassweeds (blackgrass and ryegrass) in early sown crops.

### Pest pressure

Slug pressure has been relatively low this season due to the drier weather. As rainfall increased in November, slugs have been slightly more prevalent, though damage is reportedly minimal.

Aphid activity has been variable, but frit fly numbers are above average, though damage is said to be localised. Gout fly eggs have been seen on earlier sown crops, but it was too early to assess any damage.

### Disease pressure

Generally, low levels of disease have been reported so far, with a few incidences of mildew (mainly in the West Midlands) and septoria being observed across the UK.

### Prospects for the coming months

The wheat crop has established well so far and overall prospects look good for the season. Careful nitrogen management will be required in certain areas moving forward.

## WINTER BARLEY

### Crop establishment

As at the end of November, 92% of winter barley was in good-excellent condition, up from 90% at the same point last season. Just 1% was in poor-very poor condition. A prompt finish to harvest meant that drilling of winter barley was all but complete by the end of October. The majority (60%) was drilled in September, 39% in October, and 1% in November. It's thought that 89% of winter barley is now tillering.

Similar to winter wheat, mild autumn conditions have led to good crop establishment and hybrid varieties in particular are reportedly looking advanced and healthy. However, the increased rainfall as of late has led to yellowing of leaves in fields experiencing waterlogging.

### Nutrition

As with winter wheat, due to high input costs P & K applications are being reduced. Manganese deficiency has also been reported in parts of Yorkshire and the North East. In the East of England, nitrogen application is thought to have been reduced by 10%-20%.

### Weed pressure

Varied control of blackgrass and ryegrass has been observed, with the South East reporting rare incidences of needing to spray off and re-drill the crop due to blackgrass.

### Pest pressure

There has been variable aphid activity, with earlier drilled crops generally experiencing higher numbers of aphids. In the East of England, most crops have needed two aphicide applications. Some very minor slug damage has also been seen across the entire crop.

### Disease pressure

Net blotch is present in many crops, with Yorkshire reporting its highest level for many years. Mildew is also present especially in susceptible varieties, though no treatment is required in most cases.

### Prospects for the coming months

Overall, 2023 barley crops, especially hybrid varieties, are in a good position at this point in the year.

## WINTER OATS

### Crop establishment

At the end of November, 89% of winter oats were in good-excellent condition, up on last year's figure of 79%. Drilling is nearly complete with 33% being drilled in September, 61% in October and 5% in November.

Like winter wheat, the crop has established well, and the earlier start to drilling has meant there are reports of some very forward crops of oats, notably in the East of England.

### Nutrition

As with winter wheat and barley, many will be reducing P & K application this season due to higher input costs. On the other hand, manganese deficiencies have been rare compared to other cereals.

### Weed pressure

As fewer licensed options of herbicides are available for oats, there have been issues with grassweed control in several regions, especially where herbicide applications have not been made. However, Yorkshire have seen good control of meadow grass and broadleaf weeds where diflufenican has been applied.

### Pest pressure

Fewer pest problems have been reported to date, though oats are seeing similar issues with aphids as wheat and barley. In the East of England, greater susceptibility to BYVD means that earlier sown crops have had two aphicide applications.

### Disease pressure

Very little disease has been observed to date. The main disease present in Yorkshire is mildew, while Wales has reported low levels of crown rust in susceptible varieties.

### Prospects for the coming months

Overall, winter oat crops are faring well for this point in the year.

## OILSEED RAPE

### Crop establishment

Oilseed rape crops were rated 77% good-excellent at the end of November, down slightly from 78% at the same point last year. Drilling of OSR was complete at the end of September, with 73% being drilled in August and 27% in September. Generally, the crop has established well, though certain areas struggled due to the prolonged dry conditions at the end of summer.

Dry conditions prevented some early OSR drilling, which resulted in some growers to change cropping plans.

Subsequent rainfall has enabled the crop to grow fairly well, though the South East reported that an average of 10% of drilled OSR area failed either due to dry conditions or cabbage stem flea beetle (CSFB). Crops that have failed have generally been replaced by winter beans.

### Nutrition

As with winter cereals, higher costs have led to reduced fertiliser applications, particularly MAP and DAP. In Yorkshire, it's thought that crop establishment has been better where manures and slurries were applied prior to drilling. In Wales, there have been reports of magnesium deficiency beginning to show on lighter land.

### Weed pressure

Weather conditions have caused delays for application of herbicides, leading to issues with grassweeds and cereal volunteers. It's been reported in Yorkshire that blackgrass control has been at 50-60% due to delays in applications, and that charlock/runch is becoming competitive against OSR where it has emerged.

### Pest pressure

CSFB is still the main concern for OSR, with crops sown in August and early September at most risk. On the other hand, there is low pressure from slugs, and no significant pigeon damage as of yet.

### Disease pressure

Generally, there are low levels of phoma being reported, though fungicide treatments are being applied to crops that have reached the threshold level. There have also been limited incidences of light leaf spot reported.

### Prospects for the coming months

The majority of OSR crops look good, but the extent of CSFB damage remains a concern for the coming months.