AHDB HARVEST REPORT

Report 6 – Week 13

Week ending 09 October 2024

NOTE

This is the sixth and final harvest report of the 2024/25 season. It covers from 26 September to 09 October, which are the twelfth and thirteenth weeks of a 'typical' harvest period. It is produced with data collected by The Andersons Centre and compiled by AHDB. Due to the change in data provider, the approach used varies slightly from previous years. The information is based on a sample survey of farmers in the United Kingdom (including Northern Ireland), which provided figures on harvest progress throughout the harvest season.

Please note that these harvest progress reports are separate from AHDB's Recommended Lists harvest data, which includes results from their variety trials.

Grain and seed yields from early harvested crops are based on farmer reported yields. The percentage deviation between the farmers' reported yield and the five-year average is applied to the regional five-year average quoted by Defra. Yields have been adjusted where moisture is above 14.5% for cereals and 8% for oilseed rape. Moisture levels below 14.5% and 8% have not been adjusted.

OVERVIEW

Harvesting of cereals and oilseeds is now complete for all farmers in our survey across the UK. Anecdotally, there may be some small areas of pulses left to be cut outside of this survey. This report provides a look back at harvest 2024.

Met Office data highlights how dry weather towards the beginning of harvest, gave way to frustrating delays towards the end. Despite being later planted than usual, spring crops fared much better than winter crops, which had a very tough start with August 2023 to February 2024 being the second wettest August through February since 1837, when records began.

The 2024 UK wheat harvest commenced in week four of a 'typical' harvest period and ended in week 11. Rapid progress was made earlier in the harvest, before slowing with more variable conditions as the harvest moved north and west. Moisture adjusted yields are estimated to be down 7% on average across the UK, at 7.5t/ha. Protein content has been lower on average across milling wheat samples. Moisture content has been high in some cases, mainly later harvested crops. Ergot has been especially prevalent this season, with a high number of loads requiring colour sorting for grain ergot and aspirating required for grass ergots.

The barley harvest (both winter and spring) is now complete and quality has been good, with good germination scores reported, but low nitrogen levels. Spring barley moisture contents increased on average as the harvest progressed into Scotland. However, moisture adjusted yields were only reported to be down 3% on the five-year average level across the UK. Spring barley harvest finished in Scotland in week 12.

The UK oat harvest finished in week 12. There was a noticeable improvement in performance across oats towards the end of harvest, reflecting the transition from winter oats to spring oats. The winter crop was, generally, established in poor conditions, but while

many spring oats were planted much later than usual, these later planted crops had a favourable start. Oat yields (winter and spring crops combined) in the UK were just 2% below the five-year average.

Oilseed rape quality has been good this season, with oil content high. Yields have been variable from region to region. Typically yields were higher than average in regions that have seen historically high cabbage stem flea beetle (CSFB) pressure, such as Eastern England. Oilseed rape yields were reported to be down 8% on average, at 2.97t/ha.

Within this survey, pulse harvesting was completed this week, with the final areas cut in Northern Ireland. Anecdotally, some small areas remain to be harvested outside this survey. Little historical information is available on regional pulse yields, so it is hard to draw a national conclusion. However, yields were generally average or slightly above average for those farms reporting pulse progress.

It is evident just how variable yields are from region-to-region, farm-to-farm, and field-to-field. This is not surprising given the unusual weather, but the larger drop in yields for some businesses will pose significant cash flow challenges.

With harvest complete, attention is now turning to establishing the 2025 crop, many will be eager to get winter cereals in the ground considering last year's extremely wet autumn and winter conditions.

WINTER BARLEY

Harvest update

The winter barley harvest was the second quickest in the past five years, behind only 2022. It was completed in the week ending 21 August (week 6 of a typical harvest period).

Yields

The final estimate of winter barley yields from this survey is 6.13t/ha, a 13% decline on the five-year average yield across the UK. There was significant deviation in yields between regions.

Quality

Winter malting barley quality is good. Although there have been some lower bushel weights and subsequently lower screenings (retentions on a 2.25 mm sieve), merchants report that the crop is very usable for the domestic market.

Specific weight – Specific weights ranged from 59 – 72 kg/hl, with an average of 64 kg/hl.

Screenings – Screening retentions (on a 2.25 mm sieve) for winter barley are averaging 88% but with a range of 85-98%.

Grain nitrogen (for malting varieties) – Nitrogen levels within winter malting barley have averaged 1.5%, with a range of 1.3% to 1.6%. This is low for winter malting barley, where maltsters typical look for grain nitrogen of up to 1.75%. This could prove a challenge for exporting, with a higher nitrogen level required for continental malting (up to 1.85%).

Moisture – The average moisture observed across the UK was 14.2%, with a range from 11.6% to 16.0%. As such, very little of the crop has needed to be dried apart from the earlier cut samples.

Germination – Germination in the winter malting crop is good with the almost all of the crop above 98%.

WINTER OILSEED RAPE

Harvest update

The winter oilseed rape (WOSR) harvest progressed ahead of average throughout and was generally, the quickest since 2022, when hot and dry weather led to very quick progress. The 2024 harvest was completed by 28 August (week 7).

Yields

Yields are down 7.7% across the UK, at an average of 2.97t/ha. Yield declines this season are not entirely due to pest pressure, although pressure was high. Anecdotally there have also been challenges with clubroot and some smaller seed sizes.

Quality

Oil content – The average oil content is reported to be 45%, with very few samples below 44%. Specialist WOSR crops such as High Oleic and Low Linolenic (HOLL) and High Erucic Acid Rape (HEAR) varieties have reportedly produced oil contents in excess of 47%. While part of the driver of low yields has been smaller seed sizes, this has not impacted oil content.

Moisture – Moisture levels for oilseed rape varied from 6.7% in the East to 10% in the South East. One challenge for oilseed rape as harvest progressed was ensuring the crop cooled sufficiently.

OATS

Harvest update

During the first half of harvest, progress was ahead of last year's rain delayed pace but behind the rapid 2022 harvest. Progress slowed in the later part of August and fell behind last year's pace in September. The harvest was completed in week 12.

Yields

Oat yields have been variable across the UK, and also between winter and spring oats. On average the oat yield is down 3%, at 5.28 t/ha.

Quality

Quality for both winter and spring oats was good, and most samples are of milling specification.

Specific weight – Specific weights have averaged 53 kg/hl, with samples bold and of good colour.

Moisture – Moisture content averaged 14.6%, with typical regional values ranging from 14.0% to 16.5%.

WHEAT

Harvest update

Weather conditions were favourable during much of the 2024 wheat harvest, and 88% was cut by 28 August (week 7). This was well ahead of the five-year average of 60% complete at that stage. But progress slowed in September as rain and humid conditions brought interruptions. Harvesting was largely (over 99%) completed by week 11, with the final parcels gathered in week 12.

Yields

Yields in the UK were down 7.3% on the five-year average averaging 7.5t/ha. Yield variability is a significant challenge and makes reporting averages difficult. Some growers have managed to produce high yields given the circumstances, but many have seen significant drops.

Quality

Protein contents were low, though the information on other characteristics is more positive.

Specific weight – The specific weight of milling samples has been encouraging, averaging 76 – 78kg/hl. Some feed samples have exceeded 80kg/hl.

Hagberg Falling Number (HFN) – There are no problems reported with Hagberg Falling Numbers, although this is unsurprising given the dry conditions during much of the harvest period in England.

Protein – UK Flour Millers Group 1 samples have averaged generally 11.5% to 12.0%, though some samples have exceeded 13%. Anecdotally, the crop will be manageable and there are reports of high volumes of imports of high protein wheat to blend with lower protein UK samples.

Moisture – The average moisture level observed across the UK was 15.3%.

SPRING BARLEY

Harvest update

Spring barley harvest progression varied depending on the crop's readiness for harvest and the weather conditions. Spring barley harvest was wrapped up in week ending 2 October, the twelfth week of a typical harvest period.

Yields

The UK average yield is estimated at 5.7t/ha, a 3.4% decline on the five-year average.

Quality

The spring malting barley samples seen so far have been particularly good.

Specific weight – Specific weights are averaging 65 kg/hl. Grains are generally a good size, with specific weights higher than those of winter malting varieties.

Screenings – Retentions on a 2.25 mm sieve are in excess of 95%.

Grain nitrogen (for malting varieties) – Nitrogen content has averaged 1.45%, with samples ranging from 1.2% to 2.0%. Samples at the high end for nitrogen are few and far between, with the majority of samples in the 1.2% to 1.6% range. This may cause challenges where exports are based on minimum nitrogen specification, with most UK samples falling below this threshold.

Moisture – Moisture levels are averaging 16.5% to date.

Germination – Assessments so far suggest germination is in excess of 98%.

PULSES

The pulse harvest was completed by most farms in the survey which reported on pulse progress in week 11. This excludes Scotland, the North East and the South West of England. Harvesting of the final survey areas in Northern Ireland, were completed this week (week 13). Outside of this survey, there are anecdotal reports of some spring beans still to be cut.

Given the lack of regional yields published on pulses, it is not possible to estimate a national average yield based on the data collected through this survey. There is a wide range of results reported.

STRAW

Straw production has anecdotally been variable from farm-to-farm, reflecting the patchiness of crops (especially winter crops) this season.

That said, there are reports of good volumes of straw in various regions and across crops throughout the UK. Straw yields ranging from 3.5-4.5t/ha have been quoted by some but will not be reflective of all. Good straw yields are welcomed by many, especially where yields of grain have been poor.

The price of straw has declined significantly in recent weeks, a reflection of an increased availability of straw. This may also reflect more choosing to bale straw in response to higher prices this year.

Oat straw proved a challenge this year, taking longer than wheat and barley straw to dry.