

# Early Bird Survey of planting and planting intentions for harvest 2026



18 December 2025

The final results of the Early Bird Survey (EBS) of planting intentions show a rise in the oilseed rape area from last years' low level, along with a small increase in wheat plantings at the national level for harvest 2026. The survey also indicates lower areas of barley, oats and pulses.

There have been some small changes to the forecasts for the main crops compared to the provisional release, mainly reflecting the inclusion of official data on cropped areas in 2025. Also, the regional variation in cropping intentions across the UK are now shown on the following pages for wheat, barley, oats and oilseed rape.

Thousand hectares	Defra June Survey for harvest 2025	Final EBS forecast for harvest 2026	% year-on-year change
All wheat	1,670	1,695	1%
Winter barley	363	360	-1%
Spring barley	717	612	-15%
Oats	198	171	-14%
Other cereals*	65	69	7%
OSR	241	317	32%
Other oilseeds**	20	28	40%
Pulses	202	178	-12%
Uncropped arable land	576	620	8%
Other crops on arable land***	720	748	4%
<b>TOTAL</b>	<b>4,772</b>	<b>4,798</b>	

\*crops included rye, triticale and mixed grains

\*\*crops included linseed and borage

\*\*\*crops included sugar beet, potatoes, vegetables, maize (33%) and temporary grass (20%)

Source: Defra, The Andersons Centre for the AHDB

Please note that this survey (EBS) captures early plantings and planting intentions as of late-October and early November. In recent years, planted and harvested areas have differed because of weather events, including for harvest 2025, our base year for this survey, meaning some uncertainty is accordingly built into these results.

Autumn drilling conditions were generally good in 2025, contrasting with the wet start to the autumn drilling window last year and extremely wet conditions in autumn 2023. However, the market environment is challenging, with lower prices for cereals and lower milling and malting premiums, plus increased costs for all crops.

Against this backdrop, oilseed rape likely benefited from a more favourable margin outlook compared to other crops, as well as the good yields achieved in 2025. The poor cereal yields of the past two years, along with ongoing commitments to [agri-environment schemes](#) and rotation needs are also likely to be influencing 2026 planting plans. After the area declined in 2025, the survey also points to an 8% increase in uncropped arable land in 2026. This category would include productive land requiring options under the Sustainable Farming Incentive (SFI) in England, as well as rotational fallow and more.

## DIFFERENCES IN CROPPING INTENTIONS ACROSS THE UK

On 11 December, Defra released its full estimates for the 2025 UK arable crop areas. This allows us to look at the results of our Early Bird Survey of planting intentions on a regional level for the four main crops: wheat, barley, oats and oilseed rape (OSR).

### WHEAT

The total UK wheat area is forecast to increase slightly (+1%) from 2025 to 1,695 Kha but remain just below the 2021-2025 average of 1,704 Kha. While spring wheat remains a small part of the total area, it's important to note a sharp drop in planned spring wheat plantings from the elevated levels in 2025.

Wheat areas are generally stable or higher across most of the UK. The largest rise in hectare terms is in the South East (+10 Kha), while the largest percentage rise is for the North East (+8%). Small percentage falls are reported for Yorkshire & The Humber, the North West and South West.

The wheat area in Scotland is estimated to rise by 5% to 113 Kha, the highest level since 2011. There are area gains for Wales and Northern Ireland too.

Wheat			
<i>Thousand hectares</i>	Defra June Survey for harvest 2025	Final EBS forecast for harvest 2026	% change from 2025
South East	201	211	5%
South West	146	139	-5%
Eastern	427	429	1%
East Midlands	298	299	0%
West Midlands	149	156	5%
Yorkshire & The Humber	213	212	-1%
North East	62	67	8%
North West	29	29	-2%
Scotland	108	113	5%
Wales & NI	37	41	11%
<b>UK</b>	<b>1,670</b>	<b>1,695</b>	

Source: Defra, The Andersons Centre for the AHDB

### BARLEY

The UK winter barley area is estimated to decline slightly again in 2026 to 360 Kha, while a larger fall is expected in the spring barley area to 612 Kha. The area falls reflect the challenging environment, with pressure on malting demand both in the UK and globally. If realised, this would put the total UK barley area for harvest 2026 at 972 Kha, down 10% year-on-year and the lowest level since 2011.

The largest fall in winter barley area, in hectares, is in the East Midlands, where the area of winter barley is estimated to decline 9% (4 Kha) compared to that harvested in 2025. There are also declines in the south and Eastern England, while area changes are overall more limited in northern England, along with in Wales and Northern Ireland.

A 13% rise in winter barley area is estimated for Scotland.

Winter Barley			
Thousand hectares	Defra June Survey for harvest 2025	Final EBS forecast for harvest 2026	% change from 2025
South East	27	23	-12%
South West	39	37	-7%
Eastern	77	74	-4%
East Midlands	45	41	-9%
West Midlands	25	27	8%
Yorkshire & The Humber	57	59	2%
North East	20	21	3%
North West	12	12	-4%
Scotland	43	49	13%
Wales & NI	17	18	3%
<b>UK</b>	<b>363</b>	<b>360</b>	

Source: Defra, The Andersons Centre for the AHDB

The spring barley area looks set to decline in 2026 in all countries of the UK and in all English regions.

In Scotland, a 10% decline is forecast reflecting the challenging conditions for the malting and distilling industries. If confirmed, this would take the Scottish spring barley area down to 227 Kha, the lowest level since 2007.

Within England, the East Midlands expects the largest decline in spring barley, in hectare terms, followed by the East of England. The smallest predicted decline in both hectare and percentage terms is in the North West.

Spring Barley			
Thousand hectares	Defra June Survey for harvest 2025	Final EBS forecast for harvest 2026	% change from 2025
South East	63	55	-11%
South West	76	67	-12%
Eastern	102	87	-14%
East Midlands	79	60	-24%
West Midlands	28	16	-41%
Yorkshire & The Humber	55	45	-18%
North East	13	8	-38%
North West	24	24	-1%
Scotland	252	227	-10%
Wales & NI	26	23	-11%
<b>UK</b>	<b>717</b>	<b>612</b>	

Source: Defra, The Andersons Centre for the AHDB

## OATS

The UK oat area is expected to decline 14% to a projected 171 Kha for harvest 2026. While below the last two years, the forecast area would be just above that seen in 2023 (167 Kha).

The oat area is predicted to fall in all regions of England for harvest 2026, with a decline also expected in Wales and Northern Ireland. The largest fall in both percentage and hectare terms is expected for the East Midlands, while the smallest fall is in the North East.

In contrast, the oat area in Scotland is expected to rise by 7% to 31 Kha.

Oats			
Thousand hectares	Defra June Survey for harvest 2025	Final EBS forecast for harvest 2026	% change from 2025
South East	30	24	-22%
South West	25	23	-9%
Eastern	28	24	-13%
East Midlands	30	21	-30%
West Midlands	22	17	-24%
Yorkshire & The Humber	12	11	-7%
North East	10	10	-1%
North West	5	5	-14%
Scotland	29	31	7%
Wales & NI	6	6	-9%
<b>UK</b>	<b>198</b>	<b>171</b>	

Source: Defra, The Andersons Centre for the AHDB

## OILSEED RAPE

Oilseed rape is the stand out for 2026, with a 32% rise to 317 Kha. While this is a significant year-on-year rise, the rise is from the forty-two years low recorded in 2025. The 2026 projection would also still be clearly below 2023's 391 Kha.

There are rises for all the English regions. The largest rise is in the East Midlands, though again this would still be below 2023's level. The North East and North West record only slight gains in hectares.

A large rise is expected for Scotland. But a decline is estimated for Wales and Northern Ireland combined.

Oilseed Rape			
Thousand hectares	Defra June Survey for harvest 2025	Final EBS forecast for harvest 2026	% change from 2025
South East	30	38	27%
South West	24	29	23%
Eastern	43	55	28%
East Midlands	36	61	69%
West Midlands	24	30	27%
Yorkshire & The Humber	32	41	29%
North East	13	13	7%
North West	3	3	20%
Scotland	33	42	29%
Wales & NI	5	4	-22%
<b>UK</b>	<b>241</b>	<b>317</b>	

Source: Defra, The Andersons Centre for the AHDB

## ADDITIONAL INFORMATION

There have been slight changes in area expectations compared to the provisional results released in November 2025. The raw data sample is unchanged, but the official 2025 crop area estimates have been included. There are also small adjustments to allow for any weighting differences (crop mix or regions) between the survey area and the final official data, reverting to the methodology used in the 2023 EBS. In 2024, due to the large changes in cropped areas and uncropped land, unadjusted figures were presented to better show the cropping intentions for the main crops in arable rotations, for harvest 2025.

The Early-Bird Survey (EBS) is undertaken each autumn to assess national cropping intentions. It is carried out by The Andersons Centre with help from agronomists from the Association of Independent Crop Consultants (AICC) and the Agricultural Industries Confederation (AIC): independents and nationals alike.

In total, nearly 70 agronomists took part in the survey contributing 600 Kha of arable land across the UK to establish cropping changes on farms as a representation for the national change in cropping. The survey was mainly struck during late October, with most data collected by 01 November, though submissions were received up to 07 November.

Crops of smaller area had a lesser area coverage in the survey, so these results will be subject to greater uncertainty.

This survey is focused on the arable farm rotation rather than all arable land which would include grass and forage rotations. For this reason, an estimate of the total area of these crops is included in the figure for 'other crops on arable land'.

Figures in all tables are subject to rounding and may not add up exactly to national figures.

The survey carries a track record of accurate figures. Nonetheless, the survey only represents a snapshot at a given point in time and therefore, should be interpreted carefully. The reliability of the estimates for larger crops is greater, as are estimates for the winter crops as they are based on actual plantings, compared with planting intentions for spring crops.