

FARMING UPDATE

INTRODUCTION

Welcome to the Ceres Rural Farming Update, a publication that provides independent insights on agricultural issues, reports on policy, grant and administrative updates and key market information. To discuss any of the topics raised, please contact one of the [team](#).

IN THE FIELD: 2025 HARVEST YIELDS

The 2025 Ceres Rural Yield Survey received c. 227 wheat entries this year, with an ever-growing interest in the dataset to compare and benchmark yields as the seasons become more disruptive and uncertain. This year was characterised by prolonged drought, unusually high temperatures and sunshine hours, low pest and disease pressure, and one of the earliest harvests in nearly 20 years. Figure 1 shows the challenges of this season's rainfall, revealing high variability compared to the 25-year average: 2023/24 was unusually wet, while 2024/25 has been very dry.

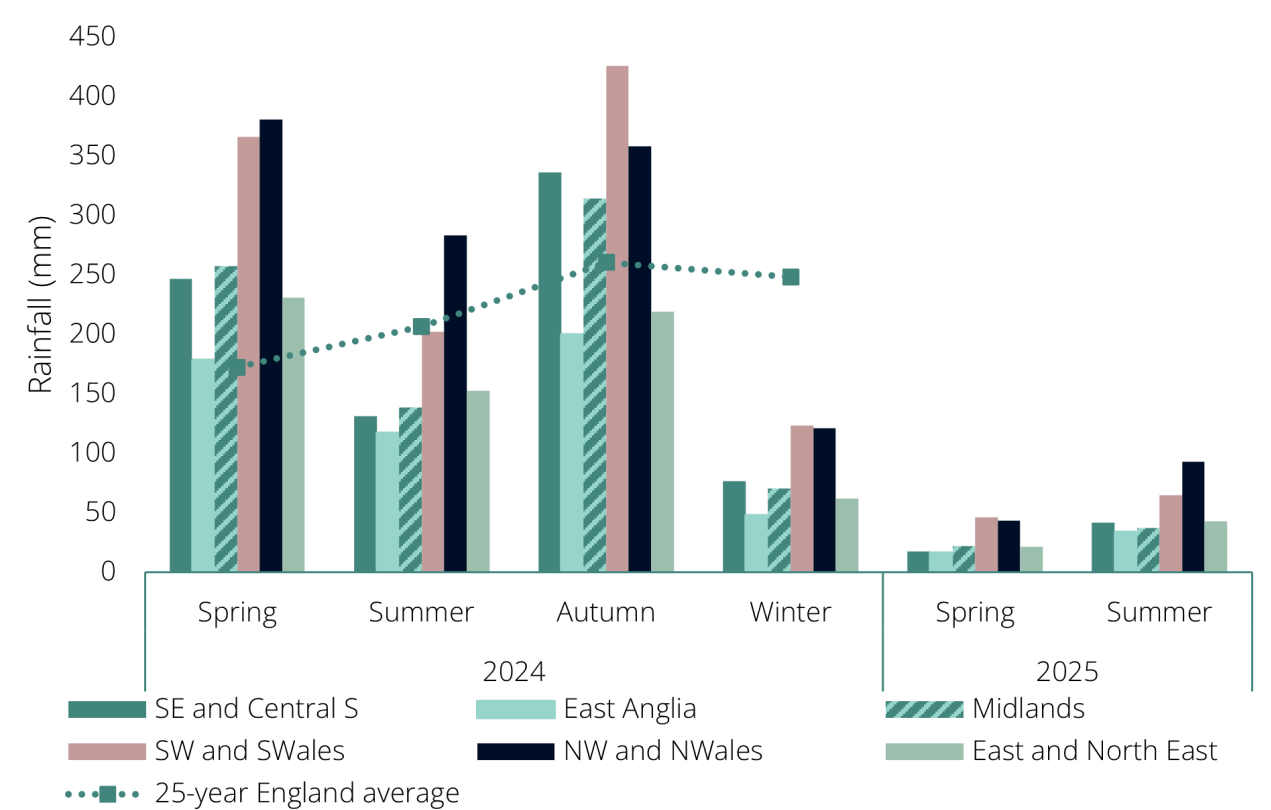


Figure 1. Total rainfall across UK regions, including a 25-year average across England from Spring through to Winter. Data source: MetOffice.

Despite this, yields have held up better than first anticipated. Though, when you compare this year’s harvest to the previous 4 years (as in Figures 2 and 3 below), particularly in the case of winter wheat, the trend isn’t looking so positive.

Winter wheat is down 7% compared to last year, spring wheat is down 16% and winter oats are down 7%. On the flip side, barley had a more positive year and recovered from last year, with winter barley up 9% compared to last year and spring barley remaining the same.

OSR had a really good year, up 20% compared to last year. A combination of enough moisture to drill, dry conditions in the spring and some light relief of (a little more!) rain in July boosted pod filling and subsequent harvest yields.

Both winter and spring beans on average are down c. 17% compared with the past 4-year average. This is potentially a result of the wet state at drilling, though the very dry conditions that followed seemed to impact on much of the spring crops, especially on lighter land.

Check out the Yield Summary 2025 and the Farming Update Plus for further insights and analyses into this year’s harvest. These publications delve further into the influence of farm size, soil type and environmental factors on yields across the region. They seek to uncover where, when and under what conditions harvests performed best, providing valuable insight into how we can improve productivity in the coming year.

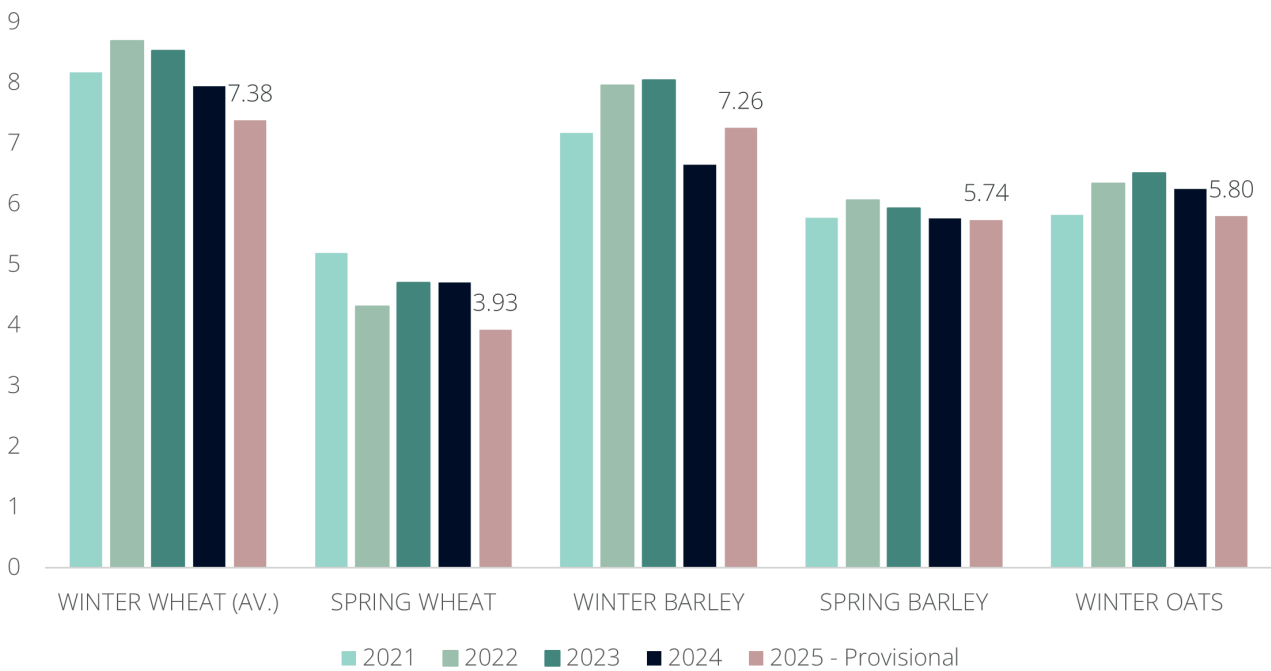


Figure 2. Average cereal yields (t/ha) from 2021 – 2025. 2025 yields stated above their bar.

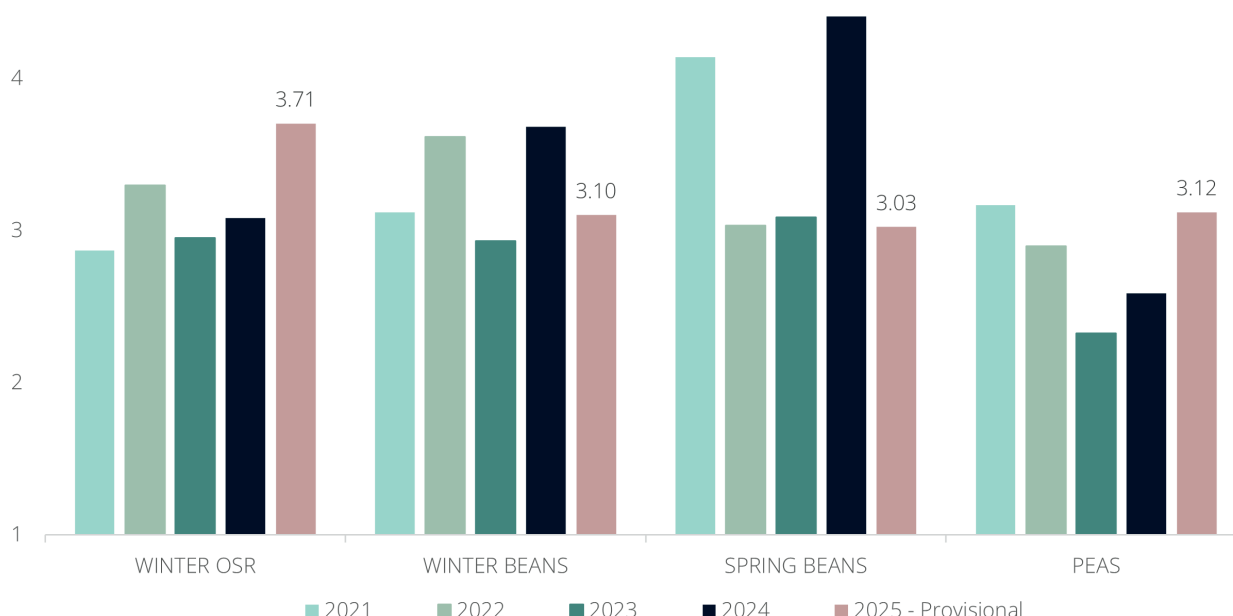


Figure 3. Average break crop yields (t/ha) from 2021 – 2025. 2025 yields stated above their bar.

IN THE FIELD: EAST UPDATE

Winter cereal drilling for the most part is nearing completion, post roots and veg being the exceptions. Most will have drilled all they had planned with perhaps a few abandoning spring cereal options to take full advantage of good conditions. Some heavy land or where seedbeds have been worked and dried out are still in need of some rain to achieve full emergence. For most growers autumn 2025 has been a dream end to a painful year.

Grassweed control is variable, early drilled crops when there was moisture have generally had some reasonable control from pre emergence herbicides, where moisture has limited pre emergence activity early to mid drilling there is ryegrass and blackgrass to deal with. Later plantings with moisture can expect reasonable control from pre emergence herbicide stacks.

Early emerging cereals will have an appropriate herbicide follow up and where permitted a treatment for BYDV once thresholds are met.

OILSEED RAPE ESTABLISHMENT

OSR drilling across the region is finished, and those who waited until September benefited from excellent soil conditions (warm and moist) for successful establishment.

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Encouragingly, cabbage stem flea beetle (CSFB) pressures have been low again during the key latter stages of August and early September. While the larvae remain a significant concern over the winter/spring, the reduction in numbers has given some optimism for those who have persevered with the crop.



SUGAR BEET

Early sugar beet lifting has exceeded expectations with excellent harvesting conditions across most of the East. Soils have been dry enough to support clean lifting and yields have benefited from higher sugar contents and lower dirt tares. Many have taken the advantage of early beet lifting and have been quick to follow with wheat drilling in good soil conditions. However, those opting for a later lift, especially on lighter soils, are beginning to see crops showing signs of stress from a lack of moisture. Rainfall will be very welcome in those areas to maintain yield until lifting.

British Sugar opened contract for the 2026 campaign on the 15th October. Many will be looking to concentrate the beet onto the minimum appropriate area while the opportunity of a beet holiday will be appropriate for others.

IN THE FIELD: WEST UPDATE

CEREALS AND OILSEEDS

Drilling is off to a good start in the West. Wheat, barley, and rye are being drilled into moist, high-quality seedbeds, allowing seeds to chit in a matter of days. Aside from one wet day this autumn, conditions have been favourable, supporting strong crop establishment before winter. Oats are just starting to get drilled in the area and will continue to do so in the next few weeks. Pre-emergence herbicides have been applied effectively, providing the best possible start to grassweed control programmes. Over the next few weeks, we will monitor emerging crops for weeds, slugs, and aphids in particular.

Oilseed rape has been drilled from a range of dates ranging from early August to mid-September leading to a variety of growth stages now. Cabbage stem flea beetle levels have been low, and all being well crops are expected to grow away from it now. Early slug grazing on emerging crops was observed, but application of slug pellets has supported crop growth. Graminicides have been applied for taking out cereal volunteers and thoughts are now on further grass and broadleaf weed control.

GRASS

There has been a period of late, rapid growth of grass in the region due to the recent rains and this has allowed many dairy and livestock farms to get a final cut ahead of winter. Whilst the quality may not be quite as good as some would have liked, it's good to still be filling silage clamps this late in the season. This has also allowed grazing to continue for later than expected.

MAIZE

Surprisingly for many, this years' maize harvest has not been a total disaster given the prolonged dry periods we've faced. Crops have yielded anywhere from 14t-20t/ac which really isn't as bad as it could have been. This was probably due to its quick establishment and the amount of sunlight hours, as well as having manure or digestate underneath the crop which has significantly helped. This does pose the question though of what the crop could have yielded if we had more rainfall? Crops have been taken off in good conditions and not left much mess for cultivations ahead of wheat drilling.

CHEMICAL SUPPLY

Chemical supply chains are coming under pressure earlier than usual. Supplies of generic Liberator are very tight and Proclus is on the verge of being sold out. This is being driven by:

- Higher than anticipated winter cereal crop area across the UK
- An early start to drilling with rapid progress in current, good conditions.

The prospect of shortages has led to panic buying from some growers. It would be advisable to liaise early with agronomists and distributors to secure products and consider alternative pre-emergence strategies where necessary. Forward planning remains key to ensure timely applications, especially with the grassweed pressures observed so far this autumn.



LIVESTOCK UPDATE

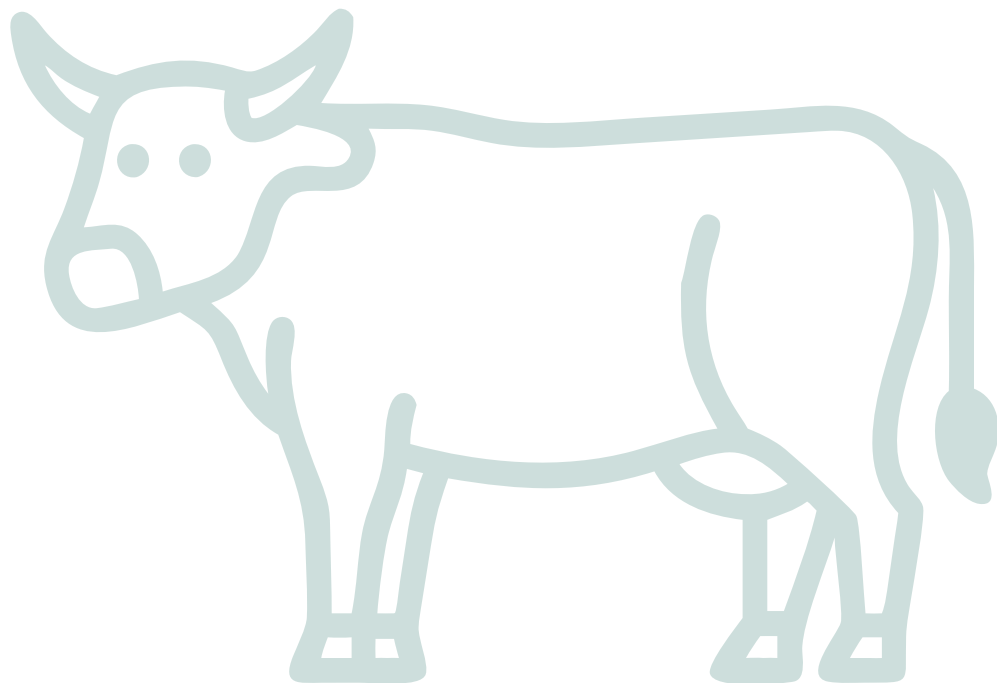
The recent rainfall has brought some very welcome grass growth. Cattle farmers will be hoping for a mild autumn and to be able to leave stock outside for as long as possible to conserve winter fodder supplies.

The downside of mild weather, of course, is the survival of midges and the continued slow spread of Bluetongue (BTV-3) across England – and in the last week or so into parts of Wales. Although the number of reported cases has not reached anticipated levels, vaccine uptake fell short of expectations, leaving a significant portion of the Welsh sheep population still vulnerable to the disease.

We have also seen the return of a different strain of Bluetongue virus (BTV-8) in Cornwall – not found in the UK since 2008 – and the source of infection has yet to be confirmed.

Avian Influenza never really went away over the summer. The picture is starting to look like this will be another disease which we will have to accept is likely to become endemic in the country rather than a winter visitor.

This year has seen an abundance of acorns and reports from APHA's Veterinary Investigation Service suggest that acorn poisoning is being found commonly as a cause of death, particularly in sheep, as well as other hedgerow plant poisons such as Hemlock and Sycamore.



VITICULTURE UPDATE

For many in the UK, the 2025 harvest was very promising, with extended warm weather helping to reduce disease pressure, improve sugars and increase ripening rates, leading to a speedy and bumper crop, for both sparkling and still wines.

Unlike many other crops, vines benefitted from the extreme dry weather, allowing for “fast and full” harvests, and there is optimism that the 2025 vintage will be a memorable one.

Extreme heatwaves across other areas of Europe have caused some blistering and yield crop damage, which may benefit UK growers long-term, as the warmer summers improve the viability of UK vineyards, whilst negatively impacting areas like the Champagne region. However, winemakers may need to consider longer-term strategies to protect younger vines, as these drought-stricken summers look to become a pattern in Britain.

Growers saw a brief opportunity to apply for funding to support equipment and infrastructure improvements whilst the Capital Grant and Farming Equipment & Technology Funds were briefly open to applications. However, many will be awaiting the re-opening of the Sustainable Farming Incentive in coming months, to review ways to de-risk and future proof incomes through implementing regenerative practices.

At Ceres Rural, we offer expert advice across every aspect of vine management and business development, we help vineyards achieve meaningful, continuous improvements – driving sustainable growth and long-term success. If you need help with your vineyard, or you’re considering a new venture, please get in touch with [Beth Speakman](#), or [Louise Penn](#).



HEALTH & SAFETY

With ploughing matches completed, autumn open days and shooting season is here. There are plenty of do's and don'ts regarding the safe carriage of passengers on farm trailers, some which are outlined below:

- Use only purpose-built passenger trailers with proper seating, guard rails and safe access
- Drive cautiously, with smooth braking and cornering
- Give a safety brief to passengers
- Don't use grain, silage or livestock trailers to transport people – they are unsafe and unlawful
- Don't overload trailers with more passengers than it is designed to carry
- Don't ignore weather and ground conditions that could increase the risk of injury.

Working dogs are central to shooting days, but the health and safety of people, dogs or livestock should not be forgotten around these events. Farms and estates have a legal duty under the Health & Safety at Work etc. Act 1974 to ensure the health, safety and welfare of employees, shoot participants and volunteers. Safe practices include regular health checks on working dogs, briefing handlers and beaters ahead of each event, provision of clean drinking water and rest breaks, and a basic canine first-aid kit should be available.

Whilst there are particularly important health and safety risks to identify throughout the event season, let's not forget ongoing safety in farm and estate cottages. Failing to manage these risks in particularly distinct areas can put residents, visitors and the wider farm or estate business at risk. Remember to keep up with building safety and maintenance, identify and inform location and farmyard risks properly, and maintain welfare and wellbeing by preventing unsafe water supplies, pest outbreaks, heating and insulation damage and most importantly keep open communication within your agreements to ensure a good state of mental health.

[The full October Health and Safety bulletin can be found here.](#) This month's bulletin elaborates on the do's and don'ts of farm carriage safety, safe design and use of mezzanine floors and raised storage platforms, and finally the bulletin turns client's attention to a recent safety alert on the use of safety control levers or isolation devices.

POLICY & BUSINESS NEWS

CABINET RESHUFFLE, LABOUR PARTY CONFERENCE & THE AUTUMN BUDGET

Last month, we saw some major changes as Emma Reynolds MP was appointed Secretary of State for Environment, Food & Rural Affairs, replacing Steve Reed. Dame Angela Eagle was moved from her previous Home Office role to become Minister of State (Food Security & Rural Affairs) at DEFRA, and Daniel Zeichner who had been the Minister of State for Food Security & Rural Affairs, left the government.

At the end of September/early October, Labour highlighted in the Labour Party Conference that agriculture is a strategic priority, with farming debated in fringe events and directly addressed in speeches. In summary of the Conference:

Inheritance Tax Protests – There was a strong farmer presence in Liverpool to protest against the planned inheritance tax reforms.

Sustainable Farming Incentive (SFI) Delays – Widespread anxiety persists about delays to the SFI, with warnings that late payments and uncertainty could create severe cashflow problems for many farms. According to recent speculation, an SFI announcement previously described as ‘imminent’ is now expected to occur next year.

Ministerial Tone – Labour ministers promised to listen and engage with farmers but avoided firm commitments on reversing unpopular policies.

Diversification Debate – Farming voices argued that food production should remain the core focus, with diversification seen as useful but not a substitute for viable farm incomes, reflecting the general unease about being pushed into non-farming activities.

Regional Priorities – Devolved and regional farm groups pressed Labour to ensure that future support reflects local realities, amid fears that UK-wide policy may overlook specific needs, but there were not many firm responses on the future.



Key watchpoints for 2026:

- Clarity on inheritance tax legislation
- Rollout pace and payment reliability of the SFI and successor schemes
- Government food resilience strategy and funding commitments
- Trade negotiations
- Budget allocations – particularly ensuring any underspend is not lost to the Treasury.

There is an anxious wait now for the Autumn Budget which is scheduled for the 26th November. This remains a key date in the calendar for the government to set tax and spending policies.

CAPITAL GRANTS

As of the 1st August, the scheme had fully allocated its £150 million of available funding for 2025. A new round is expected to open in 2026.

HIGHER LEVEL STEWARDSHIP (HLS) SCHEME

Defra has increased the payment rates for this scheme. Agreement holders will get the revised payment for their 2025 claim from December 2025.

COUNTRYSIDE STEWARDSHIP HIGHER AND MID TIERS

Applications are now available to those invited on CS Higher Tier, on a rolling basis, to apply online.

CS Mid Tier agreements due to expire this year will be offered a one-year extension following months of pressure by the NFU, as announced recently. The Rural Payments Agency will communicate directly with eligible participants, providing comprehensive information regarding their offer and the procedures for acceptance. We can only presume at this point in time based on announcements that agreements are not being offered the same rolling basis that Higher Tier agreements are.

DRAFT LEGISLATION FOR AGRICULTURAL & BUSINESS PROPERTY RELIEF

New explanatory notes and draft clauses have confirmed the government's direction for Agricultural and Business Property Relief. [You can read the key updates from the Draft Finance Bill here.](#) With the Inheritance Tax reforms taking effect from April 2026 – capping 100% APR/BPR at the first £1 million and applying 50% relief thereafter – many farm businesses are reviewing their structures and succession plans. Areas for review include:

- Succession and business/partnership structures
- Machinery and share values
- Lifetime gifts
- Pensions and wills

If you need support or advice on these matters, please do not hesitate to contact either anna.loweth@ceresproperty.co.uk or edward.rout@ceresproperty.co.uk for expert guidance.

MARKET UPDATE

The market continues to be challenging at best; prices remain low with little signs of recovering given the global supply and demand balance. Prices have continued to decrease quite drastically since our last update (November 2025 prices as of July 2025 in the table below), with milling wheat ex-farm bids dropping from £200/t to £176/t.

Malting premiums have seen an all-time low in recent times, down to c. £10-15/t as opposed to c. £40/t that was seen in 2024. On average, prices are down c. 13% across the board, though OSR seems to be relatively stable following a good season. Prospects for early next year don't seem to offer much excitement either, despite prices increasing slightly for most crops.

Recent forecasts by the AHDB suggest that EU soft wheat production for 2025/26 may hit record levels. Similarly, barley production in the EU is expected to be high, with AHDB quoting it as a "17-year high". The broader trend is one of excess supply or at least non-tight supply globally, which in turn puts downward pressure on commodity prices.

Premium markets are weakening more sharply because of excess quality, soft demand, and reduced ability to command a premium because of good quality specs this year.



Although global supply remains the key driver, local and regional circumstances have also played a significant role in shaping markets. Factors such as policy changes, unpredictable weather patterns, and other variables across the area combined with persistent pressure from rising production costs are prompting farmers and growers to approach price negotiations for their crops with greater caution. Plus, drilling season is well underway which has focused the mind out in the field for now.

ARABLE (£/T)	YEAR AGO	NOV 2025	OCT 2025	JAN 2026
MILLING WHEAT	242	200 (July '25)	176	181
FEED WHEAT	180	168	162	164
FEED BARLEY	160	152	136	146
MALTING PREMIUM	40	30	c.10-15	c.10-15
OILSEED RAPE	420	410	405	406
BEANS	265	n/a	207	218

Source: Merchant East Anglia ex. farm bids (as of 14th October 2025)

FARMLAND UPDATE

The UK farmland market in 2025 has demonstrated considerable resilience, with values holding firm despite sustained pressure on farming incomes from volatile weather, rising input costs, commodity price fluctuations, and reducing governmental support.

SUPPLY NORMALISATION

The supply of land in the market, whilst lower than levels in 2024, has returned to average levels over the past decade, having recovered from the historic lows experienced during COVID. 2024 saw the most land publicly marketed since 2011.

Critically, reported figures reflect open market transactions only. Industry analysis suggests around 25-30% of sales now conclude privately, with this growing trend toward off-market transactions, potentially masking true activity levels as vendors seek discretion.

PRICE POLARISATION INTENSIFIES

A pronounced quality premium has become evident this year, with values strongest where superior land quality coincides with locations that attract non-farming and rollover buyers. Well-equipped farms with productive, well-drained soils and modern buildings attract the most competition, offering efficient operations and minimising future capital investment.

In such prime locations, we have witnessed arable land transactions in excess of £15,000/ac. Conversely, remote or lower-quality blocks face greater scrutiny, with values starting around £8,000/ac, reflecting weaker local demand in the absence of non-farming and rollover purchasers.

While open market data shows average arable land values have eased to around £10,750/ac, this headline figure conceals significant variation driven by location, soil quality, and infrastructure.

MARKET OUTLOOK

Looking ahead, 2026 will effectively mark the first subsidy-free operating environment since 1947. Uncertainty remains around future environmental scheme payments, which may impact short-term cashflow for some farms. Meanwhile, new inheritance tax rules from April 2026 could prompt increased land sales as businesses reassess succession and capital needs. In this context, realistic pricing in line with market fundamentals - location, soil quality, infrastructure and proven productivity - will be key for successful sales.

If you need a valuation of your land for sale, or you're looking to purchase land, please do not hesitate to contact Peter Mason.



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WANT TO KNOW MORE?

YIELD SUMMARY 2025

This free publication details conclusions and learnings from harvest. We have analysed results across a breadth of crops, using a significant Ceres Rural dataset built over the last five seasons. The objective is to provide you with an independent view of crop performance and useful notes to take forward into the new year.

FARMING UPDATE PLUS

In addition, Ceres Research Members have full access to the Farming Update 'Plus'. This publication delves further into this year's yields, specifically providing greater statistical analysis of yields in correlation with weather and soil types for example, to give you an improved insight into what worked and what didn't work this year.

Read the Farming Update 'Plus' [here](#).

[Become a Ceres Research Member today](#) to access this 'Plus' publication.

CERES AGRISTRATEGY CONFERENCE

The inaugural Ceres Group AgriStrategy Conference is designed to reflect on the past year's challenges and breakthroughs, while equipping attendees with strategic insights for the seasons ahead. The agenda includes expert-led sessions, keynote addresses, panel discussions, and concludes with networking, and an optional drinks reception and dinner. Speakers include Martin Hanson (HSBC), Quintin McKellar (Ceres Group), Sir Peter Kendall (Rothamsted Research), Charlie Ireland (Ceres Rural) and Jeremy Moody (CAAV), plus many more.

[View the full agenda and book your tickets for the 4th December here.](#)

DATES FOR THE DIARY

- On The Farm Day, Bury St Edmunds
7th November
- Farm Business Innovation Show
5-6th November
- IAgRM National Farm Management Conference
6th November
- Ceres Agristrategy Conference
4th December: [Get Tickets](#)



GET IN TOUCH

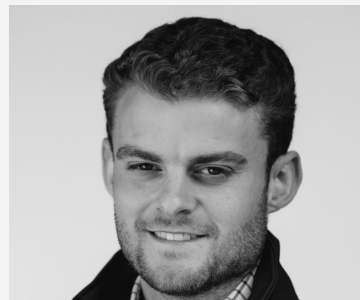
Want to discuss any of the topics in this issue of the Farming Update? Contact the project leaders.



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