

# FARMING UPDATE

## INTRODUCTION

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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: EAST UPDATE

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In terms of the farming calendar, the year started off in a tricky position with a very wet East Anglia which made the ground difficult to travel on. Fast forward to now, since Spring, the East has seen very dry weather, and we have all been hoping for more rain throughout the season. These extreme conditions from very wet to very dry will continue to cause difficult farming conditions, as they become more frequent and last for longer.

- **Rainfall:** In our last update, we were recording drier springs with as much as an 87% decrease in rainfall compared to Spring last year. Things haven't improved much, with every month consecutively since Spring achieving on average 63% less rain than last year until June, which was relatively similar to this time last year (with only 4mm less rain). Whilst last year was an exceptionally wet year, this year's average rainfall is still 35% less than the 5-year average.
- **Temperature:** Temperatures have stayed relatively mild until early May when they have risen hard and fast and continued to stay high. In June, the average temperature was 18.2 degrees Celsius, a whole 2 degrees higher than the 5-year average. The average temperature for the whole of England in June has been the warmest on record (according to the Met Office).
- **Sunshine:** Sunshine hours have increased starkly this year, along with the temperature. Compared with the 5-year average for the months of March through to June, there has been a 74%, 35%, 17% and 18% increase in sunshine hours respectively.



## CEREALS

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Another early harvest is underway with many winter barley and rye crops being cut 2-3 weeks earlier than normal. Yields are as expected, variable depending on the quality of crop establishment, rainfall and nitrogen timing. That said it “feels” like the early harvested crops could be those least impacted by the drought with some high yielding blocks of barley and rye being achieved on moisture retentive soils. In general crop specific weights are above contract minimum which is a big relief with little difference between six row and two row in yield and quality. Straw yields are c.25-30% lower than last year, fields have been baled/chased leaving the soil in good conditions for cultivation or for the brave rape planting later at the next sign of rain. Winter malting barley nitrogen at this stage seems to be trending to the higher end of an acceptable spec. Some early drilled spring barley has been cut and again nitrogen content appears to be high 1.6%.

Wheat harvest has also started, in general it's not good news on yields for these early crops c.1.5t/ha off 5-year average with some light land fields under 6t/ha, hopefully as we get onto later maturing crops there will be better news. Specific weights are generally 75-81kg/hl which is a relief and like the barley, it looks like late nitrogen availability is helping grain proteins get over the 12% threshold, with many around 13% and higher. One note of caution, it's likely thousand grain weights could be low this year so the tonnage required to save seed from may need to be higher than normally predicted, until the sample is received work on TGW's of 38-45.

Rain on the forecast is likely to bring a short break in harvesting, after which it will be very much full steam ahead with many potentially finishing wheat by 10<sup>th</sup> August.

## BREAK CROPS

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Most oilseed rape crops have been harvested with many crops moved out of store. With harvest weights and yields now known, it's generally been a good growing season for rape despite the drought and spring pigeon damage. Blocks with full fields of crop to the edges have exceeded 4t/ha, where the crop is less complete yields slip back. Many crops that could have been pulled up in April have achieved 2.8-3.5t/ha suggesting the dry spring and sunshine during flowering has benefitted the crop.

Winter beans finished dramatically quickly towards the end of June with many crops already harvested at 12% moisture. Yields are mediocre with few crops yielding above 4t/ha. Peas are more mixed with blue/yellow peas so far peppering the 4t/ha while marrowfats are performing about as good as they normally do, 2.5-3t/ha.

## SUGAR BEET

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Many root-crop growers are facing ongoing challenges due to limited soil moisture and reduced water supplies, with several reporting that reservoir levels are already depleted. The dry spring placed additional demand on water resources during a critical stage of crop establishment, resulting in varied establishment levels across regions. As the season progresses, there is growing attention on how to manage irrigation effectively to support crops through to harvest. The [EA reports](#) that irrigation prospects this summer are moderate, advising growers to actively review their water needs.

For sugar beet the situation has been variable. Growers who were able to prepare seedbeds early and achieved strong emergence saw a clear benefit when the later rains arrived, resulting in good crop development with canopies beginning to meet between the rows. In areas where drilling conditions were drier and establishment more uneven, crops have been slower to meet across the row. With the first fungicide timing approaching, light land crops are wilting and in need of rain. Canopies on heavier land are holding up much better and will get their fungicide and nutrition shortly. Beet moth caterpillars are widespread in some crops, but growers are reluctant to treat due to ineffective control strategies. Coragen insecticide has recently been granted emergency approval, and we will await the results of its efficacy. There doesn't seem to be much sign of virus in crops at present, reflecting the lower levels of virus in the trapped aphid.

## POST-HARVEST STRATEGY

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Looking ahead to cultivations, growers aiming to get an early start to encourage a grassweed chit may need to adjust plans, particularly given the current lack of soil moisture. Dry conditions could make soil more challenging to work and limit the effectiveness of early chitting. However, with a flexible approach, opportunities to manage weed burdens can still be found as weather patterns shift.

Similarly, those planning to establish summer cover crops post-harvest may face some initial hurdles with drilling into dry soils and achieving appropriate drilling depth. Even so, with some rainfall, these crops can still be a valuable tool for improving soil structure and fertility heading into the next season.

If dry conditions persist, cultivation strategies may need to be amended. Where possible, delaying primary cultivations until there has been significant rainfall can help improve soil workability and create a better tilth for drilling. Additionally, reducing tillage depth could help preserve the moisture at depth. Remaining adaptable will be key to making the most of the season's conditions.



# OILSEED RAPE ESTABLISHMENT

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Establishing oilseed rape successfully this year will require strategies to minimise the impact of cabbage stem flea beetle. Keeping wide rotations can also help limit pest build-up, with a focus on achieving fewer but more vigorous plants that are better able to withstand larval feeding. Adjusting drilling timing, either earlier or later than the typical mid to late August window, can help avoid peak beetle migration. Caution is advised when considering pyrethroid use, as resistance remains widespread and these treatments can negatively affect beneficial insects that play a role in controlling CSFB populations naturally.

It is also advisable to wait for sufficient soil moisture to ensure good seed-to-soil contact. With expected limited moisture this summer, incorporating organic materials can improve soil structure, support plant growth and help mitigate beetle pressure.

## IN THE FIELD: WEST UPDATE

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**Temperature:** It has been slightly cooler in the West, with an average temperature of 15 degrees Celsius for the month of June. Compared to the 5-year average, temperatures since February have remained comparatively similar too.

**Rainfall:** Compared to the East, the West has seen much more rainfall despite the generally dry season. In June alone, 133mm of rain was recorded which is c.43% lower than the 5-year average for that month.



**Sunshine:** Sunshine hours were up in the months of April and May compared to the 5-year average, with May recording 283 sunshine hours. June had reduced slightly to 177 hours, 13 hours less than the 5-year average.

## CEREALS

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On the whole, crops are looking relatively pleasing, with most wheat crops having enough rainfall in June to carry them through the season. However, at this moment in time, some wheat crops are looking pretty burnt up on very light land. Winter barley is now starting to be combined and so far, yield and bushel results are not displeasing. The short crops we have been seeing may cause straw prices to rise. This offers a somewhat better outlook for some arable farmers.

Weed control in cereals has generally been good with grassweed sprays applied at the correct times due to the dry spring. The only headache is some late wild oats popping up through gappy crops. On a disease level, the usual concern is septoria but this year's levels have been extremely low, thus fungicide spends have been reduced. The main disease we have been chasing this year has been yellow rust due to the breakdown of the YR15 gene leading to some unusual varieties, previously resistant to yellow rust, getting the disease. Moving forwards, remember to reaffirm your variety choices based on the latest insight and don't rely solely on the AHDB Recommended List disease ratings. Remain vigilant and continue in-field monitoring for the disease.

Spring cereals are very up and down. Surprisingly, the lighter land crops have performed better than the heavier land which was mostly the result of moisture retention. Weed control has been good with spring cereals too, as well as disease suppression which has again been low due to the weather conditions.

## GRASS

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Grass production in the western region has been significantly impacted in 2025 by one of the driest springs on record. Rainfall over the first six months of the year has been around half the level recorded in 2024, with particularly low figures in March and April leading to severely dry soil conditions. As a result, grass growth during what should have been peak growing months has been much below seasonal expectations, with many dairy farms already having used nearly half of their first cut silage to supplement livestock diets.

Typical Dry Matter yields have dropped considerably, and the lack of moisture has limited grass regrowth, raising serious concerns over forage availability for the remainder of the year. The Environment Agency and National Drought Group have acknowledged the worsening conditions, as reservoir levels have also dropped to 77%, well below the seasonal norm of 93%. Brief rainfall in early June offered short-lived relief, but dry conditions have since persisted, further straining pasture productivity.



Farmers are being advised to plan feed and water resources carefully, assess forage stocks early, and explore alternative crops or supplementary feed sources to prepare for continued pressure into the autumn and winter seasons. The situation highlights the increasing vulnerability of forage systems to extreme weather and the urgent need for more resilient, adaptive strategies across livestock farms in the region.

## MAIZE

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Maize establishment and development has been rather variable, with establishment on the heavier soil types generally worse and in some cases the same field having two lots of emergence leading to uneven crops. Where established well and drilled slightly earlier, crops are nearly 6ft tall. However, crops are starting to show stress signs due to the drought and are in definite need of a drink! It will be interesting to see how they perform come the autumn

# POLICY & BUSINESS NEWS

## JUNE 2025 SPENDING REVIEW

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[Defra's latest spending review](#) went live in June. The key numbers include:

- **Delinked payments** will be reduced significantly, with a maximum of £600 being allocated to each business in 2026 and 2027
- **£16bn** total capital allocation to Defra
- **£2.7bn** per year for “farming, food security, and nature’s recovery”
  - 2.3bn annually for the Farming & Countryside Programme.
  - Up to £400mn for “additional nature schemes”, with word on the ground that this could be used for tree planting and peatland restoration
- **£2bn** committed to Environmental Land Management Schemes (ELMS) by 2028/29 – focus on water, air and biodiversity. It is expected that this is where the delinked payments will be redirected
- **£4.2bn** over 3 years for flood defence infrastructure

More information in the coming weeks is expected as to how this allocation will be deployed.

INDICATIVE FUNDING (£M)	2026-27	2027-28	2028-29
DELINKED PAYMENTS	20	20	0
ENVIRONMENTAL LAND MANAGEMENT SCHEMES	1,950	1,950	2,000
OTHER (PRODUCTIVITY, INNOVATION, TRANSITION)	350	300	250
FARMING AND COUNTRYSIDE PROGRAMME	2,320	2,270	2,250
NATURE SCHEMES	450	450	450
FARMING AND NATURE TOTAL	2,770	2,720	2,700

## FARMING RULES FOR WATER

Defra has updated its [statutory guidance](#) on Farming Rules for Water. A summary of the amended rules include:

- Autumn muck spreading is only justified when agronomic need is clearly proven
- Farmers must have a nutrient management plan for each field, provided by a FACTS-qualified agronomist, referencing RB209 and provided using accredited farm software
- The following are now mandatory:
  - Soil sampling and analysis
  - Testing of organic manure prior to application
  - Assessment of crop nutrient requirements
  - Must prove crop need and how the risk of diffuse pollution will be minimised

Whilst the Environment Agency will continue an advice-led approach before enforcement, repeat issues could lead to penalties and it is important farmers plan practical steps now, to protect against future ramifications.

## CAPITAL GRANTS

Capital Grants in England have reopened with immediate effect. £150 million worth of funding has been set aside for 78 specified items, but the scheme will only last until this money runs out.

- It is a first come, first served offer this time. Information says that "this round of the scheme will close to applications when the available funding is committed. We will aim to give reasonable notice of scheme closure, but this may not be possible."
- In general, all the rates per option seem the same as before.
- There are new caps depending on the options to either £25k or £35k.



- If you have already got an “open” claim for something else, that parcel cannot be re-entered for another grant until the previous one has been completed, claimed and paid.
- One application per SBI per annum.
- Please note the options that still require CSFO visits and endorsements as that adds another level of time constraints.

## HIGHER LEVEL STEWARDSHIP SCHEME

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Defra has increased the payment rates for the HLS scheme. These new rates are available to view [here](#). Agreement holders will receive the updated payment against their 2025 claim, which will be paid from December 2025.

## COUNTRYSIDE STEWARDSHIP SCHEME HIGHER-TIER

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Applications opened in January of this year by invitation only and there seems to be a plan for a continued phased roll out approach. Natural England and the Forestry Commission have been working with invited customers on pre-application activities since the invitations were sent in January. Mirror agreements will be offered for expiring CSHT agri-environment agreements. Capital items can be included as part of the Higher Tier application.

It is suggested that those who are interested in committing to a long-term, more ambitious environmental project contact their local Natural England officer to request that their farm is included on the list of those being considered for the wider rollout of the scheme.

Agreements will last 5, 10, 15 or 20 years. There will be 99 revenue-based actions and 33 supplemental actions, plus capital items.



# SUSTAINABLE FARMING SCHEME (SFI) UPDATE

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The SFI scheme was closed on 11<sup>th</sup> March. If you have an SFI agreement, you will continue to receive payments as normal under the terms of your agreement.

Those who opened applications within two months of 11<sup>th</sup> March are able to open an SFI application limited to £9,300 per year. This is available now through the RPA online service and applicants have six weeks to complete the application (ending at 11.59pm on Monday 18<sup>th</sup> August). Options entered into this agreement cannot be increased at the annual declaration.

Further information on an SFI 2025 offer should be available later this summer. This is expected to open in 2026 and will be smaller in scale with a more targeted approach.

## WELSH SUSTAINABLE FARMING SCHEME (SFS) UPDATE

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Further SFS details have recently been published, with the scheme commencing from the 1<sup>st</sup> January 2026. The scheme has capped actions with some mandatory and some optional, a 2-month window to apply and is similar in some ways to the SFI available in England. The publication is available [here](#) which lays out the full scheme requirements, eligibility, monitoring and evaluation processes, and intended payment rates so Welsh farmers are informed well ahead of making their choice to enter the scheme or not.



# LIVESTOCK UPDATE

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Regarding animal health, Avian Influenza remains present. However, there is currently increased attention on Bluetongue, given concerns that infected midges carried across the North Sea last year may have survived the mild UK winter. With the ongoing warm weather, these midges could be multiplying, potentially leading to an increase in clinical cases occurring earlier and in greater numbers compared to the previous year.

Bluetongue vaccines, available since spring, do not prevent infection but do lessen disease severity. Vaccination is especially recommended for sheep, who experience the most severe symptoms and need only one dose. Cattle show milder signs and require two doses, but vaccination is still worthwhile (both in terms of the cost and inconvenience of double vaccinations), particularly in dairy herds, as it can prevent losses from reduced milk yield and fertility issues leading to extended calving intervals.

A key issue for farmers near the Welsh or Scottish border is that the devolved Administrations have not included Wales or Scotland in the Bluetongue restriction zone, which currently encompasses all of England. Cattle may only be moved from England at least three weeks after completing a two-dose Bluetongue vaccination course. For sheep, the situation is even more complicated and costly. All animals (other than those moving directly for slaughter), must be blood tested for Bluetongue virus (regardless of whether they have been vaccinated) within seven days of their intended move from England. The introduction of these rules, valid from the 1<sup>st</sup> July, has resulted in considerable disruption to cross border market trading. Further information on how to prevent and stop the virus spreading can be found [here](#).

# MARKET UPDATE

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Compared to a year ago, all arable prices are significantly reduced, with not much prospect of improvement for later this year. The greatest decrease is in the malting premium, which is down 25%, with no obvious suggestion of rising again this year. Towards the less drastic end, oilseed rape is down 4.8% (£390/t) with a slight increase hoped for later. Though compared with March 2025 values (£435/t), these are still bleak prices.

Beans have made a slight comeback since March this year with current prices suggesting £220/t, though still well below the £265/t that they were a year ago. Spring beans don't look prosperous this year, but winter beans are looking better and haven't required much fungicide, so the jury is still out there on profit margins.

This downward pricing trend in the market reflects the broader global market sentiment of declining prices influenced by factors such as ample supply, limited export demand, geopolitical uncertainties, and weather conditions. Whilst the USDA report that global wheat production is forecast to rise (up by 8.7 Mt from last year), AHDB suggest that the export demand remains sluggish due to slowing economic growth among key importers which puts downwards pressure on prices.

The UK-US trade framework announced earlier this year is also a factor to consider. This framework was initially met with a combination of positive and negative considerations regarding its potential effects on British agriculture. Whilst not a full free trade agreement, the framework contributes to the turbulence caused by increased US tariffs earlier this year. UK farmers have noted the potential impacts of eliminating UK tariffs on US bioethanol imports, especially regarding possible effects on wheat prices used in domestic ethanol production. Domestic plants supplied by UK cereal producers may face increased competition as a result. The Viverno bioethanol plant in Hull, which can process around 1 million tonnes of wheat per year, is set to close in September unless it receives more government funding following the recent trade framework details.

Whilst the weather conditions have allowed some respite from disease pressures this year allowing for reduced fungicide spends, the market sentiment towards harvest remains turbulent. The ongoing and somewhat unstable geopolitical tensions, the high cost of production and lower market prices are really constraining the potential returns this year. As with 2024, this year's harvest is expected to be tight, but it's still early on into harvest season and we're hopeful.

ARABLE (£/T)	YEAR AGO	AUG 2025	% DECREASE AUG 24-25	NOV 2025
MILLING WHEAT	242	196 (Sept '25)	19	200
FEED WHEAT	180	160	11.1	168
FEED BARLEY	160	145	9.4	152
MALTING PREMIUM	40	30	25	30
OILSEED RAPE	420	400	4.8	410
BEANS	265	220	16.9	n/a

Source: Merchant East Anglia ex. farm bids (as of July 1<sup>st</sup> 2025)



# HEALTH & SAFETY

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With recent extreme weathers, there is an increased risk of field and machinery fires this harvest. Preventative and reactive measures to improve safety currently include:

- Regular maintenance of machinery to prevent sparks and overheating
- Avoiding harvesting during the hottest part of the day
- Prompt removal and proper stacking of bales to prevent spontaneous combustion

**Air compressors** pose a serious health risk if they are not used and maintained properly. Some of the key safety considerations relate to regular maintenance and inspection, use of pressure relief valves, proper routing and storage of hoses and conducting noise assessments and provided hearing protection where necessary.

**Pillar drills** are often associated with health and safety failures, but farms and estates are reminded of their obligations to ensure that working equipment is maintained in an efficient state, working order and in good repair. The Control of Vibration at Work Regulations 2005 also stipulate that in certain circumstances, frequent users of pillar drills should be considered for health surveillance for Hand-Arm Vibration Syndrome (HAVS), if their vibration exposure meets or exceeds regulated thresholds.

Lastly, this is a good time to remind farms and estates to apply for abnormal load dispensation for machinery movements in the coming months. This must be done before the movement occurs and a copy of the document should always be kept in the machinery. Key regulations and further information on dispensations can be found [here](#).

As well as some recent examples of health and safety accidents and prosecutions, the full Health and Safety bulletin for July 2025 includes an article by Steve Panton of Stephens Scown LLP, setting out a solicitor's view of health and safety in British Agriculture. The full bulletin can be found [here](#).



# CERES RESEARCH

## MEMBERSHIP SERVICE

Ceres Research has launched a new [membership service](#) for arable farmers who want to benefit from the latest independent and technical advice.

Developed to deliver timely, data-driven solutions for progressive farmers and related businesses, the new service will combine regular agronomic, economic and political insights with field-based reviews and events.

That makes it suitable for those who are interested in the science behind the advice that they are offered and want to stay ahead.

Farmers who become members will receive:

- Relevant and timely publications on key topics, including recent publications on [Strategic Rotation Planning and Variety Selection for the Season Ahead](#), and [New Season Nitrogen Pricing: Strategic Insights for 2025](#).
- Monthly Digests bringing the latest updates on agricultural policy and regulation, industry news, science and innovation, and relevant publications for useful insights.
- Online Agronomy Club meetings designed to help aid your decisions and plan for upcoming agronomy, powered by the latest scientific data. [Check out the insights from our first Agronomy Club](#).
- Skills webinars and training events offering you valuable insights and practical training to support your professional growth.
- [Monthly podcast 'Fields of the Future'](#), giving you easy audio access to essential topics from budgeting, benchmarking, agronomy, farm trial design, health and safety, business strategy, policy, and grants.
- Innovative digital tools in the form of interactive dashboards that allow farmers to investigate and benchmark their key metrics as well as stay up to date with weather trends. The ['benchmark your yields' dashboard](#) might be very useful in the coming months to give farmers a quick sense check of how their yields compare against regional and national datasets.

The cost of membership is £700/year, with Ceres Rural agronomy clients qualifying for a 25% discount. A free trial of your first online Agronomy Club meeting is being offered to anyone interested in the new service. Contact Danni at: [dannielle.roche@ceresresearch.com](mailto:dannielle.roche@ceresresearch.com) if you would like to attend or have any queries, or sign up to become a member [here](#).

# DATES FOR THE DIARY

- Burwarton show – 7<sup>th</sup> August
- Aylsham show – 25<sup>th</sup> August
- Moreton in Marsh Show – 6<sup>th</sup> September
- East Kent Ploughing Match – 24<sup>th</sup> September
- Cheshire Ploughing Match – 24<sup>th</sup> September
- Essex Ploughing Match – 27<sup>th</sup> September
- Farm Business Innovation Show – 5-6<sup>th</sup> November
- IAgRM National Farm Management Conference – 6<sup>th</sup> November
- Ceres Agristrategy Conference – 4<sup>th</sup> December: [Get Tickets](#)



## GET IN TOUCH

Want to discuss any of the topics in this issue of the Farming Update? Contact the project leaders, Will Spurdens, Sophia Slater, Annis Cousins or Dr Dannielle Robb.



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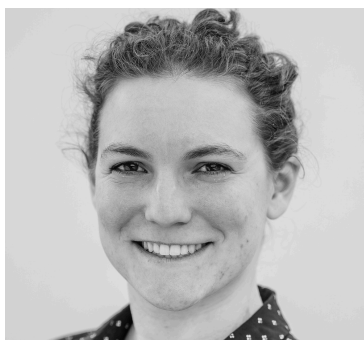
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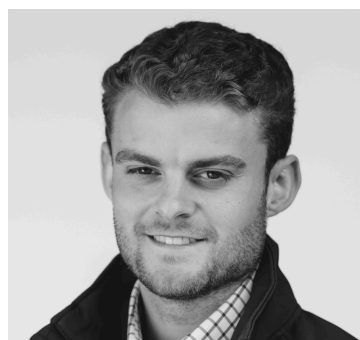
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