YIELD SUMMARY 2025

CERES RURAL

INTRODUCTION:
WEATHER DATA

This year (Sept '24-Aug '25) was defined by a significantly dry spring and summer across the UK, with little rainfall received by multiple regions (Figure 1). In March 2025, total average rainfall in England was ~84% lower than in 2024, and ~76% lower than the 25-year average.

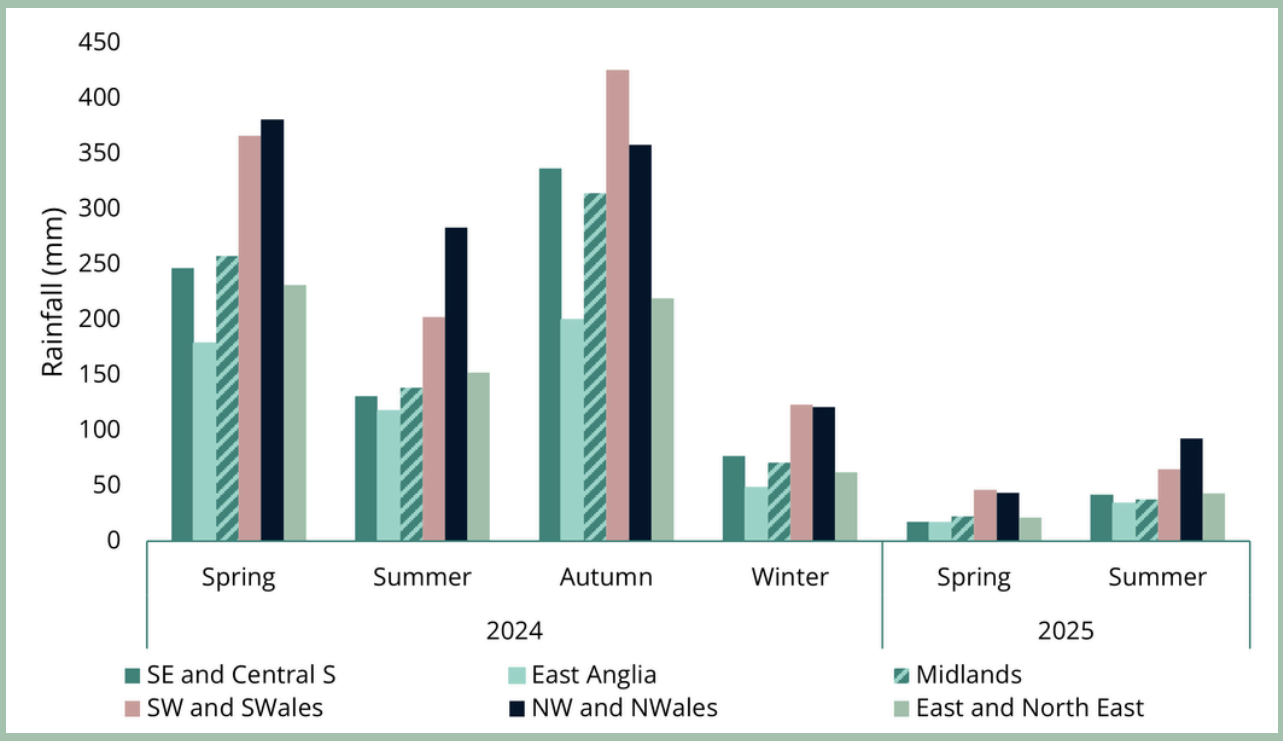

Figure 1. Total rainfall across UK region. Met Office data for mean total rainfall (MM).

In tandem with significantly lower rainfall totals during the spring and summer, mean air temperatures and total sunshine hours were higher than their respective 25-year averages across the majority of months from January to July-August 2025 (exceptions: January – mean air temperature, February – total sunshine hours) (Figure 2). Summer 2025 was declared the warmest on record for the UK (mean air temperature = 16.1°C), with four relatively short-lived and interspersed heatwaves recorded by the Met Office during the season.

Figure 2a. Met Office data for mean air temperature

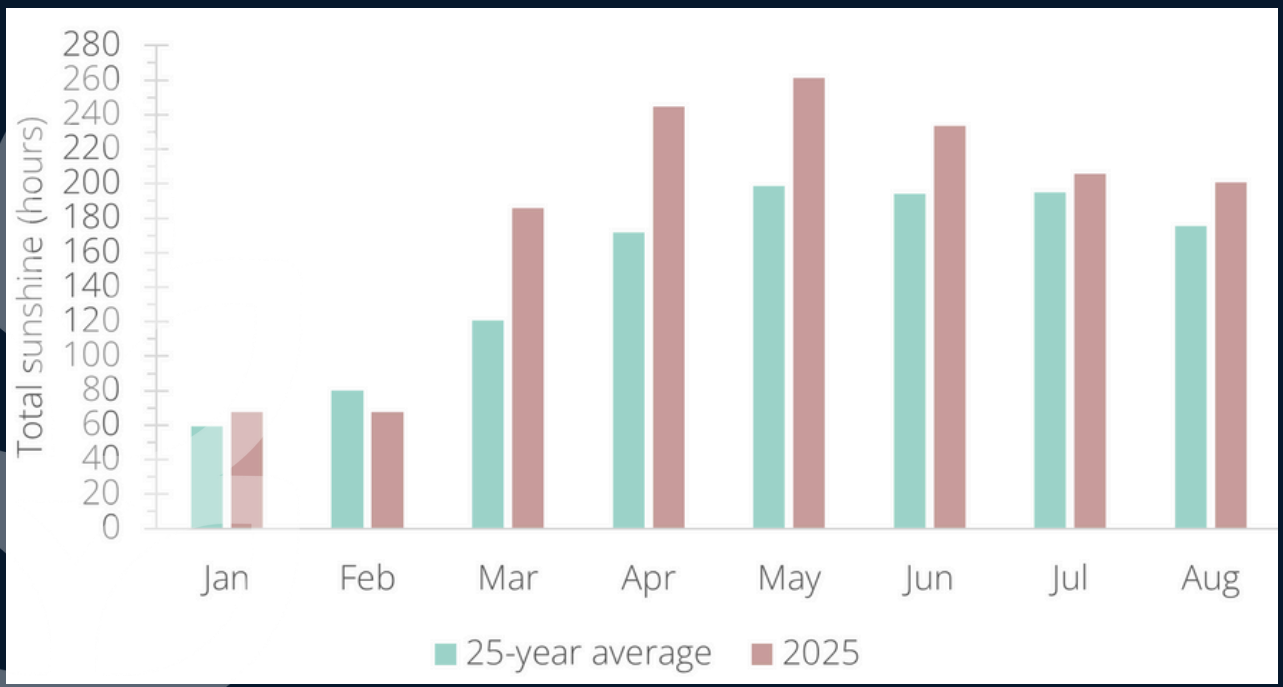

Figure 2b. Met Office data for total sunshine hours.

CERES RURAL 2025 HARVEST RESULTS

As noted by the AHDB, the 2025 harvest was characterised by high variability in yield and crop performance, with considerable variations both within and between regions across the UK (AHDB, 2025). Tables 1-2 and Figures 3-4 summarise the crop yield data received from Ceres Group client farms for the 2025 harvest in comparison to the previous four years.

TABLE 1. 2025 CEREAL HARVEST RESULTS

CROP YEAR	WINTER WHEAT (AV.)	1ST WHEAT	2ND WHEAT	3RD WHEAT	SPRING WHEAT	WINTER BARLEY	SPRING BARLEY	WINTER OATS	SPRING OATS	RYE
2025 PROV	7.38	7.70	7.51	7.96	3.93	7.24	5.74	5.80	5.13	7.39
NO. OF CROPS	227	131	58	10	25	83	97	13	58	3
2024	7.94	8.15	8.07	7.45	4.71	6.65	5.76	6.25	5.70	6.77
NO. OF CROPS	152	121	46	5	22	57	72	6	47	11
% CHANGE VS. 2024	-7%	-6%	-7%	7%	-16%	9%	0%	-7%	-10%	9%
2023	8.53	8.72	8.64	6.76	4.70	8.05	5.93	6.51	4.94	8.10
NO. OF CROPS	144	101	58	10	12	60	57	8	32	6
% CHANGE VS. 2023	-7%	-7%	-7%	10%	0%	-17%	-3%	-4%	15%	-16%
2022	8.70	9.18	8.08	7.55	4.32	7.96	6.07	6.34	4.91	7.7
NO. OF CROPS	127	116	65	10	16	64	63	12	26	10
2021	8.17	8.23	8.20		5.20	7.18	5.78	5.82	4.67	7.51

TABLE 2. 2025 BREAK CROP HARVEST RESULTS

CROP YEAR	WINTER OSR	AHIFLOWER	LINSEED	WINTER BEANS	SPRING BEANS	PEAS
2025 PROV	3.70		1.46	3.10	3.03	3.12
NO. OF CROPS	74		4	60	22	17
2024	3.08	0.00	0.00	3.68	4.41	2.59
NO. OF CROPS	63	0	0	33	17	12
% CHANGE VS. 2024	20%			-16%	-31%	21%
2023	2.95	1.12	1.84	2.93	3.09	2.33
NO. OF CROPS	56	1	2	65	23	14
% CHANGE VS. 2023	4%			26%	43%	11%
2022	3.3	1.19	1.73	3.62	3.04	2.90
NO. OF CROPS	62	3	4	41	23	12
2021	2.87	1	1.21	3.12	4.14	3.17

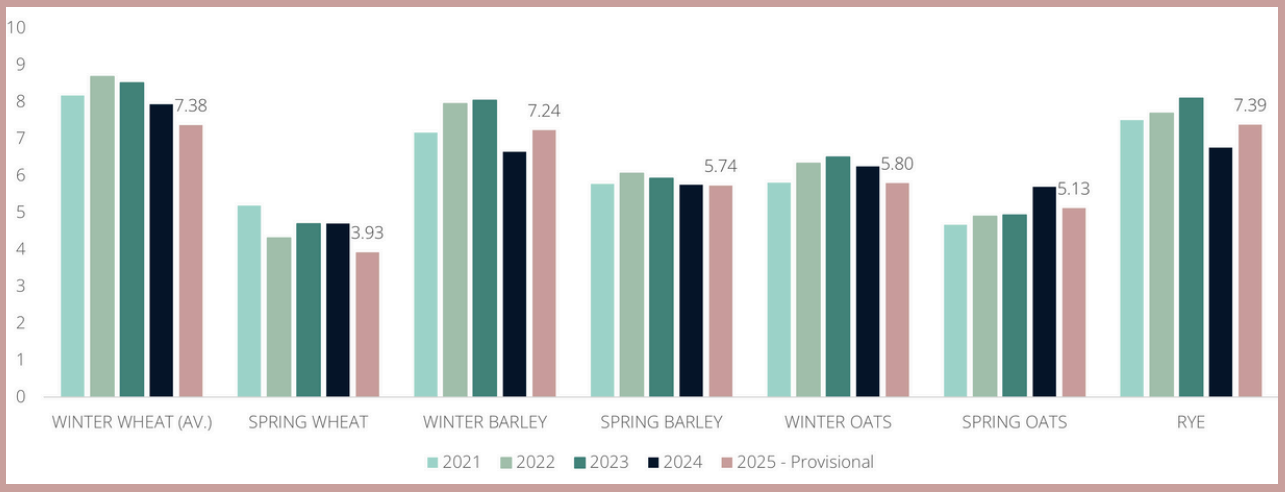

Figure 3. 2025 cereal crop yields

Figure 4. 2025 break crop yields

OVERALL

- Cereal yields in the 2025 harvest (except spring oats) declined in comparison to their respective five-year rolling averages (2021-25), with winter wheat showing a third consecutive year of decline since 2022.

- Winter oilseed rape (OSR) yields increased by nearly 20% compared to 2024, driven largely by improved establishment, reduced cabbage stem flea beetle (CSFB) pressure and favourable flowering and pod set conditions.

- Spring peas also saw a substantial uplift, with yields rising by over 20% in comparison to 2024, and over 10% in comparison to their five-year rolling average.

WINTER WHEAT

The total wheat area across England in 2024/25 increased by 8.8% to reach ~1.5 million hectares (1,525,137 ha DEFRA June 2025 Survey), reversing a two-year decline (Figure 5) as growers took advantage of establishment opportunities and better wheat margins over other crops.

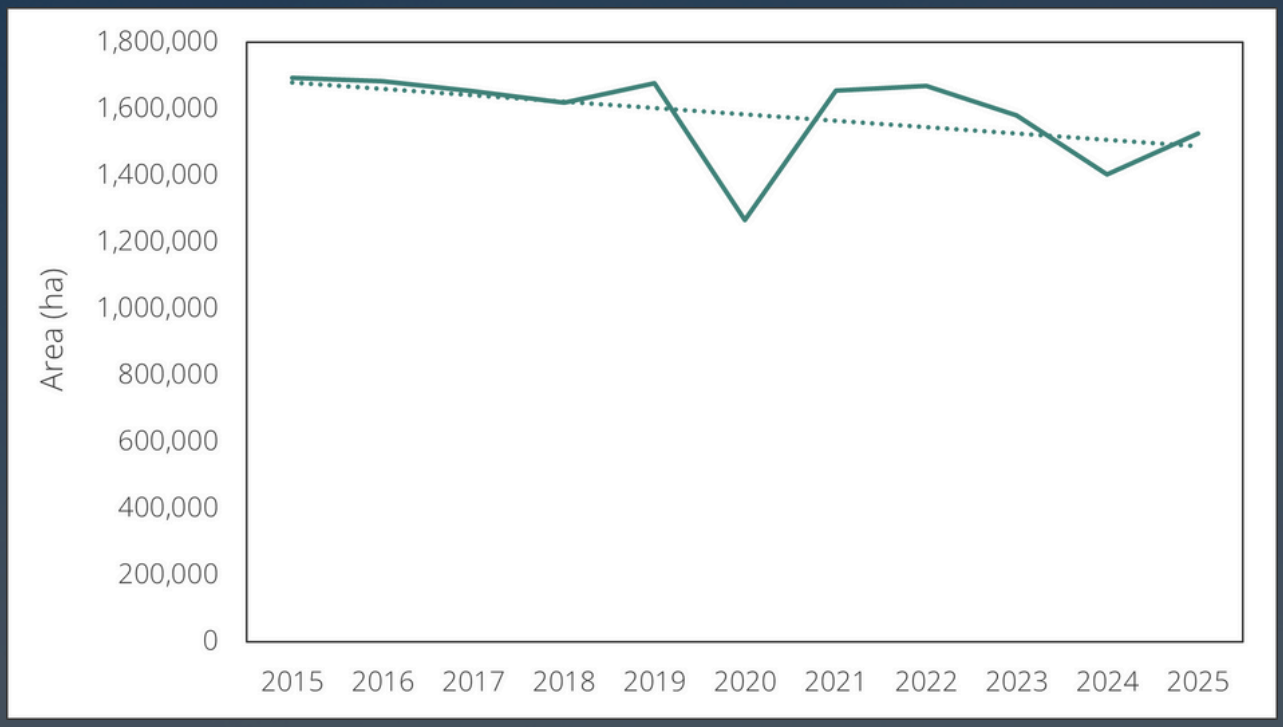

Figure 5. total cropped area for wheat in England

**No Defra data yet available for England yields / comparison with Ceres data (as at 09/10/25)*

AHDB estimates the UK average winter wheat yield for the 2025 harvest was 7.6 t/ha, ~6% below the ten-year average, though ~4% higher than the 2024 harvest. The AHDB also notes that yield performance this year varied significantly between farms and regions making it difficult to draw consistent conclusions. Establishment, spring rainfall pattern and soil quality were key.

For instance, some farms within the AHDB survey recorded yields that were more that 20% lower than their five-year averages, while other farms recorded better results (including from Scotland).

TABLE 3. 2025 HARVEST RESULTS FOR WINTER WHEAT

WINTER WHEAT (AVERAGE)	2025	% CHANGE VS. 2024	% CHANGE VS. 2021-2025
NO. OF CROPS	277	+49.3	+48.2
YIELD (T/HA)	7.38	-7.1	-9.4

Figure 6. 2025 harvest regional variability in winter wheat yield

The number of winter wheat crops recorded in the 2025 survey (227) was the highest within our dataset (2021-present). In comparison to 2024 and the five-year rolling average (2021-2025), the number of crops in this year's survey was ~50% higher. However, this year's mean average yield for winter wheat (7.38 t/ha) was ~7% lower than in 2024, and ~9% lower than the five-year rolling average.

The number of crops that yielded over 10 t/ha in 2024 represented 9.2% of the survey, in 2025 this figure falls to 6.6% of farms. In contrast, farms that yielded under 7 t/ha in 2025 represented 38% of our dataset, while in 2024 those lower performing farms represented 21%. First wheat yields showed an average of 7.7 t/ha (n=131), while second wheat yields showed an average of 7.51 t/ha (n=58), with both ~6-7% lower than the previous year, and ~7-8% lower than their five-year rolling averages.

Several factors likely contributed to an overall reduction in yield. Late drilling was widespread, with a greater proportion of crops sown late October/November.

Slow root development, challenged in some locations by rainfall and seedbed quality proved to be a compromised foundation when conditions changed in the spring. The winter season was followed for most by an exceptionally dry spring and summer. Many experienced less than 45mm of rain between the end of March and July despite which early spring growth and biomass accumulation for the most part looked good through April, with very few crops showing signs of yellowing associated with nitrogen deficit.

By May the effects of the higher accumulated temperatures was clear in the crop as it raced through rapid leaf emergence, easily catching up from the late start.

Abruptly the lack of moisture and the combination heat and fast growth finished the crop prematurely, the pace of crop development did not slow, flowering and grain filling completed quickly, most crops unable to fully utilise the nitrogen present and pack on yield.

While sites with more rain at the right time and those with moisture retentive soils had a pleasing harvest, sites with neither of the above experienced the worse harvest of their career.

Grain specific weights were consistently above marketable specifications, with generally high grain protein, principally from the lack of yield dilution with generally high Hagberg falling numbers despite some later post rain harvested crops.

FOLIAR DISEASE

Foliar disease pressure during the 2024/25 season was notably low in winter wheat, as well as most other cereals. Limited leaf wetness periods suppressed the development of major pathogens such as septoria and rusts. As a result, varietal resistance traits were not significantly tested, and yield differences between varieties narrowed due to the absence of disease-driven differentiation.

In general, this provided opportunity to scale back fungicide applications, particularly after T1, with many opting for lower-cost rust active treatments over more expensive septoria active programs depending on risk profile. Feed wheats often received reduced inputs, while milling wheats were managed more cautiously to preserve grain quality.

Thankfully ergot incidence in winter wheat was also lower than in previous years, as flowering was more synchronised in stable, dry conditions. Improved blackgrass control further reduced the potential for ergot contamination, contributing to better grain quality across many blocks.

SPRING WHEAT

The number of spring wheat crops in 2024 were almost double 2023, but interestingly the yield is very similar at c.4.7t/ha for both years. Late planted wheat/spring wheat has somewhat been the success story of the year, generally achieving better grass weed control, less disease pressure/expense and generally higher grain specifications, particularly grain protein levels. The only niggle which can vary greatly is the levels of ergot in the sample. With unpredictable autumns, it's likely spring wheat seed will be retained on farm and used as insurance for poor autumn drilling campaigns.

TABLE 4. 2025 HARVEST RESULTS FOR SPRING WHEAT

SPRING WHEAT	2025	% CHANGE VS. 2024	% CHANGE VS. 2021-2025
NO. OF CROPS	25	+13.6	+26.3
YIELD (T/HA)	3.93	-16.5	-14.0

The number of spring wheat crops recorded in the 2025 survey (25) was the highest within our dataset. In comparison to 2024, the number of crops in this year's survey was ~14% higher, while compared to the five-year rolling average (2021-2025), it was ~26% higher. In terms of yield, this year's mean average for spring wheat (3.93 t/ha) was ~16% lower than in 2024, and ~14% lower than the five-year rolling average.

What affected winter wheat broadly affected spring wheat with similar grain quality outcomes. Better establishment conditions in the spring generally justified holding off drilling the crop once winter conditions deteriorated.

WINTER BARLEY

TABLE 5. 2025 HARVEST RESULTS FOR WINTER BARLEY

WINTER BARLEY	2025	% CHANGE VS. 2024	% CHANGE VS. 2021-2025
NO. OF CROPS	83	+45.6	+27.3
YIELD (T/HA)	7.24	-8.8	-2.4

As for winter and spring wheat, the number of winter barley crops recorded in the 2025 survey (83) was the highest within our dataset. In comparison to 2024, the number of crops in this year's survey was ~46% higher, while compared to the five-year rolling average (2021-2025), it was ~27% higher. In terms of yield, this year's mean average for winter barley (7.24 t/ha) was ~9% higher than in 2024, though ~2% lower than the five-year rolling average.

In contrast to wheat, winter barley yields rebounded in 2025 compared to the previous year, indicating greater resilience to the season's challenges from an earlier maturing crop. Remaining broadly consistent with the five-year rolling average (within ~2%), this year's mean average yield indicates greater stability compared to the trend (decline) observed in wheat yields over recent years.

SPRING BARLEY

TABLE 6. 2025 HARVEST RESULTS FOR SPRING BARLEY

SPRING BARLEY	2025	% CHANGE VS. 2024	% CHANGE VS. 2021-2025
NO. OF CROPS	97	+34.7	+41.8
YIELD (T/HA)	5.74	-0.4	-2.0

The number of spring barley crops recorded in the 2025 survey (97) was the highest within our dataset. In comparison to 2024, the number of crops in this year's survey was ~35% higher, while compared to the five-year rolling average (2021-2025), it was ~42% higher. In terms of yield, this year's mean average for spring barley (5.74 t/ha) was approximately on par with 2024 (within 0.4%), and ~2% lower than the five-year rolling average.

Similar to winter barley, the relative stability in spring barley yield compared to the previous year and five-year rolling average suggests greater resilience to the challenges of recent seasons, including increasingly changeable (and extreme) weather patterns. In general, barley grew quickly during the spring in the presence of sufficient early moisture and continued to build biomass into the summer under high temperatures and sunshine hours, yielding broadly in line with previous years.

WINTER OATS

TABLE 7. 2025 HARVEST RESULTS FOR WINTER OATS

WINTER OATS	2025	% CHANGE VS. 2024	% CHANGE VS. 2021/22-2025
NO. OF CROPS	13	+116.7	+33.3
YIELD (T/HA)	5.80	-7.2	-5.6

As for wheat and barley, the number of winter oat crops recorded in the 2025 survey (13) was the highest within our dataset. In comparison to 2024, the number of crops in this year's survey was ~117% higher (though note small sample size of 6 in 2024), while compared to the four-year rolling average (2022-2025), it was ~33% higher. In terms of yield, this year's mean average for winter oats (5.80 t/ha) was ~7% lower than in 2024, and ~6% lower than the five-year rolling average (2021-2025), showing a similar trend (since 2023) to the decline observed in wheat. However, grain quality and bushel weights remained satisfactory.

SPRING OATS

TABLE 8. 2025 HARVEST RESULTS FOR SPRING OATS

SPRING OATS	2025	% CHANGE VS. 2024	% CHANGE VS. 2021/22-2025
NO. OF CROPS	58	+23.4	+42.3
YIELD (T/HA)	5.13	-10.1	+1.1

The number of spring oat crops recorded in the 2025 survey (58) was the highest within our dataset. In comparison to 2024, the number of crops in this year's survey was ~23% higher, while compared to the four-year rolling average (2022-2025), it was ~42% higher. In terms of yield, this year's mean average for spring oats (5.13 t/ha) was ~10% lower than in 2024, though approximately on par (within ~1%) with the five-year rolling average (2021-2025), while grain quality and bushel weights remained satisfactory in line with winter oats.

OILSEED RAPE

TABLE 9. 2025 HARVEST RESULTS FOR WINTER OSR

WINTER OSR	2025	% CHANGE VS. 2024	% CHANGE VS. 2021-2025
NO. OF CROPS	74	+17.5	+19.7
YIELD (T/HA)	3.70	+19.9	+16.2

Figure 7. 2025 harvest regional variability in winter OSR yield

As for wheat, barley, and oats, the number of winter OSR crops recorded in the 2025 survey (74) was the highest within our dataset. In comparison to 2024, the number of crops in this year's survey was ~18% higher, while compared to the five-year rolling average (2021-2025), it was ~20% higher. In terms of yield, this year's mean average for winter OSR (3.70 t/ha) was ~20% higher than in 2024, and ~16% higher than the five-year rolling average. This aligns with the AHDB's national yield estimate of 3.7 t/ha – an increase of 20% compared to the 2020-24 average yield, and the joint highest reported since 2017 (matching the 2022 result).

The responses indicate the number of farms getting back into rape appears quite steady, many watching to see how their neighbours crops establish and grow away in the spring.

Crop establishment generally went well, a proportion of the crop drilled unconventionally early is proving to be a relatively reliable way of getting rape past the cotyledon stage by the time the adult CSFB start to migrate. Numbers of adult CSFB have been lower at harvest which appears to tie up with fewer beetles migrating at the end of August. Timing remains everything with establishing the crop, either conserving moisture through cultivation, field fertility and rain at the right time still has a big influence on how quickly and evenly the crop establishes - evenness of establishment being key. Very little of the 2025 crop was redrilled or written off as a result.

Early nitrogen applications followed by dry generally low disease conditions favoured the crop. Good sunlight hours and warm conditions provided an uncurtailed flowering period culminating in good pod and seed set.

WINTER BEANS

TABLE 10. 2025 HARVEST RESULTS FOR WINTER BEANS

WINTER BEANS	2025	% CHANGE VS. 2024	% CHANGE VS. 2021-2025
NO. OF CROPS	60	+81.8	+32.7
YIELD (T/HA)	3.10	-15.7	-5.7

The number of winter bean crops recorded in the 2025 survey (60) was the second highest within our dataset (65 crops in 2023). In comparison to 2024, the number of crops in this year's survey was ~82% higher, while compared to the five-year rolling average (2021-2025), it was ~33% higher. In terms of yield, this year's mean average for winter beans (3.10 t/ha) was ~16% lower than in 2024, and ~6% lower than the five-year rolling average.

From an agronomic perspective, the dry and warm spring and summer months were detrimental for winter beans. Although crops were generally well established and got off good start following the mild winter, once again the combination of warm/high temperatures cut short the flowering period as the drought drove maturity. Many crops seem to only set pods on 50% of the stem as later flowers failed to set pods.

Disease incidence was generally low once conditions changed, localised rust and chocolate spot pressure largely influenced by the density of the crop canopy. Overall better but another uninspiring year from crop.

SPRING BEANS

TABLE 11. 2025 HARVEST RESULTS FOR SPRING BEANS

SPRING BEANS	2025	% CHANGE VS. 2024	% CHANGE VS. 2021-2025
NO. OF CROPS	22	+29.4	+5.8
YIELD (T/HA)	3.03	-31.4	-14.5

As for winter beans, the number of spring bean crops recorded in the 2025 survey (22) was the second highest within our dataset (23 crops in 2023 and 2022). In comparison to 2024, the number of crops in this year's survey was ~29% higher, while compared to the five-year rolling average (2021-2025), it was ~6% higher. In terms of yield, this year's mean average for spring beans (3.03 t/ha) was ~31% lower than in 2024, and ~15% lower than the five-year rolling average.

Spring beans were particularly vulnerable to moisture stress due to their later sowing under dry conditions, and development of shallower root systems. Higher than average temperatures during May, when flowering typically occurs, likely curtailed flower duration and pod set. Crops that missed key rainfall events during the spring and summer months struggled to maintain canopy and fill pods effectively, resulting in low yield potential.

SPRING PEAS

TABLE 12. 2025 HARVEST RESULTS FOR SPRING PEAS

SPRING PEAS	2025	% CHANGE VS. 2024	% CHANGE VS. 2021-2025
NO. OF CROPS	60	+81.8	+32.7
YIELD (T/HA)	3.10	-15.7	-5.7

In line with wheat, barley, oats, and winter OSR, the number of spring pea crops recorded in the 2025 survey (17) was the highest within our dataset. In comparison to 2024, the number of crops in this year's survey was ~42% higher, while compared to the five-year rolling average (2021-2025), it was ~23% higher. In terms of yield, this year's mean average for spring beans (3.12 t/ha) was ~21% higher than in 2024, and ~11% higher than the five-year rolling average.

From an agronomic perspective, spring peas showed strong resilience to the dry and warm conditions during the spring and summer that adversely affected many other spring-sown crops. Their capacity to tolerate elevated temperatures and withstand moisture deficits during flowering likely supported more reliable pod development and seed fill, resulting in the highest mean yield recorded in our dataset since 2021 (3.17 t/ha).

CONCLUSION

The 2025 harvest season was shaped by exceptional weather conditions, with notably dry spring and summer months across the UK, while mean air temperatures and sunshine hours were consistently above long-term norms. Summer 2025 was declared by the Met Office as the warmest on record, with multiple (four) heatwaves further intensifying crop stress.

Climatic extremes (particularly drought) had a pronounced impact on crop performance. Cereal yields (except spring oats) declined in comparison to their respective five-year rolling averages (2021-25), with winter wheat showing a third consecutive year of decline since 2022. Winter oats are beginning to display a similar trend, with yields showing a second consecutive year of decline since 2023. In contrast, barley showed greater resilience – winter barley yields rebounded from 2024, and spring barley yields remained relatively stable in line with previous years – both benefiting from rapid spring growth and early-season moisture.

Despite setbacks in wheat, some break crops performed strongly. Winter OSR yields increased by nearly 20% compared to 2024, supported by reduced CSFB pressure and favourable conditions for canopy development and flowering. Spring peas also achieved substantial yield gains, up over 20% from the previous year and more than 10% above the five-year rolling average. Beans, however, were more vulnerable to moisture and temperature stress, with winter and spring types recording lower yields than previous years.

Overall, the 2025 harvest results highlight the importance of adaptive agronomic practices (particularly crop rotation, variety selection and soil management) to be appropriate to the disease threat and crop potential though increasingly challenging weather.

Continued analysis of break crop diversity, soil type, and regional performance will be essential to inform future strategies and support yield stability.

AHDB (2025) AHDB Harvest Report: Report 6 – Week 12.
Defra (2025) Provisional cereal and oilseed production estimates for England 2025.

CERES RURAL

CONTACT US

HEAD OFFICE
Ceres Rural
Council Offices
Saffron Walden
CB11 4ER

contact@ceresrural.co.uk
01223 679 679

VISIT US

ceresrural.co.uk

FOLLOW US

PARTNERED WITH

CERES RESEARCH

CERES PROPERTY

SMART BUSINESS SOLUTIONS

CONTACT US TO SEE HOW YOUR HARVEST COMPARES

JOCK WILLMOTT

M: 07592 041 671

E: jock.willmott@ceresrural.co.uk