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Report Highlights:

The United Kingdom (UK) is forecast to have a significant increase in grain crop production in Marketing Year (MY) 2025/26. This is largely driven by a partial recovery in wheat production following a particularly low level of production in MY 2024/25. Planting conditions and progress remain positive, improving the outlook for yields in MY 2025/26, although weather between now and harvest will be the main determinant. Continued low wheat prices domestically have made UK producers reluctant to sell, although producers may be forced to do so in the coming months due to cashflow and storage constraints.

Disclaimer: This report presents Post's first outlook for grain and feed, and production, supply, and distribution (PSD) forecasts for the marketing year (MY) 2025/26, as well as estimates for MY 2023/24 and MY 2024/25. Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service analysts in the UK and is not official USDA data.

Abbreviations used in this report:

EU European Union
FAS Foreign Agricultural Service
FSI Food, Seed and Industrial
Ha Hectares
MHa Thousand hectares
MMT Million Metric Tons
MT Metric Ton (1000 kg)
MY Marketing Year. Post and USDA official data both follow the EU local marketing year of July to June except for rice which follows a September to August calendar
CY Calendar Year
TMT Thousand Metric Tons
TY Trade Year. July to June for wheat and October to September for coarse grains
UK United Kingdom
U.S. United States

Executive Summary

In Marketing Year (MY) 2025/26, United Kingdom (UK) grain (wheat, barley, oats, and mixed grains) production is expected to increase to 20.9 million metric tons (MMT), a rebound from the 2024/25 level of 19.1 MMT, largely based on an increased supply of wheat. Oats and barley production are forecast to remain relatively flat for MY 2025/26.

Planting and Yields: In MY 2025/26, area planted and yields for grains are expected to be higher compared to MY 2024/25. If the historically dry conditions persist in MY 2025/26 this may lower the efficacy of fertilizer applications and nitrogen uptake, in turn diminishing expected yields. Disease levels are also expected to be low in MY 2025/26, even on initial reports of yellow rust and gout fly damage. In England, wheat and barley are expected to benefit from milder conditions. Cold weather has slowed the growth of wheat, oats, and barley in some other regions of the United Kingdom.

In MY 2024/25, planting conditions are expected to be more favorable than MY 2023/24, due to milder weather, dry conditions, and fewer cold weather periods during the spring plantings. In MY 2024/25 planting progress has recovered despite storm disruptions during the early season (October and November). The grains harvest is expected to be lower in MY 2024/25, largely due to a drop in wheat production. During the first half of MY 2024/25, the UK has relied on imports to meet demand across multiple grain commodities, more so than in MY 2023/24. This has been largely driven by persistently low domestic wheat prices and a smaller than average wheat harvest. In MY 2024/25 imports are expected to be higher than MY 2023/24 on lower domestic production, uncertainty in the trade environment, and competitive import prices compared to domestic production. The trend throughout MY 2024/25 has been to front load on imports in the first few months. Exports have also been sluggish as UK wheat producers have been reluctant to sell their crop due to low prices, instead holding onto wheat production until prices rise.

Production and Demand: Grain feed demand for MY 2025/26 is forecast higher by 324,000 MT, a 2 percent increase over MY 2024/25 but still below MY 2023/24 rates. The UK compound animal feed sector has adjusted to lower domestic production, competitive import prices and on farm availability by substituting wheat inputs for barley, oats, and maize. The use of cereals in compound feed is being driven by a slight increase in consumption from the dairy and pig sectors. The coarse grain (particularly barley and oats) portion of this demand can be partially attributed to the ready availability and comparable prices to wheat.

In MY 2024/25, UK wheat production declined due to low yields, lower planted area, and profitability concerns from farmers due to persistently low prices. Additionally, overall demand for wheat was lower due to declines in animal feed demand, lower human consumption, and lower feedstock usage for bioethanol production. Between MY 2024/25 and MY 2023/24 animal feed demand declined from 7.4 MMT to 6.6 MMT. For food, seed and industrial use (FSI) demand declined from 8.2 MMT to 7.8 MMT. Competitively priced imports from Canada and the European Union (EU) have also offset declines in domestic production by meeting demand from the animal feed and bioethanol feedstock sectors.

Table 1: Feed and Residual Consumption

Feed and Residual	2023/24	2024/25	2025/26
Wheat	7400	6600	7150
Barley	4290	4440	4350
Corn	1500	1600	1480
Oats	215	320	290
Rye	35	31	30
Mixed Grain	230	180	195
Total	13670	13171	13495

Units = thousand metrics tons (MT)

In MY 2025/26 barley consumption is anticipated to decline largely driven by expected declines in the brewing, malting and distilling sectors. There has also been a significant erosion of premiums (due to decreased demand from these sectors) for malting barley resulting in an increased usage in compound feed.

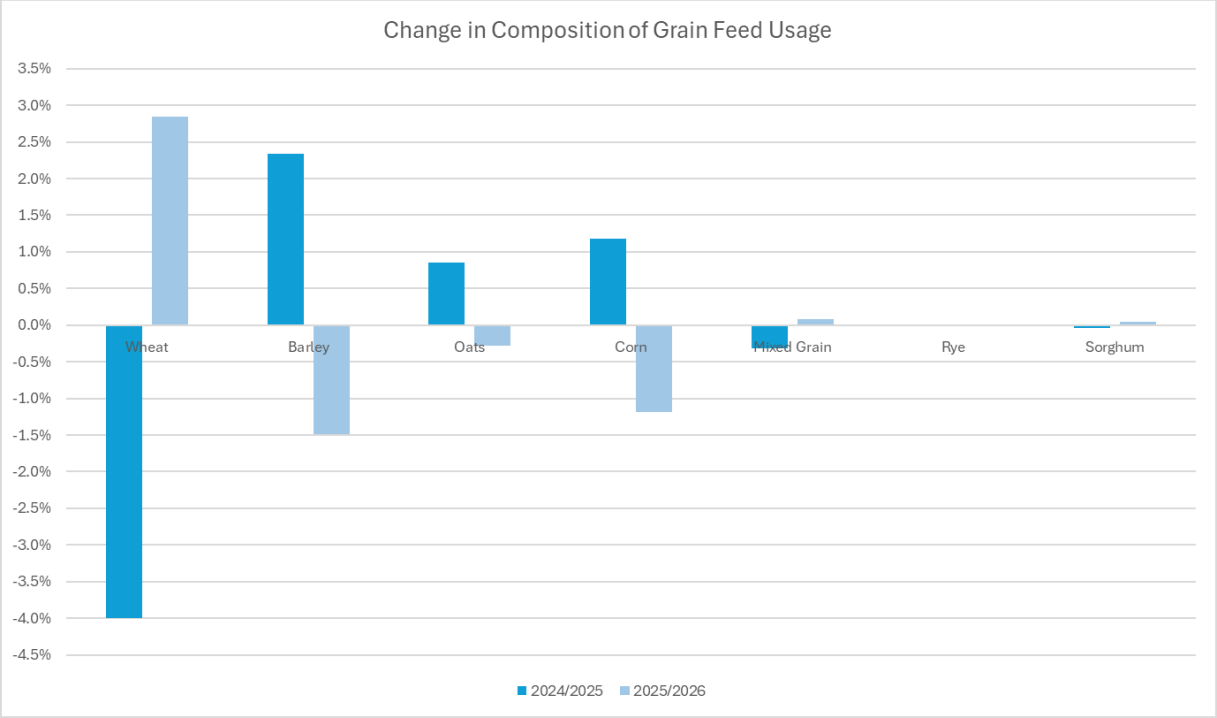

Table 1. Production, Supply and Distribution - Wheat

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1719	1720	1400	1526	0	1630
Beginning Stocks (1000 MT)	2309	2309	3261	3261	0	3496
Production (1000 MT)	13980	13980	11050	10950	0	12800
MY Imports (1000 MT)	3135	3135	3700	4125	0	3050
TY Imports (1000 MT)	3135	3135	3700	4125	0	3050
TY Imp. from U.S. (1000 MT)	11	11	0	0	0	0
Total Supply (1000 MT)	19424	19424	18011	18336	0	19346
MY Exports (1000 MT)	569	569	500	440	0	560
TY Exports (1000 MT)	569	569	500	440	0	560
Feed and Residual (1000 MT)	7400	7400	6700	6600	0	7150
FSI Consumption (1000 MT)	8194	8194	8200	7800	0	8200
Total Consumption (1000 MT)	15594	15594	14900	14400	0	15350
Ending Stocks (1000 MT)	3261	3261	2611	3496	0	3436
Total Distribution (1000 MT)	19424	19424	18011	18336	0	17915
Yield (MT/HA)	8.1326	8.1279	7.8929	7.1756	0	7.8528

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2024/2025 = July 2024 - June 2025

Production

In MY 2025/26, UK wheat production is estimated at 12.8 MMT, a partial recovery from last year's dip and returning closer to historical levels. In MY 2025/26, the UK's Precision Breeding legislation (only applicable in England) is expected to improve the crop varieties available for commercial use in England, which grows over 90 percent of all wheat in the UK. Multiple applications for precision bred wheat varieties are under review with opportunities for boosting yields once authorized.

For MY 2024/25 winter wheat growth was slower than the previous year due to colder weather. The crop is generally in good condition, but protein levels are lower in MY 2024/25 compared to imports, partially related to difficulties applying nitrogen due to wet weather early in the season. There has also been a large carryover from MY 2023/24 forming part of the total supply, and dampening prices.

Consumption

MY 2025/26 wheat demand is expected to recover, reflecting a more typical harvest, and drawing down of high stocks. In MY 2024/25 industrial demand for UK wheat for the production of domestic bioethanol declined on more competitively priced imported bioethanol. This is a trend which has been ongoing over the last five years in the UK. The flour milling sector is expected to report a slight increase in consumption, due to higher extraction rates for UK wheat compared to MY 2023/24 and may use more domestic wheat by the end of the season. The smaller crop and lower availability has meant a drop in on farm usage of wheat in animal feed in MY 2024/25.

Trade

In MY 2025/26, imports are expected to decline slightly on higher domestic production. Unlike MY 2024/25 where imports of wheat from the EU increased in both relative and absolute terms (with three quarters of wheat coming from EU member states), in MY 2025/26 imports from the EU (both on volume and proportion) are expected to decline on higher imports from Canada and Ukraine due to more competitive prices. In MY 2025/26 UK imports from the United States are not expected change from MY 2024/25 due to expected lower competitiveness.

In MY 2024/25 the drop in exports was smaller than expected given the reduction in wheat supplies relative to consumption. Imports have been particularly high due to the especially low levels of domestic production and low global prices in MY 2024/25. The volume of imports is expected to slow towards the end of MY 2024/25, following a strong ramp up in the early part of the year. These imports have included a large portion of high-quality milling wheat. Feed wheat has mostly been imported to service the Northern Ireland market.

Stocks

In MY 2025/26 beginning stocks are expected to be particularly high and remain high. In MY 2024/25 ending stocks were high based on lower exports and farmers expectations that prices would rise. Old crop wheat is expected to remain in storage until there is an increase in price or storage constraints from the new crop necessitate the sale of the old crop around late May and June. These stock levels are significantly above average.

Table 2.

Production, Supply and Distribution - Barley

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1137	1137	1200	1200	0	1150
Beginning Stocks (1000 MT)	1268	1268	1218	1218	0	1460
Production (1000 MT)	6963	6963	7200	7050	0	7000
MY Imports (1000 MT)	201	201	150	236	0	105
TY Imports (1000 MT)	232	232	100	200	0	105
TY Imp. from U.S. (1000 MT)	1	1	0	0	0	0
Total Supply (1000 MT)	8432	8432	8568	8504	0	8565
MY Exports (1000 MT)	780	780	550	505	0	650
TY Exports (1000 MT)	653	653	650	600	0	650
Feed and Residual (1000 MT)	4290	4290	4500	4440	0	4350
FSI Consumption (1000 MT)	2144	2144	2100	2099	0	2150
Total Consumption (1000 MT)	6434	6434	6600	6539	0	6500
Ending Stocks (1000 MT)	1218	1218	1418	1460	0	1415
Total Distribution (1000 MT)	8432	8432	8568	8504	0	8565
Yield (MT/HA)	6.124	6.124	6	6	0	6.087

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

Production

In MY 2025/26, barley production is forecast to stay stable at 7MMT due to a slight decrease in area harvested and a minor drop in production. In MY 2024/25 winter barley production is in good condition

and production is expected to increase to 7.05 MMT, due to good growing conditions and a modest increase in the area harvested.

Consumption

In MY 2024/25 FSI consumption is down, as part of a continuing trend of decreased demand in the brewing, malting and distilling sectors as consumption of derived products (alcoholic beverages) continues to decline. Malting premiums have also decreased to minimal levels. Lower premiums for barley in malting and brewing in MY 2024/25 has led to increased usage of barley as a feed ingredient, particularly in compound feed. On farm feed usage has also increased due to barley's ready availability.

Trade

Barley exports in MY 2024/25 declined compared to MY 2023/24. However, exports are expected to partially recover in MY 2025/26. Imports in MY 2025/26 are expected to decline further from MY 2024/25 as the brewing, malting and distilled sectors continue to adjust to changes in consumer demand. Barley exports are anticipated to recover in 2025/26 to 650,000 MT as other sources of demand offset this decrease.

Stocks

Going into MY 2025/26, there is expected to be an increase in beginning stocks, despite a tight supply and a drop in exports, largely resulting from a stronger pound, in MY 2024/25.

Table 3.

Production, Supply and Distribution - Oats

Oats	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Jul 2023**		**Jul 2024**		**Jul 2025**	
United Kingdom	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	167	167	200	200	0	190
Beginning Stocks (1000 MT)	140	140	124	124	0	220
Production (1000 MT)	830	830	1000	940	0	900
MY Imports (1000 MT)	16	16	15	14	0	15
TY Imports (1000 MT)	15	15	15	14	0	15
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	986	986	1139	1078	0	1135
MY Exports (1000 MT)	116	116	60	28	0	55

TY Exports (1000 MT)	95	95	75	50	0	55
Feed and Residual (1000 MT)	215	215	350	320	0	290
FSI Consumption (1000 MT)	531	531	535	510	0	525
Total Consumption (1000 MT)	746	746	885	830	0	815
Ending Stocks (1000 MT)	124	124	194	220	0	265
Total Distribution (1000 MT)	986	986	1139	1078	0	1135
Yield (MT/HA)	4.9701	4.9701	5	5	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Oats begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

Production

In MY 2025/26 oat production is forecast to be 900,000 MT, settling slightly below MY 2024/25 levels. In MY 2024/25, oat supplies outstripped demand, leading to an increase in stocks estimated at 220,000 MT. Winter oats have seen normal growth in MY 2024/25, similar to MY 2023/24, and are in good condition with yields expected to be slightly higher in MY 2024/25.

Consumption

Oat usage for feed is expected to be slightly higher in MY 2025/26 and 2024/25, due to increased use in compound feed and on farm feed usage. A small decrease is expected for FSI due to a slight decrease in usage by oat millers. Consumer demand is expected to remain stable and food use is not expected to increase in MY 2024/25.

Imports are expected to be relatively unchanged in MY 2024/25. Exports have been particularly low, and 220,000 MT of this year's crop is expected to be carried over in ending stocks, significantly higher than beginning stocks.

Table 4.

Production, Supply and Distribution - Corn

Corn	**2023/2024**		**2024/2025**		**2025/2026**	
Market Year Begins	**Jul 2023**		**Jul 2024**		**Jul 2025**	
United Kingdom	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**

Area Harvested (1000 HA)	8	8	8	8	0	6
Beginning Stocks (1000 MT)	145	145	203	203	0	240
Production (1000 MT)	25	25	25	25	0	20
MY Imports (1000 MT)	2650	2650	2550	2750	0	2680
TY Imports (1000 MT)	2756	2756	2550	2700	0	2680
TY Imp. from U.S. (1000 MT)	88	88	0	427	0	100
Total Supply (1000 MT)	2820	2820	2778	2978	0	2940
MY Exports (1000 MT)	167	167	125	158	0	170
TY Exports (1000 MT)	155	155	125	140	0	170
Feed and Residual (1000 MT)	1500	1500	1550	1600	0	1480
FSI Consumption (1000 MT)	950	950	900	980	0	960
Total Consumption (1000 MT)	2450	2450	2450	2580	0	2440
Ending Stocks (1000 MT)	203	203	203	240	0	330
Total Distribution (1000 MT)	2820	2820	2778	2978	0	2940
Yield (MT/HA)	3.125	3.125	3.125	3.125	0	3.125

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

Corn supply is expected to decrease to 2.94 MMT in MY 2025/26, slightly down 38,000 MT from MY 2024/25. Ample corn supplies, competitive prices and large carryovers are reflective of global markets for corn in 2024/25. In MY 2025/26, industrial use of corn for bioethanol production is expected to decline, substituted by feed use, as prices are expected to increase – as corn remains relatively affordable compared to other feed inputs. In the UK, competitive prices for ethanol in MY 2024/25 resulted in increased industrial use of corn for bioethanol production. In MY 2024/25 corn feed use is up with imports being used for on-farm and compound feed. This has resulted in an overall increased level of imports for MY 2024/25, despite imports slowing down in the second half of MY 2024/25. Strong imports, due to low global prices, in the first half of MY 2024/25 resulted in persistent use of higher corn volumes in compound feed use throughout the MY 2024/25 season. Demand for corn for feed use is concentrated in the North of England and Northern Ireland in MY 2024/25.

Table 5.

Production, Supply and Distribution - Rice

Rice, Milled	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	22	22	13	13	0	28
Milled Production (1000 MT)	0	0	0	0	0	0
Rough Production (1000 MT)	0	0	0	0	0	0
Milling Rate (.9999) (1000 MT)	6940	6940	6940	6940	0	6940
MY Imports (1000 MT)	636	636	675	625	0	630
TY Imports (1000 MT)	682	682	675	650	0	630
TY Imp. from U.S. (1000 MT)	19	19	0	11	0	15
Total Supply (1000 MT)	658	658	688	638	0	658
MY Exports (1000 MT)	30	30	35	20	0	25
TY Exports (1000 MT)	31	31	35	28	0	25
Consumption and Residual (1000 MT)	615	615	625	590	0	618
Ending Stocks (1000 MT)	13	13	28	28	0	15
Total Distribution (1000 MT)	658	658	688	638	0	658
Yield (Rough) (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2024/2025 = January 2025 - December 2025

In MY 2025/26 rice supplies are expected to rise to 658,000 MT following a slight decline in MY 2024/25. This returns to a long-term trend of sustained incremental growth. Imports in MY 2024/25, have been increasing but are expected to settle around 625,000 MT. In MY 2025/26 a modest increase in carryover stocks to 28,000 MT is a result of a slight decrease in consumption in MY 2024/25. Rice prices continue to be relatively low in the UK, especially due to low import prices for basmati and other fragrant rice prices from south and southeast Asia. An ample supply from India in MY 2024/25, has contributed to keeping prices low for UK milled rice. As the UK is wholly reliant on imports of rice for

use in its milling sector, it is particularly exposed to changes in trade policies and global markets. Global rice production is expected to increase slightly for MY 2024/25. Trade policies including import tariffs may affect UK prices, which may see an increased volume available from rice producing countries under the Comprehensive and Progressive Trans-Pacific Partnership which came into effect in December 2024.

Table 6.

Production, Supply and Distribution – Mixed Grain

Mixed Grain	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	60	60	60	60	0	60
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	230	230	180	180	0	195
MY Imports (1000 MT)	0	0	0	0	0	0
TY Imports (1000 MT)	0	0	0	0	0	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	230	230	180	180	0	195
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	230	230	180	180	0	195
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	230	230	180	180	0	195
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	230	230	180	180	0	195
Yield (MT/HA)	3.8333	3.8333	3	3	0	3

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Mixed Grain begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

Table 7.

Production, Supply and Distribution - Rye

Rye	2023/2024		2024/2025		2025/2026	
Market Year Begins	**Jul 2023**		**Jul 2024**		**Jul 2025**	
United Kingdom	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Area Harvested (1000 HA)	5	5	5	5	0	5
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	30	30	20	23	0	25
MY Imports (1000 MT)	5	5	10	11	0	10
TY Imports (1000 MT)	7	7	10	11	0	10
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	35	35	30	34	0	35
MY Exports (1000 MT)	0	0	0	3	0	5
TY Exports (1000 MT)	0	0	0	3	0	0
Feed and Residual (1000 MT)	35	35	30	31	0	30
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	35	35	30	31	0	30
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	35	35	30	34	0	35
Yield (MT/HA)	6	6	4	4.6	0	4

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rye begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

Table 8.

Production, Supply and Distribution - Sorghum

Sorghum	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	14	14	15	8	0	15
TY Imports (1000 MT)	12	12	15	8	0	15
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	14	14	15	8	0	15
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	14	14	15	8	0	15
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	14	14	15	8	0	15
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	14	14	15	8	0	15
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Sorghum begins in October for all countries. TY 2024/2025 = October 2024 - September 2025

Policy

In MY 2025/26, a number of prominent UK government decisions may affect the outlook for the grain sector. The government's Autumn Statement (October 30, 2024) announcing a partial removal of agricultural property relief and business property relief could potentially lead to a decrease in farmer's cash flow. This combined with low wheat prices, may cause some producers to sell production early in MY 2025/26. This may particularly be the case for old crop which has been stored as prices remain low.

The imposition of tariffs in other countries may see some trade diversion towards the UK through the end of MY 2024/25 and MY 2025/26, particularly for grain commodities where the UK has low tariffs or tariff-free access, leading to continued lower prices for the UK market for some commodities. The UK is a net importer of grains, and this is even more so the case in MY 2024/25, meaning the global trading environment may have a more significant impact on the UK supply, prices and export potential. The UK continues to apply the UK Global tariff, and has not made any changes set to affect the grain market, aside from the suspension of the tariff for wheat gluten and corn gluten, which is set to continue through beyond MY 2025/26.

Domestic UK policy changes in MY 2024/25 may lead to some longer-term effects on UK production, likely starting in MY 2025/26, however there is uncertainty around the extent of this impact. Recent changes to inheritance tax, specifically the partial removal of Agricultural Property Relief, may result in increased transfers of agricultural land. In response to this change, among other pressures faced by farmers, some British farmers are refusing to supply milling wheat in protest. This is expected to affect the availability of flour and derived products for the tail end of MY 2024/25 and may persist into MY 2025/26.

In March 2025, the UK paused applications for its flagship Sustainable Farming Incentive Scheme due to a lack of funds. The abrupt pause resulted in many farmers not being able to apply for these environmental scheme payments, which they are increasingly dependent on, following the progressive withdrawal of direct income support as part of the UK's post-Brexit Agricultural Transition. This does not seem to have disproportionately affected the grains sector and impacts for MY 2024/25 may be limited. However, in MY 2025/26, due to a drop in government support available for putting land towards exclusively environmental benefits, the area used for grain production may increase as farmers look to maximize incomes from production outside of government support. The extent of this remains to be seen, as other crops such as oilseeds may see a more significant impact from this, dampening the effect on grain production.

The UK is progressing with its Precision Breeding legislation (see FAS GAIN report here), applicable in England. This is expected to allow new gene editing techniques to be used to develop improved crop varieties, including grains. There have been multiple applications submitted relevant for the sector, the first authorizations of these are expected in early MY 2025/26, and commercialization may begin shortly after.

Attachments:

No Attachments