



UK wheat briefing – 23 September 2026

Exceptionally dry and hot conditions during spring and summer 2026 significantly limited UK wheat yields, resulting in a third consecutive year of low production. The small domestic crop, together with disruption to Russian and Ukrainian wheat exports, has contributed to higher UK wheat prices. The conflicts in Russia-Ukraine and the Middle East have also increased uncertainty across international grain, energy and fertiliser markets, adding to the cost and risk of wheat production.

This note and supporting charts provide an overview of the key factors:

- Production estimates for the 2026 UK wheat harvest indicate a crop size of 11.6 Mt. If realised, this will be the third consecutive year of sub-12Mt wheat production, down 14% on the 10-year average (2016 to 2025). This reflects the ongoing decline in UK wheat production due to a small crop area and below-average yields^{1,2,3} (**Figure A**).
- Fortunately, although 2026 production is poor, milling wheat functionality is reportedly good and the availability of wheat meeting milling industry quality requirements is expected to be sufficient.
- Since July, UK feed wheat futures (November 2026 delivery) have risen significantly by 17%, equivalent to an increase of £31.50 / tonne⁴ (**Figure B**).
- The rise in UK wheat price has been driven in part by concerns over the small UK wheat crop and by geopolitical uncertainty affecting the global supply of wheat. Attacks on grain export infrastructure and commercial shipping in the Black Sea have disrupted Russian and Ukrainian exports and increased freight, insurance and supply risks. Although the overall global wheat outlook remains relatively well supplied, Russia and Ukraine typically account for a significant proportion of global wheat trade. Disruption in the region therefore provides significant support to global wheat prices.
- Wider input costs are also challenging. Fertiliser (**Figure C**) and fuel (**Figure D**) prices^{5,6} remain elevated due to disruption to production and trade from the conflict in the Middle East. This adds significant cost to wheat production and if input costs remain elevated there may be farmers that will reduce investment in inputs, depressing 2027 crop yields and production as a result. Milling wheat is particularly affected by rises in fertiliser prices as the crop requires a higher level of nitrogen fertiliser addition than feed wheat.

References

1. [Defra official agricultural statistics](#)
2. [AHDB planting and variety survey 2026](#)
3. [AHDB harvest progress report 2026](#)
4. [AHDB futures price data](#)
5. [AHDB fertiliser price data](#)
6. [DESNZ road fuels and petroleum product price data](#)

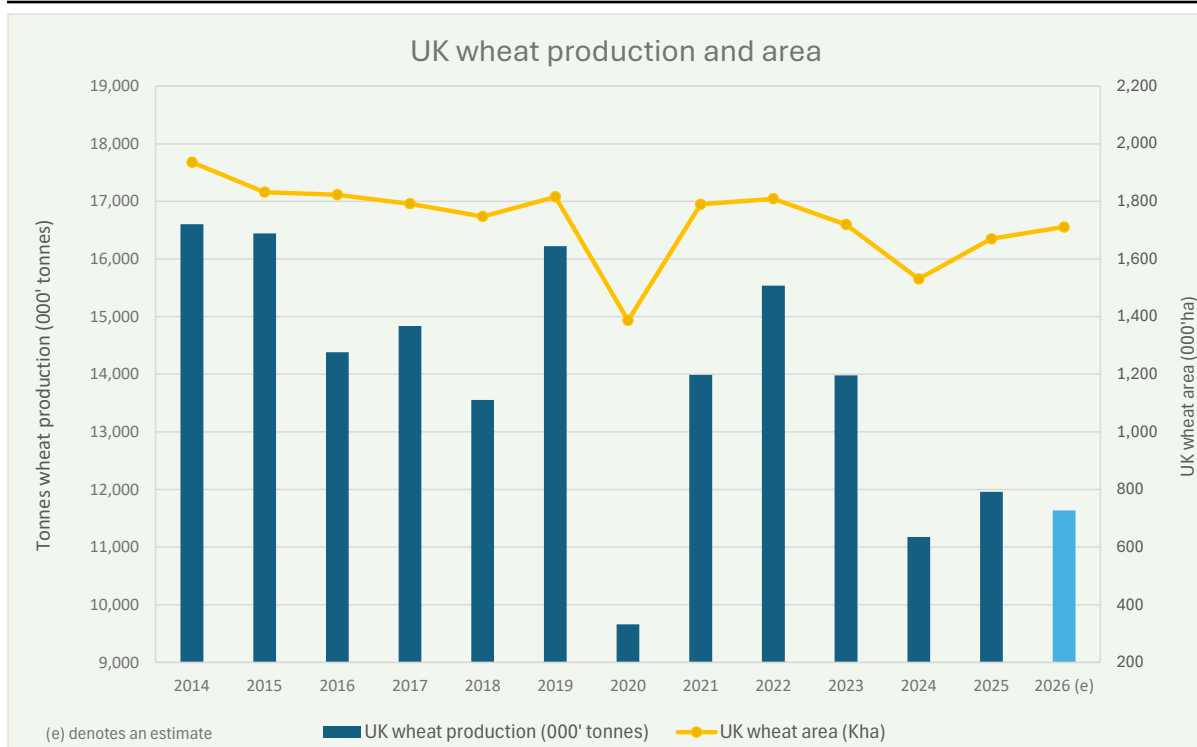


Figure A. UK wheat production figures. Data to 2025 are from the official Defra agricultural statistics¹. The 2026 production figure is an estimate based on the AHDB Planting and Variety Survey² wheat area of 1.711 million hectares and AHDB Harvest Progress Survey 2026³ average wheat yield of 6.8 tonnes / hectare.

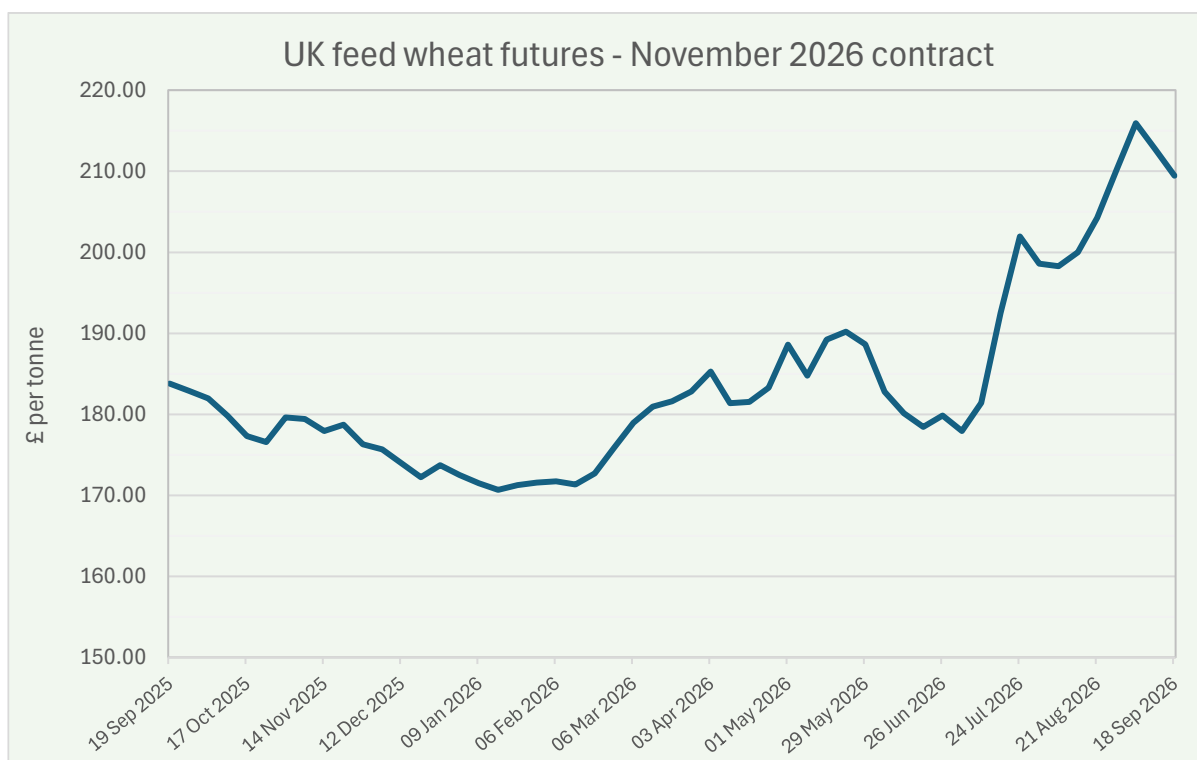


Figure B. UK feed wheat futures prices for November 2026 delivery, weekly. Source: AHDB price data⁴. Accessed: 21/09/2026.

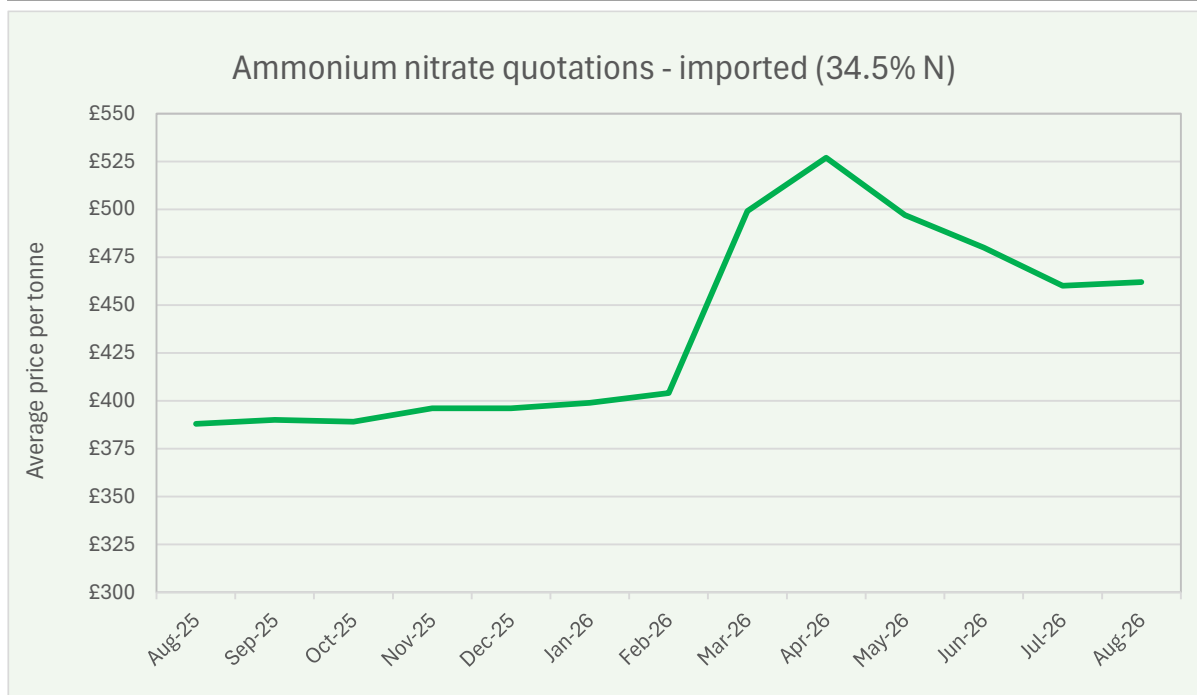


Figure C. Imported ammonium nitrate average monthly price. Data to August 2026.

Data source: AHDB⁵. Accessed: 21/09/2026.

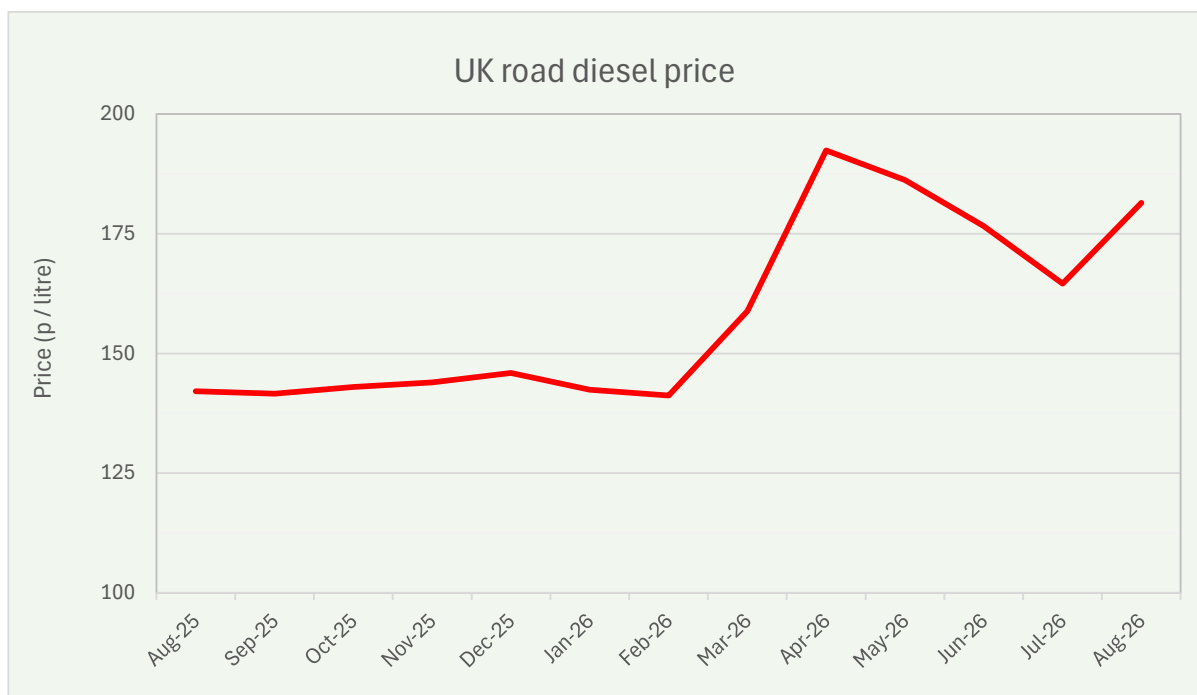


Figure D. UK road diesel representative national price. Includes duty and VAT. Data to August 2026.

Data source: Department for Energy Security and Net Zero (DESNZ)⁶. Accessed: 21/09/2026.