

UK breadmaking wheat production prospects – harvest 2025

Within the past five years there have been two significantly challenging UK wheat harvests, delivering small wheat crops. These harvests, whilst challenging in of themselves, have also masked a decline in UK wheat area and production. For milling wheat, this contraction is exacerbated by a decrease in popularity of Group 1 wheat varieties, which form the backbone of UK breadmaking flour.

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

- The Agriculture and Horticulture Development Board (AHDB) Planting and Variety Survey¹ has estimated the 2025 UK total wheat area at 1.62 million hectares. Whilst an increase on 2024, this is 102,000 hectares lower than the average of the past ten-years, reflecting the ongoing reduction in UK wheat area (**Figure 1**).
- The share of Group 1 breadmaking wheat varieties, which make up the majority of UK flour miller homegrown wheat usage, is also in decline. For harvest 2025, the AHDB Planting and Variety Survey¹ indicates just 19% of wheat will be Group 1 varieties, the lowest figure in 10 years (**Figure 2**).
- Using these wheat area and variety data, together with a yield estimate based on the average across the past five years, gives a Group 1 wheat production forecast of just 2.4 million tonnes, the lowest level in over ten years (**Figure 3**). Using the same five-year yield average and the UK total wheat area gives an overall production forecast of 12.6 million tonnes, close to the US Department of Agriculture World Agricultural Supply and Demand Estimate (WASDE) figure of 12.8 million tonnes for the UK².
- The recent production decline has been exacerbated by quality challenges, most notably a steady decrease in the proportion of Group 1 wheat achieving 13% protein, the standard specification for breadmaking wheat (**Figure 4**).
 - As reported by AHDB, the dry conditions this season (the driest start to spring on record in the UK) elevates the risk of a low protein crop by restricting nitrogen fertiliser uptake, a key process for achieving high grain protein³. AHDB have issued a warning to growers that late nitrogen applications, which are often used to boost milling wheat protein levels, could be particularly hindered by the dry conditions³.
- Some millers also use Group 2 wheat varieties to produce breadmaking flour. Whilst these varieties have a less consistent quality than Group 1 wheat and some are only suited for blends, they play an important role in UK milling wheat supply. However, AHDB data indicate the share of these varieties has been in decline since 2023, dropping to just 17% of the wheat area for this harvest¹ and adding to supply concerns.
- The exceptionally poor conditions of the 2020 and 2024 seasons and the impact on domestic wheat production were well documented. This has masked the ongoing decline in UK breadmaking wheat production. Against a backdrop of stable milling industry demand for wheat, this represents a significant erosion of UK food security.

References

1. [AHDB Planting and Variety Survey](#)
2. [USDA WASDE Report – June 2025](#)
3. [AHDB analysis of dry spring impacts on nitrogen fertiliser uptake](#)
4. [Defra agricultural statistics](#)
5. [AHDB Cereal Quality Survey](#)

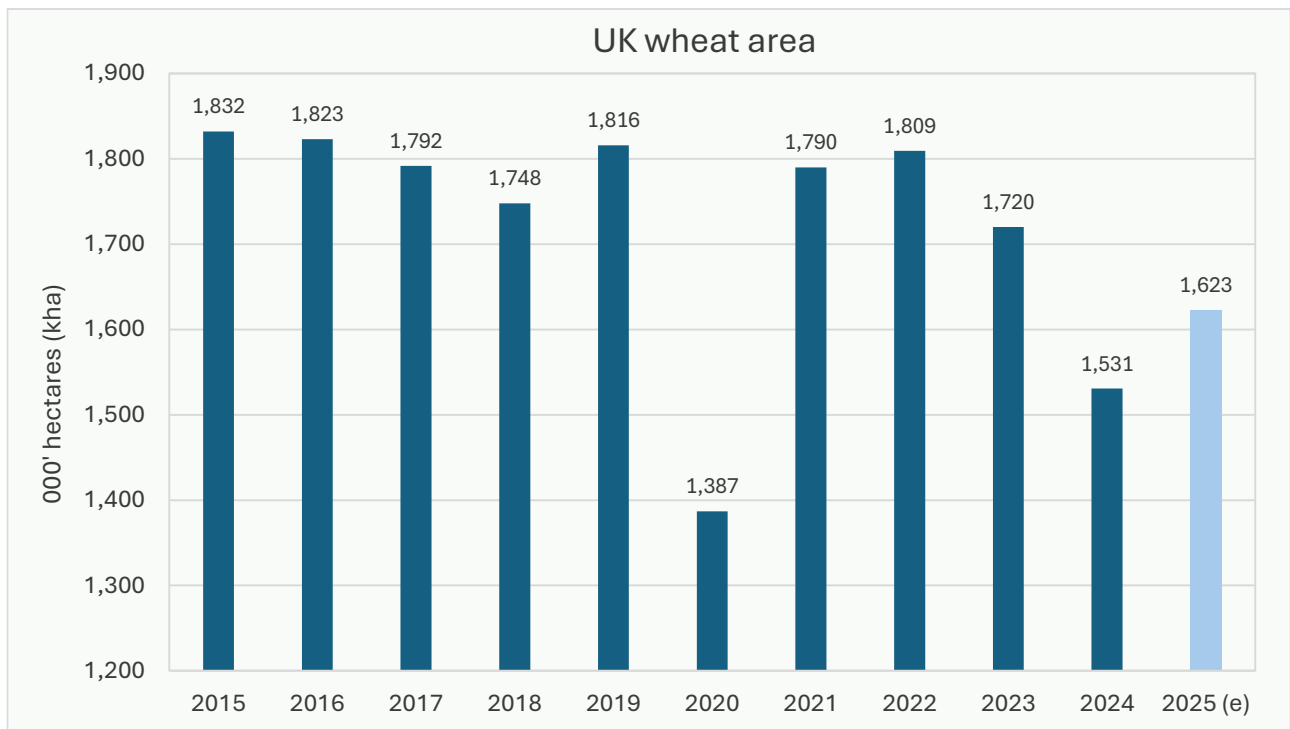


Figure 1. UK wheat area in thousand hectares.

Source: Figures up to 2024 are from Defra agricultural statistics⁴. The 2025 figure is an estimate from the AHDB Planting and Variety Survey data¹.

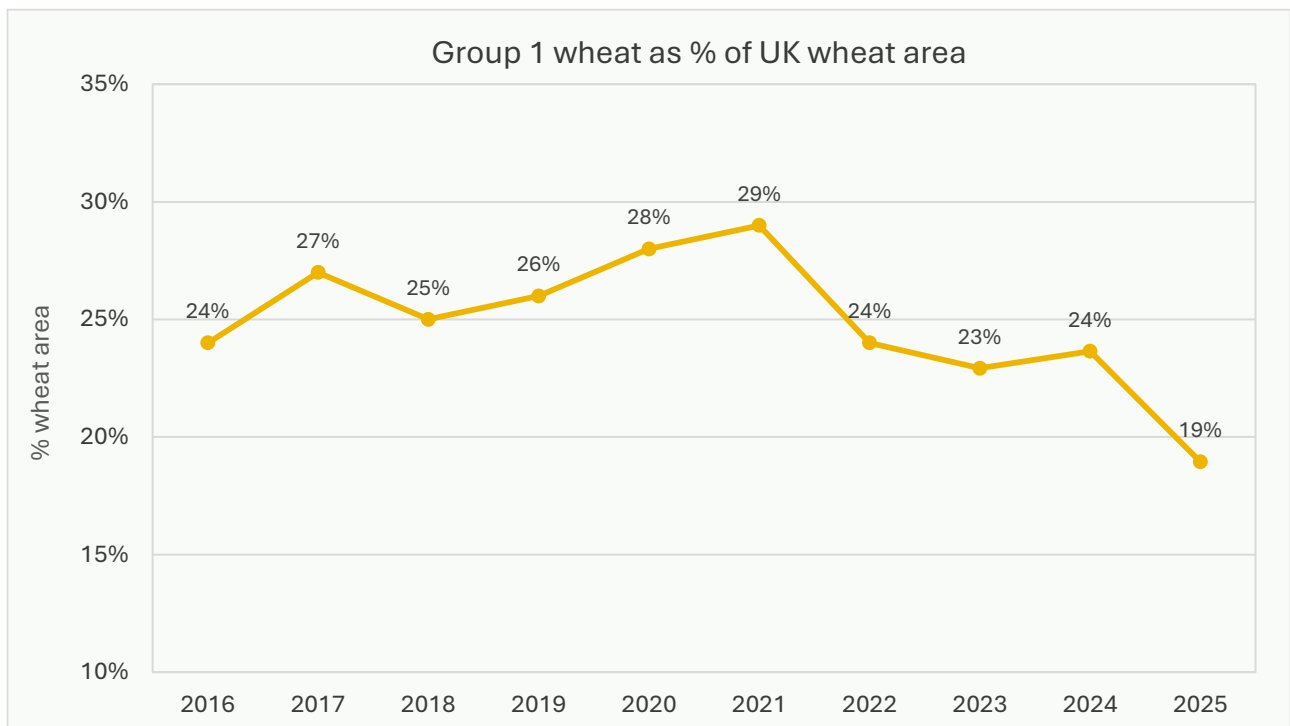


Figure 2. Group 1 wheat varieties as a percentage of total UK wheat area.

Source: AHDB Planting and Variety Survey¹.

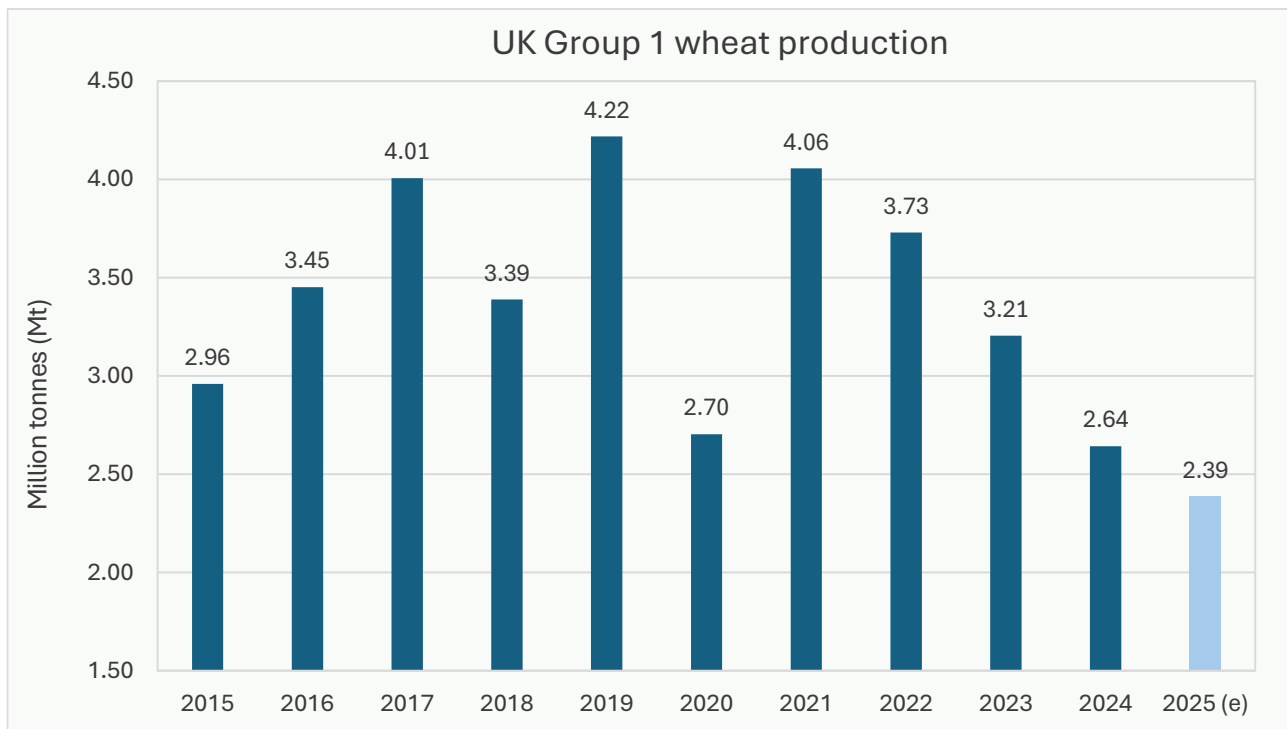


Figure 3. UK Group 1 wheat production, calculated from Defra wheat production statistics³ and the proportion of UK wheat area cropped with Group 1 varieties¹. 2025 UK wheat production figure is an estimate based on the 5-year average production figure and AHDB Planting and Variety Survey wheat area.

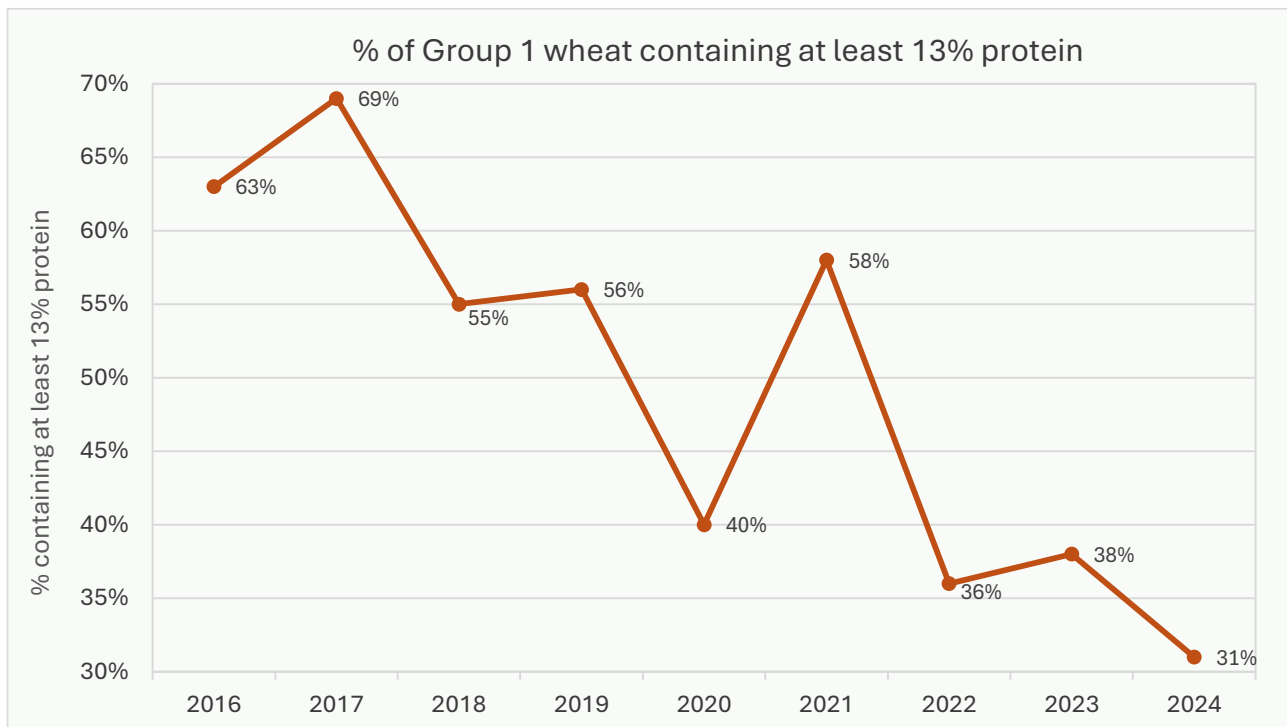


Figure 4. The % of Group 1 wheat containing at least 13% protein.
Data source: AHDB Cereal Quality Survey⁵.