

Land Business Update

Week commencing 19th October 2026

Farming & food

Organic Action Plan for England

The Organic Action Plan for England, which is a joint Defra and organic industry plan aimed at growing the domestic organic market and creating more opportunities for English farmers, has been published. It focuses on three areas:

- Supporting existing and new organic producers and processors;
- Bringing domestic supply more in line with demand; and
- Building demand for English organic products through greater consumer awareness and public sector procurement.

Organic food sales are worth more than £3.9bn a year and rising, and the ambition is to increase the area of land farmed organically from around 3% towards 10% by 2036. The government sees the Plan as linked to / part of the Farming Roadmap, and it also recognises the potential benefits of organic farming for soil health, biodiversity, water quality and animal welfare.

Yields show striking differences between north and south

Defra has published the final results of its large-scale yield survey, which is based on responses from 1,500 farms to the Cereal and Oilseed Rape Production Survey. This is a representative sample of growers across English regions and farm sizes. It is therefore a more reliable sample than some from commercial organisations.

The tables below show yields for 2026, a three-year average for the past three years (2024- 26 harvests), so the ones most recently affected by climate change, and a ten-year 'recent historical' average yield before the past three years (so for the 2014-23 harvests).

For wheat, yields have been much more affected in southern England than in the north and Scotland. (The double horizontal line separates northern from southern England).

Wheat Yields (t/ha)	2026	2024 to 2026 3-year average	2014 to 2023 10-year average	2026 % change from 10 yr ave	2024-26 % change from 10 yr ave
North East	8.4	7.6	8.2	2%	-8%
North West & Mersey	6.5	6.3	5.9	10%	6%
Yorkshire & The Humber	8.2	7.7	8.3	-2%	-7%
East Midlands	7.4	7.1	8.2	-9%	-13%
West Midlands	6.6	6.5	7.7	-14%	-15%
Eastern	7.0	7.3	8.4	-17%	-14%
South East and London	6.7	7.1	8.3	-19%	-15%
South West	6.6	6.7	7.9	-16%	-15%
England	7.2	7.1	8.2	-12%	-13%
Wales	Not available	6.5	7.4	-	-13%
Scotland	Not available	9.0	8.6	-	4%



Winter barley appears slightly less affected by climate change, although yields have still been significantly reduced. There is a smaller north-south difference, with yields in most regions lower than they have been historically. However, again, yields in Scotland are higher than in the 2014-23 period.

Winter barley Yields (t/ha)	2026	2024 to 2026 3-year average	2014 to 2023 10-year average	2026 % change from 10 yr ave	2024-26 % change from 10 yr ave
North East	7.5	6.6	7.1	5%	-8%
North West & Mersey	5.6	5.6	6.2	-10%	-9%
Yorkshire & The Humber	7.3	6.9	7.4	-2%	-7%
East Midlands	7.0	6.7	6.7	5%	0%
West Midlands	6.5	6.0	6.6	-2%	-9%
Eastern	6.0	6.4	7.0	-13%	-7%
South East and London	5.7	5.8	6.9	-17%	-16%
South West	6.5	6.4	6.9	-5%	-7%
England	6.6	6.5	7.0	-5%	-7%
Wales	Not available	6.0	6.7	-	-10%
Scotland	Not available	8.0	7.6	-	6%

Oilseed rape has been the least affected of the main crops, with high yields across most regions this year. Although the three-year averages remain close to the 10-year historical averages, there are signs of the north and Scotland again faring better.

Oilseed rape Yields (t/ha)	2026	2024 to 2026 3-year average	2014 to 2023 10-year average	2026 % change from 10 yr ave	2024-26 % change from 10 yr ave
North East	4.4	3.4	3.6	20%	-5%
North West & Mersey	4.0	3.4	3.1	28%	7%
Yorkshire & The Humber	4.2	3.6	3.6	15%	1%
East Midlands	3.7	3.2	3.3	12%	-2%
West Midlands	4.0	3.4	3.5	14%	-2%
Eastern	3.5	3.3	3.4	4%	-2%
South East and London	3.5	3.2	3.1	12%	5%
South West	3.6	3.2	3.1	13%	2%
England	3.8	3.4	3.3	12%	0%
Wales	Not available	3.1	3.4	-	-10%
Scotland	Not available	4.1	3.9	-	5%

NB To standardise the data, the yields are only adjusted for farms which have reported moisture content above 14.5% for cereals and 9.0% for oilseed rape.

SFI26 Window 2 'exception groups' extended



Defra has previously said it would allow two small 'exception groups', who contacted the RPA before Window 2 closed, to continue with their applications. One is 'assisted digital' farmers, who need the RPA to complete an application on their behalf. The other 'technical issue' farmer group, which included those who had 'started but not submitted' (SNS) an application before Window 2 closed and were prevented from applying because of a technical issue with the application service. The second group has been extended to include:

- A small number of additional SNS farmers who reported valid technical issues up to a week after Window 2 closed (so by 11:59pm on 29 September 2026).



- Farmers who (i) submitted applications affected by a valid technical issue before Window 2 closed on 22 September; and (ii) reported that valid technical issue up to one week after Window 2 closed (by 11:59pm on 29 September 2026). They will be allowed to amend their submitted applications to include elements which the system should have allowed them to apply for under the scheme rules.

Applicants who reported issues after the above deadline will not qualify for the exception group. Defra has also said that applications where actions were correctly excluded by the RPA system, for example due to combinations of ineligible actions, will not be considered as a technical issue exception. Please contact your local farming team if you would like to discuss an application or whether you qualify as an exceptional case.

Farms and rooftop solar

At a time when electricity prices for businesses remain volatile, rooftop solar is a proven way of helping farming businesses to lower energy costs and potentially generate income from surplus power. But the success of a project depends on getting the fundamentals right: choosing the right-sized system, making sure you are on the most appropriate tariff, and exploring the full range of opportunities for how it should be funded. The economics of projects varies; a project recently completed for a client paid back the capital investment in under four years. Please contact [Anthony Field](#) if you would like to discuss renewable energy projects.

Natural capital & environment

Latest Living Planet Index shows 50% of wildlife populations in decline

The latest report from the World Wildlife Fund shows that 50% of the wildlife populations that were included in the study, across the globe, were in decline; 43% were increasing and the remaining 7% were stable. There are differences between groups, with amphibian populations most likely to be declining (57% of populations) and reptiles the least (45%). Across all of the 5,790 species included, the average change in their abundance (or numbers) is a 73% fall since 1970, which is extremely concerning. NB The data includes mammals, birds, reptiles, amphibians, and fish; it doesn't yet include invertebrates or plants.

Separately but linked, over 130 businesses and financial institutions, including BNP Paribas Asset Management, which is part of our Group, have called on governments to reform the fiscal and financial incentives that currently impact nature, distort markets and threaten long-term economic and supply chain security. The businesses say that at least \$2.6 trillion a year of public spending, which is ~ 2.5% of global GDP, unintentionally rewards practices that deplete the soils, water and ecosystems which support global trade.

Rural economy & property

Good fruit, tougher market: our vineyard survey highlights commercial pressures

We are passionate about wine and supporting the viticulture sector in Great Britain. We have worked with many businesses over the past twenty-five years and seen the sector grow. Given that growth, and some of the challenges that we have seen recently, we carried out a survey to produce a dynamic picture of the state of the UK vineyard sector, with support from Stephen Skelton MV of EnglishWines, Vinescapes, and Plumpton College. The full survey findings are available on our Rural Hub [here](#). The findings underscore the importance of businesses having clear marketing and sales strategies, which drive brand awareness and create opportunities for higher margin sales. Please contact [Nick Watson](#), our head of viticulture and private client, if you would like to discuss the survey, viticulture or wine.

Regulatory regime planned for the heating oil market

Heating oil prices have more than doubled to around £1.10/litre. Unlike electricity and gas prices and markets, the heating oil market is largely unregulated. The government says it will consider how to promote competition and customer redress, as recommended by the CMA. The regulations are like to cover England, Scotland and Wales only as Ofgem only covers the three countries; the UK government will engage with the Northern Ireland Executive, where around 60% of households use oil.

New flood performance certificates (FPCs) to aid homeowners

This pilot project is designed to provide homeowners (and buyers) with clear information about their property's flood risk and resilience, with standardised data and metrics, similar to those for energy performance certificates. It is being developed with the insurance body Flood Re. The pilot will start this year in flood prone areas with a roll out to more pilot areas in 2027. It will draw on



flood risk information already available through the 'Check Your Flood Risk' service, which covers risks such as rivers and surface water. By 2050 a quarter of homes are estimated to be at risk from flooding. Separately, the new Flood and Drought Resilience Taskforce has met, which includes representatives from more than 50 organisations, including the Environment Agency, Met Office, Mayoral authorities, the Fire and Rescue Services, and the farming, water and insurance industry.

Contacts



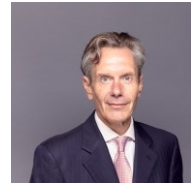
Jason BEEDELL
Head of Research

*jason.beedell@
struttandparker.com*



Natalie GAIBANI
Head of Farming

*natalie.gaibani@
struttandparker.com*



Nick WATSON
Head of Private
Client

*nicholas.watson@
struttandparker.com*

© BNP PARIBAS REAL ESTATE ADVISORY & PROPERTY MANAGEMENT UK LIMITED. ALL RIGHTS RESERVED. No part of this publication may be reproduced or transmitted in any form without prior written consent by Strutt & Parker. The information contained herein is general in nature and is not intended, and should not be construed, as professional advice or opinion provided to the user, nor as a recommendation of any particular approach. It is based on material that we believe to be reliable. While every effort has been made to ensure its accuracy, we cannot offer any warranty that it contains no factual errors. The information contained herein should therefore not be relied upon for any purpose unless otherwise agreed with Strutt & Parker and Strutt & Parker shall have no liability in respect of the same. Strutt & Parker is a trading style of BNP Paribas Real Estate Advisory & Property Management UK Limited, a private limited company registered in England and Wales (with registered number 4176965) and whose registered office address is at 10 Harewood Avenue, London NW1 6AA.