ANALYSIS

When the grass isn't greener: the impact of drought on grass growth

Summary

- **Grass growth across the UK has fallen sharply during July 2026.** In the week ending 31 July, growth averaged 28 kg of dry matter per hectare per day (kg DM/ha/day), **46% below the 2019-24 average** for the same period.

- Across the last three weeks of available data, **grass growth has run 43% below** the 2019-24 average.

- **The collapse is recent**. Cumulative growth to the end of June stood at 5,820 kg DM/ha, or 97% of the 2019-24 average for the same weeks and was running ahead of the 2025 drought year. Weekly growth then fell from 94% of the average in the week ending 3 July to 63% a week later.

- Applying scenario projections to the remainder of the season (to 6 November), **the 2026 season is likely to end up between 77% and 86% of the 2019-24 average**, with a central case of 81%.

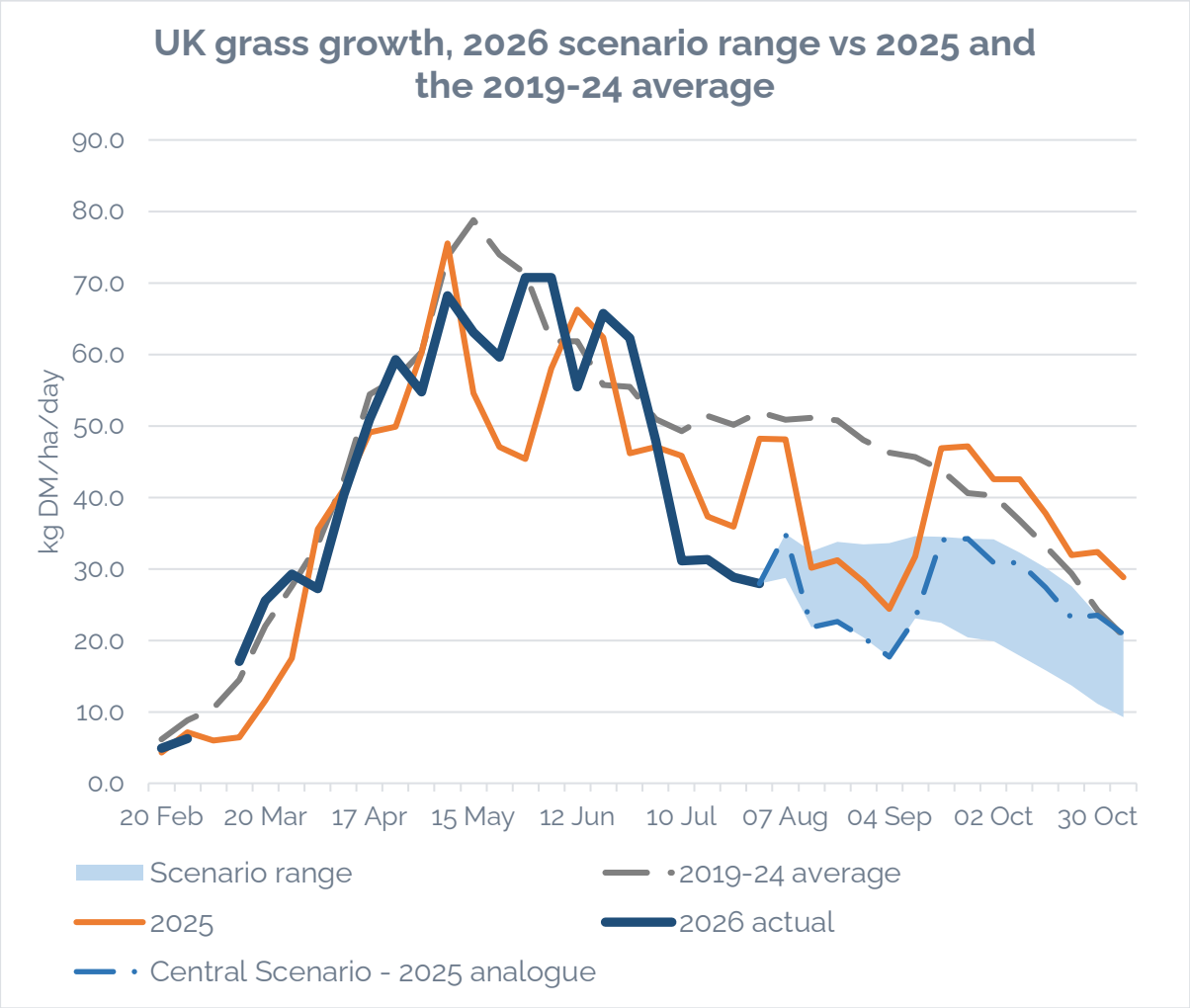
- Even in an optimistic scenario where growth rates increase to season end, **it is unlikely that the 2026 season will improve on the 2025 season**, itself historically bad for yields (87% of the average).

- Livestock farmers are facing a **second consecutive short forage year**, placing additional pressure on winter stocks.

Grass growth in the UK: historic comparison

By some estimations, 75–90% of what UK cattle and sheep eat, by dry matter, is grass and forage — 80% for beef, 90% for sheep, 75% for dairy. This emphases the important role that grass plays in sustaining the UK's livestock industry. The following graph plots surveyed grass growth in the UK from February to November. It shows the average

growth rate of 2019-24, the 2025 growth rate, and 2026 year-to-date. A range of scenarios were created to project the potential growth rates for 2026 to the end of the season.[1]



[1] See methodology for more details.

Average UK grass growth totals (kg DM/ha, 20 Feb – 6 Nov, 2019-26)

Series	Average UK yield (kg DM/ha)	% of 2019-24 average	Gap vs 2019-24 average (kg DM/ha)	% of 2025	Gap vs 2025 actual (kg DM/ha)
2019-24 average	11,717	100%	—	115%	1,526
2025 actual	10,191	87%	-1,526	100%	—
2026 central scenario	9,547	81%	-2,169	94%	-643
2026 optimistic	10,030	86%	-1,687	98%	-161
2026 pessimistic	9,017	77%	-2,700	88%	-1,174
2026 no-recovery	9,245	79%	-2,472	91%	-946

Source: AHDB Forage for Knowledge weekly UK grass growth series; ECIU scenario projections to 6 November 2026. Percentages calculated from unrounded totals and rounded to the nearest whole number.

The impact of weather on grass growth

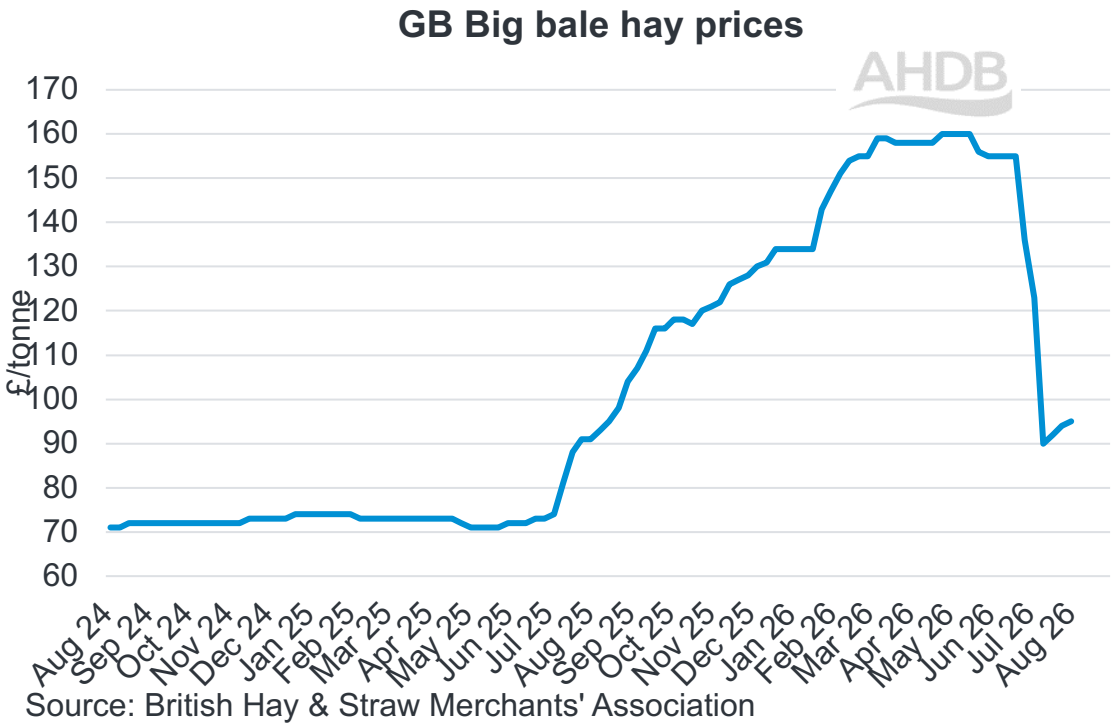
The primary cause of low growth is soil moisture. In the week ending 21 July 2026, less than 1mm of rain fell across England, taking month-to-date rainfall to 3% of the long-term average for the month. Soil moisture deficits reached record levels for the time of year across north-east, central, south-east and south-west England, and only one-sixth of river flow indicator sites were classed as normal for the time of year. AHDB reported that UK soil moisture at the end of June was the driest on record. By mid-July, reservoir storage in England had fallen to 78.8%, around 5 percentage points below the long-term average for the time of year.

The impact of grass growth on farms

Salmoral et al. (2020) found drought impacts centre on feed and fodder availability, animal productivity and welfare, farm economics and farmer wellbeing, with strong interdependencies between them. The study identified three main coping strategies:

managing available grazing and feed, selling livestock to reduce feed demand and generate income, and buying in additional feed.

Low grass growth can have impacts long after conditions have improved. A year after the 2018 drought, two-thirds of surveyed livestock farmers were still experiencing or expecting a forage shortage; of those, two-thirds had needed to buy in fodder and half had sold off livestock. Low growth also impacts hay prices, with the 2025 drought correlating with a marked increase in hay prices in Great Britain.



Source: British Hay & Straw Merchants' Association

Financial costs can quickly accumulate. A 2018 assessment by the Scottish Government of the impact of unfavourable harvest conditions estimated that an average 110-cow upland suckler herd incurred around £8,000 in additional costs from extended housing and higher straw prices, equivalent to a potential 19% reduction in beef enterprise gross margin. The same work put the cost to Scotland's livestock sector at around £5 million for every additional week that stock was housed.

Impacts can be seen in outputs that are heavily reliant on forage as an input. Recent ECIU analysis found that milk deliveries in the UK were down 25 million pints over the May and June heatwaves, as reduced forage and heat stress impacted dairy cows' ability to produce milk.

The impact of grass growth on food prices

Grass growth affects food prices indirectly, through farm input costs and production volumes rather than through any direct link to shelf prices. Pass-through from the farmgate to the checkout is partial, lagged and difficult to separate from the other drivers of food inflation such as energy, labour, packaging, tax and global commodity markets, and the farmgate share of a typical retail price is small. The effect of a single UK grazing season therefore cannot be quantified with confidence, and nothing in this analysis supports a specific figure for the price impact of the 2026 season. The mechanisms, however, are well established, and the direction of risk is upward.

The first channel is cost. Where grass is short, forage must be replaced with bought-in hay, straw or concentrates, at prices that tend to rise in the conditions that create the shortage. As shown above, AHDB's hay and straw pricing data shows a marked price response to the 2025 drought. Housing stock earlier or for longer adds further cost, as the Scottish Government's 2018 assessment illustrates. Those costs land on farm margins first; whether and how quickly any of them reach consumers depends on contract structures and on how much processors and retailers absorb.

The second channel is volume. Reduced forage lowers output directly and lowers it indirectly through lighter carcases, slower lamb and cattle finishing and weaker conception rates. The timing effect cuts both ways: farmers selling stock to cut feed demand can increase throughput and soften prices in the short term, while tightening supply in subsequent seasons. Any price consequence of a poor forage year is as likely to appear in 2027 as in 2026.

The wider price data is consistent with weather-exposed foods driving a disproportionate share of food inflation. ECIU analysis of ONS data found that butter, beef, milk, coffee and chocolate account for around 11% of the average shopping basket but 30–40% of all food price inflation over much of the past two years, with inflation in those five items peaking at 16.0% in July 2025 against 2.6% for the rest of the basket. Beef inflation reached almost 28% by November 2025 on tight supply.

Recent movements caution against over-reading the food price impact of a single season. Deadweight cattle prices have eased since the start of 2026 and some retail dairy prices, notably butter, have softened on lower wholesale values, with AHDB expecting cheese and pig meat to follow in the second half of the year. A second consecutive short forage year is best framed as a risk factor that raises the probability of renewed pressure on beef, lamb and dairy prices, rather than as a forecast of immediate price increases on supermarket shelves.

Case Studies

The following are a selection of case studies from farmers during the 2026 summer, to illustrate the live impacts of reduced grass growth on operations.

Holly Purdey, Exmoor, Somerset

Holly has seen no regrowth on her hay fields, which limits her grazing rotations and means she cannot wean lambs onto them as she normally would. She expects a significant number of farmers in the Exmoor area to have to start feeding hay during the summer, and says anyone taking a second cut of forage has no chance of doing so this year. Long swards have provided some buffer, but after a prolonged period without rain there is next to no recovery left in them. Her only natural water source has dried up and her water bill has risen sharply as livestock drink more. Reduced ewe milk yields and poorer grass quality have checked lamb growth, with lambs taking more milk off their mothers than is usual at this point in the season; ewe body condition is falling as a result, which Holly expects to affect conception rates at tupping (breeding season), as it did in 2025. Because she is drawing down the grazing she would normally defer for later in the year, she also anticipates feeding hay for longer over the winter.

Jo Coates, Yorkshire Dales

Jo runs an upland beef farm on a rotational system and installed a water bladder in January 2026 after running out of water during the 2025 drought — a problem also faced a few years earlier, and one shared by neighbouring farms. The investment has allowed her to keep moving cattle this summer (in 2025 several fields were unusable because stock could not be watered on them). Grass growth has now slowed significantly, and, on a smaller holding, grazing options are running short as cattle are moved to avoid overgrazing. Water security and winter forage are her principal concerns. Trees planted on the farm are also under stress, with no means of getting water to them.

Sam Kenyon, Denbighshire

Sam works to a field-by-field rotation, moving stock in an adaptive seasonal pattern rather than set stocking or high-intensity mob grazing. This steadier approach makes good use of the farm's shade and shelter from hedges and trees. With this consistent but flexible system, she's seeing the benefits: despite feeding ewes and lambs in July and having no second cut of forage to sell, she reflects that the rotation has still given four to six weeks more grass than if she'd set-stocked the fields.

Rhodri Lloyd-Williams, North Ceredigion

Rhodri is substantially down on silage this year due to poor grass growth. He has removed a field of 26 acres from his grazing rotation and left it ungrazed all summer, in the hope that it will provide enough paddock grazing later in the year to keep cattle out

closer to winter. Boreholes installed in recent years have made a significant difference to water availability, and around 100,000 trees planted on the farm are now providing shade for livestock.

Methodology

This analysis uses the AHDB Forage for Knowledge weekly UK grass growth series, measured in kilogrammes of dry matter per hectare per day (kg DM/ha/day). Three series were used: the 2019-24 six-year average, 2025 actuals, and 2026 actuals to date, each on a common weekly frame running from the week ending 20 February to the week ending 6 November. Weekly dry matter yield is approximated as the daily growth rate multiplied by seven, and season totals are the sum of those weekly yields. There is no 2026 reading for the week ending 6 March, so every series is restricted to the same 37 comparable weeks; all totals and comparisons in this report are therefore like-for-like.

The 2019-24 average is used as the comparison baseline and the basis for projection because it excludes the 2025 drought year. It does, however, still include 2022, so 2026 is being measured against a benchmark that is itself heat-depressed.

The projection is anchored on the most recent actual reading, the week ending 31 July 2026 (27.96 kg DM/ha/day). Current conditions are summarised by a three-week anchor window covering the weeks ending 17, 24 and 31 July, over which 2026 growth averaged 29.4 kg DM/ha/day against 51.2 for the 2019-24 average and 40.5 for the same weeks of 2025. That gives a measured current position of 57.4% of the 2019-24 average, and a 2025-analogue scale factor of 0.726.

Four scenarios were run. All four use the actual 2026 readings up to and including 31 July and diverge only over the remaining fourteen weeks:

Central case (2025 recovery analogue). Each remaining week replays the actual 2025 growth rate for the same calendar week, scaled by the 0.726 analogue factor. This preserves the step-shaped late-season recovery observed in 2025 while starting from where 2026 actually stands, and is treated as the central case throughout.

Optimistic. The ratio to the 2019-24 average rises linearly from 57.4% to 100% by the final week, applied to each week's 2019-24 average.

Pessimistic. The same construction, with the ratio falling linearly from 57.4% to 45% by the final week.

No recovery. The current ratio of 57.4% is held flat for all fourteen remaining weeks, applied to each week's 2019-24 average.