



Farmdex Report.

2026





Introduction & Foreword.

One year on from our inaugural Farmdex report, this year's iteration provides important insight into how British farmers are feeling about the future of the industry. While some indicators have improved, the overall picture shows a sector continuing to face significant economic, environmental and operational challenges.

The past year has been a stark reminder of the growing pressures facing British agriculture. It has seen one of the hottest and driest summers on record and farmers across the country have been forced to navigate and adapt to increasingly unpredictable conditions.

This extreme weather coupled with rising input costs and global disruption is making it harder for farmers to plan and invest for the future. These challenges have far-reaching implications for the future of family-run farms, the next generation entering the industry, and Britain's long-term food security.

Yet the findings also reveal reasons for optimism. British farmers continue to demonstrate remarkable determination and adaptability to embrace new approaches. Many see technology, sustainable practices and regenerative agriculture as important tools for improving productivity, strengthening resilience and securing long-term profitability.

As a company founded by farmers, McCain Foods understands that long-term resilience cannot be built by farmers alone. That is why we work side by side with our growers, combining long-term partnerships and investment with agronomy expertise, training and practical on-the-ground support. From launching our Farm of the Future UK earlier this year to help understand, test and showcase regenerative practices, and in turn derisking the transition for farmers, to innovative financial packages and arrangements to support investment in critical infrastructure, our focus is on giving growers the tools and confidence to build stronger, more resilient businesses for the future.

By listening to farmers and working together, we can build a clearer vision for British agriculture, one that recognises food security as national security, drives innovation and skills, strengthens climate and water resilience, and gives farmers a fair environment in which to compete. With greater clarity, stability and support, we can give the next generation confidence in farming's future and build a more resilient and secure food system for decades to come.

James Young,
Vice President Agriculture, McCain Foods GB&I



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Executive Summary.

British farmers: under pressure, but not giving up.

The second year of McCain's Farmdex survey finds an already struggling sector under further pressure after a summer of drought, but despite challenges British farmers remain resilient, and continue to look to the future, calling for urgent change.

The Farmdex Optimism Index, a composite measure of three key metrics, sits at -34%, a four-percentage point improvement on 2025, showing sentiment is similar to last year.

Farmers are particularly concerned about:

The future of farming in Britain

-51% net optimism (+11pp year on year)

The future of their own farm

-24% net optimism (-1pp year on year)

The next generation of farmers

-26% net optimism (+3pp year on year)



These concerns are likely to be influenced by one of the hottest summers on record in 2026, as well as the geopolitical disruption seen in the Middle East. Three quarters (74%) of British farmers agree that increasingly unpredictable weather is making it harder to plan and manage their farm effectively. Additionally, farmers are highly pessimistic about global politics and economics (-74% optimistic score). Rising input costs are the dominant contributor with a vast majority (87%) of farmers agreeing that these have significantly impacted their farm's profitability in the past year.

Given this backdrop farmers are looking to technology and sustainability. A majority of farmers (64%) agree that sustainable practices are essential for the future of farming in Britain. In line with last year, we see that those farmers who have invested in sustainable practices are more optimistic about the future of farming. Furthermore, nearly two-thirds of British farmers (63%) agree that investment in technology is critical for

the future of farming in Britain, but cost is holding them back from investing.

Similar to 2025, farmers want clarity, stability and support. There is a desire for a vision of British farming that:

- Commits to investment that reflects the full value of food and farming, recognising 'food security as national security'
- Supports regenerative practices, technology adoption, and upskilling to protect long-term productivity and strengthen food security
- Secure fair-trade deals that hold imports to the same standards as British produce

Resilience is strong but British farmers require support to enable the next generation, who will determine the future of food security in Britain.



The Farmdex Year Two.

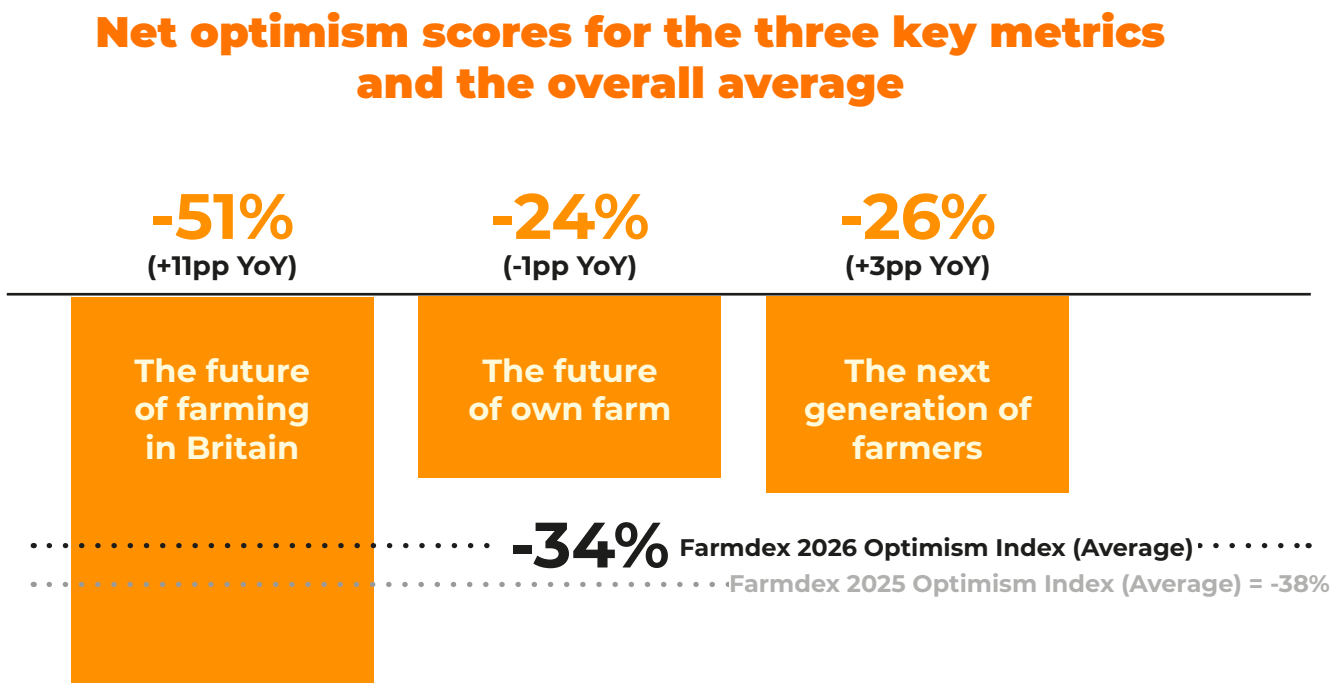
An optimism index, providing annual tracking of the views of British farmers.

This is the second year of our annual Farmdex survey, which provides a platform for farmers to voice their perspectives on the state of the farming industry in Britain today, and share what they see as the priority areas that need to be addressed. The survey responses give us a unique insight into the pressures facing British farmers. This year, we see a variety of domestic and international factors that are having a substantial impact on them as individuals and the industry as a whole.

In our survey, we asked farmers how optimistic or pessimistic they are feeling about the future of British farming, about the future of their own farm, the future generations of farmers, and other variables we know impact them. This data helps us to understand the overall sense of optimism among British farmers today, and how that has changed since last year's Farmdex.

The Farmdex score reveals continuing pessimism: -34% net optimism across our 3 key indicators, just a 4-percentage point improvement on 2025's Index score of -38%, suggesting that pessimism remains consistent year on year.

What is the Farmdex?
A composite measure of British farmers' sentiment on the future of farming, their own farm, and the next generation.



This composite score was calculated by using the net optimism scores for the three key metrics (future of farming, future of their own farm and the future of the next generation) and then finding the average of these 3 scores (Farmdex Optimism Index= (Future of Farming+ Future of Own Farm+ Future of Next Generation) / 3).

Resilience Being Tested.

Farming is facing some of the biggest pressures in modern times, and farmers' resilience is being put to the test.

Half of farmers (51%) are pessimistic about the future of their own farm, with two in five (40%) believing they will be forced to leave the industry in the next 10 years, consistent with 2025.

"Farmers want to get on with farming. They want a fair price for their produce that gives them and their families a reasonable standard of living. They want to feel valued and appreciated for their hard work and commitment and not constantly criticised and belittled."

Farmer, Wales

"British farmers are a resilient bunch and will survive. Governments come and go quickly whereas farmers and farming are much longer term"

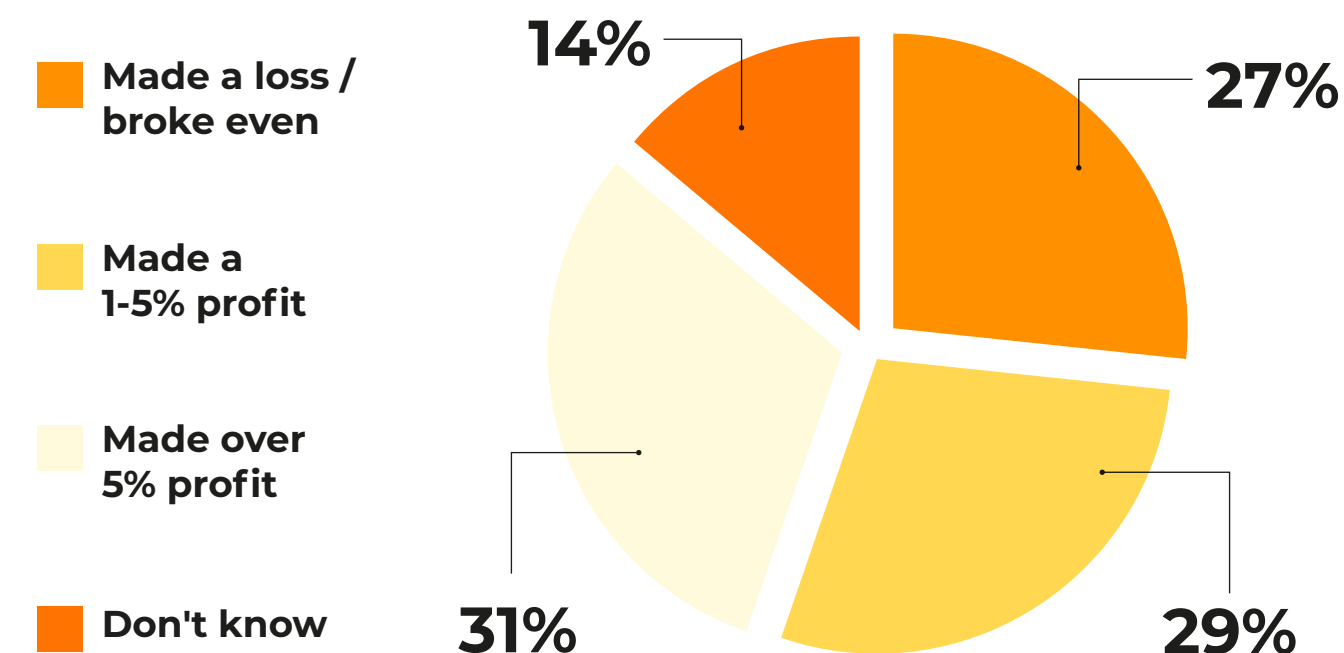
Farmer, North West England

Low profits are fueling concerns about their future in the industry.

Consistent with last year, profitability is low among the majority of farmers we spoke to, with 1 in 4 (27%, -7pp YoY)

making a loss or breaking even, and a further 29% (+3pp YoY) making 1-5% profit. However, some farmers are seeing returns, with 31% (+4pp YoY) making over 5% profit.

Profitability of farming activities in 2026



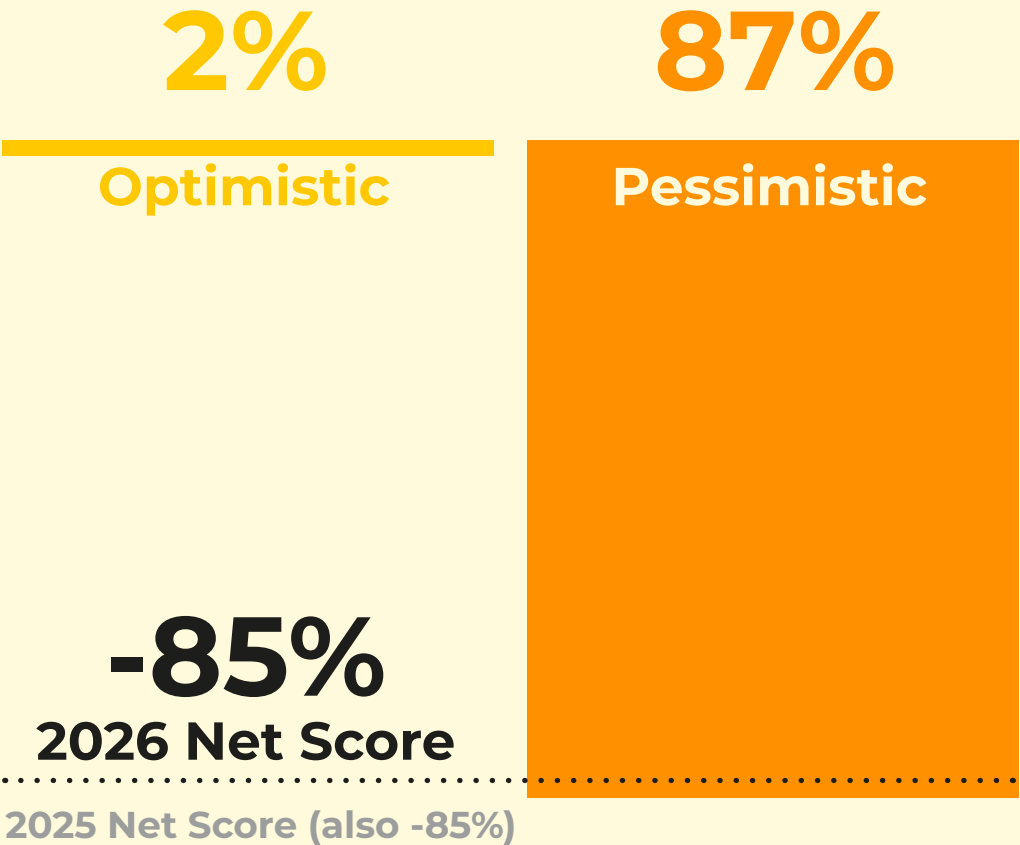
The wider economic outlook remains a key source of concern to British farmers. Farmers remain highly pessimistic about the UK economy with a net optimism score of -85%, unmoved since last year.

Beyond the UK economy, the instability of the global economy is also top of mind for British farmers, with key events such as the conflict in the Middle East and continued Russian invasion of Ukraine leading to growing concerns about the impact of global politics on British agriculture.

"I'm so dependent on things that are outside my control, from the government, the weather and more frequently international events"

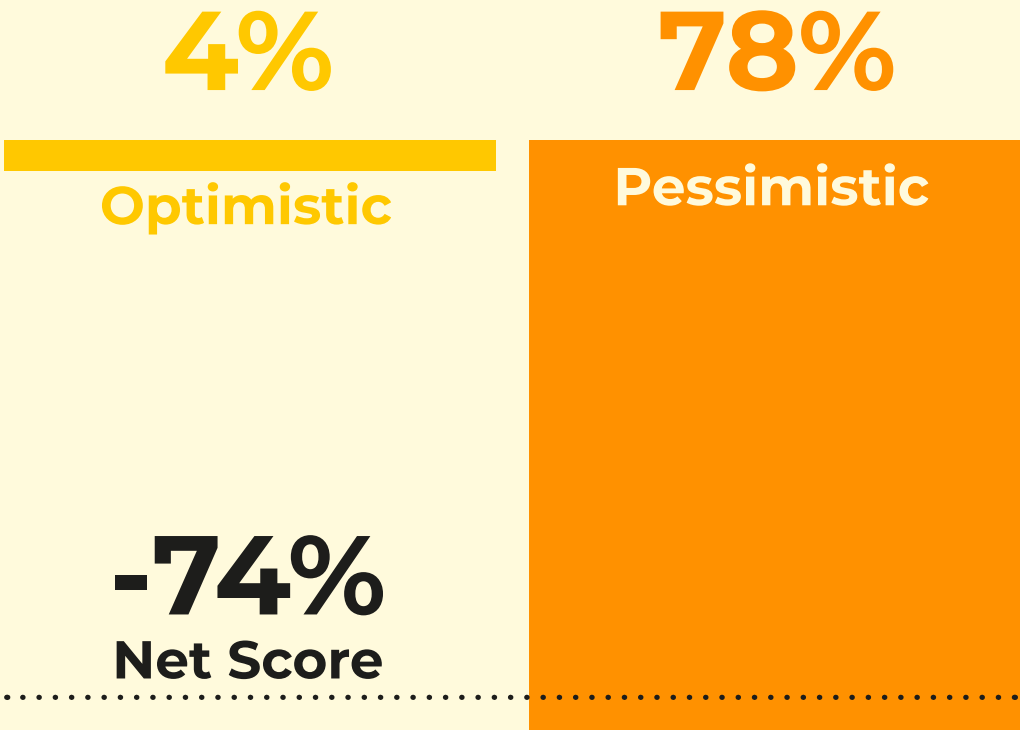
Farmer, Wales

Net optimism scores for overall optimism towards 'The UK economy'



Net optimism scores for overall optimism towards 'Global politics and economics'

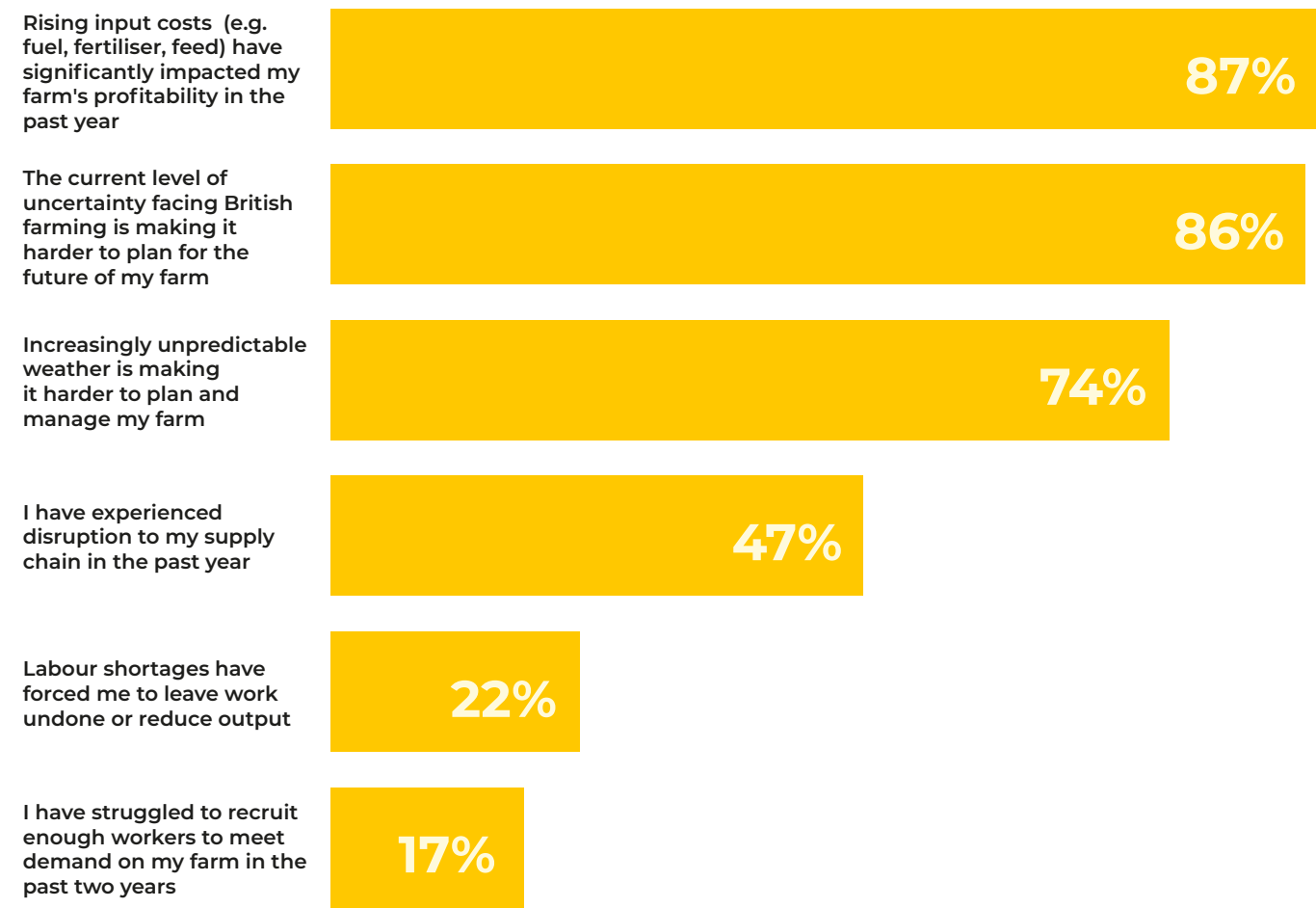
New question for 2026



Given the economic climate and record-breaking drought of the summer of 2026, it is unsurprising that the most prevalent operational pressures affecting farmers this year are **rising input costs, uncertainty making it harder to plan for the future and increasingly unpredictable weather.**

Agreement levels on threats to long-term farm growth

New question for 2026



Operational costs are placing significant financial pressures on British farmers with **two in five (42%) saying they have considered leaving farming** in the past year due to financial

constraints. In fact, **40% of farmers question whether they'll still be farming in ten years' time**, a proportion consistent with 2025.

“Costs have increased significantly and the value of what we produce has not”

Farmer, West Midlands

This accumulation of pressures shapes how farmers feel about long-term food security in Britain.

Consistent with last year, just 5% of British farmers are optimistic about long-term food security in Britain, with 87% reporting pessimism. Farmers point towards an overreliance on food imports, with farmers saying they are struggling to maintain competitive pricing amid rising costs. A vast majority (91%) believe more investment is needed in farming to ensure long-term food security in Britain.

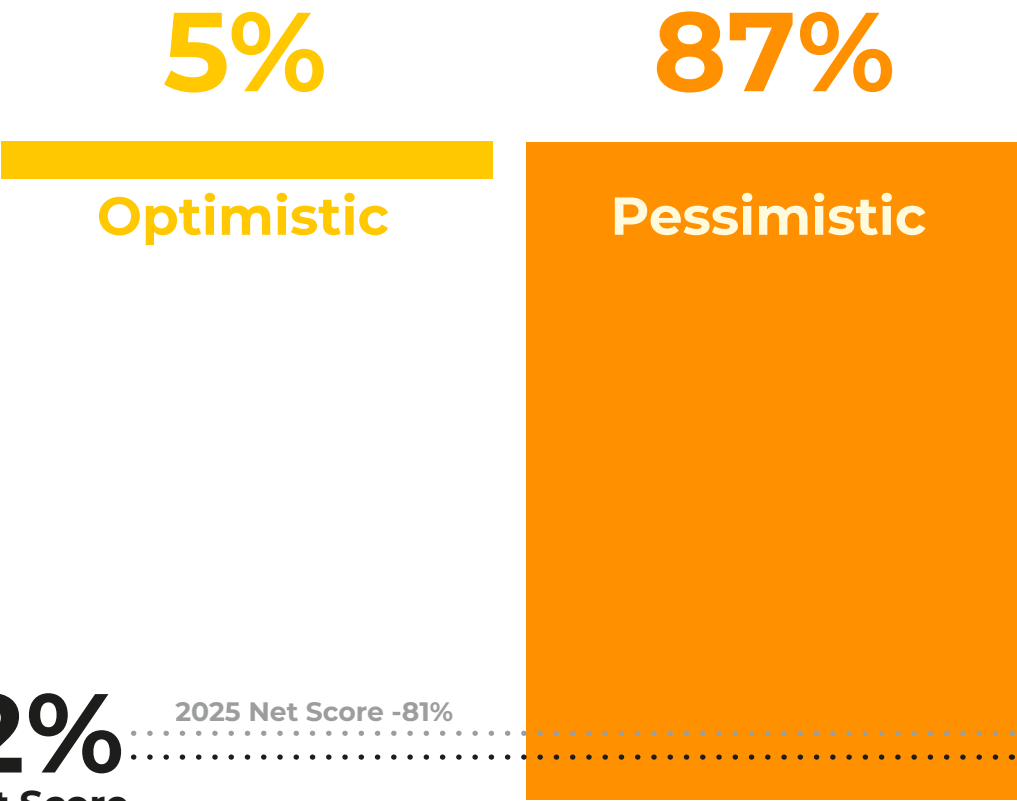
“I think a lot of produce gets exported whilst we are simultaneously importing the same product, which makes no economic sense. We are not self-sustaining.”

Farmer, Wales

“People will always need food and we can't always rely on imported [food].”

Farmer, South West England

Net optimism scores for overall optimism towards ‘Long-term food security in Britain’



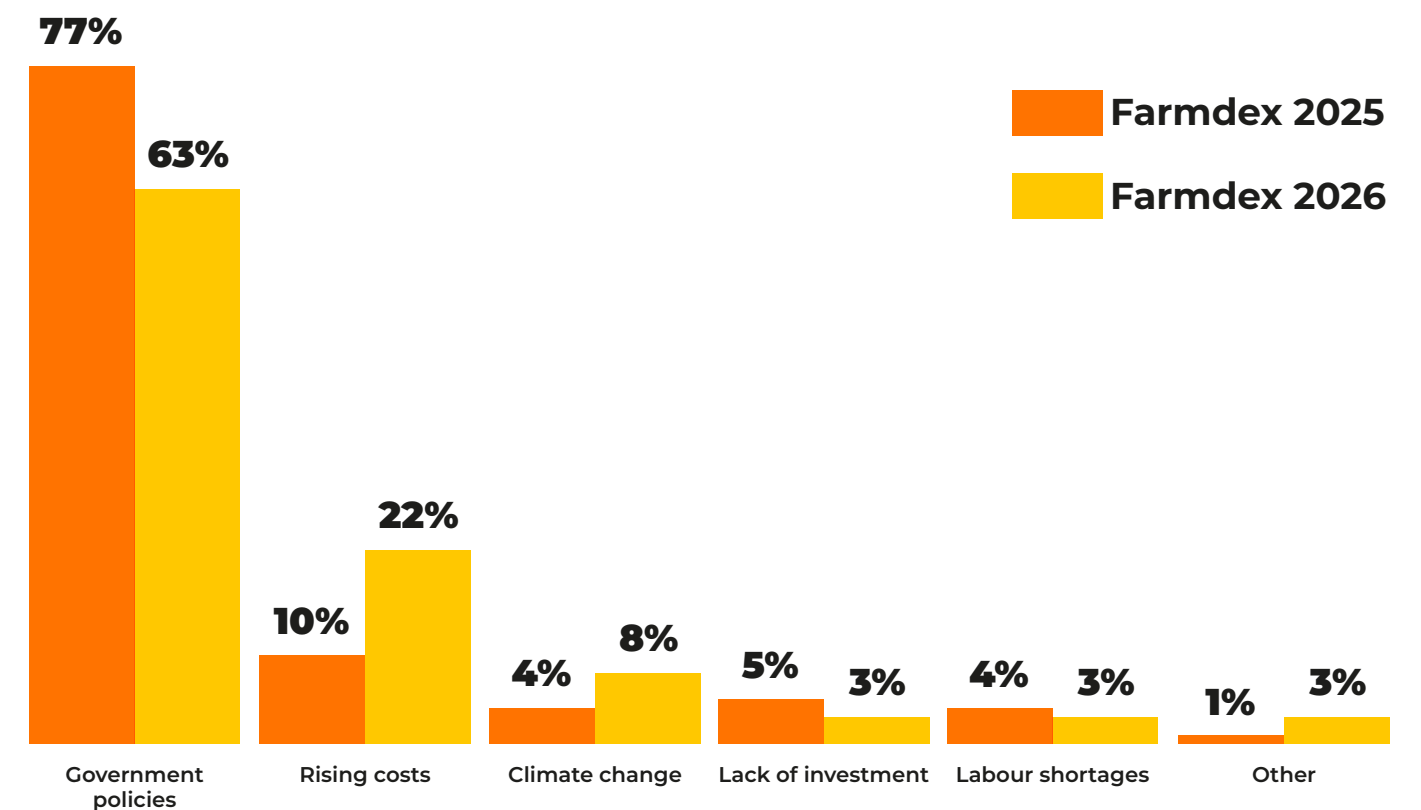
Supporting Farmers.

Amidst rising costs, demand is high for investment and government support.

Consistent with 2025, **government policy is seen as the single biggest threat to the long-term growth of farming in Britain.**

However, this has decreased by 14pp since 2025, with rising costs growing fast enough as a concern to start closing the gap (from 10% to 22%, a significant rise). The threat narrative is diversifying, not softening.

The single biggest threat to the long-term growth of farming in Britain



As we saw last year, a majority (91%) of respondents don't believe the Government provides adequate support to British farmers.

Uncertainty is a key concern here - 86% of British farmers agree that Government policy uncertainty is negatively impacting their farm. Three in five (61%) of the farmers we spoke to have heard of the Government's Farming Roadmap, but awareness has not translated into

reassurance. Just 7% of those familiar with it agree it provides clarity on the government's policy direction, and only 1% say it gives them confidence in the future stability of their business. This suggests the issue is not that farmers are unaware of government action, but that the Roadmap has not been written in a way that translates into clear, practical next steps for their farm. This gap between publication and clarity helps explain why uncertainty remains a defining concern even after the Roadmap's release.

“We do not feel supported by the government; the people making the policies and enforcing them know very little about farming. All new policies feel like the government is trying to eradicate farmers altogether”

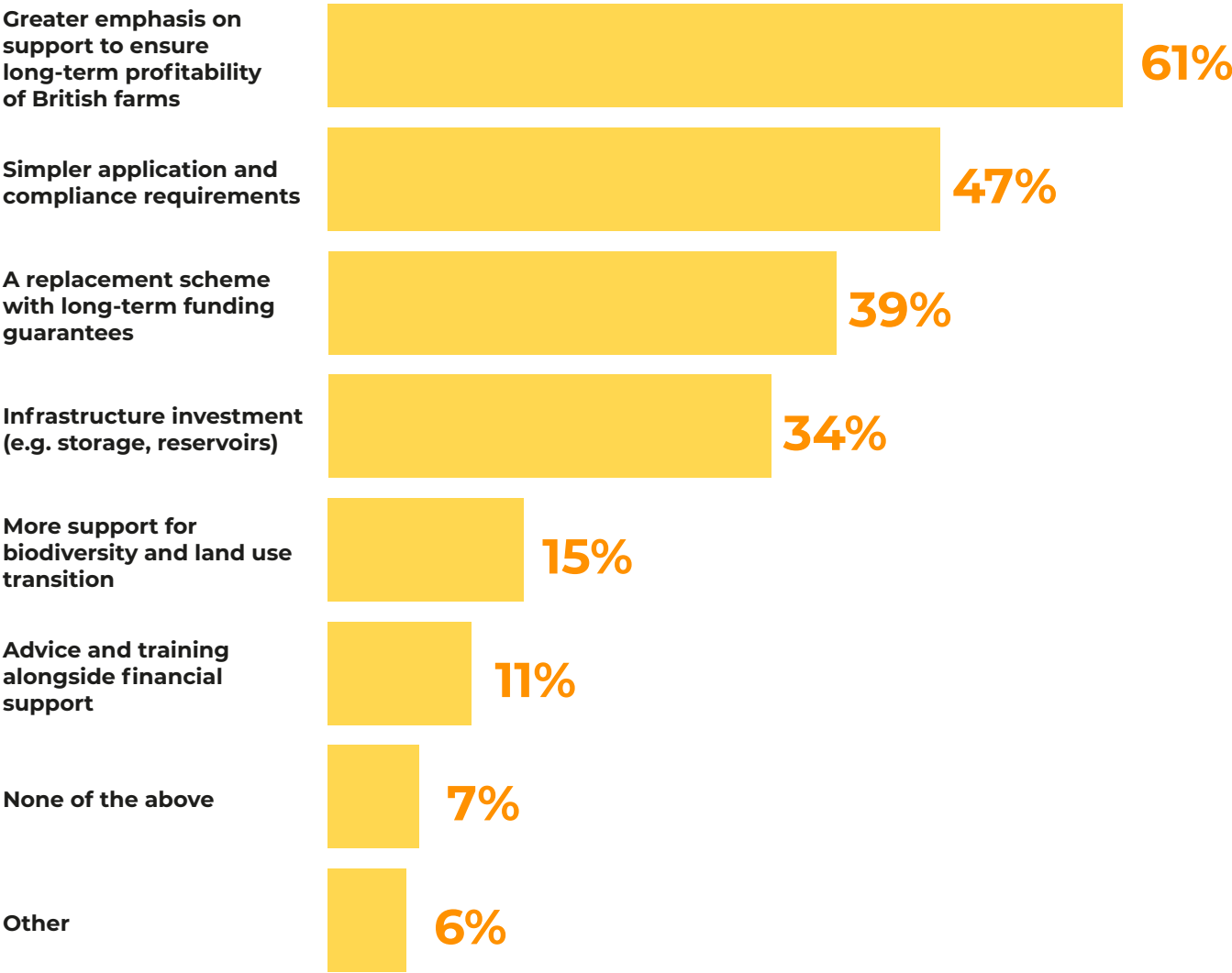
Farmer, Wales

However, farmers are seeing the benefits of some Government funding support, with a majority of those (67%) who have received a Sustainable Farming Incentive (SFI) payment in the last year continuing to view the scheme as essential to supporting sustainable farming practices on their farm.

While the importance of the scheme is clear, farmers say confidence to invest in future sustainable farming will depend on government measures that support the long-term profitability of British farms (61%) and simplify application and

compliance requirements (47%). This highlights the importance of schemes that are both financially viable and straightforward to access.

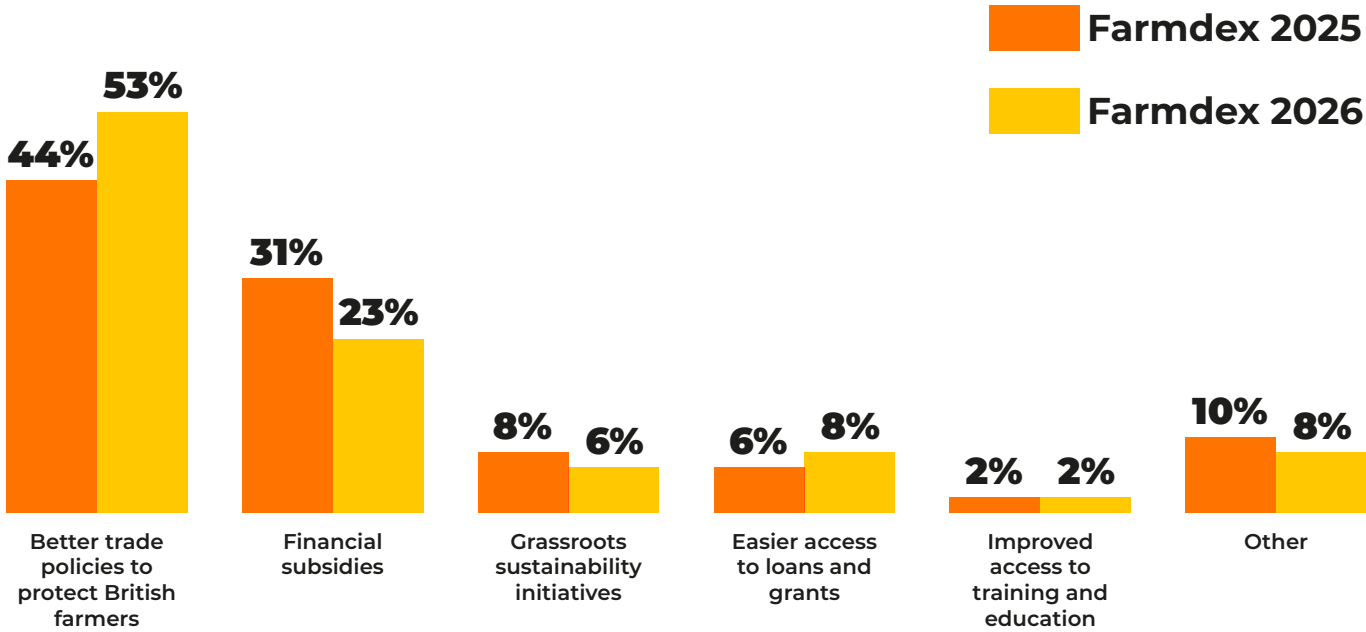
Future government support needed for confidence to invest in sustainable farming



This year, in light of growing input costs, one of the key priorities for farmers is trade policies. When asked for the single most important thing the Government could do, better trade policies to protect

British farmers is the top priority for farmers. British farmers are worried about lower-quality and cheaper food imports undermining UK agriculture (and thereby long-term food security in Britain).

The most important type of support the government could provide to the agriculture industry (2025 vs 2026)



"We are also facing a price war against foreign imports that are grown to a lower standard than our crops and can use farming practices that we aren't allowed to."

Farmer, East Midlands

"Overburdening farmers with red tape, then allowing products in from overseas without the same stringent rules is something that needs rectifying."

Farmer, Wales



The Next Generation of Farmers.

Just one in four (26%) British farmers are optimistic about the next generation of farmers, consistent with 2025.

**Net optimism scores for overall optimism towards
'The next generation of farmers'**

26%

Optimistic

52%

Pessimistic

-26%

2026 Net Score

2025 Net Score -29%

Given the mounting pressures that farmers are facing, the majority (58%) of farmers believe that farming is not an appealing career option for young people in Britain.

One in two farmers (49%) agree they depend on family members to support their livelihood, leaving no doubt about the importance of the family unit when it comes to British farming. There continues to be concern about how the next generation will cope with the demands foreseen in the next 10 years and beyond, with 92% believing the number of family-run farms in Britain will fall in the next decade.

"I think in 15 years' time small family farms will be a thing of the past. The only profitable farms seem to be on such a large scale."

Farmer, South West England

However, **one quarter of farmers (26%) are optimistic about the next generation.** We see that this optimism is driven by hope that the next generation will focus on new techniques that could be critical to the future success of British farming. There is a belief that despite the multiple challenges farmers face, the next generation will find a way to make it work.

“It is a longstanding industry and as it tends to be passed down from generation to generation, I think it will withstand the current economic downturn, though the overview may become fewer small farms and more large-scale farms.”

Farmer, North West England

“I think there are people doing great work and young people who are interested. Grazing longer grasses, longer rest periods, more extensive grazing. That's where the profit is and we're seeing it become more popular.”

Farmer, Yorkshire / Humberside

The Climate Question.

The summer drought has put climate change front and centre of conversations, with sustainable practices seen as key to the future of British farming.

The climate continues to be a key concern for farmers this year, with **three quarters (74%) of British farmers agreeing that increasingly **unpredictable weather** is making it harder to plan and manage their farm effectively.**

Following a record-breaking dry July in England and a summer of heat waves, unpredictable weather is noted as a key concern for farmers this year. **A quarter of British farmers (27%) report climate change as one of the biggest pressures currently facing their farms' finances** and

one in three (34%) farmers see climate change as one of the biggest threats to the long-term growth of farming in Britain. This lack of control felt by farmers when it comes to extreme weather is likely feeding into lower optimism scores more widely.

“The biggest problem though is the global warming, particularly in the South East.”

Farmer, South East

“Margins are tight, weather extremes are making operations and yields poor”

Farmer, West Midlands

“Climate change makes everything an absurd gamble.”

Farmer, Scotland

“I feel helpless and hopeless right now heading into another winter after a drought with the winter forage already being fed and no grass growing.”

Farmer, East Midlands

A majority of farmers (64%) agree that sustainable practices are therefore essential for the future of farming in Britain. And consistent with last year, we see that those farmers who have invested in sustainable practices are more optimistic about the future of farming.

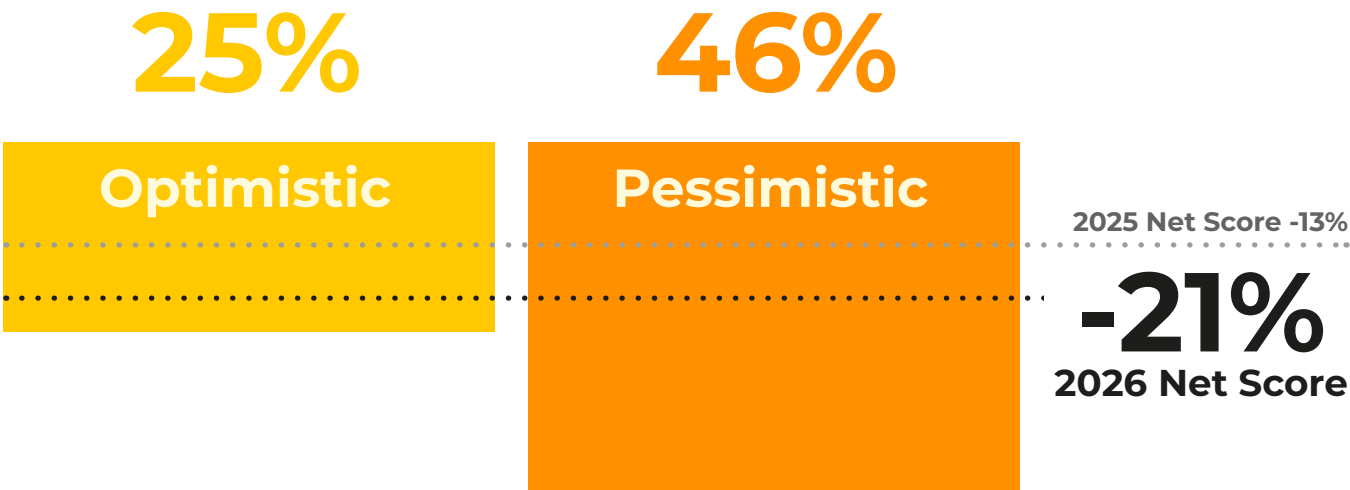
We continue to see that a majority of British farmers (65%) have invested at least somewhat in sustainable farming practices in the past five years. Among those farmers who say they have made significant investment in sustainable farming practices on their own farm, we see that they are twice as optimistic about the future of farming in Britain (35%* vs 17% total).

But despite this, just a quarter of the farmers we spoke to (25%) are optimistic about the adoption of regenerative agricultural practices in the UK, highlighting a gap between the positive experiences of early adopters and confidence in the future uptake of these practices across British farming.

*The 35% figure for those who made significant investment in their own farm and are optimistic about the future of farming in Britain is from a base size of 20. Given the small base size, the finding should be treated as indicative only.

Beyond their own farms, sustainability is also seen as a priority for the farming industry more broadly. For a majority of farmers, sustainable practices are seen as a potential solution to their concerns around long-term food security, with 60% viewing sustainability practices as essential to ensuring global food security.

Net optimism scores for overall optimism towards ‘Adoption of regenerative agricultural practices in the UK’



Those who are optimistic about the adoption of regenerative agricultural practices in the UK see these as a way to improve their farms' profitability in the long term (74% vs 50% total), which we know is a key priority for farmers in Britain. Helping farmers to understand how regenerative agriculture can support their long-term finances is incredibly important, as McCain-backed research by Demos shows the adoption of sustainable methods could increase farm profits by £1.6 billion a year across the UK by 2050*.

Diversification is seen by farmers as playing a key role in protecting their bottom line, with the majority (57%) viewing it as essential to future-proofing their business, and half (53%) believing they must diversify operations in order to remain profitable.

*Demos Growing Strong report (2026)

“We have to be adaptable. Climate change is the biggest threat to our own business model and it will create shortages of food which will lead to higher prices.”

Farmer, Wales

“Every person naturally wants to be sustainable, otherwise you’re digging an expensive hole for yourself.”

Farmer, Wales

Technology: A Double-edged Tool.

**Critical for future success,
but unease about over
reliance on technology.**

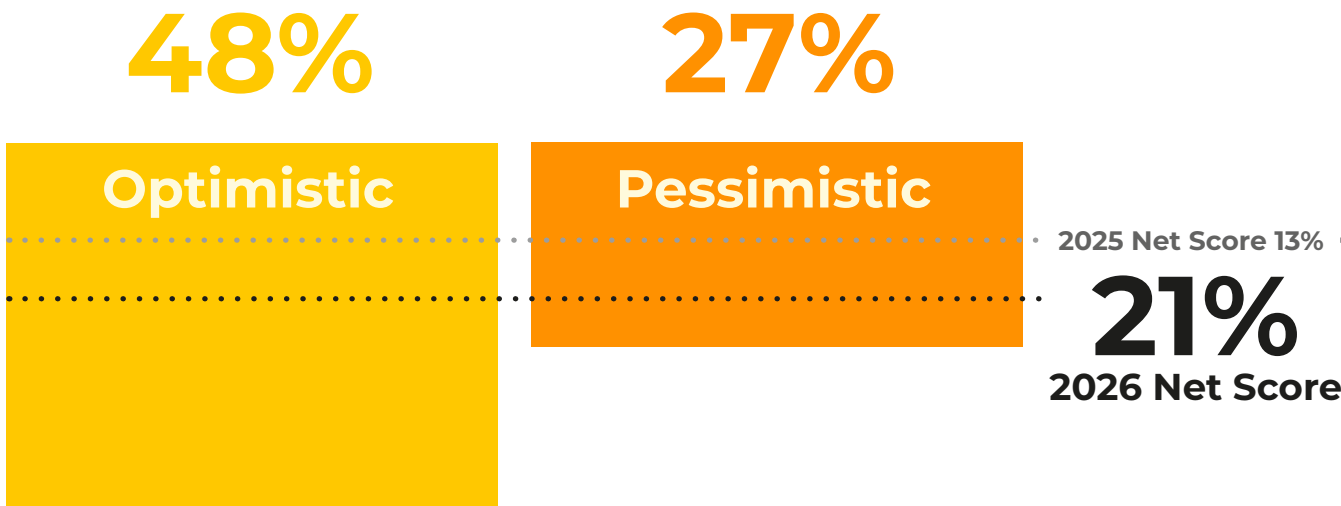
**Nearly
two thirds
of British
farmers (63%)
agree that
investment
in technology
is critical for
the future of
farming in
Britain.**



With labour shortages a key focus this year, this is one area where technology is seen as a potential solution. One in five farmers (22%) say that labour shortages have forced them to leave work undone or reduce output and farmers believe that technology could help to solve this - more than half (54%) agree that technology is essential to solving the labour shortages on British farms.

This belief in technology's potential to aid farmer's output is reflected in their optimism score. Technology is the area of highest optimism among farmers of those tested (21%, +8 YoY), with just under half (48%) optimistic in technology's potential to improve efficiencies in farming.

**Net optimism scores for overall optimism towards
'The role of technologies in improving
efficiencies in farming'**



Cost is the barrier, with the majority (65%) of British farmers saying they would invest in farming technology if the upfront costs were lower. It isn't that innovation and technology aren't important to farmers, but that they cannot afford the costs required in order to invest in new technologies, showing how important initiatives such as the Government's Farming Innovation Programme are to British farmers.

But that confidence sits alongside real unease. 59% of farmers are concerned that relying on technology could make farming more vulnerable to disruption, and 25% admit they lack the knowledge or training to make full use of new farming technologies. Belief in technology and anxiety about depending on it are, for many farmers, held at the same time.

Technology is therefore recognised as one of the key solutions to the current difficulties facing the farming industry, but there is also unease on reliance on any one thing.





Calls to Action.

McCain continues to be a strong supporter of UK potato growers, helping them adapt to a changing climate and build sustainable food systems that ensure food security for the future.

Farmdex 2026 highlights that, amidst rising costs, unpredictable weather and economic uncertainty, coordination between the private and public spheres is essential to address these challenges. McCain is calling on the Government, policymakers and industry leaders to:

1 Commit

to investment that reflects the full value of food and farming, recognising 'food security as national security'

2 Support

wider adoption of regenerative farming to strengthen food security and farm profitability

3 Prioritise

water resilience to protect farm productivity and long-term food security

4 Drive

technology adoption and the upskilling of the farming workforce to build a more productive, resilient sector

5 Secure

fair trade deals that hold imports to the same standards as British produce

Methodology

Republic conducted an online survey of 200 farmers in Britain between 22nd - 31st July 2026. This survey tracked key metrics from last year's survey, which was conducted with 200 British farmers between 14th - 18th July 2025.

Due to the nature of the sample, we are unable to quota on exact demographics; however, consistency with the previous wave was ensured on region, farm ownership and main type of farming.

The survey was scripted and hosted by our operational partner **Omnisis** - MRS Company Partners and members of the British Polling Council.

Age	
Age	Percentage
18-24	1%
25-34	6%
35-44	26%
45-54	32%
55-64	22%
65+	14%

Farm Size	
Size	Percentage
Less than 5 hectares	1%
5 to under 20 hectares	6%
20 to under 50 hectares	14%
50 to under 100 hectares	23%
100 hectares or more	56%

Farm Type	
Type	Percentage
Grazing livestock (e.g. beef, sheep)	37%
Mixed farming (both crops and livestock)	25%
Cereals	15%
Dairy	12%
General cropping (e.g., root crops, potatoes, oilseed)	6%
Pigs, poultry or other livestock	3%
Other	3%
Horticulture (e.g., fruit, vegetables, ornamental)	2%



