



Farmdex Report.

2025





Introduction & Foreword.

Farming is the foundation of Britain's food system, and its importance to our economy and national food security cannot be overstated.

Yet today, farmers nationwide are navigating a landscape that's more complex than ever. From climate volatility and rising input costs, to evolving consumer expectations and policy shifts, the pressures are mounting.

But amid these challenges, there is also momentum. Across the country, farmers are driving innovation, adapting practices, and building resilience which is often rooted in generations of experience.

At McCain, we're proud to stand alongside them. As a company founded by farmers, we understand the realities of life on the farm. That's why when it comes to our farmers, we invest in long-term partnerships, provide practical support, and champion regenerative agriculture, not just as a sustainability initiative, but as a business imperative.

This report presents perspectives from farmers who operate across the sector, including those in livestock and arable farming. Through the Farmdex Optimism Index, we asked farmers across Britain about the challenges they're facing, what they're hopeful about, and how they see the future unfolding.

It's an honest reflection of life in farming today and while the challenges are real, so too is the ingenuity and determination of the farming community. Their stories remind us that progress in agriculture depends upon a myriad of factors, ranging from policy and climate, to the economy and farmers themselves.

By listening to farmers and amplifying their perspectives, we can help shape a more resilient, sustainable, and prosperous future for British agriculture.

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



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Executive Summary.

British farming is facing a pivotal moment.

The inaugural McCain Farmdex survey, based on the views of farmers across Britain, reveals a sector under strain – but also one that is resilient, adaptive, and calling for urgent change.

The Farmdex Optimism Index, a new composite measure of sentiment, shows a net optimism score of -38%, reflecting widespread concern about the future of farming in Britain.

Farmers are particularly concerned about:

The future of farming in Britain

-62% net optimism

The future of their own farm

-23% net optimism

The next generation of farmers

-29% net optimism



This pessimism is rooted in their lived experience of the impacts being felt from a multitude of global and economic pressures. Farmers are grappling with rising input costs, policy uncertainty, and a growing sense that their work is undervalued. Almost universally (90%), farmers feel the UK economy is negatively affecting their farm's financial position. Over half (51%) have considered leaving farming in the past year due to financial constraints, and 2 in 5 (40%) believe they may be forced to exit the industry within the next decade. There are fears for the implications of the expected decline in the farming industry, with 86% saying they are pessimistic about long-term food security in Britain.

Behind these numbers are stories of long hours, mental strain, and family sacrifice. Most farmers (84%) work more than 40 hours a week, with a third (36%) exceeding 70 hours during peak seasons. Many (60%) rely on unpaid family labour to keep their farms afloat, and 61% say farming is negatively impacting their mental health.

Yet amid the pressure, there is a clear sense of what is needed to address these issues.

Farmers overwhelmingly agree that investment is essential – not just to survive, but to build a future and 96% say long-term investment is needed to secure Britain's food supply. Regenerative agriculture is emerging as a beacon of hope: 77% see sustainable practices as essential, and those who have invested in them report higher optimism about the future.

Farmers are asking for clarity, consistency, and a seat at the table. They want policy that supports innovation, trade that protects domestic agriculture, and public recognition of the role they play in national resilience. With the right support, British farming can move from survival to renewal.

The Farmdex.

A new optimism index, to measure the views of farmers

Our Farmdex survey, run for the first time this year, provides a platform for farmers to voice their perspectives on the state of the farming industry in Britain today. The survey responses gave us a unique understanding of the pressures British farmers are under and the impacts on them as individuals, their families and the industry as a whole. This report aims to identify the decisions that can and should be made to change the sector for the better.

In our survey, we asked farmers how optimistic or pessimistic they are feeling about the future of farming, about the future of their own farm, the future generations of farmers, and other variables which we know are impacting them. We used the responses to our survey to understand the overall sense

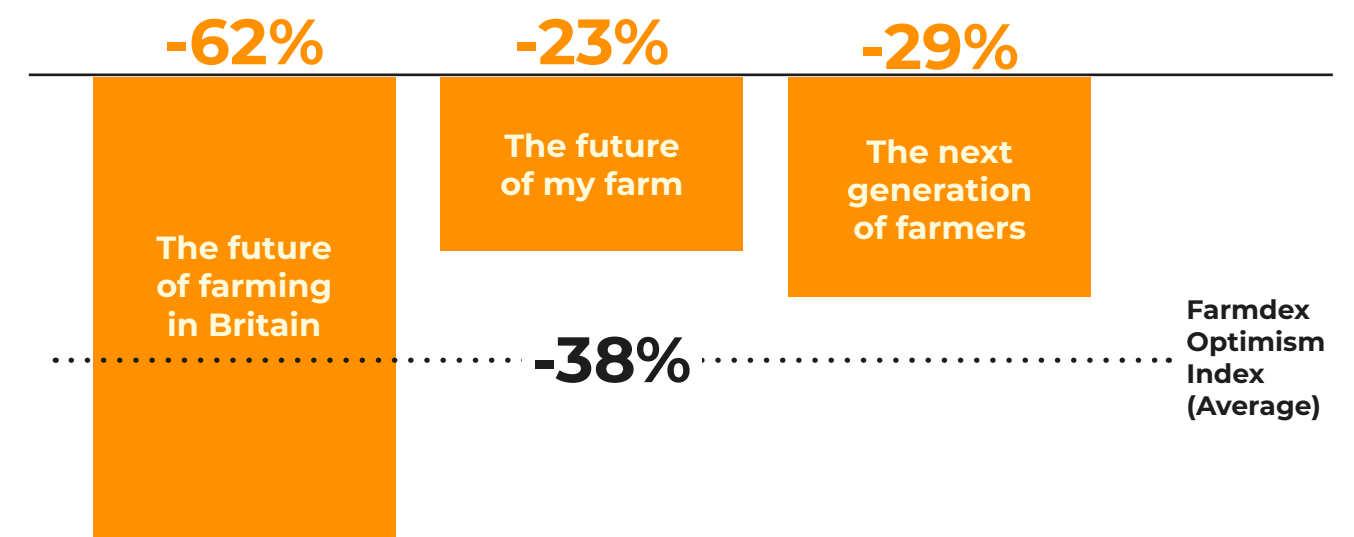
of optimism among British farmers today and give them a platform to voice their feelings about the emotional and physical impacts of their careers.

The Farmdex score:
Our Farming Index reveals deep pessimism: -38% net optimism across our three key indicators.

What is the Farmdex?

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

Net optimism scores for the three key metrics and the overall average



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).

Future Fears.

Three-quarters of British farmers fear for the future of farming

Economic, geopolitical and environmental concerns are all contributing to farmers' uncertainty.

British farmers are currently navigating complex global challenges, all of which are weighing heavy on their minds. Our survey findings show that the rising disparity between costs and income, the ever increasing impacts of climate change, and fears around long-term food

security are all significantly impacting farmers' levels of optimism. We found that a massive 90% of British farmers are feeling pessimistic about the UK economy, and 86% are pessimistic about the long-term food security in Britain.

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

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



"We don't produce enough food in this country. Over-regulation adds layers of unnecessary complexity at great cost." Farmer, South East England

This multitude of global pressures is unsurprisingly impacting how British farmers feel about the future of the farming sector.

Overall optimism for the future of farming in Britain is notably low, with only 12% of farmers saying they feel optimistic, compared to 74% saying they feel pessimistic.

Net optimism scores for overall optimism towards 'The Future of farming in Britain'

12%

Optimistic

74%

Pessimistic

-62%
Net Score

"The most challenging period I have seen in 35 years"
Farmer, East of England

"Climate change is changing outcomes quicker than small farms can adapt."

Farmer, North West England



Farming Families Under Pressure.

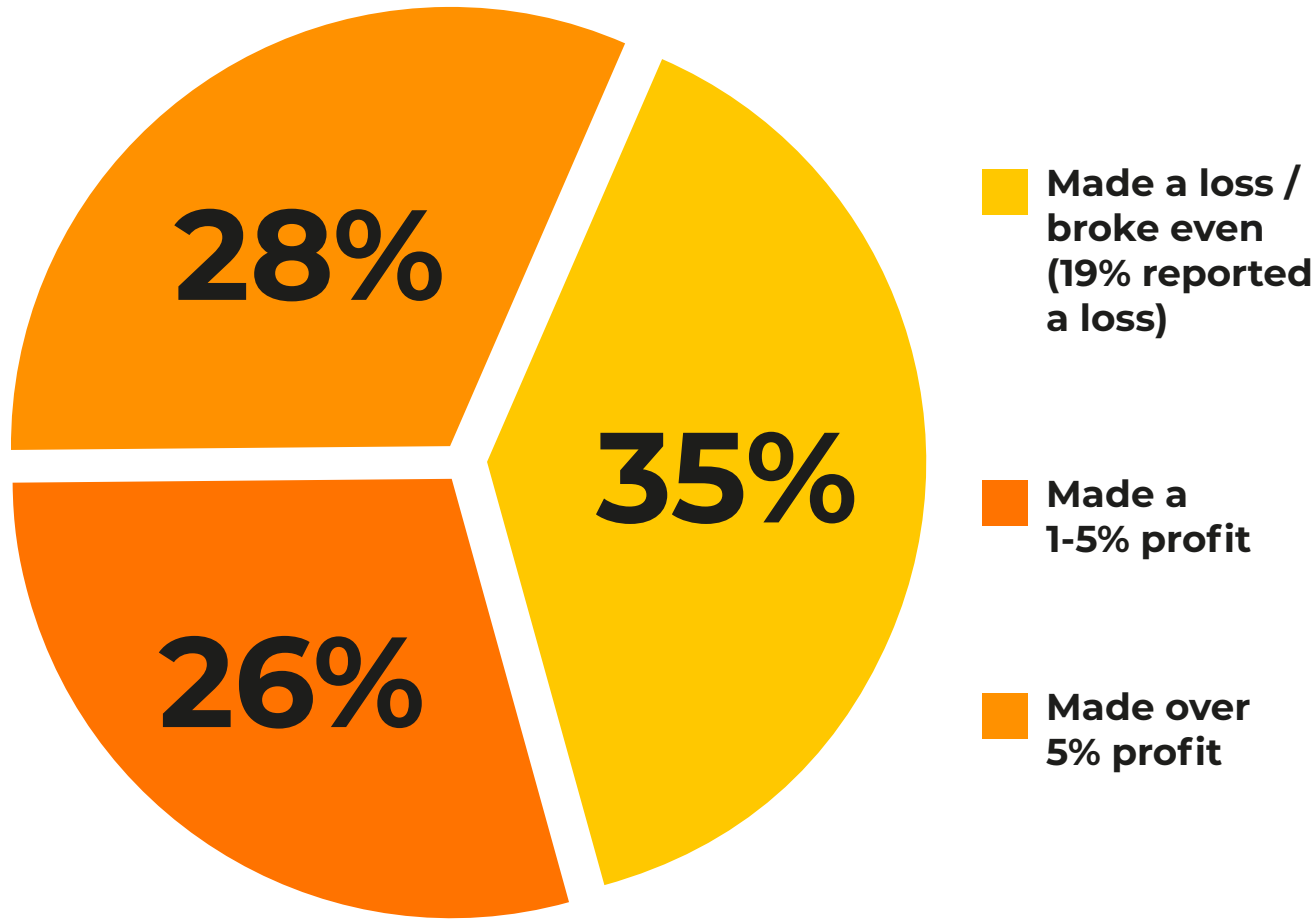
Low profits, long hours and mental strain

Low profits, long hours, and mental strain are casting doubt over the industry's future.

Farming is integral to the British economy, but British farmers are worried about the future of their farms. Many say they are struggling with low profits and the financial burden of keeping their farms running. Farmers are indisputably an important part of the British economy, making up £13.7bn of the British economy in 2023*. Despite this significant contribution to the country's economy, our survey found that most

British farmers are not actually making a viable profit, with only 14% saying they made 10% or more profit in the past year. In fact, many are making no profit at all. 1 in 3 (35%) of the farmers we spoke to reported making a loss or breaking even. This is the case **even for the highest valued farms, with 28% of those who have farms valued at £2.5 million or more reporting a loss or no profit in the past year.**

Reported Farm Profitability in 2024/2025

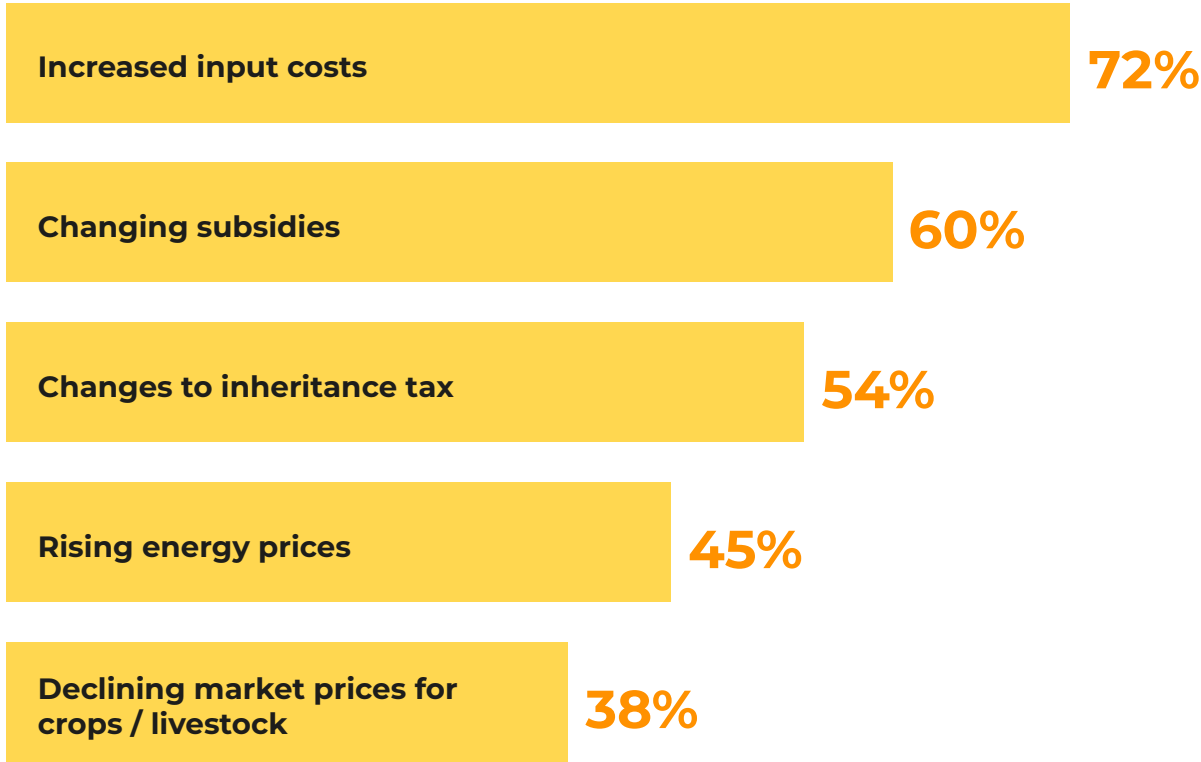


*Statistics from the Department for Environment, Food & Rural Affairs: Farming evidence pack: A high-level overview of the UK agricultural industry, published 16 September 2024.

British farmers see increased input costs as the key financial difficulty facing their farms.

Three quarters (76%) of the farmers we spoke to believe the UK economy is having a negative impact on their farm's financial position, with increased input costs being the biggest financial pressure facing farmers in Britain, followed by changes to support payments and inheritance tax.

The biggest pressures facing farmers' finances



These financial pressures are all casting doubt over the future for our farmers.

Half of the farmers we spoke to (51%) have considered leaving farming in the past year due to financial constraints. Furthermore, **2 in 5 (40%) believe they will be forced to leave the industry in the next 10 years.** Overall optimism for the future of their own farms is notably low, with only 27% of farmers saying they feel optimistic, compared to 50% saying they feel pessimistic.

Net optimism scores for overall optimism towards 'The future of my farm'

27%
Optimistic

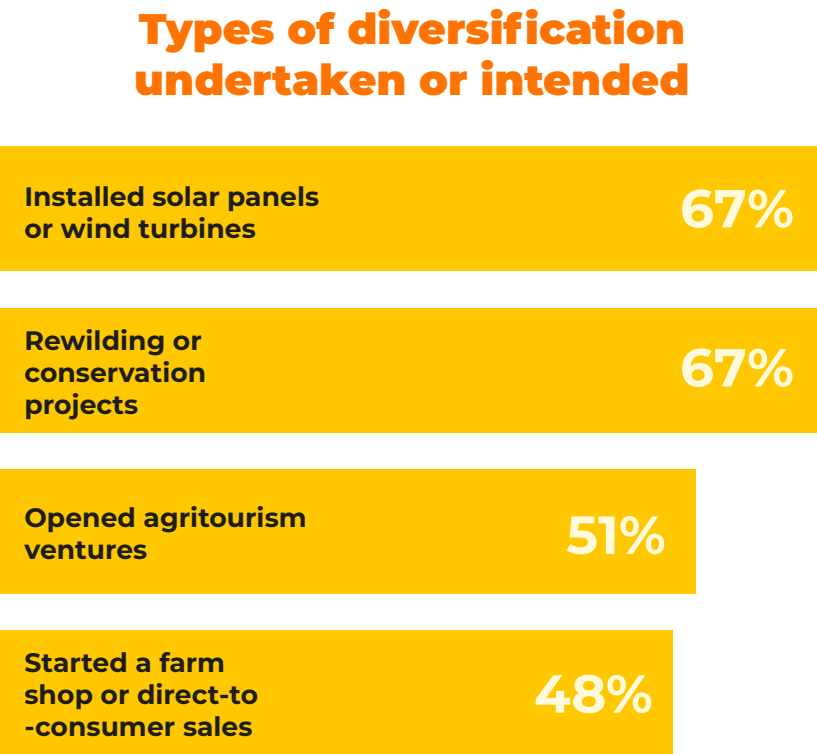
-23%
Net Score

50%
Pessimistic

For many farmers, diversification is seen as essential to protecting their future prospects. A significant proportion of the farmers we surveyed (67%) have already diversified their farming operations, but further costs and other challenges mean it is not easy to do so.

Over a quarter of farmers (28%) say they have already had to downsize their farm in recent years because of financial or operational challenges, so they are looking for ways to protect their future financial prospects. Diversification is seen as the answer for many; two thirds of the farmers we spoke to (67%) believe that diversification is essential to future proof their farming business.

Farmers are using multiple approaches to diversification, with solar panels, rewilding and starting a farm shop being the most popular diversification options.



“Diversification is essential for many farms irrespective of size. It supports food production by allowing farms to continue farming in spite of poor periods.”

Farmer, South East England

But diversification is not simple, and many farmers are held back from being able to do so due to:

70%

Financial cost

47%

A lack of time or resources

35%

Regulatory challenges

27%

Insufficient knowledge or expertise

In the face of a bleak economic outlook, farmers are imposing tough working conditions on themselves as they do what they can to survive. The relentless work schedules are having knock-on impacts on their mental health and family life.

The majority of farmers say they are consistently working long hours, taking on most of the burden of responsibility themselves to keep their farm running.

We found that nearly all of the farmers we spoke to were working more hours than the UK average (36.7 hours per week, according to 2024 ONS data*), with 84% saying they work over 40 hours a week, and **a third (36%) reporting working as much as over 70 hours a week**, in peak season. On top of these gruelling work

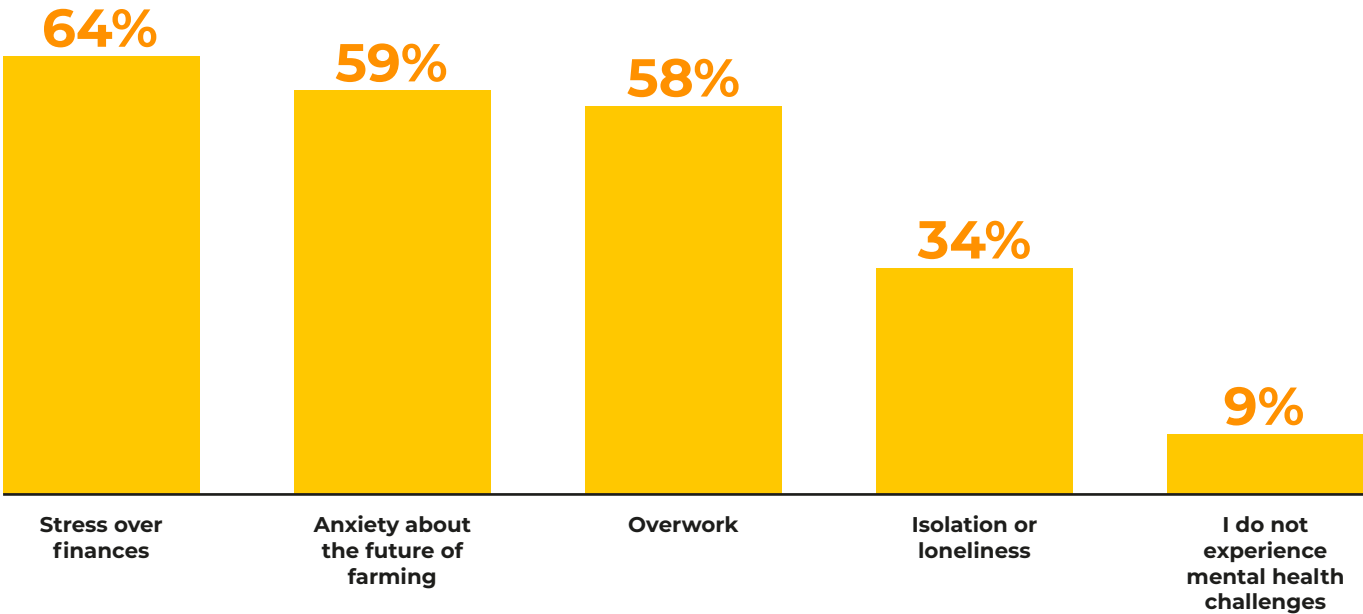
weeks, 2 in 5 (39%) report taking a holiday less than every five years, or never.

Perhaps unsurprisingly then, we are seeing that farmers' mental health is being impacted. Almost two-thirds (61%) of the farmers we spoke to say that farming is having a negative impact on their mental health. This is largely driven by a combination of stress about finances, anxiety about the future of farming, and overwork.

Farmers often turn to their families for support. 3 in 5 (60%) of the farmers we spoke to say they depend on their family members in order to support their livelihood. While 45% of our farmers said they do not employ staff, as many as 83% of the farmers we spoke to said

members of their family worked on the farm with them, including their spouse / partner (54%), or children (23%). This unpaid work and support from family members proves to be crucial in keeping our British farms afloat.

Mental health challenges faced by British farmers in their day-to-day farming life



*Statistics from the Office for National Statistics: Labour market statistics time series (LMS). Published 14 October 2025

“Family run farms are in danger and farming families are under a great deal of stress and pressure.”

Farmer, East Midlands

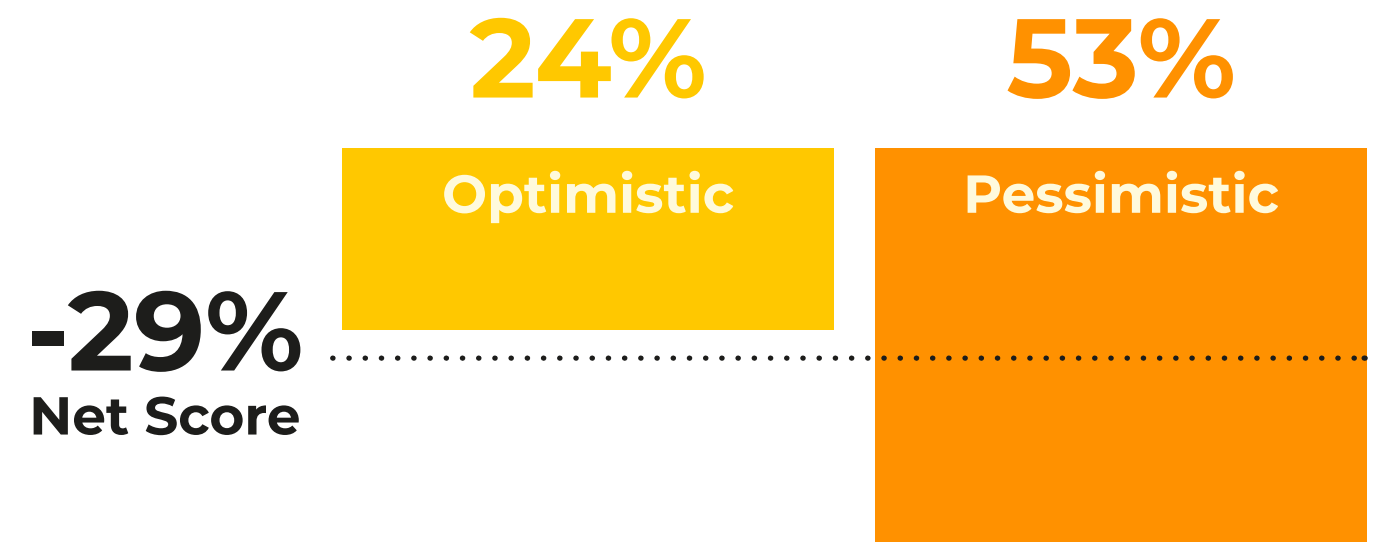
British farmers are concerned about the long-term trajectory of the industry.

Feeling pessimistic about the future of their own farm, and in light of the struggles they face daily, British farmers no longer see farming as a viable career option for their children and grandchildren. Just a quarter of British farmers (24%) think farming is an appealing career option for young people in Britain. Furthermore, nearly all of the farmers we surveyed (95%) believe

that the number of family-run farms in Britain will fall in the next decade.

In the context of persistent challenges, British farmers struggle to be optimistic about the next generation of farmers. Only 1 in 4 (24%) farmers say they are optimistic about the next generation, while over half (53%) say they are pessimistic.

Net optimism scores for overall optimism towards ‘The next generation of farmers’



“We have lost so much of Britain's history with the selling off of family farms up and down the country.”

Farmer, North East England

Supporting Farmers.

Calls for investment and government support

Policy uncertainty is seen as a threat to British farming.

With farmers feeling significant pressures, there is frustration that farming issues are not higher up the agenda for the public or policy makers. They are left feeling undervalued and unempowered. As they continue to face multiple challenges, they are looking for more support from the government.

Nearly all farmers (92%) think that government policies are one of the greatest threats to the long-term

growth of farming in Britain, alongside rising costs (71%). In fact, just 4% believe the UK government provides adequate support to farmers.

In recent years, the farming industry has seen many changes to regulations and the support it receives. And the effects are already being felt on their farms, with 93% of farmers we spoke to saying that government policy uncertainty is negatively impacting their farm.

Top three biggest threats to long-term growth of farming in Britain:

92%
say
government
policies

71%
say rising
costs

36%
say lack of
investment

“The uncertainty is so damaging to businesses, individuals and families. Imports are killing the profitability of farming. Chopping and changing of grants and subsidies is not helping anyone and particularly not the environment”

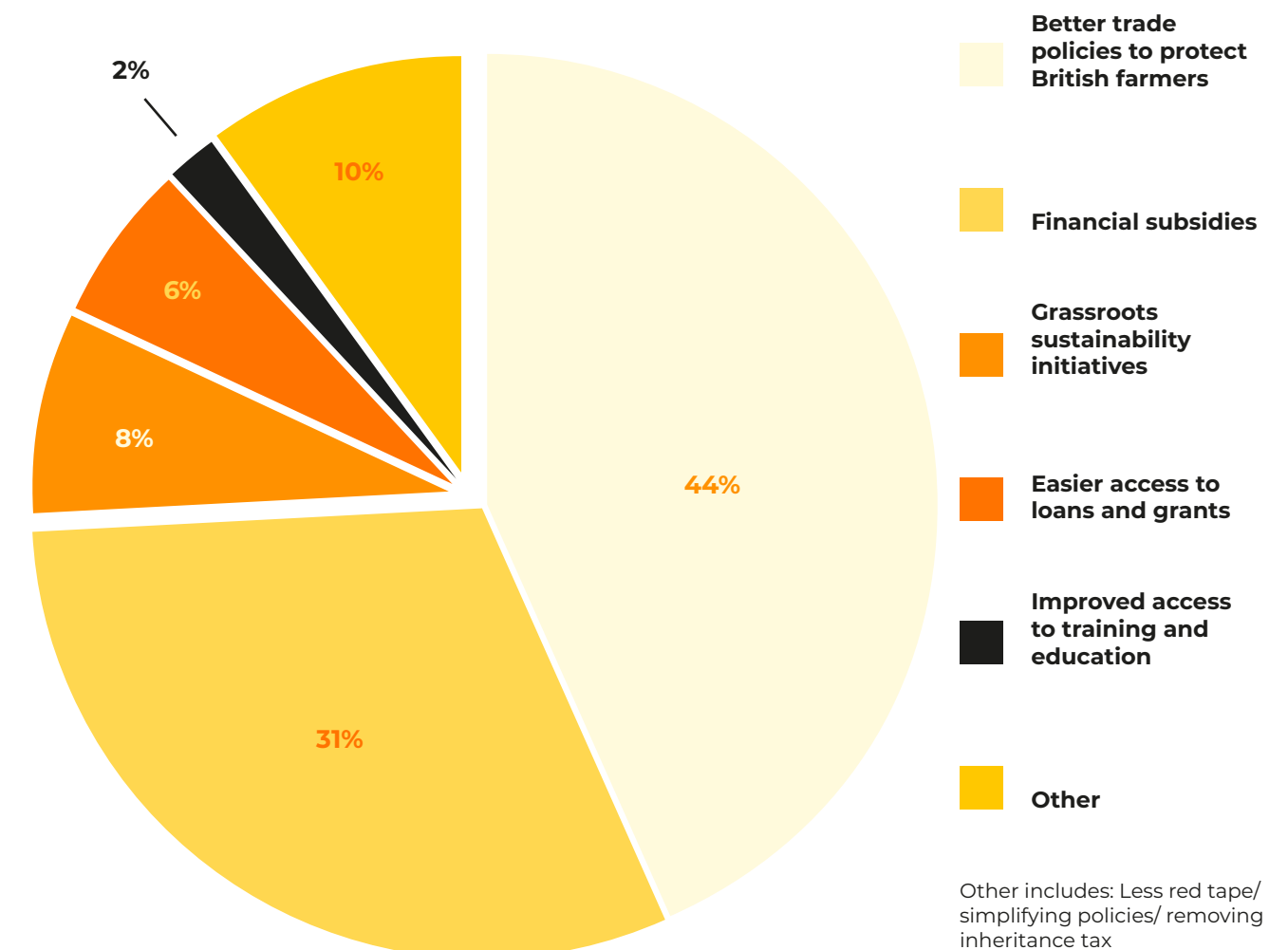
Farmer, North West England

Almost universally
(96%) farmers agree
that **investment** is
desperately needed to
ensure long term food
security in Britain.

Farmers are in need of **more financial support** from the government to ensure the long-term viability of their businesses in the years to come.

The support they are looking for is mostly better trade policies and support payments.

Most important types of support farmers feel the government could provide to the agriculture industry



Despite **government support** being seen as necessary for the long-term health of the farming sector, farmers are concerned that it might not happen.

Almost all of the farmers we spoke to (92%) report being pessimistic about government support of the farming sector in Britain, and just 4% are optimistic.

*“Innovation is key
and UK farmers are
one of the best at
being early adopters
on new technology
and science.”*

Farmer, South West England

**Farmers are also
looking for investment
in technology.**

68%

of farmers

agree that investment in technology is critical for the future of farming in Britain. Technology is seen as an important way to increase efficiency, which is of course critical in a sector struggling with financial uncertainty.

42%

of British farmers

are optimistic about the role of technology in improving efficiencies in farming.

The Way Ahead.

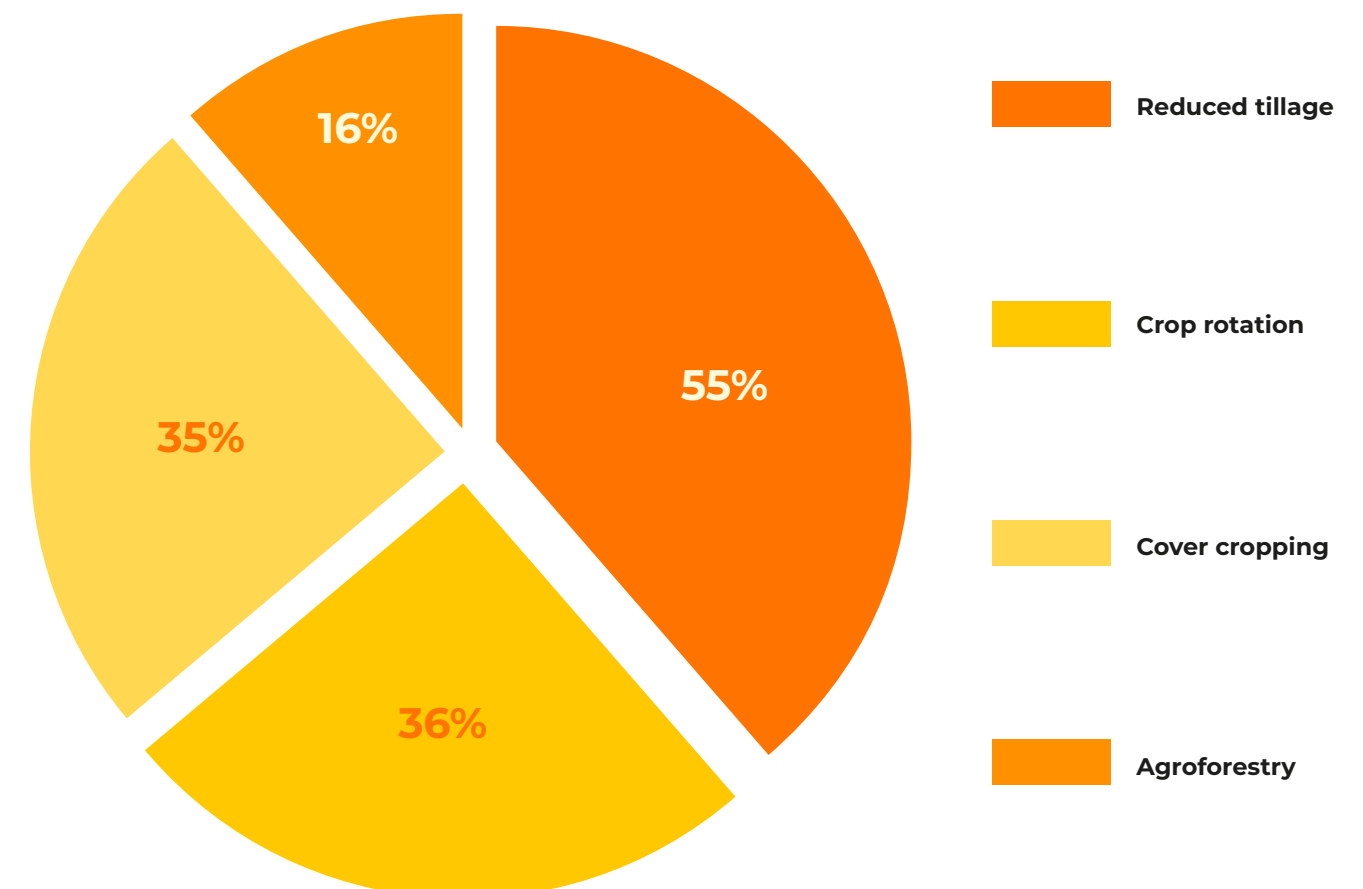
Regenerative agriculture offers hope, and investment and clarity are urgently needed

Regenerative agriculture as a viable business strategy.

Many farmers view regenerative agriculture as a positive shift, providing solutions to some of the challenges they face. Over 3 in 4 farmers (77%) agree that sustainable practices are seen as essential for the future of farming. A similar proportion (76%) agree that sustainable practices are essential to ensure global food security. Our survey data also revealed that those farmers who say they have made significant investments in sustainable farming practices on their own farm have greater optimism for the future of farming in Britain (28% vs 12% total).

It's not just the environmental benefits that are top of mind for farmers; regenerative agriculture practices are considered by many farmers as making good business sense too. For those optimistic about the adoption of regenerative agricultural practices in the UK, approximately **4 in 5 (78% vs 60% total) see sustainable agricultural practices as a way to improve their farm's profitability in the long term**, with 86% (vs 70% total) believing that the protection and enhancement of biodiversity is essential to the long-term success of their farm. With this positive mindset, most farmers (71%) have invested in sustainable farming practices in the last five years.

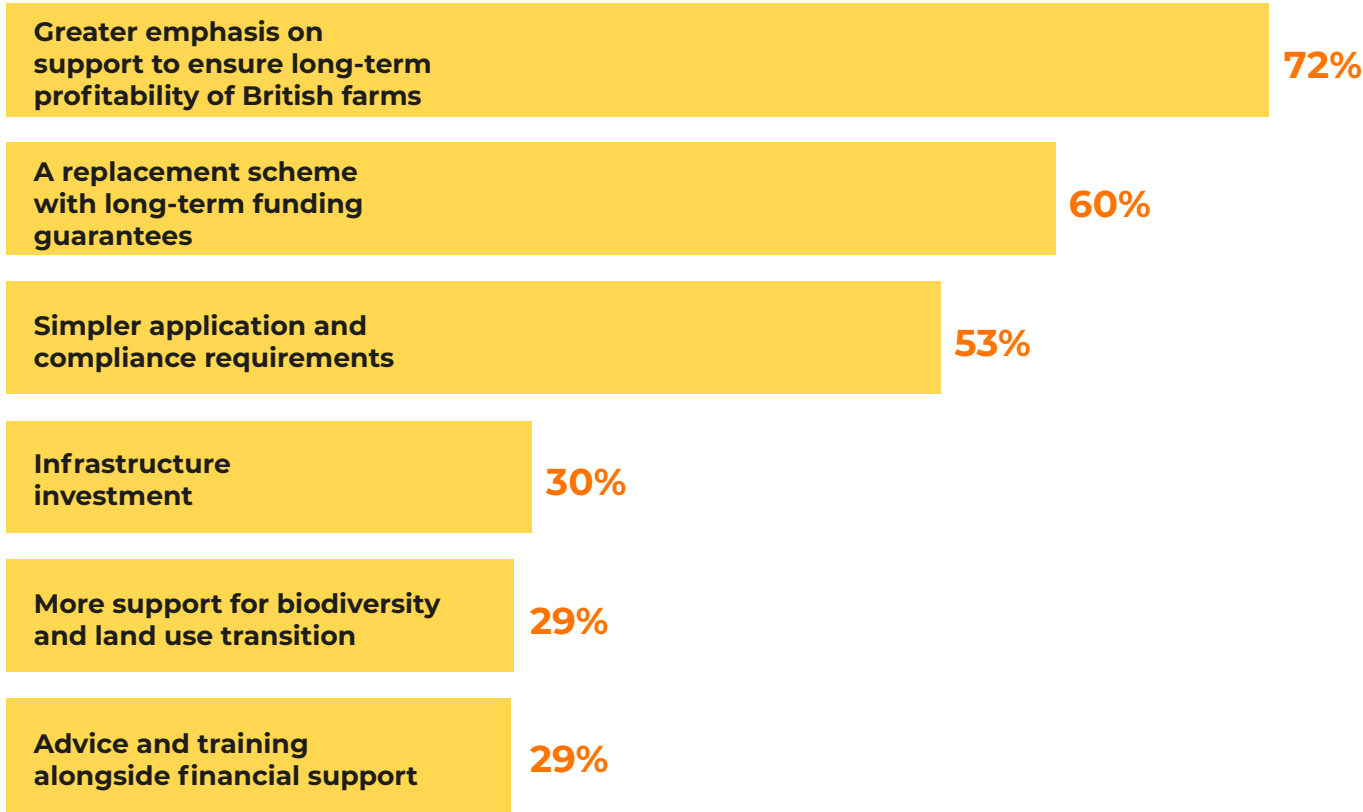
Sustainable practices adopted by British farmers in the past five years



Inconsistencies in government support are impacting farmers’ approach to farming.

A high proportion of farmers (59%) said they received a payment within the last year from the Sustainable Farming Incentive (SFI), and 70% of these farmers agree that the SFI has been essential to supporting sustainable practices on their farms. However, 75% of those who received an SFI payment said that the uncertainty over the future of the scheme has changed how they approach sustainable farming.

Types of future government support that would give confidence to invest in sustainable farming



While 1 in 4 (26%) of the farmers surveyed said they were optimistic about the adoption of regenerative agricultural practices, we also see that 2 in 5 (39%) are pessimistic about the adoption of regenerative agriculture practices in the UK, highlighting some concerns about its implementation.

However, there is demand for more public awareness and more political support for investment in regenerative agriculture. 2 in 3 (64%) of the farmers we surveyed believe the general public does not care about sustainable farming practices. And with unpredictable government policy changes, farmers are finding it difficult to invest.

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

26%

Optimistic

-13%

Net Score

39%

Pessimistic

“Our youngsters are far more willing to incorporate green technologies and regenerative practices than the current generation. They have youth, optimism and better qualifications on their side.” Farmer, South West England

Calls to Action.

McCain has long supported UK potato growers, helping them mitigate challenges they are facing and helping them transition to more sustainable practices.

The Farmdex findings are a reminder that progress in agriculture requires collective action, not just from businesses or individual farmers. This is why McCain is calling for cross-sector collaboration and urging the Government, policymakers, and industry leaders to:

1 Support

regenerative agriculture to increase food security and farmer profitability

2 Prioritise

long-term food security

3 Provide

certainty on government policy direction and funding

4 Ensure

the long-term viability of family farms

5 Guarantee

fair trade deals that support domestic agriculture

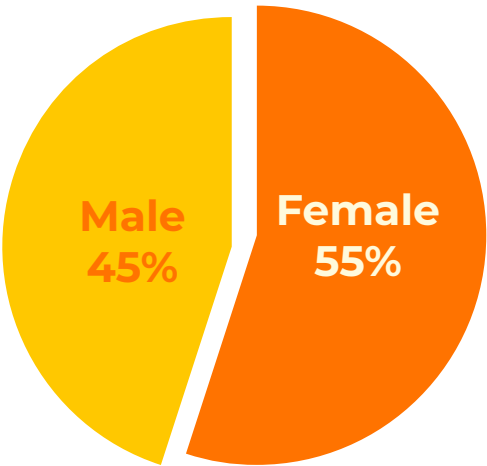
Methodology

Republic conducted an online survey of 200 farmers in Britain between 14th - 18th July 2025.

Sample for the project was provided by the **FieldMouse Opinion Harvester** panel - one of only two dedicated online panel suppliers in the UK for farmers and farm workers. The sample included a mix of farm types, sizes, and regions, but no quotas were set (due to sampling restrictions of this audience).

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	3%
25-34	14%
35-44	25%
45-54	25%
55-64	24%
65+	11%



Farm Size	
Size	Percentage
Less than 5 hectares	5%
5 to under 20 hectares	12%
20 to under 50 hectares	14%
50 to under 100 hectares	27%
100 hectares or more	43%

Farm Type	
Type	Percentage
Grazing livestock	47%
Mixed farming	23%
Cereals	10%
Dairy	10%
General cropping	4%
Pigs, poultry or other livestock	4%
Horticulture	2%
Other	2%



