

# Supply & Demand

29 November 2017



## End of Season 2016/17 Defra UK Cereals Supply and Demand – residuals unallocated

The tables below provide the Defra estimates of UK cereals supply and demand in the 2016/17 (July-June) season. For the 2016/17 wheat and barley end of season balance sheets residuals have been identified after the full season official statistics were taken into account, stated in Appendix 1. 2016/17 end of season balance sheets are also available with the identified residuals apportioned using the Defra reliability scores method – [click here](#).

Please note that after investigations into full season trade data, HMRC have made some revisions to UK imports. In particular these revisions relate to wheat and maize imports from Romania in April, which were substantially high. The amended import figures have been accounted for in the relevant balance sheets below.

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## DEFRA ANNUAL UK CEREAL SUPPLY AND DEMAND ESTIMATES (a)

## Estimates made in September

000 tonnes

In 2015, Defra reviewed how it uses survey estimates to achieve consistent cereals balance sheet estimates. The outcome of the review was the introduction of the reliability scores method used to allocate identified residuals across the balance sheet as and when required. Cereals balance sheets are published by AHDB Cereals & Oilseeds on behalf of Defra at <http://cereals.ahdb.org.uk/markets/supply-and-demand.aspx>.

(JULY - JUNE YEARS)

Links connect to relevant Defra/AHDB data pages

	WHEAT								BARLEY							
	2011/12 2015/16 average	2014/15 estimate**	2015/16 estimate**	2016/17 Jun-17	2016/17 Sep-17	Absolute change Jun-17	% change on 15/16	2011/12 2015/16 average	2014/15 estimate	2015/16 estimate	2016/17 Jun-17	2016/17 Sep-17	Absolute change Jun-17	% change on 15/16		
(1) <a href="#">Opening Stocks</a>	1,842	1,559	2,434	2,792	2,787	-5	15%	1,137	1,379	1,497	1,367	1,367	0	-9%		
(2) <a href="#">Production</a>	14,639	16,363	16,506	14,383	14,383	0	-13%	6,478	6,911	7,370	6,655	6,655	0	-10%		
(3) <a href="#">Imports</a>	1,847	1,669	1,509	1,700	1,870	170	24%	158	139	159	105	132	27	-17%		
<b>(4) Total Availability</b>	<b>18,328</b>	<b>19,591</b>	<b>20,449</b>	<b>18,875</b>	<b>19,040</b>	<b>165</b>	<b>-7%</b>	<b>7,772</b>	<b>8,429</b>	<b>9,026</b>	<b>8,127</b>	<b>8,154</b>	<b>27</b>	<b>-10%</b>		
(5) <a href="#">Human and Industrial Consumption (b)</a>	7,407	7,831	7,360	8,106	8,100	-6	10%	1,881	1,949	1,833	1,860	1,860	0	1%		
(5a) (of which home grown)	6,165	6,640	6,416	7,171	7,160	-11	12%	n/a	n/a	n/a	n/a	n/a	-	*		
(6) <a href="#">Usage as Animal Feed (c)</a>	6,756	6,991	7,094	7,224	7,243	19	2%	3,285	3,276	3,613	3,633	3,658	25	1%		
(6a) (of which home grown)	6,180	6,501	6,444	6,547	6,522	-25	1%	n/a	n/a	n/a	n/a	n/a	-	*		
(6b) (of which Compounders)	3,610	3,632	3,845	4,011	4,042	31	5%	1,026	1,079	1,108	1,112	1,136	24	3%		
(6c) (of which Integrated Poultry Units)	1,428	1,427	1,210	1,222	1,210	-12	0%	62	47	49	51	52	1	6%		
(7) Seed (d)	294	291	281	283	283	0	1%	171	177	182	181	181	0	-1%		
(8) Other	75	88	79	72	72	0	-9%	32	35	37	33	33	0	-11%		
<b>(9) Total Domestic Consumption</b>	<b>14,532</b>	<b>15,201</b>	<b>14,814</b>	<b>15,685</b>	<b>15,698</b>	<b>13</b>	<b>6%</b>	<b>5,370</b>	<b>5,437</b>	<b>5,665</b>	<b>5,707</b>	<b>5,732</b>	<b>25</b>	<b>1%</b>		
<b>(10) Balance (4) - (9)</b>	<b>3,797</b>	<b>4,390</b>	<b>5,635</b>	<b>3,190</b>	<b>3,342</b>	<b>152</b>	<b>-41%</b>	<b>2,403</b>	<b>2,992</b>	<b>3,361</b>	<b>2,420</b>	<b>2,422</b>	<b>2</b>	<b>-28%</b>		
(11) <a href="#">Exports (e)</a>	1,704	1,957	2,848	1,500	1,444	-56	-49%	1,167	1,495	1,994	1,000	1,050	50	-47%		
(12) Intervention Stocks (e)	-	-	-	-	-	-	-	-	-	-	-	-	-	-		
<b>(13) Commercial End-Season Stocks (e)</b>	<b>2,093</b>	<b>2,434</b>	<b>2,787</b>	<b>2,040</b>	<b>1,758</b>	<b>-282</b>	<b>-37%</b>	<b>1,236</b>	<b>1,497</b>	<b>1,367</b>	<b>1,183</b>	<b>1,106</b>	<b>-77</b>	<b>-19%</b>		
(14) <a href="#">(of which Estimated Operating stock requirement) (f)</a>	1,459	1,500	1,500	1,600	1,560	-40	4%	730	750	760	760	760	-	0%		
(15) <a href="#">(of which free stock) (g)</a>	634	934	1,287	440	198	-242	-85%	506	747	607	423	346	-77	-43%		
(16) Surplus available for either export or free stock (10)-(12)-(14)	<b>2,337</b>	<b>2,890</b>	<b>4,135</b>	<b>1,590</b>	<b>1,782</b>	<b>192</b>	<b>-57%</b>	<b>1,673</b>	<b>2,242</b>	<b>2,601</b>	<b>1,660</b>	<b>1,662</b>	<b>2</b>	<b>-36%</b>		
(17) Residual (10)-(11)-(13)				<b>350</b>	<b>140</b>						<b>237</b>	<b>266</b>				

	MAIZE								OATS							
	2011/12 2015/16 average	2014/15 estimate	2015/16 estimate**	2016/17 Jun-17	2016/17 Sep-17	Absolute change Jun-17	% change on 15/16	2011/12 2015/16 average	2014/15 estimate	2015/16 estimate	2016/17 Jun-17	2016/17 Sep-17	Absolute change Jun-17	% change on 15/16		
(1) <a href="#">Opening Stocks</a>	209	259	309	145	148	3	-52%	94	168	107	96	93	-3	-13%		
(2) <a href="#">Production</a>	-	-	-	-	-	-	*	765	820	799	816	816	0	2%		
(3) <a href="#">Imports</a>	1,723	1,856	1,742	1,978	2,059	81	18%	58	37	39	40	53	13	35%		
<b>(4) Total Availability</b>	<b>1,932</b>	<b>2,115</b>	<b>2,051</b>	<b>2,123</b>	<b>2,207</b>	<b>84</b>	<b>8%</b>	<b>916</b>	<b>1,025</b>	<b>945</b>	<b>952</b>	<b>962</b>	<b>10</b>	<b>2%</b>		
(5) <a href="#">Human and Industrial Consumption</a>	480	566	465	548	569	21	22%	498	492	525	530	521	-9	-1%		
(5a) (of which home grown)	-	-	-	-	-	-	*	443	450	499	485	455	-30	-9%		
(6) <a href="#">Usage as Animal Feed</a>	1,084	1,144	1,310	1,254	1,186	-68	-9%	254	326	239	267	286	19	20%		
(6a) (of which home grown)	-	-	-	-	-	-	*	254	326	239	267	286	19	20%		
(7) Seed	-	-	-	-	-	-	*	19	18	19	21	20	-1	5%		
(8) Other (h)	49	4	9	4	4	0	-56%	4	4	4	4	4	0	0%		
<b>(9) Total Domestic Consumption</b>	<b>1,613</b>	<b>1,714</b>	<b>1,784</b>	<b>1,806</b>	<b>1,759</b>	<b>-47</b>	<b>-1%</b>	<b>776</b>	<b>840</b>	<b>787</b>	<b>822</b>	<b>831</b>	<b>9</b>	<b>6%</b>		
<b>(10) Balance (4) - (9)</b>	<b>319</b>	<b>401</b>	<b>267</b>	<b>317</b>	<b>448</b>	<b>131</b>	<b>68%</b>	<b>141</b>	<b>184</b>	<b>158</b>	<b>130</b>	<b>131</b>	<b>1</b>	<b>-17%</b>		
(11) <a href="#">Exportable surplus</a>	103	92	120	170	177	7	48%	41	77	65	21	21	0	-68%		
(12) <a href="#">Commercial End-Season Stocks</a>	<b>216</b>	<b>309</b>	<b>148</b>	<b>147</b>	<b>271</b>	<b>124</b>	<b>83%</b>	<b>100</b>	<b>107</b>	<b>93</b>	<b>109</b>	<b>110</b>	<b>1</b>	<b>19%</b>		

(a) These are revised during the year. Figures rounded to the nearest 1000 tonnes

(b) Defra updated the registry for the UK flour millers survey in spring 2016, the wheat H&amp;I usage has been adjusted to take account of this change.

(c) Animal feed usage has been split by sector. Note, other users are only included in the total.

(d) Seed numbers have been updated based on a number of assumptions, calculated for the purposes of the balance sheet only

(e) Split of exports, intervention and total commercial end-season stocks only published for historical seasons

(f) Estimated Operating Stocks Requirement is a calculated estimate of the minimum tonnage that users of grain require to get through to a point at which new crop can be utilised

(g) Free stock is the stock available after both exports and estimated operating stock requirements have been fulfilled

(h) 2014/15 new format: Maize demand in "Other food use" has been added to the H&amp;I total for maize. This was previously included in the "Other" category

\* Percentage change not meaningful

\*\* These balance sheets have been adjusted as per Defra's reliability allocation method

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		OTHER CEREALS (i)						
		2011/12 2015/16 average	2014/15 estimate	2015/16 estimate	2016/17 Jun-17	2016/17 Sep-17	Absolute change Jun-17	% change on 15/16
(1)	Opening Stocks	5	5	5	5	5	0	0%
(2)	Production	117	131	121	110	110	0	-9%
(3)	Imports	3	1	3	3	3	0	0%
<b>(4)</b>	<b>Total Availability</b>	<b>125</b>	<b>137</b>	<b>129</b>	<b>118</b>	<b>118</b>	0	-9%
(5+6)	H&I and Animal Feed	115	129	121	110	110	0	-9%
(5a+6a)	(of which home grown)	112	128	118	107	107	0	-9%
(7)	Seed	3	3	3	3	3	0	0%
(8)	Other	-	-	-	-	-	-	*
<b>(9)</b>	<b>Total Domestic Consumption</b>	<b>118</b>	<b>132</b>	<b>124</b>	<b>113</b>	<b>113</b>	0	-9%
<b>(10)</b>	<b>Balance (4) - (9)</b>	<b>6</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>5</b>	0	0%
(11)	Exportable surplus	1	0	0	0	0	-	*
(12)	Intervention Stocks	0	0	0	0	0	-	*
<b>(13)</b>	<b>Commercial End-Season Stocks</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>5</b>	<b>5</b>	0	0%

		TOTAL CEREALS						
		2011/12 2015/16 average	2014/15 estimate**	2015/16 estimate**	2016/17 Jun-17	2016/17 Sep-17	Absolute change Jun-17	% change on 15/16
(1)	Opening Stocks	3,287	3,370	4,351	4,405	4,400	-5	1%
(2)	Production	21,999	24,225	24,796	21,964	21,964	0	-11%
(3)	Imports	3,788	3,702	3,452	3,826	4,117	291	19%
<b>(4)</b>	<b>Total Availability</b>	<b>29,074</b>	<b>31,297</b>	<b>32,599</b>	<b>30,195</b>	<b>30,481</b>	286	-6%
(5)	H&I (wheat, barley, maize, oats) (h)	10,310	10,838	10,183	11,044	11,050	6	9%
(6)	Animal Feed (wheat, barley, maize oats) (h)	11,394	11,737	12,256	12,378	12,373	-5	1%
(5a +6a)	Other cereals (H&I and Animal Feed)	115	129	121	110	110	0	-9%
(7)	Seed	487	490	485	488	487	-1	0%
(8)	Other	160	131	129	113	113	0	-12%
<b>(9)</b>	<b>Total Domestic Consumption</b>	<b>22,467</b>	<b>23,325</b>	<b>23,174</b>	<b>24,133</b>	<b>24,133</b>	0	4%
<b>(10)</b>	<b>Balance (4) - (9)</b>	<b>6,607</b>	<b>7,972</b>	<b>9,425</b>	<b>6,062</b>	<b>6,348</b>	286	-33%
(11)	Exports	3,016	3,621	5,027	2,691	2,692	1	-46%
(12)	Intervention Stocks	-	-	-	-	-	0	*
<b>(13)</b>	<b>Commercial End-Season Stocks</b>	<b>3,649</b>	<b>4,351</b>	<b>4,400</b>	<b>3,484</b>	<b>3,250</b>	-234	-26%
(14)	Estimated Operating stock requirement (wheat & barley only)	2,189	2,250	2,260	2,360	2,320	-40	3%
(15)	Free stock for wheat and barley	1,140	1,681	1,894	863	544	-319	-71%
(16)	Surplus available for either export or free stock (all)	4,476	5,722	7,166	3,702	4,028	326	-44%
(17)	Residual (10)-(11)-(13)				- 113	406		

(i) Includes mainly rye, triticale, mixed grain and sorghum

Source: DEFRA

\*\* These balance sheets have been adjusted as per Defra's reliability allocation method

APPENDIX II

**CUMULATIVE MONTHLY STATISTICS**  
**Usage of Cereals by Processors,**  
**External Trade and Stocks**

Situation as at end of June 2017

Thousand tonnes

		2010/11 to 2014/15 Average	2008/09 52 weeks	2009/10 52 weeks	2010/11 52 weeks	2011/12 52 weeks	2012/13 52 weeks	2013/14 52 weeks	2014/15 52 weeks	2015/16 52 weeks	2016/17 52 weeks	% Change 2016/17 on 2015/16	Actual Change 2016/17 on 2015/16
<b>WHEAT</b>													
(1) Usage	Human and -Flour Millers	1205	1202	1055	767	688	1794	1439	1168	935	940	1%	5
(2)	Industrial -home-grown	5260	4894	5135	5685	5267	4787	4957	5675	5616	6289	12%	673
(3)	Processors -Total	6465	6096	6190	6451	5955	6581	6396	6843	6551	7229	10%	678
(4)	-Distillers	743	580	527	531	662	818	815	772	649	705	9%	56
(5)	-Others	173	117	120	159	157	174	181	175	176	166	-5%	-10
(6)	Animal Feed Processors (a)	3098	2841	2797	2739	3079	3085	2875	3099	3353	3493	4%	139
(7)	Poultry Integrated Units	1425	1496	1540	1614	1606	1505	1381	1420	1215	1210	0%	-5
(8)	Imports From July (b)	1750	1304	1240	1000	907	2956	2210	1677	1504	1870	24%	366
(9)	Exports From July (b)	1662	3524	2427	2654	2545	734	431	1948	2857	1444	-49%	-1413
(14)	Intervention -Actual	0	0	0	0	0	0	0	0	0	0	-	-
(15)	-Projected	0	0	0	0	0	0	0	0	0	0	-	-
<b>BARLEY</b>													
(1) Usage	Maltsters/Distillers	-	-	-	-	-	-	-	-	-	-	-	-
(2)	-home-grown	-	-	-	-	-	-	-	-	-	-	-	-
(3)	-Total	1853	1743	1592	1730	1818	1832	1902	1893	1821	1847	1%	26
(4)	Animal Feed Processors (a)	903	692	863	854	650	880	1047	953	986	998	1%	12
(5)	Poultry Integrated Units	62	80	94	69	57	70	86	47	49	52	7%	4
(6)	Imports From July (b)	151	142	86	125	156	237	100	139	159	132	-17%	-27
(7)	Exports From July (b)	925	812	1034	772	804	395	1158	1495	1994	1050	-47%	-944
(11)	Intervention -Actual	22	0	62	106	5	0	0	0	0	0	-	-
(12)	-Projected	9	0	140	40	5	0	0	0	0	0	-	-
<b>MAIZE</b>													
(1) Usage	Human and Industrial	346	267	252	295	278	308	375	447	322	396	23%	73
(2)	Animal Feed Processors (a)	253	119	114	109	108	238	360	281	276	267	-3%	-9
(3)	Imports From July (b)	1612	952	898	1041	985	1687	2394	1954	1814	2059	13%	245
(4)	Exports From July (b)	89	14	15	34	30	60	203	119	115	177	54%	62
<b>OATS</b>													
(1) Usage	Human and Industrial Processors	498	419	429	460	474	492	508	492	525	522	-1%	-4
(2)	Animal Feed Processors (a)	80	61	89	91	59	78	118	95	52	40	-24%	-12
(3)	Exports From July (b)	39	86	50	53	16	13	36	77	65	21	-68%	-44

n/a - Not Available/Applicable (a) Great Britain only. (b) HM Customs/Intrastat

\* Percentage changes not meaningful.

There were 53 weeks in the Statistical year 2010. In order to incorporate the change January 2010 was increased to a 5 week period compared to 4 weeks in 2009. There were 53 weeks in the Statistical year 2016. In order to incorporate the change April 2016 was increased to a 5 week period compared to 4 weeks in 2015. Note: This Appendix reflects the position as at 26 September 2017. The figures above may differ slightly from the most recent published data.

Survey data for GB Compounders and Cereals Usage by Millers, Brewers and Maltsters can be found using the following link:

<https://www.gov.uk/government/organisations/department-for-environment-food-rural-affairs/about/statistics>

SOURCE: Defra Agricultural Statistics and Analysis, HM Customs and Excise/Intrastat, HGCA