

SUMMARY OF REVISIONS

The tables below provide estimates of UK cereals supply and demand in the 2018/19 season (July – June). For the 2016/17 and 2017/18 wheat and barley end-season balance sheets, and the 2018/19 wheat and maize balance sheets, residuals have been identified after the full season official statistics were taken into account, stated in Appendix 1.

The **main revisions** from May's estimates and comparisons with the 2017/18 season are summarised below.

END-SEASON 2018/19 UK CEREAL SUPPLY AND DEMAND

WHEAT

- **Trade** – In 2018/19 the UK imported 1.858Mt of wheat, 128Kt higher than that forecast in May and 65Kt more than in 2017/18. Exports totalled 358Kt, 58Kt more than May's estimate, but 20% (90Kt) lower year on year.
- **Availability** – Total available supplies are estimated at 17.131Mt, 128Kt higher than May's estimate. However, compared with 2017/18 total availability is 7% (1.255Mt) lower.
- **Usage** – Full season domestic consumption is estimated at 14.718Mt relatively unchanged from May's estimates but 933Kt less than levels recorded in 2017/18. While animal feed demand is estimated to be lower (-111Kt), the majority of the decline is driven by a fall (-816Kt) in human and industrial (H&I) consumption.
- **Closing stocks** – Commercial end-season stocks are estimated at 1.911Mt for 2018/19, 73Kt lower than May's forecast, but 193Kt higher than levels recorded in 2017/18.

BARLEY

- **Trade** – At 70Kt, full season barley imports are 10Kt less than May's estimates and 35Kt lower year on year. Exports of barley in 2018/19 are 47Kt down on that forecast in May and 22% (238Kt) lower on levels recorded in 2017/18.
- **Availability** – Total available supplies of barley are estimated at 7.657Mt, relatively unchanged (-10Kt) from May's estimate, but 9% (722Kt) lower year on year.
- **Usage** – Domestic consumption of barley is estimated at 5.703Mt, just 8Kt lower than May's forecast, but 444Kt down on 2017/18 levels. While H&I consumption recorded a slight rise on the year, animal feed usage is estimated to have decreased.
- **Closing stocks** – At 1.091Mt, commercial end-season stocks are 46Kt higher than previous estimates and 1% (15Kt) higher year on year.

OATS

- **Trade** – Imports of oats reached 32Kt, relatively unchanged from May's estimates, but 13Kt higher year on year. Full season exports are 37Kt, unchanged from previous forecasts, but 9Kt more than in 2017/18.
- **Availability** – At 1.020Mt, total availability of oats is unchanged from May's estimate, but 16Kt up on the year.
- **Usage** – Total domestic consumption of oats is estimated at 867Kt, 25Kt more than previous forecasts and 30Kt higher year on year. H&I oat usage remains relatively unchanged on the year, while animal feed demand is 11% higher than in 2017/18.
- **Closing stocks** – End-season stocks of oats are estimated at 116Kt, 24Kt less than the previous estimate and 22Kt down year on year.

MAIZE

- **Trade** – In 2018/19 maize imports totalled 2.822Mt, 332Kt higher than May's estimate, 798Kt more than levels recorded in 2017/18, and the highest level on record.
- **Availability** – At 3.069Mt, total availability of maize for the season is 332Kt more than previous estimates and 774Kt higher year on year.
- **Usage** – Full season domestic consumption of maize is estimated at 2.421Mt, 124Kt higher than Mays estimate, and 544Kt up on the year. H&I usage of maize is 24% higher and animal feed demand is 31% more compared with 2017/18.
- **Closing stocks** – Commercial end-season stocks of maize are estimated to be 46Kt higher than previous forecasts and 66Kt more than end-June 2018 at 313Kt.

For further information please contact:

Millie Askew, Senior Analyst, Balance Sheet Team
E: millie.askew@ahdb.org.uk T: 024 7647 8968

UK CEREAL SUPPLY AND DEMAND ESTIMATES (a)

Estimates made in September

(JULY - JUNE YEARS)

Links connect to relevant Defra/AHDB data pages

Thousand tonnes

| | WHEAT | | | | | | | | BARLEY | | | | | | | |
|--|-------------------------------|-----------------------|---------------------|---------------------|-------------------|-------------------|------------------------------|-------------------------|-------------------------------|---------------------|---------------------|---------------------|-------------------|-------------------|------------------------------|-------------------------|
| | 2013/14 2017/18 average | 2015/16 estimate** | 2016/17 estimate | 2017/18 estimate | 2018/19 May-19 | 2018/19 Sep-19 | Absolute change May-19 | % change on 17/18 | 2013/14 2017/18 average | 2015/16 estimate | 2016/17 estimate | 2017/18 estimate | 2018/19 May-19 | 2018/19 Sep-19 | Absolute change May-19 | % change on 17/18 |
| (1) Opening Stocks | 2,144 | 2,434 | 2,787 | 1,755 | 1,718 | 1,718 | - | -2% | 1,269 | 1,497 | 1,367 | 1,105 | 1,076 | 1,076 | - | -3% |
| (2) Production | 14,779 | 16,506 | 14,383 | 14,837 | 13,555 | 13,555 | - | -9% | 7,039 | 7,370 | 6,655 | 7,169 | 6,510 | 6,510 | - | -9% |
| (3) Imports | 1,804 | 1,509 | 1,855 | 1,793 | 1,730 | 1,858 | 128 | 4% | 122 | 159 | 106 | 105 | 80 | 70 | -10 | -33% |
| (4) Total Availability | 18,727 | 20,449 | 19,025 | 18,386 | 17,003 | 17,131 | 128 | -7% | 8,430 | 9,026 | 8,128 | 8,379 | 7,666 | 7,657 | -10 | -9% |
| (5) Human and Industrial Consumption (b) | 7,711 | 7,360 | 8,110 | 7,792 | 6,996 | 6,976 | -20 | -10% | 1,897 | 1,833 | 1,863 | 1,881 | 1,903 | 1,903 | - | 1% |
| (5a) (of which home grown) | 6,580 | 6,416 | 7,169 | 6,765 | 5,968 | 5,923 | -45 | -12% | n/a | n/a | n/a | n/a | n/a | n/a | * | * |
| (6) Usage as Animal Feed (c) | 7,042 | 7,094 | 7,236 | 7,514 | 7,384 | 7,403 | 19 | -1% | 3,617 | 3,613 | 3,655 | 4,046 | 3,592 | 3,584 | -8 | -11% |
| (6a) (of which home grown) | 6,357 | 6,444 | 6,523 | 6,792 | 6,636 | 6,653 | 17 | -2% | n/a | n/a | n/a | n/a | n/a | n/a | * | * |
| (6b) (of which Compounders) | 3,825 | 3,845 | 4,034 | 4,232 | 4,144 | 4,166 | 22 | -2% | 1,153 | 1,108 | 1,132 | 1,278 | 1,182 | 1,203 | 21 | -6% |
| (6c) (of which Integrated Poultry Units) | 1,297 | 1,210 | 1,211 | 1,241 | 1,158 | 1,155 | -3 | -7% | 59 | 49 | 53 | 59 | 48 | 50 | 2 | -15% |
| (7) Seed (d) | 283 | 281 | 278 | 271 | 271 | 271 | - | 0% | 179 | 182 | 189 | 183 | 183 | 183 | - | 0% |
| (8) Other | 76 | 79 | 72 | 74 | 68 | 68 | - | -8% | 35 | 37 | 33 | 36 | 33 | 33 | - | -8% |
| (9) Total Domestic Consumption | 15,111 | 14,814 | 15,696 | 15,651 | 14,719 | 14,718 | -1 | -6% | 5,728 | 5,665 | 5,740 | 6,147 | 5,711 | 5,703 | -8 | -7% |
| (10) Balance (4) - (9) | 3,616 | 5,635 | 3,329 | 2,735 | 2,284 | 2,413 | 129 | -12% | 2,702 | 3,361 | 2,388 | 2,232 | 1,955 | 1,954 | -1 | -12% |
| (11) Exports (e) | 1,425 | 2,848 | 1,438 | 448 | 300 | 358 | 58 | -20% | 1,355 | 1,994 | 1,026 | 1,101 | 910 | 863 | -47 | -22% |
| (12) Intervention Stocks (e) | - | - | - | - | - | - | - | * | - | - | - | - | - | - | * | * |
| (13) Commercial End-Season Stocks (e) | 2,051 | 2,787 | 1,755 | 1,718 | 1,984 | 1,911 | -73 | 11% | 1,285 | 1,367 | 1,105 | 1,076 | 1,045 | 1,091 | 46 | 1% |
| (14) (of which Estimated Operating stock requirement) (f) | 1,522 | 1,500 | 1,560 | 1,600 | 1,550 | 1,550 | - | -3% | 751 | 760 | 760 | 770 | 780 | 780 | - | 1% |
| (15) (of which free stock) (g) | 529 | 1,287 | 195 | 118 | 434 | 361 | -73 | 206% | 534 | 607 | 345 | 306 | 265 | 311 | 46 | 2% |
| (16) Surplus available for either export or free stock (10)-(12)-(14)-(17) | 1,954 | 4,135 | 1,633 | 567 | 734 | 720 | -14 | 27% | 1,889 | 2,601 | 1,371 | 1,408 | 1,175 | 1,174 | -1 | -17% |
| (17) Residual (10)-(11)-(13) | | | 136 | 568 | | 144 | | | | | 257 | 54 | | | | |

| | MAIZE | | | | | | | | OATS | | | | | | | |
|--|-------------------------------|-----------------------|---------------------|---------------------|-------------------|-------------------|------------------------------|-------------------------|-------------------------------|---------------------|---------------------|---------------------|-------------------|-------------------|------------------------------|-------------------------|
| | 2013/14 2017/18 average | 2015/16 estimate** | 2016/17 estimate | 2017/18 estimate | 2018/19 May-19 | 2018/19 Sep-19 | Absolute change May-19 | % change on 17/18 | 2013/14 2017/18 average | 2015/16 estimate | 2016/17 estimate | 2017/18 estimate | 2018/19 May-19 | 2018/19 Sep-19 | Absolute change May-19 | % change on 17/18 |
| (1) Opening Stocks | 241 | 309 | 148 | 271 | 247 | 247 | - | -9% | 109 | 107 | 93 | 110 | 138 | 138 | - | 25% |
| (2) Production | - | - | - | - | - | - | * | * | 855 | 799 | 816 | 875 | 850 | 850 | - | -3% |
| (3) Imports | 1,993 | 1,742 | 2,007 | 2,024 | 2,490 | 2,822 | 332 | 39% | 35 | 39 | 32 | 19 | 32 | 32 | - | 69% |
| (4) Total Availability | 2,233 | 2,051 | 2,155 | 2,295 | 2,737 | 3,069 | 332 | 34% | 999 | 945 | 941 | 1,004 | 1,020 | 1,020 | - | 2% |
| (5) Human and Industrial Consumption (b) | 585 | 465 | 570 | 643 | 777 | 800 | 23 | 24% | 517 | 525 | 521 | 537 | 535 | 536 | 1 | 0% |
| (5a) (of which home grown) | - | - | - | - | - | - | - | * | 482 | 499 | 476 | 519 | 503 | 500 | -3 | -4% |
| (6) Usage as Animal Feed (c) | 1,244 | 1,310 | 1,135 | 1,230 | 1,516 | 1,617 | 101 | 31% | 289 | 239 | 263 | 273 | 280 | 303 | 24 | 11% |
| (6a) (of which home grown) | - | - | - | - | - | - | * | * | 289 | 239 | 263 | 273 | 280 | 303 | 24 | 11% |
| (7) Seed | - | - | - | - | - | - | * | * | 21 | 19 | 23 | 24 | 24 | 24 | - | 0% |
| (8) Other (h) | 5 | 9 | 4 | 4 | 4 | 4 | - | 0% | 4 | 4 | 4 | 4 | 4 | 4 | - | 0% |
| (9) Total Domestic Consumption | 1,833 | 1,784 | 1,709 | 1,877 | 2,297 | 2,421 | 124 | 29% | 831 | 787 | 811 | 837 | 843 | 867 | 24 | 4% |
| (10) Balance (4) - (9) | 400 | 267 | 446 | 418 | 440 | 648 | 208 | 55% | 168 | 158 | 130 | 166 | 177 | 153 | -24 | -8% |
| (11) Exportable surplus | 153 | 120 | 175 | 171 | 173 | 188 | 15 | 10% | 45 | 65 | 21 | 28 | 37 | 37 | - | 30% |
| (12) Commercial End-Season Stocks | 247 | 148 | 271 | 247 | 267 | 313 | 46 | 27% | 123 | 93 | 110 | 138 | 140 | 116 | -24 | -16% |
| (13) Residual (10)-(11)-(12) | | | | | | 147 | | | | | | | | | | |

Due to rounding, totals may not agree with the sum of individual items

(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&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&I total for maize. This was previously included in the "Other" category.

* Change not meaningful

** These Balance Sheets have been adjusted as per Defra's reliability allocation method

Continued over the page

| | | OTHER CEREALS (i) | | | | | | | | |
|-------------|-------------------------------------|-------------------------------|---------------------|---------------------|---------------------|-------------------|-------------------|------------------------------|-------------------------|--|
| | | 2013/14 2017/18 average | 2015/16 estimate | 2016/17 estimate | 2017/18 estimate | 2018/19 May-19 | 2018/19 Sep-19 | Absolute change May-19 | % change on 17/18 | |
| (1) | Opening Stocks | 5 | 5 | 5 | 5 | 5 | 5 | - | 0% | |
| (2) | Production | 118 | 121 | 110 | 119 | 169 | 169 | - | 42% | |
| (3) | Imports | 3 | 3 | 3 | 4 | 4 | 3 | -1 | -33% | |
| (4) | Total Availability | 125 | 129 | 118 | 129 | 179 | 177 | -2 | 38% | |
| (5+6) | H&I and Animal Feed | 117 | 121 | 110 | 121 | 170 | 169 | -1 | 40% | |
| (5a+6a) | (of which home grown) | 115 | 118 | 107 | 116 | 166 | 166 | - | 43% | |
| (7) | Seed | 3 | 3 | 3 | 3 | 3 | 3 | - | 0% | |
| (8) | Other | - | - | - | - | - | - | - | * | |
| (9) | Total Domestic Consumption | 120 | 124 | 113 | 124 | 173 | 172 | -1 | 39% | |
| (10) | Balance (4) - (9) | 5 | 5 | 5 | 5 | 5 | 5 | - | 6% | |
| (11) | Exportable surplus | - | - | - | - | - | - | - | * | |
| (12) | Intervention Stocks | - | - | - | - | - | - | - | * | |
| (13) | Commercial End-Season Stocks | 5 | 5 | 5 | 5 | 5 | 5 | - | 0% | |

| | | TOTAL CEREALS | | | | | | | | |
|-------------|---|-------------------------------|-----------------------|---------------------|---------------------|-------------------|-------------------|------------------------------|-------------------------|--|
| | | 2013/14 2017/18 average | 2015/16 estimate** | 2016/17 estimate | 2017/18 estimate | 2018/19 May-19 | 2018/19 Sep-19 | Absolute change May-19 | % change on 17/18 | |
| (1) | Opening Stocks | 3,768 | 4,352 | 4,400 | 3,247 | 3,184 | 3,184 | - | -2% | |
| (2) | Production | 22,791 | 24,796 | 21,964 | 22,999 | 21,085 | 21,085 | - | -8% | |
| (3) | Imports | 3,955 | 3,452 | 4,003 | 3,945 | 4,336 | 4,785 | 450 | 21% | |
| (4) | Total Availability | 30,515 | 32,600 | 30,366 | 30,191 | 28,604 | 29,054 | 450 | -4% | |
| (5) | H&I (wheat, barley, maize, oats) (h) | 10,709 | 10,183 | 11,064 | 10,853 | 10,211 | 10,215 | 4 | -6% | |
| (6) | Animal Feed (wheat, barley, maize oats) (h) | 12,191 | 12,256 | 12,288 | 13,064 | 12,771 | 12,908 | 136 | -1% | |
| (5a +6a) | Other cereals (H&I and Animal Feed) | 117 | 121 | 110 | 121 | 170 | 169 | -1 | 40% | |
| (7) | Seed | 485 | 485 | 493 | 481 | 481 | 481 | - | 0% | |
| (8) | Other | 120 | 129 | 113 | 118 | 109 | 109 | - | -8% | |
| (9) | Total Domestic Consumption | 23,623 | 23,174 | 24,068 | 24,637 | 23,743 | 23,881 | 139 | -3% | |
| (10) | Balance (4) - (9) | 6,891 | 9,426 | 6,298 | 5,554 | 4,862 | 5,173 | 311 | -7% | |
| (11) | Exports | 2,979 | 5,027 | 2,660 | 1,749 | 1,420 | 1,446 | 26 | -17% | |
| (12) | Intervention Stocks | - | - | - | - | - | - | - | * | |
| (13) | Commercial End-Season Stocks | 3,710 | 4,400 | 3,247 | 3,184 | 3,442 | 3,437 | -5 | 8% | |
| (14) | Estimated Operating stock requirement (wheat & barley only) | 2,273 | 2,260 | 2,320 | 2,370 | 2,330 | 2,330 | - | -2% | |
| (15) | Free stock for wheat and barley | 1,063 | 1,894 | 541 | 424 | 700 | 673 | -27 | 58% | |
| (16) | Surplus available for either export or free stock (all) | 4,041 | 7,167 | 3,587 | 2,563 | 2,532 | 2,553 | 21 | 0% | |
| (17) | Residual (10)-(11)-(13) | | | 392 | 622 | | 290 | | | |

Due to rounding, totals may not agree with the sum of individual items

Source: AHDB; Defra

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

** These Balance Sheets have been adjusted as per Defra's reliability allocation method

CUMULATIVE MONTHLY STATISTICS
Usage of cereals by processors, external trade and stocks

Situation as at end of June 2019

Thousand tonnes

| | | | 2013/14 to 2017/18 Average | 2012/13 52 weeks | 2013/14 52 weeks | 2014/15 52 weeks | 2015/16 52 weeks | 2016/17 52 weeks | 2017/18 52 weeks | 2018/19 52 weeks | % Change 2018/19 on 2017/18 | Actual Change 2018/19 on 2017/18 |
|---------------|---------------------------------|---------------------------------------|----------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|-----------------------------------|--|
| WHEAT | | | | | | | | | | | | |
| Usage | Human and Industrial | -Flour Millers [†] | 1102 | 1794 | 1439 | 1168 | 935 | 941 | 1027 | 1053 | 2% | 25 |
| | | -imported | 5675 | 4787 | 4957 | 5675 | 5616 | 6308 | 5820 | 5038 | -13% | -782 |
| | | -home-grown | 6777 | 6581 | 6396 | 6843 | 6551 | 7249 | 6847 | 6091 | -11% | -756 |
| | | -Total | 745 | 818 | 815 | 773 | 649 | 696 | 794 | 722 | -9% | -72 |
| | | -Distillers | 3296 | 3086 | 2875 | 3099 | 3353 | 3488 | 3665 | 3586 | -2% | -79 |
| | | Animal Feed Processors ^(a) | 1294 | 1505 | 1381 | 1420 | 1215 | 1211 | 1241 | 1155 | -7% | -86 |
| | | Poultry Integrated Units | 1796 | 2920 | 2205 | 1632 | 1496 | 1855 | 1793 | 1858 | 4% | 65 |
| Imports | | From July ^(b) | 1420 | 734 | 431 | 1947 | 2839 | 1438 | 448 | 358 | -20% | -90 |
| Exports | Intervention | -Actual | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | * | * |
| | | -Projected | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | * | * |
| BARLEY | | | | | | | | | | | | |
| Usage | Maltsters/Distillers | -imported | - | - | - | - | - | - | - | - | - | - |
| | | -home-grown | - | - | - | - | - | - | - | - | - | - |
| | | -Total | 1860 | 1832 | 1902 | 1862 | 1821 | 1851 | 1866 | 1891 | 1% | 26 |
| | | Animal Feed Processors ^(a) | 1021 | 880 | 1048 | 953 | 986 | 995 | 1126 | 1012 | -10% | -114 |
| | | Poultry Integrated Units | 59 | 70 | 86 | 47 | 49 | 53 | 59 | 50 | -15% | -9 |
| Imports | | From July ^(b) | 107 | 220 | 92 | 110 | 125 | 106 | 105 | 70 | -33% | -35 |
| Exports | Intervention | -Actual | 1349 | 393 | 1158 | 1494 | 1964 | 1026 | 1101 | 863 | -22% | -238 |
| | | -Projected | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | * | * |
| MAIZE | | | | | | | | | | | | |
| Usage | Human and Industrial | Processors | 414 | 308 | 375 | 447 | 322 | 396 | 528 | ** | * | * |
| | | Animal Feed Processors ^(a) | 298 | 238 | 361 | 281 | 276 | 266 | 305 | 594 | 95% | 289 |
| Imports | | From July ^(b) | 1983 | 1636 | 2365 | 1847 | 1674 | 2007 | 2024 | 2822 | 39% | 798 |
| Exports | | From July ^(b) | 152 | 59 | 197 | 107 | 111 | 175 | 171 | 183 | 7% | 12 |
| OATS | | | | | | | | | | | | |
| Usage | Human and Industrial Processors | Animal Feed Processors ^(a) | 517 | 492 | 508 | 492 | 526 | 521 | 537 | 536 | 0% | -1 |
| | | | 72 | 78 | 118 | 95 | 52 | 40 | 58 | 64 | 11% | 7 |
| Imports | | From July ^(b) | 31 | 66 | 41 | 30 | 31 | 32 | 19 | 32 | 69% | 13 |
| Exports | | From July ^(b) | 45 | 13 | 36 | 77 | 63 | 21 | 28 | 37 | 30% | 9 |

Source: AHDB, Defra, HMRC

^(a) Great Britain only.^(b) HMRC

* Changes not meaningful

** Insufficient sample to produce robust figure

† Includes bioethanol and starch usage

Footnotes:

Due to rounding, totals may not agree with the sum of the individual items.

There are 53 weeks in the Statistical year 2016. In order to incorporate the change April 16 was increased to a 5 week period compared to 4 weeks in 2015.

Figures in Appendix II were updated on 19 September 2019. The data above may differ from the most recent published data.