SUPPLY AND DEMAND

24 September 2020

AHDB

SUMMARY OF REVISIONS

The tables below provide estimates of UK cereals supply and demand in the 2019/20 season (July – June). For the 2019/20 wheat, barley, maize and oats 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 2018/19 season are summarised below.

END-SEASON 2019/20 UK CEREAL SUPPLY AND DEMAND

WHEAT

- **Trade** – The UK imported 1.054Mt of wheat in 2019/20, relatively unchanged from that forecast in May, but 804Kt less than levels recorded in 2018/19. Exports totalled 1.205Mt, 35Kt more than May's estimate and 847Kt higher year on year.
- **Availability** – In 2019/20, total available supplies are estimated at 19.190Mt, relatively unchanged from May's estimate, but 12% (2.059Mt) higher than 2018/19 levels.
- **Usage** – Total domestic consumption is estimated at 14.722Mt in 2019/20, 103Kt higher than May's estimates, driven by higher than forecast demand from the human and industrial (H&I) sectors as well as animal feed. Compared with 2018/19, total usage is relatively unchanged (14.720Mt in 2018/19).
- **Closing stocks** – At 2.438Mt, commercial end-season stocks are 958Kt lower than May's estimate, but 527Kt more than year earlier levels.

BARLEY

- **Trade** – In 2019/20 the UK imported 70Kt of barley, 24Kt higher than May's estimate, but unchanged on year earlier levels. Full season barley exports are just 10Kt lower than May's estimate, but more than double that of levels recorded in 2018/19 at 1.790Mt.
- **Availability** – Total availability of barley is estimated at 9.210Mt, 24Kt higher than that estimated in May, but 20% (1.553Mt) more than levels recorded in 2018/19.
- **Usage** – At 6.150Mt, total domestic consumption is 20Kt less than May's estimate, but 447Kt higher than year earlier levels driven by a rise in animal feed demand, outweighing a drop in H&I usage.
- **Closing stocks** – Commercial end-season stocks are estimated at 1.357Mt, 141Kt higher than May's estimate and 265Kt more than year earlier levels.

OATS

- **Trade** – Full season oat imports were 4Kt higher than May's estimate, but 14Kt lower year on year. UK oat exports reached 120Kt in 2019/20, 5Kt less than that estimated in May, but 83Kt higher than levels recorded in 2018/19.
- **Availability** – At 1.210Mt, total availability of oats is 4Kt higher than May's estimate, but 189Kt up on the year.
- **Usage** – In 2019/20 total domestic consumption of oats is 19Kt higher than May's estimates, and 8% (67Kt) more than in 2018/19, driven largely by higher animal feed demand.
- **Closing stocks** – End-season stocks of oats are estimated at 106Kt, 60Kt less than the previous estimate and 10Kt down year on year.

MAIZE

- **Trade** – UK imports of maize totalled 2.376Mt in 2019/20, 88Kt higher than May's estimate, but 449Kt lower than levels recorded in 2018/19.
- **Availability** – At 2.689Mt, total availability of maize is 88Kt higher than that estimated in May, but 383Kt lower than levels recorded in 2018/19.
- **Usage** – Full season domestic consumption of maize is estimated at 2.158Mt, relatively unchanged from May's estimate. However, total usage is 218Kt lower than year earlier levels driven by a reduction in animal feed demand.
- **Closing stocks** – In 2019/20 commercial end-season stocks of maize are estimated at 222Kt, 78Kt lower than that estimated in May and 91Kt lower year on year.

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Appendix I

UK CEREAL SUPPLY AND DEMAND ESTIMATES [(a)]

Estimates made in September 2020

July to June crop years | Thousand tonnes

		WHEAT								BARLEY							
		2014/15 2018/19 average	2016/17 estimate	2017/18 estimate	2018/19 estimate	2019/20 May-20	2019/20 Sep-20	Absolute change May-20	% change on 18/19	2014/15 2018/19 average	2016/17 estimate	2017/18 estimate	2018/19 estimate	2019/20 May-20	2019/20 Sep-20	Absolute change May-20	% change on 18/19
(1)	Opening stocks	2,051	2,787	1,755	1,718	1,911	1,911	-	11%	1,285	1,367	1,105	1,076	1,091	1,091	-	1%
(2)	Production	15,129	14,383	14,837	13,555	16,225	16,225	-	20%	6,923	6,655	7,169	6,510	8,048	8,048	-	24%
(3)	Imports	1,737	1,855	1,793	1,858	1,050	1,054	4	-43%	116	106	105	70	46	70	24	0%
(4)	**Total availability**	**18,916**	**19,025**	**18,386**	**17,131**	**19,186**	**19,190**	**4**	**12%**	**8,324**	**8,128**	**8,379**	**7,657**	**9,185**	**9,210**	**24**	**20%**
(5)	Human and industrial consumption (b)	7,612	8,110	7,792	6,969	6,856	6,923	67	-1%	1,885	1,863	1,881	1,901	1,813	1,781	-33	-6%
(5a)	(of which home grown)	6,581	7,169	6,765	5,918	6,086	6,173	87	4%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6)	Usage as animal feed (c)	7,247	7,236	7,514	7,402	7,402	7,438	36	0%	3,634	3,655	4,046	3,582	4,129	4,142	13	16%
(6a)	(of which home grown)	6,582	6,523	6,792	6,652	6,897	6,938	41	4%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6b)	(of which compounders)	3,982	4,034	4,232	4,164	4,180	4,200	20	1%	1,120	1,132	1,278	1,172	1,388	1,398	10	19%
(6c)	(of which integrated poultry units)	1,249	1,211	1,241	1,155	1,165	1,182	16	2%	52	53	59	50	41	44	3	-13%
(7)	Seed (d)	280	278	271	281	281	281	-	0%	184	189	183	187	187	187	-	0%
(8)	Other	76	72	74	68	81	81	-	19%	35	33	36	33	40	40	-	21%
(9)	**Total domestic consumption**	**15,216**	**15,696**	**15,651**	**14,720**	**14,620**	**14,722**	**103**	**0%**	**5,738**	**5,740**	**6,147**	**5,703**	**6,169**	**6,150**	**-20**	**8%**
(10)	**Balance (4) - (9)**	**3,700**	**3,329**	**2,735**	**2,411**	**4,566**	**4,467**	**-99**	**85%**	**2,585**	**2,388**	**2,232**	**1,954**	**3,016**	**3,060**	**44**	**57%**
(11)	Exports (e)	1,410	1,438	448	358	1,170	1,205	35	236%	1,296	1,026	1,101	863	1,800	1,790	-10	107%
(12)	Intervention stocks (e)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks (e)**	**2,121**	**1,755**	**1,718**	**1,911**	**3,396**	**2,438**	**-958**	**28%**	**1,227**	**1,105**	**1,076**	**1,091**	**1,216**	**1,357**	**141**	**24%**
(14)	(of which estimated operating stock requirement) (f)	1,542	1,560	1,600	1,550	1,550	1,550	-	0%	764	760	770	780	790	790	-	1%
(15)	(of which free stock) (g)	579	195	118	361	1,846	888	-958	146%	463	345	306	311	426	567	141	82%
(16)	**Surplus available for either export or free stock (10)-(12)-(14)-(17)**	**1,989**	**1,633**	**567**	**720**	**3,016**	**2,093**	**-923**	**191%**	**1,759**	**1,371**	**1,408**	**1,174**	**2,226**	**2,356**	**130**	**101%**
(17)	**Residual (10)-(11)-(13)**		**136**	**568**	**142**		**824**				**257**	**54**			**-86**		

		MAIZE								OATS							
		2014/15 2018/19 average	2016/17 estimate	2017/18 estimate	2018/19 estimate	2019/20 May-20	2019/20 Sep-20	Absolute change May-20	% change on 18/19	2014/15 2018/19 average	2016/17 estimate	2017/18 estimate	2018/19 estimate	2019/20 May-20	2019/20 Sep-20	Absolute change May-20	% change on 18/19
(1)	Opening stocks	247	148	271	247	313	313	-	27%	123	93	110	138	116	116	-	-16%
(2)	Production	-	-	-	-	-	-	-	-	832	816	875	850	1,076	1,076	-	26%
(3)	Imports	2,091	2,007	2,024	2,825	2,288	2,376	88	-16%	32	32	19	32	14	18	4	-44%
(4)	**Total availability**	**2,338**	**2,155**	**2,295**	**3,072**	**2,601**	**2,689**	**88**	**-12%**	**987**	**941**	**1,004**	**1,020**	**1,206**	**1,210**	**4**	**19%**
(5)	Human and industrial consumption	609	570	643	800	799	803	4	0%	522	521	537	536	534	553	19	3%
(5a)	(of which home grown)	-	-	-	-	-	-	-	-	489	476	519	500	520	537	17	7%
(6)	Usage as animal feed	1,278	1,135	1,230	1,573	1,360	1,351	-8	-14%	281	263	273	302	351	350	-0	16%
(6a)	(of which home grown)	-	-	-	-	-	-	-	-	281	263	273	302	351	350	-0	16%
(7)	Seed	-	-	-	-	-	-	-	-	22	23	24	25	25	25	-	0%
(8)	Other (h)	5	4	4	4	4	4	-	0%	4	4	4	4	5	5	-	25%
(9)	**Total domestic consumption**	**1,892**	**1,709**	**1,877**	**2,377**	**2,162**	**2,158**	**-4**	**-9%**	**829**	**811**	**837**	**867**	**915**	**934**	**19**	**8%**
(10)	**Balance (4) - (9)**	**445**	**446**	**418**	**696**	**439**	**531**	**92**	**-24%**	**158**	**130**	**166**	**153**	**291**	**276**	**-15**	**80%**
(11)	Exportable surplus	149	175	171	188	139	135	-4	-28%	46	21	28	37	125	120	-5	224%
(12)	**Commercial end-season stocks**	**258**	**271**	**247**	**313**	**300**	**222**	**-78**	**-29%**	**113**	**110**	**138**	**116**	**166**	**106**	**-60**	**-8%**
(13)	**Residual (10)-(11)-(12)**				**194**		**174**								**50**		

Links connect to relevant Defra/AHDB data pages

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 sheets 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

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		OTHER CEREALS (i)							
		2014/15 2018/19 average	2016/17 estimate	2017/18 estimate	2018/19 estimate	2019/20 May-20	2019/20 Sep-20	Absolute change May-20	% change on 18/19
(1)	Opening stocks	5	5	5	5	5	5	-	0%
(2)	Production	130	110	119	169	168	168	-	-1%
(3)	Imports	3	3	4	3	3	1	-2	-66%
(4)	**Total availability**	**138**	**118**	**129**	**177**	**176**	**174**	**-2**	-2%
(5+6)	H&I and animal feed	130	110	121	169	168	166	-2	-2%
(5a+6a)	(of which home grown)	127	107	116	166	165	165	-	-1%
(7)	Seed	3	3	3	3	3	3	-	0%
(8)	Other	-	-	-	-	-	-		-
(9)	**Total domestic consumption**	**133**	**113**	**124**	**172**	**171**	**169**	**-2**	-2%
(10)	**Balance (4) - (9)**	**5**	**5**	**5**	**5**	**5**	**5**	**-**	-1%
(11)	Exportable surplus	-	-	-	-	-	-		-
(12)	Intervention stocks	-	-	-	-	-	-		-
(13)	**Commercial end-season stocks**	**5**	**5**	**5**	**5**	**5**	**5**	**-**	5%

		TOTAL CEREALS							
		2014/15 2018/19 average	2016/17 estimate	2017/18 estimate	2018/19 estimate	2019/20 May-20	2019/20 Sep-20	Absolute change May-20	% change on 18/19
(1)	Opening stocks	3,710	4,400	3,247	3,184	3,437	3,437	-	8%
(2)	Production	23,014	21,964	22,999	21,085	25,517	25,517	-	21%
(3)	Imports	3,978	4,003	3,945	4,789	3,401	3,520	119	-27%
(4)	**Total availability**	**30,702**	**30,366**	**30,191**	**29,058**	**32,354**	**32,473**	**119**	12%
(5)	H&I (wheat, barley, maize, oats) (h)	10,630	11,064	10,853	10,206	10,002	10,060	58	-1%
(6)	Animal feed (wheat, barley, maize oats) (h)	12,448	12,288	13,064	12,858	13,241	13,281	41	3%
(5a +6a)	Other cereals (H&I and animal feed)	130	110	121	169	168	166	-2	-2%
(7)	Seed	489	493	481	496	496	496	-	0%
(8)	Other	120	113	118	109	130	130	-	19%
(9)	Total domestic consumption	23,817	24,068	24,636	23,838	24,036	24,133	96	1%
(10)	**Balance (4) - (9)**	**6,885**	**6,298**	**5,556**	**5,220**	**8,318**	**8,340**	**22**	60%
(11)	Exports	2,901	2,660	1,749	1,446	3,234	3,249	15	125%
(12)	Intervention stocks	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks**	**3,724**	**3,247**	**3,184**	**3,437**	**5,083**	**4,128**	**-955**	**20%**
(14)	Estimated operating stock requirement (wheat & barley only)	2,306	2,320	2,370	2,330	2,340	2,340	-	0%
(15)	Free stock for wheat and barley	1,042	541	424	673	2,272	1,455	*	116%
(16)	**Surplus available for either export or free stock (all)**	**4,318**	**3,587**	**2,563**	**2,553**	**5,978**	**5,038**	**-940**	**97%**
(17)	**Residual (10)-(11)-(13)**		**392**	**623**	**337**		**962**		

Source: AHDB, Defra

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

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

AHDB

Appendix II

CUMULATIVE MONTHLY STATISTICS

Usage of cereals by processors, external trade and stocks

Situation as at end of June 2020 — Thousand tonnes

		2014/15 to 2018/19 average	2013/14 52 weeks	2014/15 52 weeks	2015/16 52 weeks	2016/17 52 weeks	2017/18 52 weeks	2018/19 52 weeks	2019/20 52 weeks	% Change 2019/20 on 2018/19	Actual Change 2019/20 on 2018/19
WHEAT											
Usage	**Flour millers** [(1)]	**6,714**	**6,396**	**6,843**	**6,551**	**7,249**	**6,844**	**6,084**	**6,043**	**-1%**	**-42**
	of which home-grown	5,690	4,957	5,675	5,616	6,308	5,817	5,034	5,293	**5%**	**259**
	of which imported	1,025	1,439	1,168	935	941	1,027	1,051	750	**-29%**	**-301**
	Brewers, maltsters and distillers	**728**	**815**	**773**	**649**	**696**	**794**	**730**	**	*	*
	Animal Feed Processors [(2)]	**4,689**	**4,256**	**4,519**	**4,568**	**4,699**	**4,906**	**4,751**	**4,831**	**2%**	**80**
	of which feed compounders	3,440	2,875	3,099	3,353	3,488	3,665	3,596	3,650	**2%**	**54**
	of which intergrated poultry units	1,248	1,381	1,420	1,215	1,211	1,241	1,155	1,181	**2%**	**26**
Imports	**From July** [(3)]	**1,727**	**2,205**	**1,632**	**1,496**	**1,855**	**1,793**	**1,858**	**1,054**	**-43%**	**-804**
Exports	**From July** [(3)]	**1,406**	**431**	**1,947**	**2,839**	**1,438**	**448**	**358**	**1,205**	**236%**	**847**
BARLEY											
Usage	**Brewers, maltsters and distillers**	**1,858**	**1,902**	**1,862**	**1,821**	**1,851**	**1,866**	**1,889**	**1,769**	**-6%**	**-120**
	Animal Feed Processors [(2)]	**1,064**	**1,133**	**1,000**	**1,034**	**1,048**	**1,185**	**1,053**	**1,291**	**23%**	**238**
	of which feed compounders	1,013	1,048	953	986	995	1,126	1,003	1,247	**24%**	**244**
	of which intergrated poultry units	51	86	47	49	53	59	50	44	**-13%**	**-7**
Imports	**From July** [(3)]	**103**	**92**	**110**	**125**	**106**	**105**	**70**	**70**	**0%**	**0**
Exports	**From July** [(3)]	**1,290**	**1,158**	**1,494**	**1,964**	**1,026**	**1,101**	**863**	**1,790**	**107%**	**927**
MAIZE											
Usage	**Human and Industrial**	**	**375**	**447**	**322**	**396**	**528**	**	**	*	*
	Animal Feed Processors [(2)]	**399**	**494**	**354**	**334**	**312**	**347**	**648**	**429**	**-34%**	**-219**
	of which feed compounders	343	361	281	276	266	305	590	365	**-38%**	**-225**
	of which intergrated poultry units	55	133	73	58	46	42	58	64	**10%**	**6**
Imports	**From July** [(3)]	**2,076**	**2,365**	**1,847**	**1,674**	**2,007**	**2,024**	**2,828**	**2,376**	**-16%**	**-452**
Exports	**From July** [(3)]	**150**	**197**	**107**	**111**	**175**	**171**	**188**	**135**	**-28%**	**-53**
OATS											
Usage	**Human and Industrial**	**522**	**508**	**492**	**526**	**521**	**537**	**536**	**553**	**3%**	**17**
	Animal Feed Processors [(2)]	**62**	**118**	**95**	**52**	**40**	**58**	**65**	**64**	**-2%**	**-1**
Imports	**From July** [(3)]	**29**	**41**	**30**	**31**	**32**	**19**	**32**	**18**	**-44%**	**-14**
Exports	**From July** [(3)]	**45**	**36**	**77**	**63**	**21**	**28**	**37**	**120**	**224%**	**83**

Source: AHDB, Defra, HMRC

[(1)] Includes bioethanol and starch usage
[(2)] Great Britain only
[(3)] HMRC
* Changes not meaningful
**Insufficient sample to produce robust figure

Notes

Due to rounding, totals may not agree with the sum of the individual items.
There are 53 weeks in the statistical year 2020. In order to incorporate the change January 2020 was increased to a 5 week period compared to 4 weeks in 2019.
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 24 September 2020. The data above may differ from the most recent published data.

Disclaimer