

Early Bird Survey of Planting and Planting Intentions – November 2024



21 November 2024

Please note, official Defra UK area information yet to be published for 2024. The 2024 area data used in this release is the official provisional estimates for England and Scotland, combined with estimated areas for Wales and Northern Ireland. Please see the 'Additional information' section below for more information.

PARTIAL WHEAT AREA RECOVERY

The provisional results from AHDB's Early Bird Survey (EBS) are shown in the table below and have been extrapolated from provisional 2024 survey data to produce forecasted crop areas.

Please note that this survey (EBS) captures early plantings and planting intentions as of early November. In recent years, planted and harvested areas have differed because of weather events, particularly for harvest 2024, our base year for this survey, meaning some uncertainty is accordingly built into these results.

Autumn drilling conditions have been poor in many parts of the UK but good in others. This survey's deadline was postponed by one week to allow time for some regions to gather more clarity on planted areas. Some drilling intentions changed last minute; most were simply delayed.

The forecasts for harvest 2025 projects the wheat and total oat area rising, but the winter and spring barley and oilseed rape areas falling from 2024. Remember these are a snapshot of farmers actions and intentions as at early November, and weather and economics can change these well before harvest.

The overall **wheat** area is forecast to rise by 5%, all within the winter crop, after last autumn's challenging weather sharply reduced the area. Spring wheat is expected to nearly halve after last year's rise due to the wet conditions, though the crop accounts for a very small proportion of the total wheat area. However, at 1,613 Kha, the projected area remains below the 2019 – 2023 average of 1,705 Kha.

The **winter barley** area is estimated to fall by just under 1%, whilst the area of spring barley is anticipated to fall by a considerable 13% after rising sharply in 2024. The **spring barley** projection at 704 Kha would still be above 2022 and 2023 levels. However, with the winter barley area edging lower again, the falls in spring barley would mean the smallest UK barley area since 2014 at 1,084 Kha.

The area of **oats** is projected to rise by a modest 3%, including a slightly greater increase in winter oats, which is expected to account for a slightly larger proportion of the national area. At 189 Kha, the oat area would be just above the 2019 – 2023 average.

FURTHER DECLINES FOR OILSEED RAPE AREA

A 17% decline in the **oilseed rape** planted area is forecast. If confirmed, this would reduce the oilseed rape area to its lowest area in the UK for 42 years. The final area could be even lower depending on damage from pests, particularly cabbage stem flea beetles, and weather conditions between now and harvest.

Historically, when oilseed rape area falls, **pulses** tend to rise to fill the break crop gap. However, this does not appear to be the case this season, with pulses falling approximately 7% from last harvest.

Other combinable cereals are down 8%. Crops of smaller area had a lesser area coverage in the survey, so these results will be subject to greater uncertainty.

The last 'catch-all' category '**other crops on arable land**' falls 3% and includes sugar beet, potatoes, vegetables and other crops that appear in the arable farm rotation such as temporary grass and maize. This survey is focussed on the arable farm rotation rather than all arable land which would include grass and forage rotations. For this reason, an estimate of the total area of these crops that appear in the arable rotation are used in this figure.

The survey also points to a further rise (+51%) in **uncropped arable land** from 2024's already high level. However, it is unclear if this reflects decisions still to be made or land intended for agri-environmental schemes in England, particularly with the largest rises reported for Northern England. Data from Defra shows that between July and October only a further 20 Kha were entered into Sustainable Farming Incentive (SFI) options that take land (grassland or arable) out of production across all farm types. Defra's next figures on SFI uptake are due in February and will need to be monitored.

Thousand hectares	2024 UK area estimates*	Provisional EBS forecast 2025^	% year-on-year change
Wheat	1,530	1,613	+5%
Winter Barley	383	380	-1%
Spring Barley	811	704	-13%
Oats	183	189	+3%
OSR	287	239	-17%

* Official provisional UK area estimates for 2024 are not available. Official provisional estimates are for England and Scotland only. AHDB have assumed the % change for Wales and Northern Ireland area figures from 2023 is the same as in England and Scotland combined. These have been combined with the provisional England and Scotland figures to produce UK area estimates.

^survey of agronomists up early November 2024.

Source: Defra, the Scottish Government, The Andersons Centre for the AHDB.

ADDITIONAL INFORMATION

The Early-Bird Survey (EBS) is undertaken each autumn to assess national cropping intentions. It is carried out by The Andersons Centre with help from agronomists from the Association of Independent Crop Consultants (AICC) and the Agricultural Industries Confederation (AIC); independents and nationals alike.

In total, over 70 agronomists took part in the survey contributing 600 Kha of arable land across the UK to establish cropping changes on farms as a representation for the national change in cropping. The survey was struck during early November, with data collected up to 15 November.

In previous years, the survey has been an accurate estimate of planted areas and therefore a strong indication of harvest areas for the following year. Final adjusted results including a breakdown of regional data for the main crops will be published following publication of the final UK June survey results for 2024, which is scheduled for release in late December. No provisional national crop area figures are published, so we use estimates from amalgamated [Defra's provisional 2024 June Survey data for England](#) and the [Scottish Government's 2024 June Agricultural Census](#) figures, plus estimates for Wales and Northern Ireland. The percentage change in cropped area between 2023 and 2024 in Wales and Northern Ireland is assumed to be in line with England and Scotland combined.

The survey carries a track record of accurate figures. Nonetheless, the survey only represents a snapshot at a given point in time and therefore, should be interpreted carefully. The reliability of the estimates for larger crops is greater, as are estimates for the winter crops as they are based on actual plantings, compared with planting intentions for spring crops.