SUPPLY AND DEMAND

23 September 2021

AHDB

SUMMARY OF REVISIONS

The tables below provide estimates of UK cereals supply and demand in the 2020/21 season (July – June). For the 2020/21 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 2019/20 season are summarised below.

END-SEASON 2020/21 UK CEREAL SUPPLY AND DEMAND

WHEAT

- **Trade** – The UK imported 2.431Mt of wheat in 2020/21, up 331Kt from May's estimate, driven by increased H&I use of imported wheat offsetting home-grown usage. Imports are 130% higher than those recorded through the 2019/20 season. Exports for 2020/21 totalled 209Kt, 29Kt more than May's forecast and down 83% on 2019/20.
- **Availability** – In 2020/21, total available supplies are estimated at 14.527Mt. This is 331Kt more than May's forecast, driven by an increase in imported wheat volumes. Available supplies for 2020/21 are 24% (4.663Mt) lower than 2019/20.
- **Usage** – Total domestic consumption is estimated at 12.849Mt, relatively unchanged from May's estimate. A slight decrease is noted in home-grown H&I usage compared with May's forecast, offset by an increase in imports. Compared with 2019/20 (14.660Mt), total domestic consumption is down 12% this season.
- **Closing stocks** – Commercial end-season stocks are estimated at 1.416Mt. This is 218Kt higher than May's forecast, but 42% less than year earlier levels (2.438Mt).

BARLEY

- **Trade** – The UK imported 88Kt of barley during 2020/21, 33Kt more than the May estimate and 18Kt more than 2019/20. Full season exports come in at 1.290Mt, 90Kt more than forecast in May and 499Kt less (-28%) than 2019/20 levels.
- **Availability** – Total availability for the 2020/21 season ends at 9.562Mt, relatively unchanged from the May forecast (+33Kt) and 4% more than the year earlier (2019/20 at 9.210Mt).
- **Usage** – Total domestic consumption ends the season at 7.292Mt just 48Kt more than May's estimate, but 1.101Mt more than 2019/20. A rise in animal feed demand has been the primary driver of this increase.
- **Closing stocks** – For 2020/21, commercial end-season stocks come in at 1.058Mt, 66Kt more than the May forecast and 22% less than 2019/2020 volumes (1.357Mt).

OATS

- **Trade** – Full season oat imports remain relatively unchanged from May's estimates, at 20Kt. Levels are 11% more than year earlier volumes (18Kt in 2019/20), but 12Kt less than 2018/19 imports). UK oat exports, at 41Kt for the full season, are down 66% from 2019/20 volumes (120Kt), but relatively unchanged from May's estimates.
- **Availability** – Total availability remains unchanged from May's forecast, at 1.157Mt, but 52Kt less than 2019/20.
- **Usage** – In 2020/21, total domestic consumption is up 3% on the year, at 962Kt and just 9Kt more than May's estimate. However, the amount is 11% greater than 2018/19 volumes, with animal feed demand continuing to increase this season.
- **Closing stocks** – End-season stocks for 2020/21 finish at 146Kt, 18Kt less than May's outlook and 40Kt more than 2019/20.

MAIZE

- **Trade** – UK maize imports for the full season of 2020/21 stand at 2.857Mt. This is 359Kt more than May's estimates, with increases in animal feed and, to a lesser degree, H&I usage driving this. Maize imports are 20% up on the year, although relative to 2018/19 volumes (2.825Mt).
- **Availability** – Total availability for 2020/21 is pegged at 3.079Mt, 359Kt more than May's forecast. This is driven by the rise in imports and returns a level similar to 2018/19 (3.072Mt).
- **Usage** – Domestic consumption for the full season stands at 2.548Mt, 117Kt more than estimated in May and 18% greater than 2019/20. An increase in predominantly animal feed demand has driven this rise.
- **Closing stocks** – Commercial end-season stocks stand at 211Kt for the 2020/21 season, 5% less than year earlier levels and 41Kt more than May's outlook.

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Appendix I

UK CEREAL SUPPLY AND DEMAND ESTIMATES [(a)]

Estimates made in September 2021

July to June crop years | Thousand tonnes

		WHEAT								BARLEY							
		2015/16 2019/20 average	2017/18 estimate	2018/19 estimate	2019/20 estimate	2020/21 May-21	2020/21 Sep-21	Absolute change May-21	% change on 19/20	2015/16 2019/20 average	2017/18 estimate	2018/19 estimate	2019/20 estimate	2020/21 May-21	2020/21 Sep-21	Absolute change May-21	% change on 19/20
(1)	Opening stocks	2,121	1,755	1,718	1,911	2,438	2,438	-	28%	1,227	1,105	1,076	1,091	1,357	1,357	0	24%
(2)	Production	15,101	14,837	13,555	16,225	9,658	9,658	-	-40%	7,150	7,169	6,510	8,048	8,117	8,117	0	1%
(3)	Imports	1,614	1,793	1,858	1,056	2,100	2,431	331	130%	102	105	70	70	55	88	33	26%
(4)	**Total availability**	**18,836**	**18,386**	**17,131**	**19,190**	**14,196**	**14,527**	**331**	**-24%**	**8,480**	**8,379**	**7,657**	**9,210**	**9,529**	**9,562**	**33**	**4%**
(5)	Human and industrial consumption (b)	7,431	7,792	6,969	6,923	6,592	6,587	-4	-5%	1,852	1,881	1,901	1,781	1,665	1,721	57	-3%
(5a)	(of which home grown)	6,488	6,765	5,918	6,173	5,229	5,099	-130	-17%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6)	Usage as animal feed (c)	7,337	7,514	7,402	7,438	5,963	5,999	36	-19%	3,808	4,046	3,582	4,142	5,316	5,307	-9	28%
(6a)	(of which home grown)	6,670	6,792	6,652	6,938	5,213	5,249	36	-24%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6b)	(of which compounders)	4,095	4,232	4,164	4,200	3,506	3,536	30	-16%	1,218	1,278	1,172	1,398	1,824	1,884	61	35%
(6c)	(of which integrated poultry units)	1,200	1,241	1,155	1,182	1,075	1,082	7	-8%	51	59	50	44	142	147	5	235%
(7)	Seed (d)	266	271	281	215	215	215	-	0%	194	183	187	228	223	223	-	-2%
(8)	Other	75	74	68	81	48	48	-	-41%	36	36	33	40	41	41	-	3%
(9)	**Total domestic consumption**	**15,108**	**15,651**	**14,720**	**14,660**	**12,817**	**12,849**	**32**	**-12%**	**5,889**	**6,147**	**5,703**	**6,191**	**7,244**	**7,292**	**48**	**18%**
(10)	**Balance (4) - (9)**	**3,728**	**2,735**	**2,411**	**4,529**	**1,379**	**1,678**	**299**	**-63%**	**2,591**	**2,232**	**1,954**	**3,019**	**2,284**	**2,270**	**-14**	**-25%**
(11)	Exports (e)	1,260	448	358	1,205	180	209	29	-83%	1,355	1,101	863	1,790	1,200	1,290	90	-28%
(12)	Intervention stocks (e)	-	-	-	-	-	-	-	0%	-	-	-	-	-	-	-	0%
(13)	**Commercial end-season stocks (e)**	**2,122**	**1,718**	**1,911**	**2,438**	**1,198**	**1,416**	**218**	**-42%**	**1,199**	**1,076**	**1,091**	**1,357**	**992**	**1,058**	**66**	**-22%**
(14)	(of which estimated operating stock requirement) (f)	1,552	1,600	1,550	1,550	1,500	1,500	-	-3%	772	770	780	790	790	790	-	0%
(15)	(of which free stock) (g)	570	118	361	888	-	-	-	-	427	306	311	567	202	268	66	0%
(16)	**Surplus available for either export or free stock (10)-(12)-(14)-(18)**	**1,829**	**567**	**720**	**2,093**	**-**	**-**	**-**	**-**	**1,782**	**1,408**	**1,174**	**2,356**	**1,402**	**1,558**	**156**	**-34%**
(17)	**2020/21 operating stock deficit (14)-(13)****					**-302**	**-84**	**218**	**-**	**-**							
(18)	**Residual (10)-(11)-(13)**		**568**	**142**	**886**		**53**				**54**	**-**	**-127**	**92**	**-78**		

		MAIZE								OATS							
		2015/16 2019/20 average	2017/18 estimate	2018/19 estimate	2019/20 estimate	2020/21 May-21	2020/21 Sep-21	Absolute change May-21	% change on 19/20	2015/16 2019/20 average	2017/18 estimate	2018/19 estimate	2019/20 estimate	2020/21 May-21	2020/21 Sep-21	Absolute change May-21	% change on 19/20
(1)	Opening stocks	258	271	247	313	222	222	-	-29%	113	110	138	116	106	106	-	-8%
(2)	Production	-	-	-	-	-	-	-	0%	883	875	850	1,076	1,031	1,031	-	-4%
(3)	Imports	2,195	2,024	2,825	2,376	2,499	2,857	359	20%	28	19	32	18	20	20	-	11%
(4)	**Total availability**	**2,452**	**2,295**	**3,072**	**2,689**	**2,721**	**3,079**	**359**	**15%**	**1,024**	**1,004**	**1,020**	**1,210**	**1,157**	**1,157**	**-**	**-4%**
(5)	Human and industrial consumption	656	643	800	803	991	1,010	19	26%	534	537	536	553	536	531	-5	-4%
(5a)	(of which home grown)	-	-	-	-	-	-	-	0%	506	519	500	537	518	513	-5	-5%
(6)	Usage as animal feed	1,320	1,230	1,573	1,351	1,436	1,534	98	14%	285	273	302	350	384	397	14	13%
(6a)	(of which home grown)	-	-	-	-	-	-	-	0%	285	273	302	350	384	397	14	13%
(7)	Seed	-	-	-	-	-	-	-	0%	24	24	25	30	29	29	-	-3%
(8)	Other (h)	5	4	4	4	4	4	-	0%	4	4	4	5	5	5	-	0%
(9)	**Total domestic consumption**	**1,981**	**1,877**	**2,377**	**2,158**	**2,431**	**2,548**	**117**	**18%**	**848**	**837**	**867**	**939**	**954**	**962**	**9**	**3%**
(10)	**Balance (4) - (9)**	**471**	**418**	**696**	**531**	**290**	**532**	**242**	**0%**	**176**	**166**	**153**	**271**	**204**	**195**	**-9**	**-28%**
(11)	Exportable surplus	158	171	188	135	120	141	21	5%	54	28	37	120	40	41	1	-66%
(12)	**Commercial end-season stocks**	**240**	**247**	**313**	**222**	**170**	**211**	**41**	**-5%**	**113**	**138**	**116**	**106**	**164**	**147**	**-17**	**38%**
(13)	**Residual (10)-(11)-(12)**		**-**	**194**	**174**		**180**				**-**	**-**	**45**		**7**		

Links connect to relevant Defra/AHDB data pages
Due to rounding, totals may not agree with the sum of individual items
* Change not meaningful
** Due to the highly unusual nature of this seasons hugely reduced wheat production figure, an extra line is included in the balance sheet to show the operating stock deficit.
(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.

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		OTHER CEREALS (i)							
		2015/16 2019/20 average	2017/18 estimate	2018/19 estimate	2019/20 estimate	2020/21 May-21	2020/21 Sep-21	Absolute change May-21	% change on 19/20
(1)	Opening stocks	5	5	5	5	5	5	-	5%
(2)	Production	138	119	169	168	157	157	-	-7%
(3)	Imports	3	4	3	1	2	2	-	138%
(4)	**Total availability**	**145**	**129**	**177**	**174**	**165**	**165**	**-**	-6%
(5+6)	H&I and animal feed	137	121	169	166	156	156	-	-6%
(5a+6a)	(of which home grown)	134	116	166	165	155	155	-	-6%
(7)	Seed	3	3	3	3	3	3	-	0%
(8)	Other	-	-	-	-	-	-	-	-
(9)	**Total domestic consumption**	**140**	**124**	**172**	**169**	**159**	**159**	**-**	-6%
(10)	**Balance (4) - (9)**	**5**	**5**	**5**	**5**	**6**	**6**	**-**	7%
(11)	Exportable surplus	-	-	-	-	-	1	1	-
(12)	Intervention stocks	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks**	**5**	**5**	**5**	**5**	**6**	**5**	**-**	-3%

		TOTAL CEREALS							
		2015/16 2019/20 average	2017/18 estimate	2018/19 estimate	2019/20 estimate	2020/21 May-21	2020/21 Sep-21	Absolute change May-21	% change on 19/20
(1)	Opening stocks	3,724	3,247	3,184	3,437	4,128	4,128	-	20%
(2)	Production	23,272	22,999	21,085	25,517	18,963	18,963	-	-26%
(3)	Imports	3,942	3,945	4,789	3,522	4,676	5,399	723	53%
(4)	**Total availability**	**30,938**	**30,191**	**29,058**	**32,475**	**27,768**	**28,491**	**723**	-12%
(5)	H&I (wheat, barley, maize, oats) (h)	10,473	10,853	10,206	10,060	9,782	9,849	67	-2%
(6)	Animal feed (wheat, barley, maize oats) (h)	12,750	13,064	12,858	13,281	13,098	13,237	139	0%
(5a +6a)	Other cereals (H&I and animal feed)	137	121	169	166	156	156	-	-6%
(7)	Seed	487	481	496	476	470	470	-	-1%
(8)	Other	120	118	109	130	98	98	-	-25%
(9)	Total domestic consumption	23,967	24,636	23,838	24,113	23,605	23,810	205	-1%
(10)	**Balance (4) - (9)**	**6,971**	**5,556**	**5,220**	**8,362**	**4,163**	**4,681**	**518**	-44%
(11)	Exports	2,826	1,749	1,446	3,249	-	1,682	*	-48%
(12)	Intervention stocks	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks**	**3,679**	**3,184**	**3,437**	**4,128**	**-**	**2,837**	*****	**-31%**
(14)	Estimated operating stock requirement (wheat & barley only)	2,324	2,370	2,330	2,340	2,290	2,290	-	-2%
(15)	Free stock for wheat and barley***	997	424	673	1,455	202	268	*	-82%
(16)	**Surplus available for either export or free stock (10)-(12)-(14)-(18)**	**4,182**	**2,563**	**2,553**	**5,038**	**1,902**	**2,104**	**202**	**-58%**
(17)	**Residual (10)-(11)-(13)**	**466**	**623**	**337**	**984**		**162**		

Source: AHDB, Defra

Links connect to relevant Defra/AHDB data pages
Due to rounding, totals may not agree with the sum of individual items
(i) Includes mainly rye, triticale and mixed grain.
* Change not meaningful
*** Free stock figure in total cereals balance sheet relates to barley only due to the wheat deficit

Appendix II

CUMULATIVE MONTHLY STATISTICS

Usage of cereals by processors, external trade and stocks

Situation as at end of June 2021

Thousand tonnes

		2015/16 to 2019/20 average	2014/15 52 weeks	2015/16 52 weeks	2016/17 52 weeks	2017/18 52 weeks	2018/19 52 weeks	2019/20 52 weeks	2020/21 52 weeks	% Change 2020/21 on 2019/20	Actual Change 2020/21 on 2019/20
WHEAT											
Usage	**Flour millers** [1]	**6,556**	**6,843**	**6,551**	**7,249**	**6,844**	**6,084**	**6,052**	**5,618**	**-7%**	**-434**
	of which home-grown	5,612	5,675	5,616	6,308	5,817	5,034	5,288	4,129	**-22%**	**-1,159**
	of which imported	944	1,168	935	941	1,027	1,051	764	1,489	**95%**	**725**
	Brewers, maltsters and distillers	**708**	**773**	**649**	**696**	**794**	**730**	**670**	**819**	**25%*** **	**149**
	Animal Feed Processors [2]	**4,754**	**4,519**	**4,568**	**4,699**	**4,906**	**4,751**	**4,844**	**4,123**	**-15%**	**-720**
	of which feed compounders	3,552	3,099	3,353	3,488	3,665	3,596	3,659	3,041	**-17%**	**-618**
	of which intergrated poultry units	1,201	1,420	1,215	1,211	1,241	1,155	1,184	1,082	**-9%**	**-102**
Imports	**From July** [3]	**1,612**	**1,632**	**1,496**	**1,855**	**1,793**	**1,858**	**1,056**	**2,431**	**130%**	**1,375**
Exports	**From July** [3]	**1,258**	**1,947**	**2,839**	**1,438**	**448**	**358**	**1,205**	**209**	**-83%**	**-996**
BARLEY											
Usage	**Brewers, maltsters and distillers**	**1,839**	**1,862**	**1,821**	**1,851**	**1,866**	**1,889**	**1,766**	**1,709**	**-3%**	**-57**
	Animal Feed Processors [2]	**1,121**	**1,000**	**1,034**	**1,048**	**1,185**	**1,053**	**1,284**	**1,818**	**42%**	**533**
	of which feed compounders	1,070	953	986	995	1,126	1,003	1,240	1,671	**35%**	**430**
	of which intergrated poultry units	51	47	49	53	59	50	44	147	**234%**	**103**
Imports	**From July** [3]	**95**	**110**	**125**	**106**	**105**	**70**	**70**	**88**	**26%**	**18**
Exports	**From July** [3]	**1,349**	**1,494**	**1,964**	**1,026**	**1,101**	**863**	**1,790**	**1,290**	**-28%**	**-499**
MAIZE											
Usage	**Human and Industrial**	**415**	**447**	**322**	**396**	**528**	**	**	**	*	*
	Animal Feed Processors [2]	**414**	**354**	**334**	**312**	**347**	**648**	**431**	**611**	**42%**	**180**
	of which feed compounders	361	281	276	266	305	590	367	550	**50%**	**183**
	of which intergrated poultry units	54	73	58	46	42	58	64	61	**-5%**	**-4**
Imports	**From July** [3]	**2,181**	**1,847**	**1,674**	**2,007**	**2,024**	**2,825**	**2,376**	**2,857**	**20%**	**481**
Exports	**From July** [3]	**156**	**107**	**111**	**175**	**171**	**188**	**135**	**141**	**5%**	**7**
OATS											
Usage	**Human and Industrial**	**534**	**492**	**526**	**521**	**537**	**536**	**553**	**531**	**-4%**	**-23**
	Animal Feed Processors [2]	**55**	**95**	**52**	**40**	**58**	**65**	**61**	**80**	**31%**	**19**
Imports	**From July** [3]	**27**	**30**	**31**	**32**	**19**	**32**	**18**	**20**	**10%**	**2**
Exports	**From July** [3]	**54**	**77**	**63**	**21**	**28**	**37**	**120**	**41**	**-66%**	**-79**

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
*** Please note year on year comparison does not truly reflect actual change due to Dec 2019 BMD wheat figure not being published

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 14 May 2021. The data above may differ from the most recent published data.

Disclaimer