SUPPLY AND DEMAND

29 September 2022

SUMMARY OF REVISIONS

The tables below provide estimates of UK cereals supply and demand for the 2021/22 season (July – June). For the 2021/22 wheat and barley 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 2020/21 season are summarised below.

END-SEASON 2021/22 UK CEREAL SUPPLY AND DEMAND

WHEAT

- **Trade** – The UK imported 1.994Mt of wheat in 2021/22, 244Kt higher than May's forecast, but 437Kt less than 2020/21 levels. At 511Kt, exports were 19Kt lower than the previous estimate, but 302Kt higher year on year.
- **Availability** – In 2021/22, total availability was slightly higher (244Kt) than May's estimates and 2.871Mt higher than in 2020/21, at 17.398Mt. While opening stocks and imports were down on the year, a larger crop in 2021 led to the rise in available supplies.
- **Usage** – Total domestic consumption is estimated at 14.708Mt in 2021/22, 23Kt lower than May's forecasts, but 1.673Mt up year on year, driven by stronger animal feed and human and industrial (H&I) demand.
- **Closing stocks** – At 1.846Mt, commercial end-season stocks are 47Kt lower than May's estimate, but 429Kt more than year earlier levels.

BARLEY

- **Trade** – Imports of barley in 2021/22 totalled 89Kt, 19Kt higher than the previous estimate and are the same as levels recorded in 2020/21. In 2021/22, the UK is estimated to have exported 764Kt of barley, relatively unchanged from May's forecast of 765Kt. Compared with 2020/21, barley exports are 526Kt lower.
- **Availability** – At 8.108Mt, total availability of barley is estimated to be 19Kt higher than that estimated in May, but 1.454Mt lower than levels recorded in 2020/21, driven by smaller carry-in stocks and production.
- **Usage** – In 2021/22, total domestic consumption of barley is estimated to be 60Kt higher than May's estimate, at 6.330Mt. Compared with 2020/21, barley demand is 930Kt lower, driven by a fall in animal feed usage, outweighing a rise in H&I demand.
- **Closing stocks** – Commercial end-season stocks are estimated at 964Kt, 90Kt lower than May's estimate, and 94Kt lower on the year. Furthermore, this is the lowest barley end-season stock level in 10 years.

OATS

- **Trade** – At 17Kt, oat imports are 3Kt lower than the previous estimate and the year. Full season oat exports are estimated at 123Kt, marginally lower (-2Kt) than May's forecast, but 82Kt higher than 2020/21 levels. 2021/22 oat exports are the highest since 2002/03.
- **Availability** – With a record high domestic oat crop, and large carry-in stocks, total availability of oats in 2021/22 is estimated at 1.287Mt, 130Kt higher than in 2020/21.
- **Usage** – At 1.008Kt, total domestic consumption of oats in 2021/22 is 46Kt lower than what was forecast in May, but 49Kt higher than 2020/21 levels. Despite lower H&I usage in 2020/22, higher animal feed demand led to the increased consumption.
- **Closing stocks** – End-season stocks of oats are estimated at 157Kt, 46Kt higher than the previous estimate and 9Kt up year on year.

MAIZE

- **Trade** – In 2021/22 the UK imported 2.207Mt of maize, 23Kt more than May's estimate, but 650Kt down year on year.
- **Availability** – Total availability of maize for 2021/22 is estimated at 2.417Mt, down 661Kt from levels recorded in 2020/21, driven mainly by lower imports.
- **Usage** – Full season domestic consumption of maize is estimated at 2.035Mt, 59Kt less than May's estimate and 516Kt lower on the year.
- **Closing stocks** – At 248Kt, maize closing stocks are 48Kt higher than the previous estimate and 37Kt more than 2020/21 levels.

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AHDB

Appendix I

UK CEREAL SUPPLY AND DEMAND ESTIMATES [(a)]

Estimates made in September 2022

July to June crop years — **Thousand tonnes**

		WHEAT								BARLEY							
		2016/17 2020/21 average	2018/19 estimate	2019/20 estimate	2020/21 estimate	2021/22 May-22	2021/22 Sep-22	Absolute change May-22	% change on 20/21	2016/17 2020/21 average	2018/19 estimate	2019/20 estimate	2020/21 estimate	2021/22 May-22	2021/22 Sep-22	Absolute change May-22	% change on 20/21
(1)	Opening stocks	2,122	1,718	1,911	2,438	1,416	1,416	-	-42%	1,199	1,076	1,091	1,357	1,058	1,058	-	-22%
(2)	Production	13,731	13,555	16,225	9,658	13,988	13,988	-	45%	7,300	6,510	8,048	8,117	6,961	6,961	-	-14%
(3)	Imports	1,799	1,858	1,056	2,431	1,750	1,994	244	-18%	88	70	70	89	70	89	19	1%
(4)	**Total availability**	**17,652**	**17,131**	**19,192**	**14,527**	**17,154**	**17,398**	**244**	**20%**	**8,587**	**7,657**	**9,210**	**9,562**	**8,089**	**8,108**	**19**	**-15%**
(5)	Human and industrial consumption (b)	7,279	6,969	6,932	6,594	7,118	7,112	-6	8%	1,829	1,901	1,778	1,722	1,896	1,883	-14	9%
(5a)	(of which home grown)	6,226	5,918	6,169	5,108	6,050	6,011	-39	18%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6)	Usage as animal feed (c)	7,165	7,402	7,560	6,115	7,265	7,248	-17	19%	4,147	3,582	4,144	5,312	4,154	4,227	74	-20%
(6a)	(of which home grown)	6,478	6,652	7,060	5,365	6,665	6,548	-117	22%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6b)	(of which compounders)	4,081	4,164	4,320	3,654	4,081	4,049	-32	11%	1,374	1,172	1,399	1,890	1,546	1,544	-3	-18%
(6c)	(of which integrated poultry units)	1,174	1,155	1,185	1,080	1,158	1,143	-15	6%	71	50	44	147	82	83	1	-44%
(7)	Seed (d)	265	281	215	278	278	278	-	0%	193	187	223	185	185	185	-	0%
(8)	Other	69	68	81	48	70	70	-	46%	37	33	40	41	35	35	-	-15%
(9)	**Total domestic consumption**	**14,778**	**14,720**	**14,788**	**13,035**	**14,731**	**14,708**	**-23**	**13%**	**6,206**	**5,703**	**6,185**	**7,260**	**6,270**	**6,330**	**60**	**-13%**
(10)	**Balance (4) - (9)**	**2,874**	**2,411**	**4,404**	**1,492**	**2,423**	**2,690**	**267**	**80%**	**2,381**	**1,954**	**3,025**	**2,302**	**1,819**	**1,778**	**-41**	**-23%**
(11)	Exports (e)	732	358	1,205	209	530	511	-19	144%	1,214	863	1,790	1,290	765	764	-1	-41%
(12)	Intervention stocks (e)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks (e)**	**1,848**	**1,911**	**2,438**	**1,416**	**1,893**	**1,846**	**-47**	**30%**	**1,137**	**1,091**	**1,357**	**1,058**	**1,054**	**964**	**-90**	**-9%**
(14)	(of which estimated operating stock requirement) (f)	1,552	1,550	1,550	1,500	1,500	1,500	-	-	776	780	790	780	800	800	-	3%
(15)	(of which free stock) (g)	296	361	888		393	346	-47	*	361	311	567	278	254	164	-90	-41%
(16)	**Surplus available for either export or free stock (10)-(12)-(14)-(18)**	**1,028**	**720**	**2,093**		**923**	**857**	**-66**	*****	**1,576**	**1,174**	**2,356**	**1,568**	**1,019**	**928**	**-91**	**-41%**
(17)	**2020/21 operating stock deficit (13)-(14)****				**-134**												
(18)	**Residual (10)-(11)-(13)**		**142**	**761**			**333**				**-**	**-121**	**-46**		**50**		

		MAIZE								OATS							
		2016/17 2020/21 average	2018/19 estimate	2019/20 estimate	2020/21 estimate	2021/22 May-22	2021/22 Sep-22	Absolute change May-22	% change on 20/21	2016/17 2020/21 average	2018/19 estimate	2019/20 estimate	2020/21 estimate	2021/22 May-22	2021/22 Sep-22	Absolute change May-22	% change on 20/21
(1)	Opening stocks	240	247	313	222	211	211	-	-5%	113	138	116	106	147	147	-	38%
(2)	Production	-	-	-	-	-	-	-	-	930	850	1,076	1,031	1,123	1,123	-	9%
(3)	Imports	2,418	2,825	2,376	2,856	2,184	2,207	23	-23%	24	32	18	20	20	17	-3	-14%
(4)	**Total availability**	**2,658**	**3,072**	**2,689**	**3,078**	**2,394**	**2,417**	**23**	**-21%**	**1,066**	**1,020**	**1,210**	**1,157**	**1,290**	**1,287**	**-3**	**11%**
(5)	Human and industrial consumption	765	800	800	1,011	854	858	4	-15%	536	536	553	531	516	503	-14	-5%
(5a)	(of which home grown)	-	-	-	-	-	-	-	-	509	500	537	513	497	485	-13	-6%
(6)	Usage as animal feed	1,367	1,573	1,362	1,536	1,237	1,174	-63	-24%	316	302	346	394	504	471	-33	19%
(6a)	(of which home grown)	-	-	-	-	-	-	-	-	316	302	346	394	504	471	-33	19%
(7)	Seed	-	-	-	-	-	-	-	-	26	25	29	28	28	28	-	0%
(8)	Other (h)	4	4	4	4	4	4	-	0%	4	4	5	5	6	6	-	20%
(9)	**Total domestic consumption**	**2,136**	**2,377**	**2,166**	**2,551**	**2,094**	**2,035**	**-59**	**-20%**	**881**	**867**	**933**	**958**	**1,054**	**1,008**	**-46**	**5%**
(10)	**Balance (4) - (9)**	**522**	**696**	**523**	**527**	**300**	**382**	**82**	**-28%**	**185**	**153**	**276**	**199**	**236**	**280**	**43**	**40%**
(11)	Exportable surplus	161	188	135	138	100	134	34	-3%	49	37	120	41	125	123	-2	200%
(12)	**Commercial end-season stocks**	**253**	**313**	**222**	**211**	**200**	**248**	48	**18%**	**124**	**116**	**106**	**147**	**111**	**157**	46	**6%**
(13)	**Residual (10)-(11)-(12)**		**194**	**166**	**178**							**50**	**11**				

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)							
		2016/17 2020/21 average	2018/19 estimate	2019/20 estimate	2020/21 estimate	2021/22 May-22	2021/22 Sep-22	Absolute change May-22	% change on 20/21
(1)	Opening stocks	5	5	5	5	5	5	-1	-10%
(2)	Production	145	169	168	156	297	297	-	90%
(3)	Imports	3	3	1	2	2	11	9	362%
(4)	**Total availability**	**152**	**177**	**174**	**164**	**304**	**313**	**9**	91%
(5+6)	H&I and animal feed	144	169	166	156	296	294	-2	88%
(5a+6a)	(of which home grown)	142	166	165	155	293	284	-9	83%
(7)	Seed	3	3	3	3	3	5	2	67%
(8)	Other	-	-	-	-	-	-	-	-
(9)	**Total domestic consumption**	**147**	**172**	**169**	**159**	**299**	**299**	**-**	88%
(10)	**Balance (4) - (9)**	**5**	**5**	**5**	**5**	**5**	**14**	**9**	196%
(11)	Exportable surplus	-	-	-	1	-	4	4	7
(12)	Intervention stocks	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks**	**5**	**5**	**5**	**4**	**5**	**9**	**5**	132%

		TOTAL CEREALS							
		2016/17 2020/21 average	2018/19 estimate	2019/20 estimate	2020/21 estimate	2021/22 May-22	2021/22 Sep-22	Absolute change May-22	% change on 20/21
(1)	Opening stocks	3,679	3,184	3,437	4,128	2,837	2,837	-	-31%
(2)	Production	22,105	21,085	25,517	18,962	22,369	22,369	-	18%
(3)	Imports	4,331	4,789	3,521	5,398	4,025	4,318	292	-20%
(4)	**Total availability**	**30,116**	**29,058**	**32,475**	**28,489**	**29,232**	**29,524**	**292**	**4%**
(5)	H&I (wheat, barley, maize, oats) (h)	10,409	10,206	10,063	9,858	10,385	10,355	-30	5%
(6)	Animal feed (wheat, barley, maize oats) (h)	12,996	12,858	13,412	13,357	13,159	13,120	-39	-2%
(5a +6a)	Other cereals (H&I and animal feed)	144	169	166	156	296	294	-2	88%
(7)	Seed	487	496	470	494	494	496	2	0%
(8)	Other	114	109	130	98	115	115	-	17%
(9)	**Total domestic consumption**	**24,149**	**23,838**	**24,241**	**23,963**	**24,449**	**24,380**	**-69**	**2%**
(10)	**Balance (4) - (9)**	**5,967**	**5,220**	**8,234**	**4,526**	**4,783**	**5,144**	**361**	**14%**
(11)	Exports	2,157	1,446	3,249	1,680	1,520	1,537	17	-9%
(12)	Intervention stocks	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks**	**3,367**	**3,437**	**4,128**	**2,837**	**3,263**	**3,223**	**-39**	**14%**
(14)	Estimated operating stock requirement (wheat & barley only)	2,328	2,330	2,340	2,280	2,300	2,300	-	1%
(15)	Free stock for wheat and barley***	657	673	1,455	278	647	509	-137	83%
(16)	**Surplus available for either export or free stock (10)-(12)-(14)-(17)**	**3,195**	**2,553**	**5,038**	**2,237**	**2,483**	**2,460**	**-23**	**10%**
(17)	**Residual (10)-(11)-(13)**		**336**	**856**	**9**		**383**		

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

AHDB

Appendix II

CUMULATIVE MONTHLY STATISTICS

Usage of cereals by processors, external trade and stocks

Situation as at end of June 2022 — Thousand tonnes

		2016/17 to 2020/21 average	2015/16 52 weeks	2016/17 52 weeks	2017/18 52 weeks	2018/19 52 weeks	2019/20 52 weeks	2020/21 52 weeks	2021/22 52 weeks	% Change 2021/22 on 2020/21	Actual Change 2021/22 on 2020/21
WHEAT											
Usage	**Flour millers [1]**	**6,371**	**6,551**	**7,249**	**6,844**	**6,085**	**6,050**	**5,625**	**5,934**	**5%**	**308**
	of which home-grown	5,317	5,616	6,308	5,817	5,034	5,287	4,140	4,833	**17%**	**693**
	of which imported	1,054	935	941	1,028	1,051	763	1,486	1,101	**-26%**	**-385**
	Brewers, maltsters and distillers	**742**	**649**	**696**	**794**	**730**	**670**	**818**	**1,004**	**23%**	**186**
	Animal Feed Processors [2]	**4,721**	**4,568**	**4,699**	**4,906**	**4,800**	**4,960**	**4,240**	**4,635**	**9%**	**395**
	of which feed compounders	3,547	3,353	3,488	3,665	3,644	3,777	3,159	3,491	**11%**	**332**
	of which intergrated poultry units	1,174	1,215	1,211	1,241	1,155	1,184	1,080	1,144	**6%**	**63**
Imports	**From July [3]**	**1,799**	**1,496**	**1,855**	**1,793**	**1,858**	**1,056**	**2,431**	**1,994**	**-18%**	**-437**
Exports	**From July [3]**	**732**	**2,839**	**1,438**	**448**	**358**	**1,205**	**209**	**511**	**144%**	**302**
BARLEY											
Usage	**Brewers, maltsters and distillers**	**1,816**	**1,821**	**1,851**	**1,866**	**1,889**	**1,766**	**1,710**	**1,869**	**9%**	**159**
	Animal Feed Processors [2]	**1,281**	**1,034**	**1,048**	**1,185**	**1,057**	**1,293**	**1,823**	**1,439**	**-21%**	**-384**
	of which feed compounders	1,210	986	995	1,126	1,007	1,249	1,676	1,356	**-19%**	**-320**
	of which intergrated poultry units	71	49	53	59	50	44	147	83	**-44%**	**-64**
Imports	**From July [3]**	**88**	**125**	**106**	**105**	**70**	**70**	**89**	**89**	**1%**	**1**
Exports	**From July [3]**	**1,214**	**1,964**	**1,026**	**1,101**	**863**	**1,790**	**1,290**	**764**	**-41%**	**-526**
MAIZE											
Usage	**Human and Industrial [4]**	**	**	**	**	**	**	**	**	*	*
	Animal Feed Processors [2]	**472**	**334**	**312**	**347**	**653**	**435**	**613**	**	*	*
	of which feed compounders	418	276	266	305	595	371	553	371	**-33%**	**-182**
	of which intergrated poultry units	54	58	46	42	58	64	60	**	*	*
Imports	**From July [3]**	**2,418**	**1,674**	**2,007**	**2,024**	**2,825**	**2,376**	**2,856**	**2,207**	**-23%**	**-650**
Exports	**From July [3]**	**161**	**111**	**175**	**171**	**188**	**135**	**138**	**134**	**-3%**	**-5**
OATS											
Usage	**Human and Industrial [5]**	**536**	**526**	**521**	**537**	**536**	**553**	**531**	**503**	**-5%**	**-28**
	Animal Feed Processors [2]	**62**	**52**	**40**	**58**	**66**	**64**	**82**	**125**	**52%**	**43**
Imports	**From July [3]**	**24**	**31**	**32**	**19**	**32**	**18**	**20**	**17**	**-14%**	**-3**
Exports	**From July [3]**	**49**	**63**	**21**	**28**	**37**	**120**	**41**	**123**	**200%**	**82**

Source: AHDB, Defra, HMRC

(1) Includes bioethanol and starch usage
(2) Great Britain only
(3) HMRC
(4) Data no longer available. For quarterly data to end of 2017/18, please access using historic balance sheets.
(5) Oat milled data published quarterly.

* 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 29 September 2022. The data above may differ from the most recent published data.