SUPPLY AND DEMAND

30 September 2025

SUMMARY OF REVISIONS

The tables below provide estimates of UK cereals supply and demand for the 2024/25 season (July – June). Residuals have been identified for the 2024/25 wheat and maize balance sheets. This is after the full season official statistics have been taken into account, stated in Appendix 1.

The **main revisions** from May's estimates and comparisons with the 2023/24 season are summarised below.

END-SEASON 2024/25 UK CEREAL SUPPLY AND DEMAND

WHEAT

- **Trade** – In 2024/25, 3.068 Mt of wheat was imported, up 631 Kt on the previous year and 65% above the five-year average. This is also 168 Kt higher than May's estimate. Full season exports totalled 199 Kt, down from 258 Kt in 2023/24, and 51 Kt lower than May's estimate.
- **Availability** – Total availably for 2024/25 stood at 16.974 Mt, down 59 Kt from the previous estimate and well below 18.369 Mt in 2023/24. Heavy opening stocks, and a high level of imports only partially offset the smaller domestic crop.
- **Usage** – Total domestic consumption was down 704 Kt on the previous year at 14.258 Mt. This figure is 412 Kt greater than May's estimate. The fall on the year came from a reduction in demand from both the human and industrial and animal feed sectors.
- **Closing stocks** – Commercial end of season stocks stand at 1.980 Mt. This is 957 Kt lower than May's figure, and 780 Kt smaller than in 2023/24.

BARLEY

- **Trade** – Exports stood at 707 Kt for the 2024/25 season. This is 57 Kt greater than estimated in May, but down 73 Kt year on year. Imports for the full season stood at 233 Kt, 58 Kt larger than May's estimate and 32 Kt higher than the year previous.
- **Availability** – Barley availability for 2024/25 was estimated at 8.487 Mt, this is just 3 Kt higher than May's estimate, but 53 Kt above 2023/24 figures.
- **Usage** – Barley usage for 2024/25 totalled 6.501 Mt, up 108 Kt from May and 179 Kt higher year on year. Feed usage of barley is up 291 Kt, while human and industrial consumption was down 112 Kt year on year.
- **Closing stocks** – Barley closing stocks for 2024/25 are estimated at 1.279 Mt, down 162 Kt from May's estimate, but 116 Kt higher than year earlier levels.

OATS

- **Trade** – Exports of oats reached 63 Kt in 2024/25, 13 Kt higher than estimated in May, but 53 Kt less than in 2023/24. Imports of oats were back slightly (-2 Kt) on 2023/24 figures at 14 Kt, but relatively in line (+1 Kt) with May's figure.
- **Availability** – Total availability of oats in 2024/25 was 1.094 Mt, this is down 29 Kt on May's estimate. However, availability is up 109 Kt on the year.
- **Usage** – Full season usage of oats stood at 891 Kt; this is up 4 Kt from May's estimate and 108 Kt higher year on year. Feed usage is up 116 Kt on the year at 369 Kt.
- **Closing stocks** – End of season stocks for 2024/25 stand at 141 Kt, down 46 Kt from May's estimate, but up 45 Kt on the previous year.

MAIZE

- **Trade** – Maize imports stood at 3.103 Mt in 2024/25, up 278 Kt on May's estimate and 461 Kt higher than 2023/24 levels. The increase in maize imports is due to limited availability of domestic wheat, and competitive prices against UK cereals.
- **Availability** – Maize availability for 2024/25 totalled 3.304 Mt, up 278 Kt from May's estimate and 517 Kt year on year.
- **Usage** – Full season domestic consumption of maize is estimated at 2.733 Mt, up 87Kt from May's estimate, and 459 Kt higher than the previous year's levels.
- **Closing stocks** – Maize end of season stocks stand at 196 Kt, down 9 Kt from May's estimate, and 4 Kt lower than in 2023/24.

Date published: 30/09/2024

Appendix I

UK CEREAL SUPPLY AND DEMAND ESTIMATES (a)

Estimates made in September 2025

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

		WHEAT								BARLEY							
		2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 May-25	2024/25 Sep-25	Absolute change May-25	% change on 23/24	2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 May-25	2024/25 Sep-25	Absolute change May-25	% change on 23/24
(1)	Opening stocks	1,901	1,413	1,788	1,953	2,987	2,760	-227	41%	1,148	1,058	964	1,268	1,218	1,163	-55	-8%
(2)	Production	13,878	13,988	15,540	13,980	11,146	11,146	-	-20%	7,495	6,961	7,385	6,963	7,091	7,091	-	2%
(3)	Imports	1,856	1,994	1,360	2,437	2,900	3,068	168	26%	108	89	88	201	175	233	58	16%
(4)	**Total availability**	**17,634**	**17,394**	**18,688**	**18,369**	**17,033**	**16,974**	**-59**	**-8%**	**8,750**	**8,108**	**8,437**	**8,433**	**8,484**	**8,487**	**3**	**1%**
(5)	Human and industrial consumption	7,110	7,156	7,326	7,520	7,125	7,128	3	-5%	1,856	1,885	1,983	1,910	1,783	1,798	14	-6%
(5a)	(of which home grown)	6,020	6,056	6,407	6,339	5,518	5,514	-4	-13%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6)	Usage as animal feed (b)	6,992	7,242	6,906	7,135	6,428	6,837	409	-4%	4,364	4,237	3,941	4,186	4,383	4,477	94	7%
(6a)	(of which home grown)	6,338	6,542	6,486	6,235	5,528	5,737	209	-8%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6b)	(of which compounders)	3,918	4,043	3,771	3,804	3,661	3,716	55	-2%	1,516	1,553	1,342	1,394	1,446	1,425	-21	2%
(6c)	(of which integrated poultry units)	1,147	1,143	1,104	1,225	1,211	1,214	4	-1%	88	83	74	92	87	88	1	-4%
(7)	Seed (c)	255	280	267	237	237	237	-	-	192	178	183	192	192	192	-	-
(8)	Other	68	70	70	70	56	56	-	-20%	38	35	37	35	35	35	-	-
(9)	**Total domestic consumption**	**14,425**	**14,748**	**14,569**	**14,962**	**13,846**	**14,258**	**412**	**-5%**	**6,449**	**6,335**	**6,144**	**6,323**	**6,393**	**6,501**	**108**	**3%**
(10)	**Balance (4) - (9)**	**3,209**	**2,646**	**4,119**	**3,407**	**3,187**	**2,716**	**-471**	**-20%**	**2,301**	**1,773**	**2,293**	**2,111**	**2,090**	**1,985**	**-105**	**-6%**
(11)	Exports (d)	754	511	1,586	258	250	199	-51	-23%	1,150	764	1,123	780	650	707	57	-9%
(12)	Intervention stocks (d)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks (d)**	**2,070**	**1,788**	**1,953**	**2,760**	**2,937**	**1,980**	**-957**	**-28%**	**1,162**	**964**	**1,268**	**1,163**	**1,440**	**1,279**	**-162**	**10%**
(14)	(of which estimated operating stock requirement) (e)	1,510	1,500	1,500	1,500	1,550	1,550	-	0%	794	800	800	800	800	800	-	-
(15)	(of which free stock) (g)	560	288	453	1,260	1,387	430	-957	-66%	368	164	468	363	640	479	-162	32%
(16)	**Surplus available for either export or free stock (10)-(12)-(14)-(18)**	**1,314**	**799**	**2,038**	**1,518**	**1,637**	**630**	**-1,007**	**-59%**	**1,517**	**928**	**1,592**	**1,142**	**1,290**	**1,185**	**-105**	**4%**
(18)	**Residual (10)-(11)-(13)**		**347**	**581**	**389**		**536**				**45**	**-98**	**168**				

		MAIZE								OATS							
		2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 May-25	2024/25 Sep-25	Absolute change May-25	% change on 23/24	2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 May-25	2024/25 Sep-25	Absolute change May-25	% change on 23/24
(1)	Opening stocks	228	211	248	145	200	200	-	38%	133	147	157	140	125	95	-29	-32%
(2)	Production	-	-	-	-	-	-	-	-	1,013	1,123	1,007	830	986	986	-	19%
(3)	Imports	2,441	2,207	2,123	2,642	2,825	3,103	278	17%	18	17	18	15	13	14	1	-11%
(4)	**Total availability**	**2,669**	**2,417**	**2,371**	**2,787**	**3,025**	**3,304**	**278**	**19%**	**1,164**	**1,287**	**1,182**	**985**	**1,123**	**1,094**	**-29**	**11%**
(5)	Human and industrial consumption	878	859	801	922	1,069	1,066	-3	16%	516	501	492	501	486	491	6	-2%
(5a)	(of which home grown)	-	-	-	-	-	-	-	-	499	483	474	486	473	478	6	-2%
(6)	Usage as animal feed	1,330	1,172	1,234	1,348	1,572	1,663	90	23%	364	476	350	253	371	369	-1	46%
(6a)	(of which home grown)	-	-	-	-	-	-	-	-	364	476	350	253	371	369	-1	46%
(7)	Seed	-	-	-	-	-	-	-	-	26	24	23	25	25	25	-	-
(8)	Other (h)	4	4	4	4	4	4	-	-	5	6	5	4	5	5	-	25%
(9)	**Total domestic consumption**	**2,213**	**2,035**	**2,039**	**2,274**	**2,645**	**2,733**	**87**	**20%**	**910**	**1,007**	**870**	**783**	**886**	**891**	**4**	**14%**
(10)	**Balance (4) - (9)**	**456**	**383**	**332**	**513**	**380**	**571**	**191**	**11%**	**254**	**280**	**312**	**203**	**237**	**204**	**-32**	**1%**
(11)	Exportable surplus	141	134	131	167	175	181	6	9%	114	123	172	116	50	63	13	-46%
(12)	**Commercial end-season stocks**	**205**	**248**	**145**	**200**	**205**	**196**	**-9**	**-2%**	**129**	**157**	**140**	**95**	**187**	**141**	**-46**	**48%**
(13)	**Residual (10)-(11)-(12)**			**56**	**146**		**193**						**-9**				

Links connect to relevant Defra/AHDB data pages

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

* Change not meaningful

(a) These are revised during the year. Figures rounded to the nearest 1000 tonnes.

(b) Animal feed usage has been split by sector. Note, other users are only included in the total.

(c) Seed numbers have been updated based on a number of assumptions, calculated for the purposes of the balance sheets only.

(d) Split of exports, intervention and total commercial end-season stocks only published for historical seasons.

(e) 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.

(f) Free stock is the stock available after both exports and estimated operating stock requireqents have been fulfilled.

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		OTHER CEREALS (i)							
		2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 May-25	2024/25 Sep-25	Absolute change May-25	% change on 23/24
(1)	Opening stocks	6	5	10	6	12	12	-	108%
(2)	Production	247	297	330	271	226	226	-	-17%
(3)	Imports	5	11	4	5	11	11	-	129%
(4)	**Total availability**	**258**	**313**	**345**	**282**	**249**	**249**	**-**	-12%
(5+6)	H&I and animal feed	237	289	300	262	233	233	-	-11%
(5a+6a)	(of which home grown)	231	279	290	256	229	229	-	-11%
(7)	Seed	7	10	10	7	7	7	-	-
(8)	Other	-	-	-	-	-	-	-	-
(9)	**Total domestic consumption**	**244**	**299**	**310**	**269**	**240**	**240**	**-**	-11%
(10)	**Balance (4) - (9)**	**14**	**14**	**35**	**13**	**9**	**9**	**-**	-32%
(11)	Exportable surplus	7	4	29	0	1	0	-	-30%
(12)	Intervention stocks	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks**	**8**	**10**	**6**	**12**	**9**	**8**	**-**	-32%

		TOTAL CEREALS							
		2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 May-25	2023/24 Sep-25	Absolute change May-25	% change on 23/24
(1)	Opening stocks	3,416	2,834	3,167	3,512	4,542	4,231	-311	20%
(2)	Production	22,633	22,369	24,262	22,044	19,448	19,448	-	-12%
(3)	Imports	4,426	4,318	3,594	5,300	5,924	6,428	504	21%
(4)	**Total availability**	**30,475**	**29,521**	**31,023**	**30,856**	**29,914**	**30,107**	**193**	**-2%**
(5)	H&I (wheat, barley, maize, oats) (h)	10,360	10,402	10,602	10,853	10,463	10,484	21	-3%
(6)	Animal feed (wheat, barley, maize oats) (h)	13,050	13,126	12,431	12,922	12,754	13,345	592	3%
(5a +6a)	Other cereals (H&I and animal feed)	237	289	300	262	233	233	-	-11%
(7)	Seed	480	492	483	461	461	461	-	-
(8)	Other	114	115	116	113	100	100	-	-12%
(9)	**Total domestic consumption**	**24,241**	**24,424**	**23,932**	**24,610**	**24,011**	**24,623**	**612**	**0%**
(10)	**Balance (4) - (9)**	**6,234**	**5,096**	**7,091**	**6,246**	**5,903**	**5,484**	**-419**	**-12%**
(11)	Exports	2,166	1,537	3,041	1,321	1,126	1,151	25	-13%
(12)	Intervention stocks	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks**	**3,574**	**3,167**	**3,512**	**4,231**	**4,778**	**3,605**	**-1,173**	**-15%**
(14)	Estimated operating stock requirement (wheat & barley only)	2,304	2,300	2,300	2,300	2,350	2,350	-	2%
(15)	Free stock for wheat and barley	928	452	921	1,623	2,027	909	-1,118	-44%
(16)	**Surplus available for either export or free stock (10)-(12)-(14)-(18)**	**3,930**	**2,404**	**4,253**	**3,252**	**3,553**	**2,405**	**-1,148**	**-26%**
(17)	**Residual (10)-(11)-(13)**		**392**	**539**	**694**		**729**		

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

Appendix II

CUMULATIVE MONTHLY STATISTICS

Usage of cereals by processors, external trade and stocks

Situation as at end of June 2025 — Thousand tonnes

		2019/20 to 2023/24 average	2019/20 52 weeks	2020/21 52 weeks	2021/22 52 weeks	2022/23 52 weeks	2023/24 52 weeks	2024/25 52 weeks	% Change 2024/25 on 2023/24	Actual Change 2024/25 on 2023/24
WHEAT										
Usage	**Flour millers [1]**	**6,024**	**6,050**	**5,649**	**6,004**	**6,123**	**6,293**	**5,858**	**-7%**	**-435**
	of which home-grown	4,934	5,287	4,163	4,904	5,204	5,112	4,243	**-17%**	**-868**
	of which imported	1,090	763	1,486	1,100	919	1,182	1,615	**37%**	**433**
	Brewers, maltsters and distillers	**	**	**818**	**1,001**	**1,060**	**1,083**	**1,139**	**5%**	**56**
	Animal Feed Processors [2]	**4,527**	**4,960**	**4,240**	**4,629**	**4,342**	**4,463**	**4,335**	**-3%**	**-128**
	of which feed compounders	3,379	3,777	3,159	3,486	3,238	3,238	3,121	**-4%**	**-117**
	of which integrated poultry units	1,147	1,184	1,080	1,144	1,104	1,225	1,214	**-1%**	**-11**
Imports	**From July [3]**	**1,856**	**1,056**	**2,431**	**1,994**	**1,360**	**2,438**	**3,068**	**26%**	**630**
Exports	**From July [3]**	**754**	**1,205**	**209**	**511**	**1,586**	**258**	**199**	**-23%**	**-58**
BARLEY										
Usage	**Brewers, maltsters and distillers**	**1,843**	**1,766**	**1,710**	**1,872**	**1,970**	**1,897**	**1,785**	**-6%**	**-112**
	Animal Feed Processors [2]	**	**1,293**	**1,823**	**1,448**	**	**1,301**	**1,334**	**2%**	**32**
	of which feed compounders	1,333	1,249	1,676	1,365	1,164	1,210	1,246	**3%**	**36**
	of which integrated poultry units	**	44	147	83	**	92	88	**-4%**	**-4**
Imports	**From July [3]**	**108**	**70**	**89**	**89**	**88**	**202**	**233**	**15%**	**31**
Exports	**From July [3]**	**1,150**	**1,790**	**1,290**	**764**	**1,123**	**780**	**707**	**-9%**	**-73**
MAIZE										
Usage	**Human and Industrial [4]**	**	**	**	**	**	**	**	*	*
	Animal Feed Processors [2]	**	**435**	**613**	**	**	**	**	*	*
	of which feed compounders	406	371	553	373	377	357	483	**35%**	**126**
	of which integrated poultry units	**	64	60	**	**	**	**	*	*
Imports	**From July [3]**	**2,441**	**2,376**	**2,856**	**2,207**	**2,123**	**2,642**	**3,103**	**17%**	**461**
Exports	**From July [3]**	**141**	**135**	**138**	**134**	**131**	**167**	**181**	**9%**	**14**
OATS										
Usage	**Human and Industrial [5]**	**516**	**553**	**531**	**501**	**492**	**501**	**492**	**-2%**	**-9**
	Animal Feed Processors [2]	**78**	**64**	**82**	**125**	**73**	**45**	**45**	**1%**	**1**
Imports	**From July [3]**	**18**	**18**	**20**	**17**	**18**	**16**	**14**	**-11%**	**-2**
Exports	**From July [3]**	**114**	**120**	**41**	**123**	**172**	**116**	**63**	**-46%**	**-53**

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. Data displayed as at end-June (52 weeks).

* 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 2024. In order to incorporate the change January 2024 was increased to a 5 week period compared to 4 weeks in 2023.
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.
Figures in Appendix II were updated on 30 September 2025. The data above may differ from the most recent published data.