

WINTER CROPPING SET TO INCREASE FROM LAST YEAR'S SPRING SURGE

The Early Bird Survey points to a resurgence in winter cropping, as the area for both winter wheat and barley is set to increase year-on-year.

This is a sizeable increase, although it comes as little surprise after last year's difficult drilling campaign which resulted in many growers switching to spring cropping. We are now seeing for 2021 a return back to winter cropping.

Oilseed rape (OSR) area is set to decrease by 18%, with the area down to 312Kha. There has been an increase in alternative cropping such as oats and pulses.

| Thousand hectares | Defra June Survey 2020 | EBS Forecast 2021 | % Year-On-Year Change |
|-------------------------------|------------------------|-------------------|-----------------------|
| All wheat | 1,387 | 1,776 | 28% |
| Winter barley | 312 | 389 | 25% |
| Spring barley | 1,076 | 756 | -30% |
| Oats | 210 | 214 | 2% |
| Other cereals* | 53 | 75 | 41% |
| OSR | 380 | 312 | -18% |
| Other oilseeds** | 33 | 39 | 18% |
| Pulses | 233 | 249 | 7% |
| Arable fallow | 362 | 254 | -30% |
| Other crops on arable land*** | 775 | 768 | -1% |
| TOTAL | 4,820 | 4,831 | |

*crops included rye, triticale and mixed grains

**crops included linseed and borage

***crops included sugar beet, potatoes, vegetables, maize (33%) and temporary grass (20%)

Source: Defra, The Andersons Centre for the AHDB

With the release of DEFRA's regional break down for harvest 2020 we can now apply data collected to the regions for the four main crops; wheat, barley, oats & OSR.

WHEAT

The total wheat area is estimated to increase by 28% year-on-year to 1,776Kha. With autumn drilling conditions better than last year intentions of cropping are estimated to turn back to winter wheat.

| Wheat | | | |
|------------------------|------------------------|-------------------------|--------------------|
| | Defra June Survey 2020 | Final EBS forecast 2021 | % change from 2020 |
| Thousand hectares | | | |
| East | 385 | 458 | 19% |
| South East | 171 | 203 | 19% |
| South West | 121 | 138 | 14% |
| East Midlands | 227 | 352 | 55% |
| West Midlands | 113 | 174 | 55% |
| North West | 23 | 30 | 28% |
| North East | 53 | 64 | 21% |
| Yorkshire & The Humber | 173 | 226 | 31% |
| Scotland | 94 | 95 | 2% |
| Wales & NI | 29 | 36 | 25% |
| UK | 1,387 | 1,776 | |

Across all regions of the UK there is an estimated increase in wheat areas. The most notable areas that have encapsulated this are the two regions that saw a significant decrease last year, the East and East Midlands.

With the area up in the East and East Midlands by 19% and 55%, respectively, growers in these two regions combined are expected to increase their wheat area by 198Kha. Excluding 2019/20 area this is back in line with the 5-year-average.

Furthermore, another region that could largely dictate how far delivered premiums for 2021/22 stretch is Yorkshire & The Humber. Their area is expected to increase by 31% with the area for wheat estimated at 226Kha.

BARLEY

The total winter barley area is estimated to increase by 25% year-on-year to 389Kha. However, the spring barley area is expected to decrease by 30% to 756Kha.

Despite the significant reduction in spring barley, growers are still collectively going to sow over 1,100Kha of barley again.

| Winter Barley | | | |
|------------------------|------------------------|--------------------------|--------------------|
| | Defra June Survey 2020 | Final EBS forecast 2021* | % change from 2020 |
| Thousand hectares | | | |
| East | 72 | 77 | 7% |
| South East | 27 | 35 | 27% |
| South West | 34 | 49 | 46% |
| East Midlands | 24 | 44 | 83% |
| West Midlands | 20 | 25 | 21% |
| North West | 10 | 11 | 9% |
| North East | 20 | 26 | 29% |
| Yorkshire & The Humber | 45 | 59 | 31% |
| Scotland | 43 | 40 | -6% |
| Wales & NI | 15 | 22 | 45% |
| UK | 312 | 389 | |

*Regional total may not match national figure due to rounding.

All regions within the UK expect their winter barley area to increase year-on-year apart from Scotland where the area is expected to decrease by 6%.

The largest increase in area is the East Midlands where an 83% increase is expected with an additional 20Kha intended to be sown in comparison to last year.

| Spring Barley | | | |
|------------------------|------------------------|-------------------------|--------------------|
| Thousand hectares | Defra June Survey 2020 | Final EBS forecast 2021 | % change from 2020 |
| East | 161 | 104 | -35% |
| South East | 112 | 80 | -29% |
| South West | 121 | 92 | -24% |
| East Midlands | 163 | 76 | -53% |
| West Midlands | 60 | 21 | -65% |
| North West | 34 | 29 | -14% |
| North East | 27 | 10 | -61% |
| Yorkshire & The Humber | 114 | 65 | -43% |
| Scotland | 259 | 265 | 3% |
| Wales & NI | 26 | 14 | -44% |
| UK | 1,076 | 756 | |

With a significant decrease across the UK the only area intending to increase their spring barley area is Scotland where the area is intended to increase by 3%.

Spring barley area in the East (-57Kha), East Midlands (-87Kha) and Yorkshire & The Humber (-49Kha) have significantly reduced, with this loss being absorbed by their increase in wheat for 2021.

The largest percentage decrease is the West Midlands, where the area for spring barley is intended at 21Kha, down 65%.

OATS

The total oats area is estimated to increase by 2.1% year-on-year to 214Kha. Last year we saw an increase in oats as growers were unable to sow winter cropping.

| Oats | | | |
|------------------------|------------------------|-------------------------|--------------------|
| Thousand hectares | Defra June Survey 2020 | Final EBS forecast 2021 | % change from 2020 |
| East | 26 | 30 | 15% |
| South East | 30 | 31 | 7% |
| South West | 27 | 31 | 15% |
| East Midlands | 27 | 33 | 25% |
| West Midlands | 26 | 14 | -43% |
| North West | 7 | 7 | 8% |
| North East | 13 | 9 | -27% |
| Yorkshire & The Humber | 15 | 16 | 2% |
| Scotland | 34 | 36 | 5% |
| Wales & NI | 7 | 7 | -1% |
| UK | 210 | 214 | |

However, we are seeing this continue to increase as the OSR area reduces. The area intended for oats for 2021 is way above the 5-year-average of 173Kha.

If spring planting intentions go as planned, we could be looking at our third successive 1Mt oat crop.

OILSEED RAPE

The total OSR area is estimated to decrease by 18% year-on-year to 312Kha. Anxieties around the risks, economic feasibility and pest prevalence of this break crop have been cited as particular challenges, as we are encapsulating another large year-on-year decrease in area.

| Oilseed Rape | | | |
|------------------------|------------------------|-------------------------|--------------------|
| Thousand hectares | Defra June Survey 2020 | Final EBS forecast 2021 | % change from 2020 |
| East | 84 | 65 | -22% |
| South East | 47 | 44 | -7% |
| South West | 29 | 21 | -28% |
| East Midlands | 75 | 42 | -44% |
| West Midlands | 36 | 35 | -4% |
| North West | 4 | 3 | -19% |
| North East | 18 | 18 | -5% |
| Yorkshire & The Humber | 51 | 50 | -3% |
| Scotland | 31 | 31 | 1% |
| Wales & NI | 4 | 3 | -28% |
| UK | 380 | 312 | |

The largest decrease in area have been from the East (-19Kha) and East Midlands (-33Kha), this isn't too much of a surprise as these two areas are where the Cabbage Stem Flea Beetle can cause significant damage.

Intentions in Northern regions and the West Midlands are slightly down but there isn't any drastic reduction in area, unlike in regions further south.

ADDITIONAL INFORMATION

There have been slight changes in figures compared to the provisional results released in November 2020. There was a slight increase in the sample collection and DEFRA provisional figures were slightly higher than the final published results.

The AHDB Early Bird Survey is carried out each autumn to assess national cropping intentions. It is undertaken by The Andersons Centre, with the help of the Association of Independent Crop Consultants (AICC), AIC and other agronomists.

This year's survey covered 615Kha, which represents ~13% of the UK area for the crops surveyed.

This year's survey represents the intentions of farmers across the UK during a snapshot in time. With the majority of data collected before 25 November 2020.

Figures in all tables are subject to rounding and may not add up exactly to national figures.