

# Early Bird Survey of Planting and Planting Intentions – 2021



17 December 2021

The Early Bird Survey of planting intentions demonstrates a strong continuation of winter cropping for harvest 2022. On a national level, both wheat and winter barley areas are set to increase again this harvest. This is unsurprising considering the relatively favourable planting window experienced in Autumn.

## REGIONAL DIFFERENCES IN CROPPING INTENTIONS

Yesterday, Defra released their final estimates for the 2021 UK arable crops. This allows us to look at our Early Bird Survey of planting intentions results at a regional level for the four main crops: wheat barley, oats and oilseed rape (OSR). The results show that on a regional level there are some changes compared to last year.

### WHEAT

The total wheat area is forecast up 1% (15Kha) year-on-year at 1,805Kha, but there are some larger differences in the regional changes.

Wheat			
Thousand hectares	Defra June Survey 2021	Final EBS forecast 2022	% change from 2021
East	478	493	3%
South East	219	225	3%
South West	156	152	-2%
East Midlands	318	319	0%
West Midlands	156	151	-3%
North West	32	36	15%
North East	68	69	1%
Yorkshire & The Humber	228	223	-2%
Scotland	105	106	1%
Wales & NI	31	31	1%
<b>UK</b>	<b>1,790</b>	<b>1,805</b>	

The East remains the largest wheat growing region and is expected to have the largest absolute increase in wheat area of 15Kha. However, in percentage change terms, the North West region is anticipated to see the biggest planted area change at 15%.

The South West, West Midlands and Yorkshire & the Humber regions are all intending to reduce the planted area. The combined drop in area is expected to be 14Kha.

This is particularly surprising in Yorkshire & the Humber, due to the delivered premium that wheat is obtaining from this region over other areas of the UK.

## BARLEY

Total barley area is down 4% year-on-year at 1,107Ka.

However, as with wheat, the **winter barley** area has risen for harvest 2022, but with regional differences. At 421Kha, the winter barley area is in line with the five-year-average (2016-19 and 2021, excluding harvest-2020 due to the abnormal autumn of 2019 swaying cropping).

Winter Barley			
Thousand hectares	Defra June Survey 2021	Final EBS forecast 2022*	% change from 2021
East	90	92	3%
South East	37	32	-12%
South West	46	43	-7%
East Midlands	42	47	13%
West Midlands	29	27	-9%
North West	14	18	29%
North East	25	26	2%
Yorkshire & The Humber	62	73	18%
Scotland	43	45	5%
Wales & NI	16	17	3%
<b>UK</b>	<b>405</b>	<b>421</b>	

Results suggest that farmers in Yorkshire & the Humber have opted for an increased winter barley area of 11Kha somewhat at the expense of wheat (-5Kha). The South East and West Midlands regions however, have experienced an area drop for winter barley of 7Kha combined.

The driver behind the overall barley area decrease is **spring barley**, down 8% (58Kha). Almost all regions of the UK anticipate a drop in spring barley plantings for harvest 2022. The South West is the only region with the intention to increase area, yet only by 1Kha. Scotland, a key spring barley producer, is only anticipated to drop 1Kha versus harvest 2021. England on the other hand, at 423Kha, is anticipating plantings to be down 10% (48Kha).

Spring Barley			
Thousand hectares	Defra June Survey 2021	Final EBS forecast 2022	% change from 2021
East	104	99	-4%
South East	67	66	-2%
South West	75	76	1%
East Midlands	87	68	-22%
West Midlands	32	30	-5%
North West	22	13	-43%
North East	17	15	-8%
Yorkshire & The Humber	67	56	-17%
Scotland	249	248	0%
Wales & NI	25	16	-35%
<b>UK</b>	<b>745</b>	<b>687</b>	

## OATS

The UK oat area for harvest 2022 is estimated at 187Kha. This is a 6%, or 13Kha, drawback to last harvest. However, the last two oat crops have been 200Kha plus, the only times the oat area has reached this since at least 1984.

Oats			
Thousand hectares	Defra June Survey 2021	Final EBS forecast 2022	% change from 2021
East	25	24	-4%
South East	29	29	1%
South West	26	23	-12%
East Midlands	24	24	-2%
West Midlands	22	22	0%
North West	6	7	17%
North East	11	7	-36%
Yorkshire & The Humber	14	15	2%
Scotland	34	28	-18%
Wales & NI	7	8	12%
<b>UK</b>	<b>200</b>	<b>187</b>	

The largest reduction in planted area comes from the North East and Scotland, collectively dropping 10Kha. The South East and West Midlands regions estimate the oat area to stay the same as the previous year at 29Kha and 22Kha respectively.

## OILSEED RAPE

A rebound in domestic rapeseed production is expected. It would seem high rapeseed prices played a part in a greater planting campaign this autumn. At 359Kha nationally, it is anticipated to be up from last harvest. This said, it is still a long way off historic levels. In 2012 the rapeseed area peaked at 756Kha and has dropped in area almost every year thereafter.

Oilseed Rape			
Thousand hectares	Defra June Survey 2021	Final EBS forecast 2022	% change from 2021
East	67	66	-1%
South East	37	40	9%
South West	22	29	30%
East Midlands	53	73	39%
West Midlands	28	31	9%
North West	3	4	19%
North East	16	17	8%
Yorkshire & The Humber	42	50	17%
Scotland	33	39	17%
Wales & NI	6	17	202%
<b>UK*</b>	<b>307</b>	<b>359</b>	

The East Midlands is expected to grow the largest area of OSR for harvest 2022, up 39% year-on-year. The East, a region particularly affected by flea beetle damage last year, has dropped its OSR area by 1%. This is the only region this year to be projected to reduce the OSR area.

There is still some hesitation from farmers due to the agronomic challenges the crop faces. Despite high prices, a crop that gets decimated by cabbage stem flea beetle is unviable.

## ADDITIONAL INFORMATION

There have been slight changes in figures compared to the provisional results released in November 2021.

The raw data sample is unchanged, but the Defra final crop area estimates are adjusted from the provisional figures.

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) and other agronomists.

This year's survey covered 630Kha, 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. Data was still being collected for these provisional results up until 15 November 2021. Figures in all tables are subject to rounding and may not add up exactly to national figures.

\*The UK OSR figure is different from the sum of the regions due to the raw data returns being weighted according to the regional area, rather than simply a national tally. A weighted UK crop area change projection is made.