

Early Bird Survey of Planting and Planting Intentions – 2022



20 December 2022

The Early Bird Survey of planting intentions shows a strong continuation of winter cropping for harvest 2023. On a national level, wheat, winter barley and oilseed rape areas are all set to increase again this harvest. These are unsurprising results given the relatively favourable planting conditions experienced in autumn.

Thousand hectares	Defra June Survey 2022	EBS Forecast 2023	% Year-On-Year Change
All wheat	1,809	1,821	1%
Winter barley	433	450	4%
Spring barley	671	632	-6%
Oats	174	166	-4%
Other cereals*	69	64	-7%
OSR	364	416	14%
Other oilseeds**	34	42	24%
Pulses	269	275	2%
Arable fallow	265	290	9%
Other crops on arable land***	734	700	-5%
TOTAL	4,822	4,855	

*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

REGIONAL DIFFERENCES IN CROPPING INTENTIONS

Last week, Defra released their final estimates for the 2022 UK arable crop areas. 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 to be relatively unchanged, up just 1% year-on-year at 1,821Kha, but there are some larger differences in the regional changes.

Wheat			
Thousand hectares	Defra June Survey 2022	Final EBS forecast 2023	% change from 2022
South East	221	219	-1%
South West	161	168	4%
Eastern	455	441	-3%
East Midlands	337	335	0%
West Midlands	169	168	0%
Yorkshire & The Humber	226	229	1%
North East	66	69	4%
North West	32	33	1%
Scotland	107	116	8%
Wales & NI	34	41	21%
UK	1,809	1,821	

The East remains the largest wheat growing region in the UK, though is expected to see the largest actual change in area, down 14Kha from last year. The South East is the only other region expecting a decline in wheat area for harvest 2023, down 1% on the year.

On the other hand, the greatest percentage change is seen in Wales and Northern Ireland, with wheat area expected to be up 21% on the year at 41Kha.

The North East region is expected to see a 4% rise in wheat plantings, and Yorkshire and The Humber are expected to see a 1% rise in wheat plantings. This is supported by delivered premiums seen in this region, with increased demand from the human and industrial sector. The North West is also expected to see a further 1% rise year-on-year, supported by higher prices in the North.

Both the West and East Midlands are expected to see little change in the 2023 wheat area.

Scotland is expected to see a rise in wheat plantings by 8%, to 116Kha.

BARLEY

Total barley area is forecast down 2% year-on-year at 1,082Kha. However, at 450Kha, the forecasted total winter barley area is well above the previous five-year-average (398Kha), and up 4% on the year.

Winter Barley			
Thousand hectares	Defra June Survey 2022	Final EBS forecast 2023	% change from 2022
South East	38	40	4%
South West	51	52	3%
Eastern	92	101	9%
East Midlands	55	60	10%
West Midlands	31	32	5%
Yorkshire & The Humber	64	61	-5%
North East	26	29	10%
North West	15	15	6%
Scotland	44	38	-13%
Wales & NI	17	21	24%
UK	433	450	

Scotland, and Yorkshire and The Humber, were the only two regions to see declines in forecasted winter barley area, expected down 13% and 5% respectively. As with wheat, Wales and Northern Ireland saw the biggest percentage increase (24%) in forecasted area for harvest 2023, at the expense of spring crops and oilseed rape.

Results suggest the greatest actual change will be seen in the Eastern region with a forecasted 9Kha increase in barley area to 101Kha. If realised, this would be the largest winter barley crop in the region since 2002.

The driver behind the overall barley area decrease is **spring barley**, expected to be down 6% (40Kha). Almost all regions of the UK anticipate a drop in spring barley plantings for harvest 2023. The East Midlands, and Yorkshire and The Humber, are the only regions with the intention to increase area, though only by 3Kha in total.

Scotland, a key spring barley producer, is anticipated to drop over 10Kha versus harvest 2022. Wales and Northern Ireland are expected to see the greatest percentage decline, down 35% on the year.

Spring Barley			
Thousand hectares	Defra June Survey 2022	Final EBS forecast 2023	% change from 2022
South East	60	56	-8%
South West	71	64	-10%
Eastern	92	89	-3%
East Midlands	69	70	1%
West Midlands	25	20	-17%
Yorkshire & The Humber	58	60	4%
North East	14	11	-26%
North West	21	20	-3%
Scotland	236	225	-4%
Wales & NI	25	16	-35%
UK	671	632	

OATS

The UK oat area for harvest 2023 is estimated at 166Kha. This is down 4% (7Kha) from harvest 2022. If realised, this oat crop will be the smallest area since 2017. However, not all regions saw declines.

The largest percentage reduction in planted area comes from Yorkshire and The Humber, down 28% on the year. This is followed closely by the South West and North East, expected down 27% and 25% respectively.

Wales and Northern Ireland, and the North West regions saw the biggest percentage increase in oat crop area on the year. The North West particularly saw an area reduction for harvest 22, these expectations show a return of oat plantings in this area.

Oats			
	Defra June Survey 2022	Final EBS forecast 2023	% change from 2022
Thousand hectares			
South East	26	24	-7%
South West	23	17	-27%
Eastern	23	22	-3%
East Midlands	21	19	-6%
West Midlands	20	23	13%
Yorkshire & The Humber	12	8	-28%
North East	10	8	-25%
North West	5	6	31%
Scotland	27	29	6%
Wales & NI	7	9	38%
UK	174	166	

OILSEED RAPE

Another yearly climb in rapeseed area is expected. It would seem high rapeseed prices, combined with favourable conditions, played a part in a greater planting campaign this autumn. At 416Kha nationally, area is anticipated to be up 52Kha from last harvest. That said, it is still a long way off historic levels.

Oilseed Rape			
	Defra June Survey 2022	Final EBS forecast 2023	% change from 2022
Thousand hectares			
South East	42	50	18%
South West	31	37	20%
Eastern	75	79	5%
East Midlands	62	76	24%
West Midlands	38	46	22%
Yorkshire & The Humber	51	54	6%
North East	21	23	10%
North West	4	4	0%
Scotland	35	43	22%
Wales & NI	6	4	-32%
UK	364	416	

Despite ongoing pest concerns, the Eastern region is still expected to grow the largest area of oilseed rape, up 5% on the year, closely followed by the East Midlands, which is forecast up 24% on the year. The only region to be predicted a decline in area this year is Wales and Northern Ireland, expected down 32%, likely a result of increased winter barley, wheat, and oat area.

There is however 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, and the condition of this larger crop will be a watchpoint moving forward.

ADDITIONAL INFORMATION

There have been slight changes in area expectations compared to the provisional results released in November 2022. 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 502Kha and represents the intentions of farmers across the UK during a snapshot in time. Data was still being collected for these provisional results up until 08 November 2022.

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