

Early Bird Survey of Planting and Planting intentions for harvest 2024



19 December 2023

The Early Bird Survey (EBS) of planting intentions shows a fall in winter cropping for harvest 2024. At a national level, wheat, winter barley and oilseed rape areas are all set to fall this harvest, with increases intended to the areas of spring wheat, spring barley and spring oats.

Please note this survey captures early plantings and planting intentions as of early November. It does not take into account subsequent weather conditions that may change the harvest area estimates. Autumn drilling conditions have been poor in many parts of the UK in later weeks of the drilling season. This has changed drilling intentions last minute.

Given the challenges faced this autumn and the condition of soils, winter crop areas may well be lower than this survey indicates. AHDB will update on the situation in early 2024 when planting progress allows.

Thousand hectares	Defra June Survey for harvest 2023	Final EBS forecast for harvest 2024	% year-on-year change
All wheat	1,720	1,660	-3%
Winter barley	455	423	-7%
Spring barley	682	756	11%
Oats	167	180	8%
Other cereals*	65	52	-20%
OSR	391	317	-19%
Other oilseeds**	26	20	-23%
Pulses	275	245	-11%
Arable fallow	311	388	25%
Other crops on arable land***	709	739	4%
TOTAL	4,800	4,780	

*crops included are rye, triticale and mixed grains

**crops included are linseed and borage

***crops include 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 its final estimates for the 2023 UK arable crop areas. This allows us to look at the results of our Early Bird Survey of planting intentions on a regional level for the four main crops: wheat, barley, oats and oilseed rape (OSR).

WHEAT

The total intended wheat area is forecast to be down 3% year-on-year at 1,660 Kha, with lower areas projected for most regions.

The falls are all within the winter crop, primarily because the later weeks of the autumn cereals drilling period have been very difficult for many regions. The final planted area may well be lower than the intended area due to the continued wet weather and the difficult early conditions for winter wheat crops.

Spring wheat area is expected to rise, but from a very small area in 2023 and still a small proportion of the total. It's currently hoped that spring will offer better weather conditions, though there are no guarantees. If these planting intentions are confirmed, this would make the total wheat area for 2024 harvest, the lowest since 2020.

The largest percentage falls are for Wales & NI (-10%), Scotland (-8%) and the East Midlands (-8%), closely followed by Yorkshire & The Humber (-7%).

Eastern England remains the largest wheat growing region in the UK, and is the only area expected to record little change in the area for harvest 2024. A year-on-year rise is only expected in the West Midlands, where the intended wheat area is up an estimated 8% to 165 Kha.

Scotland is expected to see an 8% fall in wheat plantings, to 99 Kha.

Wheat			
Thousand hectares	Defra June Survey for harvest 2023	Final EBS forecast for harvest 2024	% change from 2023
South East	206	198	-4%
South West	150	142	-5%
Eastern	440	439	0%
East Midlands	313	286	-8%
West Midlands	154	165	8%
Yorkshire & The Humber	221	206	-7%
North East	64	63	-2%
North West	33	31	-4%
Scotland	107	99	-8%
Wales & NI	33	30	-10%
UK	1,720	1,660	

BARLEY

Total barley area is forecast up 4% year-on-year at 1,179 Kha as the predicted rise in spring barley more than outweighs a fall in winter barley plantings. The forecasted total winter barley area is down 7% on the year at 423 Kha, while the area of spring barley is forecast to rise 11% from harvest 2023 to 756 Kha.

Most regions record year-on-year falls in the forecasted areas of winter barley, though to varying degrees. The biggest percentage falls for harvest 2024 are in the West Midlands and North West, down 31% and 20% respectively.

Only Scotland, and Yorkshire and The Humber, see increases in forecasted winter barley area, both expected up 5% year-on-year. If confirmed, these areas would both be the largest since 2019.

Winter Barley			
Thousand hectares	Defra June Survey for harvest 2023	Final EBS forecast for harvest 2024	% change from 2023
South East	38	37	-1%
South West	50	44	-14%
Eastern	98	89	-9%
East Midlands	59	52	-12%
West Midlands	34	23	-31%
Yorkshire & The Humber	70	73	5%
North East	27	27	-1%
North West	16	13	-20%
Scotland	46	49	5%
Wales & NI	17	17	-1%
UK	455	423	

If the predicted rise in the UK spring barley area is realised, it would be the largest area since 2020 following the extremely wet autumn of 2019.

All areas bar the West Midlands and Wales and Northern Ireland, are predicted to see a rise in spring barley plantings. In the West Midlands, the intention is for a 5 Kha (22%) decline, while a 1 Kha (4%) fall is intended across Wales and Northern Ireland.

The largest year-on-year percentage increase is forecast for the North West. This is closely followed by the and East Midlands and Yorkshire & The Humber, where some of the largest year-on-year falls in wheat and oilseed rape (OSR) area are expected.

Scotland, a key spring barley producer, is anticipated to gain in the region of 10Kha versus harvest 2023. If the intention is realised, this would mean a Scottish spring barley area comparable to that harvested in 2020.

Spring Barley			
Thousand hectares	Defra June Survey for harvest 2023	Final EBS forecast for harvest 2024	% change from 2023
South East	62	66	5%
South West	75	78	3%
Eastern	92	95	4%
East Midlands	68	101	49%
West Midlands	24	19	-22%
Yorkshire & The Humber	52	62	20%
North East	13	13	2%
North West	22	40	83%
Scotland	249	259	4%
Wales & NI	24	23	-4%
UK	682	756	

OATS

The UK oat area for harvest 2024 is estimated at 180 Kha, up 8% (13 Kha) from harvest 2023. A decline in the winter oats area is expected to be more than offset by a rise in spring area.

Larger oat areas are intended in most regions. The largest year-on-year percentage rises are for the East Midlands and Yorkshire & The Humber, where some of the largest year-on-year declines in wheat and OSR plantings are expected.

In Scotland, the intended oat area is down 12% year-on-year to 23 Kha. If realised, this would be the smallest since 2011.

A small year-on-year fall in the total oat area is also predicted for North West England (-1 Kha).

Oats			
Thousand hectares	Defra June Survey for harvest 2023	Final EBS forecast for harvest 2024	% change from 2023
South East	26	29	14%
South West	22	22	2%
Eastern	22	24	5%
East Midlands	21	26	25%
West Midlands	19	21	12%
Yorkshire & The Humber	10	13	24%
North East	9	10	13%
North West	5	4	-16%
Scotland	26	23	-12%
Wales & NI	6	7	8%
UK	167	180	

OILSEED RAPE

After climbing over the past two years, the OSR area again is predicted to fall for harvest 2024. Lower rapeseed prices, combined with lower yields and a later harvest in 2023 all seem to have played a role in curbing the area. At 317 Kha nationally, the area is anticipated to be down close to 75 Kha from last harvest and the lowest since 2021.

Oilseed Rape			
Thousand hectares	Defra June Survey for harvest 2023	Final EBS forecast for harvest 2024	% change from 2023
South East	44	39	-12%
South West	35	32	-7%
Eastern	70	63	-11%
East Midlands	68	43	-37%
West Midlands	39	32	-18%
Yorkshire & The Humber	58	40	-31%
North East	23	21	-9%
North West	5	4	-11%
Scotland	41	36	-12%
Wales & NI	8	6	-23%
UK	391	317	

Markedly lower areas of OSR are expected in all areas of the UK, with the sharpest falls estimated for the East Midlands and Yorkshire & The Humber.

Despite the estimated declines the Eastern region continues to have the largest area of OSR, followed by the East Midlands. It's worth noting however that the EBS estimates for OSR for harvest 2024 would be the lowest recorded in these regions; Defra began reporting regional OSR areas in 2001.

Nevertheless, the final area may be less than planting intentions suggest. Anecdotal reports suggest the OSR area that will not make it to harvest might be greater than last year because of heavy rains and water logging, as well as pests.

ADDITIONAL INFORMATION

There have been slight changes in area expectations compared to the provisional results released in November 2023. 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 620 Kha and represents the intentions of farmers across the UK during a snapshot in time. Data was still being collected for these provisional results up to 9 November 2023.

Crops of smaller area had a lesser area coverage in the survey, so these results will be subject to greater uncertainty.

This survey is focused on the arable farm rotation rather than all arable land which would include grass and forage rotations. For this reason, an estimate of the total area of these crops is included in the figure for 'other crops on arable land'. This figure was updated March 2024.

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