

# Early Bird Survey – Results of February Re-Run



19 February 2020

## EARLY BIRD SURVEY – RESULTS OF FEBRUARY RE-RUN

Following the fifth wettest autumn on record, it comes as little surprise that winter drilled crop areas for 2020 have been hit. Those regions who have felt the brunt of the inclement weather have been harder hit than others, and the planting decisions and intentions reflect much of this.

A large swing has been noted on a national level from winter cropping to spring, and now for many thoughts turn from a wet winter to a potentially late spring if the wet weather persists.

Thousand hectares	Defra June Survey 2019	February EBS Forecast 2020	% Year-On-Year Change
All wheat	1,816	1,504	-17%
Winter barley	453	347	-23%
Spring barley	710	1,042	47%
Oats	182	229	26%
Other cereals*	51	54	4%
OSR	530	361	-32%
Other oilseeds**	17	25	44%
Pulses	178	226	27%
Arable fallow	224	336	50%
Other crops on arable land***	719	756	5%
<b>TOTAL</b>	<b>4,880</b>	<b>4,880</b>	

\*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

## WHEAT

The total area forecast to be planted with wheat is 1,504Kha, back 17% from 2019 levels and 7% lower than forecast in the November survey. This reduction reflects the difficulties experienced with the weather conditions over the drilling period. There has been a sizeable shift from winter to spring varieties between the two survey periods. Growers have doubled their area intended for spring wheat from their November estimates, although only 2% has been planted to date.

Reports have been received from the industry on a large uptake in spring wheat seed demand, with much of this being supplied from imports. As at 14 February, farmers were still intending on planting 7% of the winter wheat area. Much of what is left to plant will be Skyfall, as other varieties become much less viable in this later drilling window.

This means that as at 14 February, UK growers still intended to plant 287Kha of both winter and spring wheat for harvest 2020. The weather over the past 10 days means that these intentions are still highly flexible and dependant on soil conditions over the coming weeks.

Wheat				
Thousand hectares	Defra June Survey 2019	February EBS forecast 2020	% of which planted*	% change from 2019
East	464	433	84%	-7%
South East	216	205	85%	-5%
South West	162	148	84%	-9%
East Midlands	326	227	62%	-30%
West Midlands	166	121	83%	-27%
North West	35	29	96%	-16%
North East	72	62	87%	-13%
Yorkshire & The Humber	237	172	77%	-28%
Scotland	107	98	95%	-9%
Wales & NI <sup>1</sup>	31	13	-	-60%

\* Includes both spring and winter varieties

Regionally, weather impacts and planting progress has varied significantly. The East Midlands, having experienced much of the wet weather, had 62% of its total wheat area drilled as at 14 February, this covers both winter and spring varieties. Winter wheat planted area in the East Midlands is reported to be 91% complete.

There has been a large shift to spring wheat in this region, with the intended area increasing five-fold on 2019 levels.

Yorkshire & Humber, another region facing the worst of the wet conditions, has only managed to drill 87% of its intended winter wheat area by mid-February. Where the crop has been drilled, the weather has played a large role in its current condition. Winter wheat in Scotland and the East is faring better than that in East Midlands and the South West.

## BARLEY

The area forecast for winter barley comes in at 347Kha. This is 23% back on 2019 and 9% less than growers intended to plant when surveyed in November.

However, we have seen a large swing towards spring barley with the area forecast at 1,042Kha: up 47% from 2019 and 10% more than intended back in November. This area may very well have switched out from winter wheat, winter barley and oilseed rape (with a combined decrease of 193Kha from the November survey). This is especially prevalent in those areas most impacted by the wet weather, with the East Midlands and Yorks & Humber more than doubling their spring barley area on 2019.

This will be something of a watch point for the season ahead, coming off the back of a heavy supply year in 2019.

Spring Barley			
Thousand hectares	Defra June Survey 2019	February EBS forecast 2020	% change from 2019
East	98	138	41%
South East	78	86	11%
South West	83	101	23%
East Midlands	73	182	149%
West Midlands	25	49	94%
North West	23	30	27%
North East	11	-	-
Yorkshire & The Humber	53	126	139%
Scotland	242	249	3%
Wales & NI <sup>1</sup>	23	-	-

Winter Barley			
Thousand hectares	Defra June Survey 2019	February EBS forecast 2020	% change from 2019
East	99	81	-18%
South East	38	36	-5%
South West	49	37	-24%
East Midlands	49	23	-53%
West Midlands	35	29	-15%
North West	14	14	-3%
North East	31	26	-17%
Yorkshire & The Humber	73	50	-31%
Scotland	49	46	-7%
Wales & NI <sup>1</sup>	16	-	-

## OATS

The area forecast for oats has increased 26% from 2019, to 229Kha. This is 12% more than stated in November. Much of this swing has come from a greater area to spring oats, which now account for two thirds of the total oat area versus 58% in 2019.

<b>Oats</b>			
<b>Thousand</b>	<b>Defra June Survey 2019</b>	<b>Final EBS forecast 2020</b>	<b>% change from 2019</b>
East	23	26	14%
South East	26	30	19%
South West	26	41	56%
East Midlands	17	26	56%
West Midlands	22	40	84%
North West	6	4	-36%
North East	12	14	19%
Yorkshire & The Humber	12	16	41%
Scotland	32	31	-3%
Wales & NI <sup>1</sup>	7	-	-

Again, those regions impacted by the worst of the conditions have seen the greatest movement from winter to spring oats, with the East Midlands more than doubling their spring oat area on the year, with the West Midlands and North East doing likewise.

#### **OILSEED RAPE**

By November, all of the intended winter OSR would have been drilled. What a February survey gives us is an indication of how much of the area may have been lost over winter.

This survey shows that OSR area has reduced further as at 14 February, to 351Kha in England and Wales, almost a third lower than last year.

<b>Oilseed Rape</b>			
<b>Thousand</b>	<b>Defra June Survey 2019</b>	<b>February EBS forecast 2020</b>	<b>% change from 2019</b>
East	107	77	-28%
South East	69	47	-32%
South West	48	30	-37%
East Midlands	125	73	-42%
West Midlands	49	42	-15%
North West	5	5	1%
North East	23	20	-15%
Yorkshire & The Humber	66	53	-19%
Scotland	32	30	-6%
Wales & NI <sup>1</sup>	6	4	-29%

The East Midlands, South East and South West have particularly recorded area decreases, reducing by 58%, 68% and 63% compared to 2019 areas, respectively. This reflects both challenging establishment

conditions and the continued effect of Cabbage Stem Flea Beetle damage. The condition of the remaining OSR in these regions is also below that seen nationally.

### **AND FINALLY...**

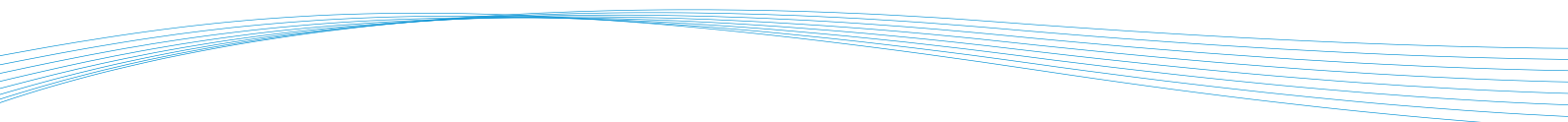
A final flag is the increased forecast in fallow land. This is up 50% on the year, at 336Kha. However, while this may be the best option for some based on the bottom line, the impact this would have on cash flow and agronomics remove it as an option for many.

### **ADDITIONAL INFORMATION**

This survey includes returns up to and including 14 February 2020, with the majority of the information being received between 12-14 February 2020

Based on a sample size of 472Kha. Some regions have been combined to ensure the statistical robustness of the data

Spring crops have been taken as those varieties that are deemed spring, rather than the time frame the crop was drilled in.



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