

Big swings in cropping intentions after delayed autumn plantings

At mid-November, farmers across the UK intended to plant nearly 10% less wheat for harvest 2020. After a rain-delayed planting season this autumn, farmers intentions were to continue planting wheat as and when the weather allows. Final decisions on switching to spring crops are yet to be determined; however, we can assume that spring wheat will heavily feature. For those already unable to plant winter crops, the intention to move to spring barley and oats may already be made.

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 615kha, which represents 13% of the UK area for the crops surveyed.

This year we have seen a prolonged and delayed planting season for winter crops which means that planting intentions remain as changeable as the weather forecast. This year's survey represents the intentions of farmers across the UK during 1 – 18 November with the majority of responses to the survey in the w/c 11 November.

The unpredictable impacts of the weather over the coming weeks means AHDB will rerun the survey in the new year to ensure it reflects the latest intentions of growers as the winter progresses and weather conditions change. Once Defra have released their final UK production estimates, including regional breakdowns, we will update our current survey with a more detailed regional update.

Crop intentions swing towards spring crops

The survey reports that at mid-November, UK farmers intend to sow a total of 1,645Kha of wheat for harvest 2020. This includes crops in the ground, winter crops still to be sowed through December and January, as well as a large swing towards spring wheat planting intentions.

The area of winter barley intended is also forecast lower at 398Kha, down 12% from 452Kha planted for harvest 2019. However, spring barley is intended to increase to the highest since 1988 at 915Kha, as growers switch to spring crops in an attempt to sow in better conditions after the autumn deluge.

Oilseed rape area is seen significantly down as growers in the UK continue to cut back acreage in response to the damage and yield risk caused by Cabbage Stem Flea Beetle. The intended area sown is forecast down 23% at 406Kha. This is not accounting for any damage during the autumn from pests and weather, and so this area may reduce further as we head through the winter.

The oat area is forecast to increase again for 2020 harvest, with UK growers intending to plant a total of 200Kha of winter and spring oats, a 10% increase year-on-year.

Provisional regional results of Early Bird Survey December 2019

Using the 2019 harvest estimates from the Defra June Survey, the Early Bird Survey percentage changes by region can now be used in order to provide a regional breakdown.

The results remain intentions of UK farmers, as at mid-November 2019, for harvest 2020. The survey will be re-run at a regional level in the New Year.

Wheat			
Thousand hectares	Defra June Survey 2019	Final EBS forecast 2020	% change from 2019
East	464	447	-4%
South East	216	209	-3%
South West	162	159	-2%
East Midlands	326	263	-19%
West Midlands	166	154	-7%
North West	35	29	-16%
North East	72	64	-10%
Yorkshire & The Humber	237	182	-23%
Scotland	107	98	-9%
Wales & NI ¹	31	26	
UK	1,816	1,631	

Winter Barley

Thousand hectares	Defra June Survey 2019	Final EBS forecast 2020	% change from 2019
East	99	93	-6%
South East	38	38	0%
South West	49	42	-16%
East Midlands	49	31	-37%
West Midlands	35	31	-10%
North West	14	14	-2%
North East	31	28	-9%
Yorkshire & The Humber	73	59	-19%
Scotland	49	45	-7%
Wales & NI ¹	16	14	
UK	453	395	

Oats

Thousand hectares	Defra June Survey 2019	Final EBS forecast 2020	% change from 2019
East	23	21	-8%
South East	26	28	9%
South West	26	32	22%
East Midlands	17	20	17%
West Midlands	22	23	8%
North West	6	7	8%
North East	12	12	0%
Yorkshire & The Humber	12	16	42%
Scotland	32	30	-5%
Wales & NI ¹	7	12	
UK	182	201	

Oilseed Rape

Thousand hectares	Defra June Survey 2019	Final EBS forecast 2020	% change from 2019
East	107	82	-24%
South East	69	50	-28%
South West	48	33	-31%
East Midlands	125	89	-29%
West Midlands	49	42	-15%
North West	5	5	0%
North East	23	20	-11%
Yorkshire & The Humber	66	59	-10%
Scotland	32	29	-8%
Wales & NI ¹	6	5	
UK	530	414	

Spring Barley

Thousand hectares	Defra June Survey 2019	Final EBS forecast 2020	% change from 2019
East	98	121	23%
South East	78	82	5%
South West	83	93	12%
East Midlands	73	146	100%
West Midlands	25	32	26%
North West	23	28	19%
North East	11	45	308%
Yorkshire & The Humber	53	108	105%
Scotland	242	244	1%
Wales & NI ¹	23	31	
UK	710	929	

Source: Defra, The Andersons Centre for the AHDB

1 Northern Ireland was not surveyed, so the forecast UK % change has been applied to 2019 Defra June survey data for NI to generate the 2020 forecast.