

Early Bird Survey for harvest 2024 – results of March re-run



15 March 2024

After heavy rainfall through autumn and winter, understandably this re-ran Early Bird Survey (EBS) shows considerable falls in winter cropping, including wheat, winter barley and oilseed rape (OSR).

The November survey had already pointed to less winter cropping for harvest 2024, but the continued wet weather through winter has sharply exacerbated the declines. This survey shows the anticipated harvest areas for winter crops, so the larger year-on-year falls point to winter losses, as well as prevented plantings.

In addition, crop condition remains patchy, which will likely impact yield potential. There may be many fields kept because they are just good enough to take to harvest, or because there aren't other viable options. This will be true for all winter crops, but especially wheat and OSR. AHDB's next crop condition report will show the crop situation as of late-March.

Understandably, there is a clear intention to plant more spring crops, though the intended areas are lower than in 2020. Grain and oilseed prices have fallen more than input costs for the 2024 crop, which is likely deterring farmers from maximising their spring crop areas. Meanwhile, the continued wet weather means fields may not dry out in time to drill and it's unclear if all the intended spring crops can be planted.

The survey also shows a sharp rise in arable fallow, up almost 80% from 2023. This will include a significant but unmeasured proportion of growers switching into agri-environmental options. The difficult soil conditions, plus profitability concerns are reportedly making environmental schemes more appealing.

Thousand hectares	Defra June Survey for harvest 2023	March 2024 EBS forecast for harvest 2024	% year-on-year change
All wheat	1,720	1,463	-15%
Winter barley	455	355	-22%
Spring barley	682	881	29%
Oats	167	209	26%
Other cereals*	65	53	-18%
OSR	391	280	-28%
Other oilseeds**	26	20	-24%
Pulses	275	236	-14%
Arable fallow	311	558	79%
Other crops on arable land***	709	745	5%
TOTAL	4,800	4,800	

*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

WHEAT

The shocking weather conditions mean that the UK wheat area is now expected to fall 15% year-on-year to 1.463 Mha. This would be the smallest area since 2020.

All parts of the UK have suffered. The East Midlands, and Yorkshire and the Humber are reported as the worst affected, with notable flooding in these areas. Less severe impacts are reported for Scotland, and southern England, where periods of less extreme rainfall seem to have allowed a bit more planting to take place. Rainfall was closer to average in October in the South West of England, in December for South East England and early 2024 for parts of Scotland.

Important to note that in the autumn, many crops were patchy and had waterlogged areas. This is not accounted for by this survey, which looks at the field area. The condition of crops will need to be monitored closely to understand yield potential; AHDB's next crop development report will show crop conditions as of late-March and will be used to assess production potential for harvest 2024.

There is a clear intention to plant more spring wheat, but the persistence of wet weather means there is uncertainty about if this can be done. We are heading to the point whereby spring sown winter wheat varieties will not be able to develop sufficiently to provide a viable crop. While the area of spring wheat is small in comparison to the total wheat area, any areas that can't be planted would further reduce the total wheat area.

BARLEY

Total barley area is estimated to rise over 8% from 2023 to 1.236 Mha, with sharp falls in winter barley areas offset by understandably considerably higher spring barley planting intentions.

The winter barley area is now estimated at 355 Kha, a 22% drop from 2023 and the lowest since 2020. This is a much steeper drop than the 7% year-on-year fall expected in November and reflects the weather remaining challenging through winter.

Spring barley planting intentions are up 29% year-on-year to an estimated 881 Kha, though this would still fall some way under the levels seen in 2020 when over 1.0 Mha were cropped. Falls in prices, along with smaller falls in input costs and uncertainty about seed availability are likely discouraging farmers from maximising spring barley areas. The continued wet weather also now poses a risk to the planned acreage; there is a real risk that the areas included in this survey for spring crops reduce further.

OATS

Overall, the total UK oat area is estimated to rise by 26% to 209 Kha, just shy of the 210 Kha harvested in 2020. A notable fall in winter oat plantings, is more than offset by a sharp rise in spring oat planting intentions. However, like spring barley, there are risks to the planned area from the continued wet weather.

OILSEED RAPE

The total area of OSR for harvest 2024 is estimated to be 28% lower than in 2023.

This is a larger fall than the November survey indicated and reflected the poor growing conditions in the latter part of the autumn and through winter. The 2024 crop has been challenged by heavy rains, water logging and pests.

At 280 Kha, the current estimate would be the UK's smallest OSR area since 1984.

ADDITIONAL INFORMATION

The Early Bird Survey (EBS) takes place 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.

After an extremely challenging autumn, AHDB re-ran this survey to give insight to the potential cropped areas for harvest 2024. For winter crops, this (March) survey shows anticipated harvest areas, while the November survey showed partly planting intentions.

This survey includes returns up to and including 13 March 2024, with most of the information being received between 6-11 March 2024. Based on a sample size of 332 Kha.

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

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 this figure.

All figures are subject to rounding.

NEXT INSIGHTS

AHDB monitors crop conditions and development at key points in the growing year; these reports can be found on [AHDB's website](#). The next crop condition and development report will show the crop situation as of late-March 2024.

AHDB runs a [Planting and Variety Survey](#) each year, which gives the first insight into the cropped areas after planting concludes. Please look out for the survey landing on your doorsteps and inboxes from late-April to help everyone understand the final UK cropping picture ahead of harvest 2024. The results of the Planting and Variety Survey are usually released in July.

AHDB TOOLS

This is a very challenging period for farmers, and you may find the below tools from AHDB useful:

- Budgeting and understanding the potential financial picture is important; AHDB's [Farmbench](#) and [Arable Business Groups](#) can help you with this.
- Guidance on [how to use data on Excess Winter Rainfall to plan nitrogen applications](#).
- Information on [agricultural policy](#), including the latest on the Environmental Land Management Schemes.

There's advice on supporting your mental wellbeing from organisations such as [Yellow Wellies](#), [the Farming Community Network](#) and the [Royal Agricultural Benevolent Institute](#), plus the [NFU](#) has links to local support.