

WINTER CROPPING SET TO INCREASE IF GOOD WEATHER CONTINUES

The Early Bird Survey points to a resurgence in the wheat area this year, up 28.3% from last year. While this is a sizeable increase, it comes as little surprise after last year's difficult drilling campaign, resulting in many growers turning to spring cropping.

With bad weather holding back until recently for the most part, winter drilling this year has reportedly gone better this year. As such, the Early Bird Survey shows large shifts back to winter cropping intentions.

Growers have seemingly remained cautious with oilseed rape (OSR) plantings, as we see the area reduce to the lowest since 1986. Anxieties around the risks, economic feasibility and pest prevalence of this break crop have been cited as particular challenges. Other break crops have recorded a slight uptick in area, potentially serving as an alternative to OSR.

A HOPEFUL RECOVERY IN WHEAT AREA?

The Early Bird Survey shows that as at mid-November, the area intended for wheat is estimated at 1,815Kha. Excluding last year's reduced area from a poor planting window, this area is back in-line with the 5-year-average (2015-2019) of 1,802Kha, and back in line with the 1,816Kha recorded in 2019.

There has also been a recovery in winter barley area, with the majority of crops in the ground already. The survey estimates the area at 394Kha, increasing 24% year-on-year.

Following the swing to spring cropping recorded last year, the surge in winter cropping has resulted in a year-on-year decrease in the spring barley area, down 30%. The survey estimates that the spring barley area is at 767Kha, excluding last year large surge of 1,096Kha, this figure is slightly above the 5-year-average of 711Kha.

The OSR area is forecast to reduce by 18.1% to 318Kha. Some of this area may have been used by other break crops.

The area of oats continues to grow (+3.6%) building on last year's rise. Other cereals are estimated to increase by 40.8%, Further to that, pulses have seen a 7% increase year-on-year, to now be estimated at 257Kha.

Thousand hectares	Defra June Survey 2020*	Provisional EBS Forecast 2021	% Year-On-Year Change
All wheat	1,415	1,815	28.3%
Winter barley	318	394	24.0%
Spring barley	1,096	767	-30.0%
Oats	211	219	3.6%
Other cereals**	53	75	40.8%
OSR	388	318	-18.1%
Other oilseeds***	18	21	17.7%
Pulses	240	257	7.0%
Arable fallow	396	277	-29.9%
Other crops on arable land****	779	771	-1.0%
TOTAL	4,914	4,914	

* provisional results

**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

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's survey represents the intentions of farmers across the UK during a snapshot in time. Data was still being collected for these provisional results up until 25 November 2020.

Once Defra have released their final UK production estimates in December, including regional breakdowns, we will update our current survey with a more detailed regional update.