

# Early Bird Survey of Planting and Planting Intentions – November 2023



14 November 2023

Please note, official Defra UK area information yet to be published for 2023. The 2023 area data used in this release is the official provisional estimates for England and Scotland, combined with the areas for Wales and Northern Ireland from harvest 2022. Please see the 'Additional information' section below for more information.

## RISE IN SPRING CROPPING DUE TO DIFFICULT WINTER PLANTING CONDITIONS

The provisional results from AHDB's Early Bird Survey (EBS) are shown in the table below and have been extrapolated from provisional 2023 survey data to produce forecasted crop areas.

**Please note that this survey (EBS) captures early plantings and planting intentions as of early November.** It does not take account of the subsequent weather conditions that may change the harvest area estimates. In recent years, planted and harvested areas have differed because of weather events, and we believe that will be the case this season. 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 provide an update on the situation in early 2024 when planting progress allows.

The **wheat** area is currently projected to fall by 1.3%, all within the winter crop. This is primarily because the later weeks of the autumn cereals drilling period have been very difficult for many farming regions. Spring wheat area is expected to be rising by as much as 23%, 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 **winter barley** area is expected to have fallen by 6%, whilst the area of **spring barley** is anticipated to rise by a considerable 13%.

The area of **oats** in the UK is projected to rise by 12%, with a decline in the winter oats area more than offset by a rise in spring area.

## CUTS TO OILSEED RAPE AREA

A decline of the planted area of **oilseed rape** (OSR) by 16% is seen. 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.

Often, when the OSR area falls, pulses tend to rise to fill the break crop gap. However, this does not appear to be the case this season, with **pulses** seen falling approximately 10% from last harvest.

A notable increase in area is expected for arable fallow, up 27% from 2023.

Amongst other crops, other oilseeds (including linseed and borage) are estimated down more than 22%, while other combinable cereals (including rye, triticale, and mixed grains) are also down 18% and potatoes are down 3%.

The last 'catch-all' category 'other crops on arable land' rises 8% and includes sugar beet, vegetables and other crops that appear in the arable farm rotation, such as temporary grass and maize.

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

This survey is focussed 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 amounts of these crops are used to include in this figure.

Thousand hectares	2023 UK area estimates*	Provisional EBS forecast 2024	% year-on-year change
Wheat	1,720	1,698	-1%
Winter Barley	453	427	-6%
Spring Barley	674	764	13%
Oats	166	186	12%
OSR	388	325	-16%

\* Official provisional UK area estimates for 2023 are not available. Official provisional estimates are for England and Scotland only. AHDB have assumed no change for Wales and Northern Ireland area figures from 2022. These have been combined with the provisional England and Scotland figures to produce UK area estimates.

Source: Defra, the Scottish Government, The Andersons Centre for the AHDB.

The forecasts for harvest 2024 project wheat, winter barley and OSR areas falling from the 2023 area, whilst spring barley, oats and non-combinable crops rise. Remember these are a snapshot of farmers' actions and intentions as at very early November, and weather and economics can change these well before harvest.

## ADDITIONAL INFORMATION

The Early-Bird Survey (EBS) is undertaken each autumn to assess national cropping intentions. It is carried out by The Andersons Centre with help from agronomists from the Association of Independent Crop Consultants (AICC) and the Agricultural Industries Confederation (AIC); independents and nationals alike.

In total, over 70 agronomists took part in the survey contributing over 620 Kha of arable land across the UK to establish cropping changes on farms as a representation for the national change in cropping. The survey is struck during the first week of November, with data collected up to 09 November.

In previous years, the survey has been an accurate estimate of planted areas and therefore a strong indication of harvest areas for the following year. Final adjusted results including a breakdown of regional data for the main crops will be published following publication of the final UK June survey results for 2023, which is scheduled for release in late December. No provisional national crop area figures are published, so we use estimates from amalgamated [Defra's provisional 2023 June Survey data for England](#) and the [Scottish Government's provisional 2023 June Agricultural Census](#) figures and carry previous area figures forward for Wales and Northern Ireland.

The survey carries a track record of accurate figures. Nonetheless, the survey only represents a snapshot at a given point in time and therefore, should be interpreted carefully. The reliability of the estimates for larger crops is greater, as are estimates for the winter crops as they are based on actual plantings, compared with planting intentions for spring crops.