

08/07/2020

Pest pressure and challenging autumn conditions impact the UK cereal and oilseed outlook

Poor autumn conditions have resulted in a large swing from winter to spring cropping, the AHDB's 2020 Planting and Variety Survey confirmed today. With large reductions of wheat plantings in many productive areas, much of this has been replaced with spring barley or oats.

Although the UK will have a plentiful supply of barley, for wheat the picture is bleak. There will be further questions over quality of the crop, as dry conditions in spring have not aided crop development.

Oilseed rape area has drastically reduced, continuing last year's downwards trajectory. Many growers this year have withdrawn the crop from rotation, with the wet autumn severely affecting both the ability to drill and the crop establishment. This, combined with ongoing pest pressure, has meant the 2020 harvest area for OSR is the lowest recorded in England since 2002.

Anthony Speight, AHDB Analyst said "The UK grower has faced many challenges this season, with a very wet autumn, followed by an extremely dry spring. However, it is critical to note going into the next marketing season that although we are going into a wheat deficit, our prices are going to be capped at import parity. Furthermore, barley export markets beyond Europe may be our only option post-December, depending on Brexit negotiations."

The key findings of the survey are:

- GB wheat area is estimated at 1,363Kha, a 25% decrease from 2019.
- GB spring barley area is estimated at 1,063Kha, up 52% from 2019.
- GB winter barley area is estimated at 296Kha, a 34% decrease from 2019.
- Area of oilseed rape in England and Scotland is estimated at 387Kha, down 26% from 2019.
- Area of oats in England and Scotland is estimated at 211Kha, a 21% increase from 2019.
- Skyfall is the most popular wheat variety with 10% of area.
- RGT-Planet is the most popular barley variety, accounting for 28% of total area.

The full AHDB Planting and Variety Survey results are [available to download](#) on the AHDB Survey Results page.

Wheat

As anticipated, every single region within GB recorded a decrease in wheat area. Nationally we are recording a year-on-year reduction of 25%, putting the GB area of wheat at 1,363Kha.

The challenging weather played a major part in this reduction. Persistent rain throughout autumn and winter altered many growers' intentions, with them switching to plant spring crops when unable to get their winter crops drilled. In areas such as the East Midlands there has been a large shift to spring wheat plantings, for this harvest spring wheat accounts for 34% of wheat plantings, up from 4% last year.

There have been significant decreases in area recorded in the East Midlands (-32%) and Yorks & Humber (-32%), equating to a reduction in area of 180Kha. Going into the next marketing year, this could pose support for delivered premiums in the North, as more grain will have to be sourced from the East.

In terms of varieties, estimated areas for nabim Group 1 and 2 varieties account for 41% of the 2020 GB wheat area, up five percentage points from last year. Skyfall has been the most popular variety, due to its late planting capabilities.

Group 4 variety Graham is down to 6% for 2020, as Group 4 Gleam and Group 1 KWS-Zyatt increase their share.

Group 4 varieties accounts for 39% of total wheat area, down from 42% last year. The area reduction has been driven by significant decreases in the East (-26Kha), East Midlands (-85Kha) and Yorks & Humber (-61Kha).

Barley

The overall GB barley area is recorded at 1,358kha, an increase of 19% year-on-year. With plentiful production in 2019, from a market perspective the cropping area for barley should have reduced. Why? Throughout the 2019/20 marketing year, barley has been maintained a significant discount to wheat making it economically less attractive.

Nevertheless, the challenging autumn drilling meant that many growers shifted their intentions to planting spring barley. However, barley yields for 2020 may be compromised, from increased spring cropping and a very dry spring.

Overall, 74% of the total GB barley area is malting barley varieties with full approval from the Institute of Brewing & Distilling for harvest 2020, a significant increase from the 56% in 2019. RGT-Planet (28%) and Laureate (25%) account for 53% of the total barley area, up from 36% in 2019.

Winter barley

The overall winter barley area for 2020 has reduced by 34% year-on-year to 296Kha. Similar to winter wheat, the weather posed significant challenges whilst drilling and after November much winter barley wouldn't have been drilled.

There has been a sizeable area reduction in Yorks & Humber (-37%) and East Midlands (-52%), two regions that were especially impacted from the excessive precipitation.

Spring Barley

The spring barley area is recorded at 1,063Kha, increasing by 52% on the year. The most notable rise has been in England (+76%). A lack of winter drilling of both wheat and barley led to spring barley as the most viable option for many growers.

Aside from the poor weather conditions, spring cropping is often used as a cultural control for black grass.

Oats

England and Scotland's oat area for 2020, is predicted to be 211Kha. With Scotland slightly reducing their area (-2%), England accounts for an increase of 26%. There has been a significant area increase in the East Midlands (+10Kha), South East (+9Kha) and West Midlands (+6Kha).

From the Early Bird Survey data, we know that a lot of intended oat plantings were scheduled for the spring, again as an alternative to the lack of winter drilling or replacement of OSR.

Due to a low Welsh survey response rate for oats, the AHDB is unable to provide an area for Wales and therefore GB.

Oilseed rape

With dryness during planting and excessive autumn rain, coupled with cabbage stem flea beetle (CSFB) damage, there has been a drastic reduction in OSR in England for 2020. The area is now recorded at 355Kha, down 28% year-on-year. This will be the lowest recorded area in England since 2002.

There has been a significant drop in large OSR areas such as the East Midlands (-35%) and the East (-28%); this is a reduction of 74Kha just in these two regions alone. It appears the damage from the CSFB could be spreading west and heading northwards. Although currently, Yorks & Humber, the North and Scotland (32Kha, up 2% year-on-year) have seen very minimal year-on-year reduction.

The latest [AHDB crop condition](#) report highlighted that 41% of total winter OSR is rated either 'very poor' (15%) or 'poor' (26%) meaning high, or extreme risk of yield loss... So, the question remains, how much of this year's reduced area will provide a viable harvested crop?

The current OSR condition could pose a significant reduction in regional yields, resulting in a sizeable decrease in production. Combining all these challenging factors, we could see the lowest OSR production this millennium.

Additional Information

- The survey had 1042 responses from a sample provided by AHDB, Defra, Scottish Government and Welsh Government. Growers were asked to submit intended harvest areas and the area harvested last year. Data for this survey was collected during the months of May and June 2020.
- Due to a low response rate from Wales, the Welsh oilseed rape and oats figures are not available for individual publication. North East and North West barley and oilseed rape area figures have also been combined.
- Percentage changes are based on comparisons to the Defra 2019 June Survey of Agriculture. Please note, that for oilseed rape Defra only produce winter crop areas for the English regions. Therefore, to enable a consistent comparison with Scottish results, the English spring oilseed rape area from harvest 2019 has been apportioned in the same ratio as the winter crops and included in the regional totals for harvest 2020.
- Regional breakdowns are based on the Nomenclature of Territorial Units for Statistics (NUTS) regions.
- Please note that totals may not agree due to rounding.
- For the first time, the 2020 survey has been held entirely online. This was due to the national lockdown from March 23rd imposed to limit the spread of coronavirus. In order to reduce the risk of transmission and reduce the burden on postal services no paper forms were used this year. Due to AHDB offices being closed throughout the lockdown, the increased risk of handling personal data outside of our HQ meant that paper forms could not be used.

AHDB Cereals & Oilseeds Planting Survey results 2020

Source: AHDB, Defra, Scottish Government

Units: '000 hectares

Last updated: 08/07/2020

| | Wheat | | | Spring Barley | | | Winter Barley | | | Total Barley | | |
|--------------|--------------------------|---------------|------------------|--------------------------|---------------|------------------|--------------------------|---------------|------------------|--------------------------|---------------|------------------|
| | Final 2019 ¹⁾ | Estimate 2020 | % change on 2019 | Final 2019 ¹⁾ | Estimate 2020 | % change on 2019 | Final 2019 ¹⁾ | Estimate 2020 | % change on 2019 | Final 2019 ¹⁾ | Estimate 2020 | % change on 2019 |
| North East** | 72 | 60 | -16 | 34 | 68 | 98 | 46 | 30 | -34 | 80 | 98 | 23 |
| North West** | 35 | 18 | -49 | | | | | | | | | |
| Yorks | 237 | 160 | -32 | 53 | 136 | 158 | 73 | 45 | -37 | 125 | 181 | 45 |
| East Mids | 326 | 222 | -32 | 73 | 149 | 104 | 49 | 24 | -52 | 123 | 172 | 41 |
| West Mids | 166 | 110 | -34 | 25 | 77 | 202 | 35 | 17 | -52 | 60 | 94 | 56 |
| Eastern | 464 | 384 | -17 | 98 | 138 | 41 | 99 | 72 | -27 | 197 | 211 | 7 |
| South East | 216 | 160 | -26 | 78 | 94 | 21 | 38 | 26 | -32 | 115 | 120 | 4 |
| South West | 162 | 130 | -20 | 83 | 120 | 45 | 49 | 31 | -36 | 132 | 151 | 14 |
| North Scot | 19 | 16 | -15 | 133 | 136 | 2 | 19 | 19 | -0 | 152 | 155 | 2 |
| South Scot | 89 | 82 | -8 | 109 | 129 | 18 | 29 | 26 | -11 | 139 | 155 | 12 |
| England | 1,677 | 1,245 | -26 | 444 | 782 | 76 | 388 | 245 | -37 | 832 | 1,027 | 23 |
| Scotland | 107 | 98 | -9 | 242 | 265 | 9 | 49 | 45 | -7 | 291 | 310 | 7 |
| Wales | 23 | 20 | -13 | 12 | 16 | 38 | 8 | 5 | -38 | 20 | 21 | 6 |
| GB | 1808 | 1363 | -25 | 698 | 1063 | 52 | 445 | 296 | -34 | 1143 | 1358 | 19 |

| | Oats | | | Total Cereals | | | Oilseed Rape | | | Total Cereals and Oilseed Rape | | |
|--------------|--------------------------|---------------|------------------|--------------------------|---------------|------------------|----------------------------|---------------|------------------|--------------------------------|---------------|------------------|
| | Final 2019 ¹⁾ | Estimate 2020 | % change on 2019 | Final 2019 ¹⁾ | Estimate 2020 | % change on 2019 | Final 2019 ¹⁾²⁾ | Estimate 2020 | % change on 2019 | Final 2019 ¹⁾²⁾ | Estimate 2020 | % change on 2019 |
| North East** | 12 | 15 | 27 | 204 | 173 | -15 | 28 | 26 | -8 | 232 | 199 | -14 |
| North West** | 6 | 7 | 8 | | | | | | | | | |
| Yorks | 12 | 15 | 31 | 374 | 356 | -5 | 66 | 62 | -6 | 440 | 418 | -5 |
| East Mids | 17 | 27 | 60 | 465 | 422 | -9 | 125 | 81 | -35 | 591 | 503 | -15 |
| West Mids | 22 | 27 | 27 | 248 | 231 | -7 | 49 | 35 | -28 | 297 | 267 | -10 |
| Eastern | 23 | 26 | 11 | 684 | 620 | -9 | 107 | 78 | -28 | 791 | 698 | -12 |
| South East | 26 | 35 | 35 | 357 | 315 | -12 | 69 | 44 | -36 | 425 | 359 | -16 |
| South West | 26 | 28 | 7 | 320 | 309 | -4 | 48 | 30 | -39 | 369 | 338 | -8 |
| North Scot | 11 | 11 | 3 | 182 | 182 | 0 | 11 | 11 | 5 | 192 | 193 | 0 |
| South Scot | 21 | 20 | -5 | 249 | 257 | 3 | 21 | 21 | 0 | 270 | 278 | 3 |
| England | 143 | 179 | 26 | 2,652 | 2,452 | -8 | 492 | 355 | -28 | 3,144 | 2,806 | -11 |
| Scotland | 32 | 31 | -2 | 430 | 439 | 2 | 32 | 32 | 2 | 462 | 472 | 2 |
| Wales | 5 | * | * | 48 | * | * | 5 | * | * | 53 | * | * |
| GB | 180 | * | * | 3130 | * | * | 529 | * | * | 3659 | * | * |

AHDB wheat variety survey results 2020

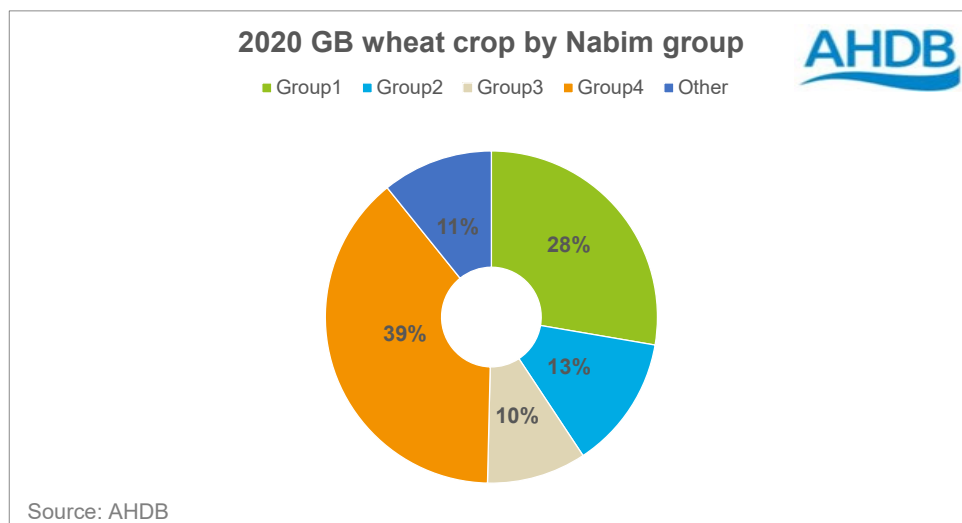
Source: AHDB, Defra, Scottish Government

Units: % and '000 hectares

Last updated: 08/07/2020

| | Nabim groups by region % | | | | | | | Planting Survey wheat area estimate | Nabim groups by region '000Ha | | | | | | |
|------------|--------------------------|--------|--------|--------|-------------|-------------|-------|-------------------------------------|-------------------------------|--------|--------|--------|-------------|-------------|-------|
| | Group1 | Group2 | Group3 | Group4 | Group4 soft | Group4 hard | Other | | Group1 | Group2 | Group3 | Group4 | Group4 soft | Group4 hard | Other |
| North East | 6% | 12% | 29% | 46% | 13% | 33% | 6% | 60 | 4 | 7 | 18 | 27 | 8 | 20 | 4 |
| North West | * | * | * | * | * | * | * | 18 | * | * | * | * | * | * | * |
| Yorks | 19% | 10% | 6% | 49% | 10% | 40% | 15% | 160 | 31 | 16 | 10 | 79 | 15 | 63 | 25 |
| East Mids | 34% | 19% | 7% | 29% | 5% | 24% | 10% | 222 | 77 | 43 | 15 | 65 | 11 | 54 | 23 |
| West Mids | 18% | 11% | * | 54% | * | * | * | 110 | 20 | 12 | * | 59 | * | * | * |
| Eastern | 26% | 13% | 11% | 43% | 6% | 37% | 7% | 384 | 101 | 48 | 43 | 165 | 24 | 141 | 27 |
| South East | 55% | 15% | 11% | 9% | * | * | 10% | 160 | 88 | 23 | 18 | 15 | * | * | 16 |
| South West | 33% | 12% | 5% | 40% | 4% | 36% | 10% | 130 | 43 | 15 | 7 | 52 | 6 | 46 | 13 |
| Scotland | * | * | 16% | 57% | 54% | 3% | 18% | 98 | * | * | 16 | 56 | 53 | 3 | 17 |
| Wales | * | * | * | * | * | * | * | 20 | * | * | * | * | * | * | * |
| GB | 28% | 13% | 10% | 39% | 9% | 30% | 11% | 1,363 | 377 | 177 | 132 | 529 | 122 | 407 | 147 |

*Due to a low response rate in the North West, West Mids, South East regions, Wales and Scotland, some figures are not available for publication
Varieties are categorised as per the Nabim wheat guide 2019/20, Other = uncategorised by nabim 2019/20



AHDB GB wheat variety survey results 2020

Planting Survey wheat area estimate: **1,363 Kha**

| Variety names | Nabim group | % of total |
|---------------|-------------|------------|
| Skyfall | 1 | 10% |
| Gleam | 4H | 9% |
| KWS-Zyatt | 1 | 7% |
| Graham | 4H | 6% |
| Mulika | 1 | 5% |
| KWS-Siskin | 2 | 5% |
| Other* | | 58% |

*Other varieties each make up less than 5% of the surveyed area
The wheat variety survey actual area was approximately 69,000Ha which represents approx 5% of the total area estimate

AHDB Cereals & Oilseeds Planting Survey results 2020

Source: AHDB

Units: %

Last updated: 08/07/2020

| | 2019 % area estimate of wheat plantings | | 2020 % area estimate of wheat plantings | |
|------------|---|--------------|---|--------------|
| | Winter wheat | Spring wheat | Winter wheat | Spring wheat |
| North East | * | * | * | * |
| North West | * | * | * | * |
| Yorks | 98% | 2% | 86% | 14% |
| East Mids | 96% | 4% | 66% | 34% |
| West Mids | 98% | 2% | 76% | 24% |
| Eastern | 97% | 3% | 89% | 11% |
| South East | 96% | 4% | 81% | 19% |
| South West | 93% | 7% | 75% | 25% |
| England | 97% | 3% | 81% | 19% |
| Scotland | 94% | 6% | 93% | 7% |
| Wales | * | * | * | * |
| GB | * | * | * | * |

AHDB GB uncropped arable land and temp grassland results 2020

Source: AHDB, Defra

Units: '000 hectares

Last updated: 27/07/2020

| Great Britain | Final 2019 ¹⁾ | Estimate 2020 | % change on 2019 |
|-----------------------|--------------------------|---------------|------------------|
| Uncropped arable land | 224 | 548 | 145% |
| Temp grassland | 1,045 | 1,092 | 5% |

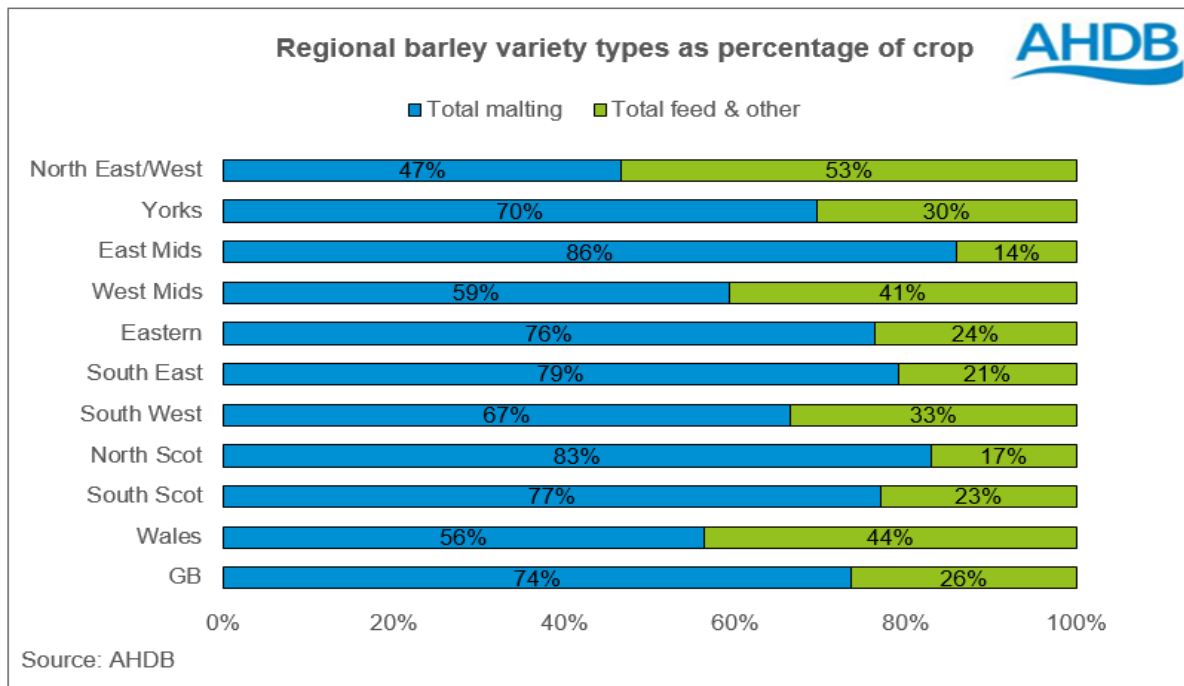
1) Final 2019 Defra data.

AHDB barley variety survey results 2020

Source: AHDB

Units: % and hectares

Last updated: 08/07/2020



*Due to a low response rate North East and North West barley area figures have been combined
 Malting: Varieties with full approval only on the Institute of Brewing and Distilling Approved List for harvest 2020

AHDB GB barley variety survey results 2020

Planting Survey barley area estimate: 1,358 Kha

| Variety names | % of total |
|---------------|------------|
| RGT-Planet | 28% |
| Laureate | 25% |
| LG Diablo | 6% |
| Propino | 5% |
| Other* | 36% |

*Other varieties each make up less than 5% of the surveyed area
 The Barley variety survey actual area was approximately 64,000Ha
 which represents approx 5% of the total area estimate

AHDB oat variety survey results 2020

Source: AHDB

Units: % and hectares

Last updated: 08/07/2020

Oat varieties as a percentage of surveyed area (England & Scotland*)

Planting Survey Oat Area Estimate: 211 Kha

| Variety names | % of total |
|---------------|------------|
| Mascani | 24% |
| WPB Elyann | 20% |
| Canyon | 19% |
| Aspen | 6% |
| Other** | 31% |

*Due to a low response rate the oats figure for Wales is not available for publication

**Other varieties each make up less than 5% of the surveyed area or do not meet thresholds for publication

The oat variety survey actual area was approximately 11,000Ha which represents approx 5% of the total area estimate

AHDB OSR variety survey results 2020

Source: AHDB

Units: % and hectares

Last updated: 08/07/2020

OSR varieties as a percentage of surveyed area (England & Scotland*)

Planting Survey OSR area estimate: 387 Kha

| Variety names | % of total |
|---------------|------------|
| Campus | 11% |
| Aspire | 7% |
| Elgar | 7% |
| Other** | 75% |

*Due to a low response rate the oilseed rape figure for Wales is not available for publication

**Other varieties each make up less than 5% of the surveyed area
The OSR variety survey actual area was approximately 20,000Ha
which represents approx 5% of the total area estimate

Notes

Total may not agree due to rounding

Breakdown at regional levels are based on smaller sample sizes than at the national level and are therefore subject to more uncertainty

Regional breakdowns are based on the Nomenclature of Territorial Units for Statistics (**NUTS**) regions

Planting survey results 2020

*Due to a low response rate, the Welsh oilseed rape and oats aread figures are not available for individual publication

**Due to a low response rate North East and North West barley and oilseed rape area figures have been combined

1) Final 2019 crop areas from Defra (June survey) and Scottish Government (June Agricultural Census)

2) Defra produce winter oilseed rape areas for the regions in England. The 2019 total spring oilseed rape area for England has been apportioned in the same ratio as the winter crop and included in the regional totals to enable a consistent comparison

Spring and winter wheat

*Due to a low response rate, the North East, North West, Welsh and GB spring and winter wheat % are not available for individual publication.

Disclaimer

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Contact us

Agriculture and Horticulture Development Board
Stoneleigh Park

Kenilworth

Head office address

Warwickshire

CV8 2TL

Telephone

024 7669 2051

Email

mi@ahdb.org.uk

Website

ahdb.org.uk

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Contact us

Agriculture and Horticulture Development Board
Stoneleigh Park

Head office address

Kenilworth
Warwickshire
CV8 2TL

Telephone

024 7669 2051

Email

mi@ahdb.org.uk

Website

ahdb.org.uk
