

08/07/2021

### **Improved autumn conditions allow resurgent wheat production for 2021**

Improved 2020/21 autumn/winter planting conditions allow GB grain areas to swing back to expected trend levels. The area of wheat is estimated to resurge back in line with 5-year-averages. Mainly at the expense of the spring barley area, while the oats area grows slightly year-on-year.

The 2020/21 marketing year has been extremely supportive of wheat, while barley has maintained a large discount to be competitive into markets. However, 2021 production outlook could close that discount.

In the last 12-months we have witnessed global grain prices surge off the back of Chinese purchasing, South American droughts and Russian export tariffs which will have posed growers with opportunity to forward sell grain for this harvest.

However, the GB oilseed rape area continues to drastically reduce due to pest pressure and high costs of growing. The 2021 area is set to be the lowest recorded area this century. The southern regions of GB are largely adding to this reduction, while they favour alternative cropping such as oats or have planted more wheat.

Anthony Speight, AHDB analyst said “With improved drilling and crop conditions this year the UK’s wheat production is estimated to rebound with talk of a 15Mt crop now in full view. This could limit delivered premiums in northern regions and mean we are exporting grain out the south of GB. Recent high prices will influence cropping intentions for 2022 but it’s critical to mitigate and manage risk amid the price volatility that we continue to see and the upcoming reduction in direct payments.”

#### **The key findings of the survey are:**

- GB wheat area is estimated at 1,742Kha, a 26% increase from 2020.
- GB spring barley area is estimated at 769Kha, down 28% from 2020.
- GB winter barley area is estimated at 350Kha, a 15% increase from 2020.
- GB oilseed rape area is estimated at 322Kha, down 15% from 2020.
- GB oat area is estimated at 211Kha, a 1% increase from 2020.
- Skyfall is the most popular wheat variety with 12% of total wheat area.
- Laureate is the most popular barley variety, accounting for 26% of total barley area.

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

#### **Wheat**

Every region within GB for 2021 is forecast an increase in wheat area for this coming harvest.

The area year-on-year is estimated to increase 26%, putting the total GB area at 1,742Kha.

With Autumn weather in 2020 significantly improving year-on-year, growers have been able to plant just shy of the intended estimated forecast in our Early Bird Survey in December 2020.

The resurgence in wheat plantings has been at the expense of spring barley, which is down as growers switch back to winter cropping.

There has been a notable year-on-year increase in areas such as the East Midlands (+47%), Yorks & Humber (+43%), equating to an increase of 150Kha combined, which could limit gains in delivered premiums in the North despite the introduction of E10 blending mandates.

Further to that, a sizable increase in the South East (+39%) and South West (+27%), combined with fair crop conditions, is providing the potential for the UK to export wheat out of the south of England for the 2021/22 marketing year.

In terms of varieties, estimated areas for Group 1 and 2 varieties account for 44% of the 2021 GB wheat area, up three percentage points from last year.

Skyfall is once again the most popular variety at 12% of total area. However, Gleam is only slightly behind at 11% of total area.

### **Barley**

The overall GB barley area is recorded at 1,119Kha, a decrease of 18% year-on-year. A sizable production in 2020 has meant that barley markets have maintained a large discount to wheat in the 2020/21 marketing year to be competitive.

With wheat prices gaining significantly over the last 12 months growers have chosen to switch largely back to wheat for harvest 2021 as sowing conditions allowed.

Overall, 58% of the total GB barley area is malting barley varieties with full approval from the Institute of Brewing & Distilling, a significant decrease from the 74% in 2020.

This has happened because growers have turned away from spring barley. Laureate is the most popular variety and accounts for 26% of total area, while RGT-Planet is second accounting for 20% of total area.

### **Winter barley**

The overall winter barley area for 2021 has increased by 15% year-on-year to 350Kha. Similar to wheat, the increase is driven by growers being able to plant their crop in the winter.

There has been a sizable increase in the East Midlands (+88%) with the estimated area at 46Kha. However, there has been marginal decrease in Scotland (-4%), North East and West (-8%) and South East (-12%) England.

### **Spring Barley**

The spring barley area is recorded at 769Kha, decreasing by 28% on the year. The large reduction is due to growers turning back to winter wheat as sowing conditions improved significantly.

Due to these improved conditions spring barley area has recede back to levels recorded between 2017-2019.

Every region within GB is forecast a reduction year-on year. With the largest area reduction in Yorks & Humber (-42%) and the East Midlands (-49%) accounting for 127Kha of reduction combined.

A marginal reduction is estimated in North & South Scotland with the combined area down 27Kha year-on-year. The total Scottish spring barley area for 2021 is estimated at 274Kha.

### **Oats**

The area for oats in GB is estimated at 211Kha, a 1% increase year-on-year. Increased area of oats is limited this year after last year's sizable increase which has pressured the market.

A significant reduction is estimated in the East Midlands (-22%) as growers in the region managed to sow their winter wheat for this year's harvest.

The area in the Eastern region is set to increase (+28%) this year as growers turn away from alternative break crops such as oilseed rape (OSR) due to pest pressures. Furthermore, a decline (-13%) in spring barley area may too have contributed to this rise in oat area.

### **Oilseed rape**

The area for oilseed rape in GB is estimated at 322Kha, down 15% year-on-year. Crop conditions last year of OSR were not ideal, which led to significant pest pressure and yields were down which meant growers turned away from planting this break crop.

The most notable area reduction is the Eastern (-34%) region and South East (-22%), equating to an area reduction of 39Kha, as this is the part of GB that the Cabbage Stem Flea Beetle is most prevalent.

### **Additional Information**

- The survey had 671 valid responses. Growers were asked to submit intended harvest areas and the area harvested last year. Data for this survey was collected during the months of April, May and June 2021.
- Due to a low response rate, North East and North West along with West Midlands and Wales have been combined for all cereals and oilseed rape crops. In addition, North and South Scotland have been combined for oats and oilseed rape.
- Percentage changes are based on comparisons to the Defra 2020 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 2020 has been apportioned in the same ratio as the winter crops and included in the regional totals for harvest 2021.
- Regional breakdowns are based on the Nomenclature of Territorial Units for Statistics (NUTS) regions.
- Please note that totals may not agree due to rounding.
- Like last year, the 2021 survey has been held entirely online. This was due to the working from home order imposed by the UK government to limit the spread of coronavirus. Due to working from home, 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 2021

Source: AHDB, Defra, Scottish Government

Units: '000 hectares

Last updated: 08/07/2021

Region	Wheat			Spring barley			Winter barley			Total barley		
	Final 2020 <sup>1)</sup>	Estimate 2021	% change on 2020	Final 2020 <sup>1)</sup>	Estimate 2021	% change on 2020	Final 2020 <sup>1)</sup>	Estimate 2021	% change on 2020	Final 2020 <sup>1)</sup>	Estimate 2021	% change on 2020
North East & West*	76	86	13	60	40	-34	30	28	-8	91	68	-25
Yorks and Humber	173	216	25	114	66	-42	45	57	27	159	123	-22
East Mids	227	334	47	163	84	-49	24	46	88	187	129	-31
Eastern	385	416	8	161	140	-13	72	73	1	233	213	-9
South East	171	237	39	112	84	-25	27	24	-12	140	108	-22
South West	121	153	27	121	77	-37	34	46	35	155	122	-21
West Mids & Wales*	134	190	42	73	46	-37	28	34	24	101	81	-20
North Scot	16	19	21	138	127	-8	17	17	-0	155	144	-7
South Scot	78	91	18	121	105	-13	26	25	-4	146	130	-11
<b>England &amp; Wales</b>	<b>1287</b>	<b>1632</b>	<b>27</b>	<b>805</b>	<b>537</b>	<b>-33</b>	<b>261</b>	<b>308</b>	<b>18</b>	<b>1066</b>	<b>845</b>	<b>-21</b>
<b>Scotland</b>	<b>94</b>	<b>111</b>	<b>18</b>	<b>259</b>	<b>232</b>	<b>-10</b>	<b>43</b>	<b>42</b>	<b>-3</b>	<b>302</b>	<b>274</b>	<b>-9</b>
<b>GB</b>	<b>1380</b>	<b>1742</b>	<b>26</b>	<b>1064</b>	<b>769</b>	<b>-28</b>	<b>304</b>	<b>350</b>	<b>15</b>	<b>1367</b>	<b>1119</b>	<b>-18</b>

Region	Oats			Total cereals			Oilseed rape <sup>2)</sup>			Total cereals & oilseed rape		
	Final 2020 <sup>1)</sup>	Estimate 2021	% change on 2020	Final 2020 <sup>1)</sup>	Estimate 2021	% change on 2020	Final 2020 <sup>1)</sup>	Estimate 2021	% change on 2020	Final 2020 <sup>1)</sup>	Estimate 2021	% change on 2020
North East & West*	19	21	7	187	174	-7	22	25	12	209	199	-5
Yorks and Humber	15	16	5	347	355	2	51	43	-17	398	397	-0
East Mids	27	21	-22	441	484	10	75	59	-21	516	544	5
Eastern	26	33	28	644	662	3	84	56	-34	728	718	-1
South East	30	27	-10	340	372	9	47	36	-22	387	408	6
South West	27	26	-5	303	301	-1	29	27	-6	332	329	-1
West Mids & Wales*	30	28	-8	265	298	12	39	42	8	305	341	12
North Scot*	*	*	*	*	*	*	*	*	*	*	*	*
South Scot*	*	*	*	*	*	*	*	*	*	*	*	*
<b>England &amp; Wales</b>	<b>174</b>	<b>171</b>	<b>-2</b>	<b>2526</b>	<b>2647</b>	<b>5</b>	<b>348</b>	<b>289</b>	<b>-17</b>	<b>2874</b>	<b>2936</b>	<b>2</b>
<b>Scotland</b>	<b>34</b>	<b>40</b>	<b>18</b>	<b>429</b>	<b>425</b>	<b>-1</b>	<b>31</b>	<b>33</b>	<b>7</b>	<b>460</b>	<b>458</b>	<b>-0</b>
<b>GB</b>	<b>208</b>	<b>211</b>	<b>1</b>	<b>2956</b>	<b>3072</b>	<b>4</b>	<b>379</b>	<b>322</b>	<b>-15</b>	<b>3335</b>	<b>3394</b>	<b>2</b>

## AHDB wheat variety survey results 2021

Source: AHDB

Units: % and '000 hectares

Last updated: 08/07/2021

	UK Flour groups by region (%)							Planting survey wheat area estimate	UK Flour groups by region ('000 hectares)						
	Group1	Group2	Group3	Group4	Group4 soft	Group4 hard	Other		Group1	Group2	Group3	Group4	Group4 soft	Group4 hard	Other
North East & West*	*	22%	25%	31%	*	*	*	86	*	19	22	27	*	*	*
Yorks & Humber	20%	16%	6%	49%	12%	37%	9%	216	44	34	13	105	26	79	19
East Mids	28%	12%	9%	47%	15%	32%	4%	334	95	39	30	157	49	108	13
West Mids & Wales*	25%	16%	*	56%	3%	53%	*	190	48	30	*	106	6	100	*
Eastern	33%	12%	10%	41%	10%	31%	5%	416	136	48	42	169	40	129	21
South East	52%	14%	14%	17%	*	*	2%	237	124	33	34	41	*	*	5
South West	38%	18%	*	38%	5%	33%	*	153	58	28	*	57	7	50	*
Scotland	*	13%	*	70%	65%	6%	8%	111	*	15	*	78	72	6	9
GB	29%	14%	9%	43%	13%	30%	5%	1,742	512	246	154	741	221	520	89

### Wheat varieties as a percentage of surveyed area

Planting survey wheat area estimate: 1,742 Kha

Variety	UK Flour group	% of total
Skyfall	1	12%
Gleam	4H	11%
KWS-Zyatt	1	7%
Crusoe	1	7%
KWS-Extase	2	7%
LG Skyscraper	4S	6%
Graham	4H	6%
Other**	-	43%

#### Notes

The wheat variety survey area was approximately 62,000 hectares which represents 4% of the total 2021 area estimate.

Varieties are categorised as per the UK Flour Wheat Guide 2020/21. Other is the uncategorised varieties from the same guide.

\*Due to a low response rate, North East & North West along with West Midlands & Wales have been combined.

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

\*\*Other varieties each make up less than 5% of the surveyed area.

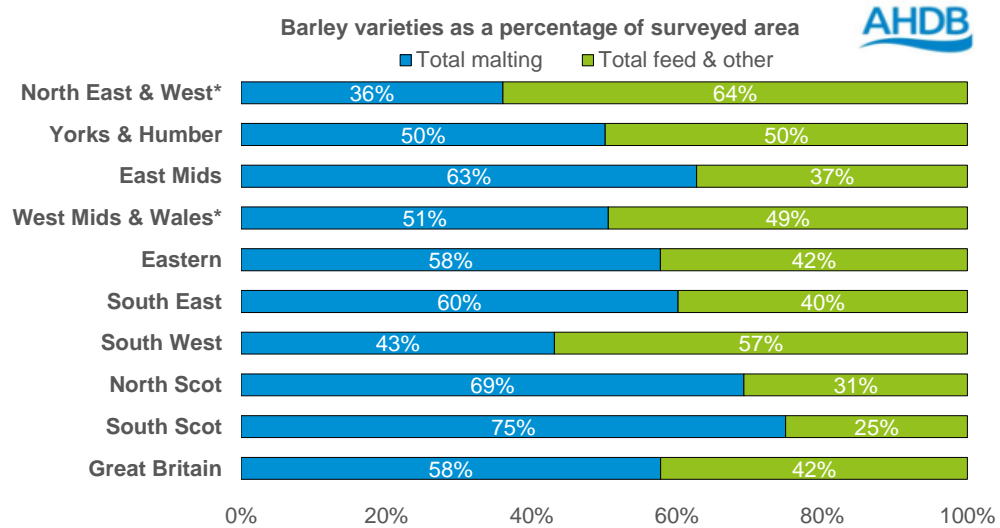
Totals may not agree due to rounding.

## AHDB barley variety survey results 2021

Source: AHDB

Units: %

Last updated: 08/07/2021



### Barley varieties as a percentage of surveyed area

Planting survey barley area estimate: **1,119 Kha**

Variety	% of total
Laureate	26%
RGT-Planet	20%
LG Diablo	6%
KWS-Orwell	5%
SY Kingsbarn	5%
Other**	37%

#### Notes

The barley variety survey area was approximately 31,000 hectares which represents 3% of the total 2021 area estimate.

Malting: Varieties with full approval only on the MBC Approved List for harvest 2021.

\*Due to a low response rate, North East & North West along with West Midlands & Wales have been combined.

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

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

Totals may not agree due to rounding.

## AHDB oat variety survey results 2021

Source: AHDB

Units: %

Last updated: 08/07/2021

### Oat varieties as a percentage of surveyed area

Planting survey oat area estimate: 211 Kha

Variety	% of total
Mascani	26%
Canyon	19%
WPB Elyann	13%
WPB-Isabel	9%
Other*	34%

#### Notes

The oat variety survey area was approximately 7,000 hectares which represents 3% of the total 2021 area estimate.

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

## AHDB oilseed rape variety survey results 2021

Source: AHDB

Units: %

Last updated: 08/07/2021

### OSR varieties as a percentage of surveyed area

Planting survey OSR area estimate: 322 Kha

Variety	% of total
Aspire	11%
Aurelia	10%
Acacia	7%
Campus	6%
Other*	65%

#### Notes

The OSR variety survey area was approximately 12,000 hectares which represents 4% of the total 2021 area estimate.

\*Other varieties each make up less than 5% of the surveyed area.

**AHDB Cereals & Oilseeds Planting Survey: Wheat and Oat planting estimates by crop type**

Source: AHDB

Units: %

Last updated: 27/10/2021

Region: Great Britain

% area estimate of plantings				
Year	Spring wheat	Winter wheat	Spring oats	Winter oats
2019	*	*	57%	43%
2020	*	*	72%	28%
2021	8%	92%	66%	34%



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## Notes

Regional breakdowns are based on the Nomenclature of Territorial Units for Statistics (**NUTS**) regions. North Scotland consists of the Highlands & Islands and the North East regions. South Scotland consist of Southern, Eastern and West Central regions.

Please note that total may not agree due to rounding and breakdown at regional levels are based on smaller sample sizes than at the national level and are therefore subject to more uncertainty.

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