

27/07/2023

More barley and oilseed rape are sown at the expense of wheat

The UK will harvest less wheat due to more barley and oilseed rape being sown, according to the latest Planting and Variety Survey.

The survey, which provides planted area estimates for the UK with a regional breakdown, revealed the UK wheat area for harvest 2023 is set to slightly decrease year-on-year.

It is estimated that 1,746 Kha of wheat has been planted for harvest 2023. The slight year-on-year decrease in wheat area has been at the expense of additional barley and oilseed rape (OSR) being sown.

The total UK barley area is estimated to increase by 5% on the year with an uptick in both winter and spring area. There is also an increase in the GB OSR area which is estimated to increase 11% year-on-year, as high prices in Spring 2022 offered growers the incentive to plant additional OSR. There seems to be a movement away from alternative break crops such as oats, as the GB oat area is set to decrease by 7% year-on-year.

Anthony Speight, AHDB Senior Analyst, said: “The UK harvest is here and it’s highly likely that gross margins for 2023 are going to be squeezed in comparison to 2022. This season has been a high input year for farmers as inflation, energy prices and input costs have increased exponentially.

“Since winter crops have been sown, global grain markets have been on a downward drift as markets have adjusted, navigated and digested the war and geo-politics in the Black Sea.

“It’s a hard time for growers as cereal and oilseed prices are now lower than what they were when planting intentions were decided last year, and those peak marketing opportunities may have passed for 2023 harvest. However, with the war continuing in Ukraine, we are still in volatile and unknown times for commodity prices. As harvest 2023 starts, growers will have a clearer idea on their breakeven point. What I will say is take marketing opportunities and ride the short-term volatile highs when opportunities arise to market your crops.”

The key findings of the survey are:

- In 2023 the total UK wheat area is estimated at 1,746 Kha, 3% down from 2022.
- The total UK barley area for harvest 2023 is estimated at 1,154Kha, up 5% on the year. The GB spring barley area is estimated at 702 Kha, up 7% year-on-year, while the GB winter barley area is estimated to be 2% higher at 434 Kha.
- The GB oat area is estimated at 161 Kha, this is 7% down year-on-year.
- The GB oilseed rape (OSR) area is estimated at 402 Kha, this is 11% higher than 2022 levels.
- For harvest 2023 KWS Extase is the most popular wheat variety with 17% of the total GB wheat area. For barley, Laureate is the most popular variety, accounting for 32% of the total GB barley area.
- The full AHDB Planting and Variety Survey results are [available to download](#) on the AHDB Survey Results page.

Wheat

The UK wheat area for harvest 2023 is estimated to decreased by 3% year-on-year to 1,746 Kha.

Nationally the UK wheat area has largely been replaced with more barley and oilseed rape (OSR) for 2023.

The region driving the reduction in area is the East Midlands (-5%), where the wheat area is estimated at 319 Kha, down 18 Kha from 2022, with the area replaced with an increase in OSR.

Further driving the reduction in area is the South East (-5%) and South West (-8%), where the total reduction of these two regions combined account for 25 Kha. For the South East this has largely been replaced with increases of both winter (+13%) and spring (+19%) barley. However, for the South West this has been driven by an increase in OSR (+64%).

In Yorkshire and the Humber the wheat area is estimated to be 219 Kha, down by 8 Kha from 2022. Excluding the 2020 area due to the Autumn wash out, **this will be the smallest wheat area in the region since 2013.**

In terms of varieties, estimated areas for Group 1 and 2 varieties account for 44% of the 2023 GB wheat area.

KWS Extase is the most popular variety at 17% of total area. However, KWS Dawsum is only slightly behind at 11% of total area.

Barley

The total UK barley area is estimated to increase for both winter and spring barley, to be up 5% year-on-year at 1,154 Kha.

Overall, 57% of the total GB barley area is malting barley varieties, with full approval from the Institute of Brewing & Distilling.

Laureate is the most popular variety and accounts for 32% of total area, while RGT Planet is second accounting for 9% of total area.

Winter barley

The overall GB winter barley area for 2023 has increased by 2% year-on-year to 434 Kha.

Driving the increase in winter barley area are the Eastern (+7%) and South East (+19%) regions of GB, who collectively are estimated to grow an extra 14 Kha in area year-on-year.

Regional breakdowns show that, more winter barley has been sown at the expense of OSR in the Eastern region, and at the expense of wheat in the South East region.

Spring Barley

The GB spring barley area is estimated at 702 Kha, up 7% on 2022, which was the lowest spring barley area since 2015.

Every region within GB has increased in spring barley area apart from the North West, South West and East Midlands.

Driving much of the increase in spring barley area is the year-on-year increase in the West Midlands and Wales (+47%), also the increase in South Scotland (+11%).

Further increases were also noted in the Eastern and South East region from reductions in OSR area. This may have been further exacerbated following OSR crop losses, as both areas have increased when compared to last autumns [Early Bird Survey](#).

Oats

The area for oats in GB is estimated at 161 Kha, down 7% year-on-year. The GB oat area continues to contract from the highs captured in 2020 & 2021. However, the area does remain historically high, but is the lowest since 2017.

Driving much of this area loss is the Eastern region, which is estimated at 15 Kha, down 7 Kha from 2022.

Oilseed rape

The GB area for OSR is estimated at 402 Kha, up 11% year-on-year. There is a large increase in the OSR area as prices rallied in spring last year. In spring 2022 when plantings intentions were being decided, spot delivered OSR prices were at over £800.00/t. This was due to the war in Ukraine which set a bullish spur into commodity markets.

Every region in GB has recorded an increase in area apart from the Eastern (-27%) and South East (-15%). Both respective regions are lower in comparison to the [Early Bird Survey](#). Crop loss for this growing season has been variable nationally. However, there are reports of losses in these two respective regions, which could give insight into why their spring barley areas have increased.

Driving the large increase in OSR area has been year-on-year area rises in the East Midlands (+25%), the South West (+64%) and West Midlands & Wales (+46%), collectively these areas have increased by 54 Kha year-on-year. For the East Midlands and South West these increases have been at the expense of wheat.

Additional Information

- The survey had 618 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 to July 2023.
- 1) Final 2022 Defra data.
- 2) Defra only provide oilseed rape winter crop areas for the English regions. Therefore, to enable a consistent comparison, the English spring oilseed rape area from harvest 2022 has been apportioned in the same ratio as the winter crops and included in the regional totals for harvest 2022.
- 3) Scotland crop areas are based on areas submitted on subsidy claims and excludes a relatively small area for farmers not claiming in 2022.
- 4) Due to a low response rate, West Midlands and Wales have been combined for all crops.
- * Insufficient sample to produce robust figure.
- 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 totals 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.

AHDB Cereals & Oilseeds Planting Survey Results 2023

Source: AHDB, Defra, Scottish Government

Units: '000 hectares

Last updated: 27/07/2023

Region	Wheat			Spring barley			Winter barley			Total barley		
	Final 2022 ¹⁾	Estimate 2023	% change on 2022	Final 2022 ¹⁾	Estimate 2023	% change on 2022	Final 2022 ¹⁾	Estimate 2023	% change on 2022	Final 2022 ¹⁾	Estimate 2023	% change on 2022
North East	66	63	-6	14	15	6	26	25	-4	41	40	-1
North West	32	32	-2	21	19	-8	15	17	16	36	36	2
Yorks and Humber	226	219	-3	58	67	16	64	60	-5	121	127	5
East Mids	337	319	-5	69	69	-0	55	55	0	124	123	-0
Eastern	455	454	-0	92	95	4	92	99	7	184	194	5
South East	221	209	-5	60	68	13	38	46	19	99	114	15
South West	161	148	-8	71	63	-12	51	51	-0	122	114	-7
West Mids and Wales ⁴⁾	195	193	-1	37	54	47	40	36	-10	77	90	17
North Scot	21	23	10	130	134	3	17	16	-8	147	150	2
South Scot	86	79	-9	106	117	11	27	29	7	133	147	10
England & Wales	1,694	1,636	-3	423	451	7	381	389	2	804	839	4
Scotland ³⁾	107	102	-5	236	251	7	44	45	2	280	296	6
Northern Ireland	8	8	10	13	*	*	8	*	*	21	19	-9
GB	1,801	1,738	-4	659	702	7	425	434	2	1,083	1,135	5
UK	1,809	1,746	-3	671	*	*	433	*	*	1,104	1,154	5

Region	Oats			Total cereals			Oilseed rape ²⁾			Total cereals & oilseed rape		
	Final 2022 ¹⁾	Estimate 2023	% change on 2022	Final 2022 ¹⁾	Estimate 2023	% change on 2022	Final 2022 ¹⁾	Estimate 2023	% change on 2022	Final 2022 ¹⁾	Estimate 2023	% change on 2022
North East	10	11	5	117	114	-3	21	22	4	138	135	-2
North West	5	*	*	73	*	*	4	4	11	77	*	*
Yorks and Humber	12	13	9	359	358	-0	51	52	2	410	410	-0
East Mids	21	24	16	481	466	-3	62	77	25	543	543	0
Eastern	23	15	-32	662	664	0	76	55	-27	738	719	-3
South East	26	29	13	346	352	2	42	36	-15	388	388	0
South West	23	20	-13	307	282	-8	31	50	64	338	332	-2
West Mids and Wales ⁴⁾	25	*	*	297	*	*	42	62	46	340	*	*
North Scot	8	*	*	176	*	*	13	18	32	190	*	*
South Scot	19	*	*	238	*	*	22	27	24	260	*	*
England & Wales	145	140	-3	2,643	2,615	-1	328	358	9	2,971	2,973	0
Scotland ³⁾	27	21	-24	414	418	1	35	45	27	450	463	3
Northern Ireland	2	*	*	30	*	*	1	*	*	31	*	*
GB	172	161	-7	3,057	3,034	-1	363	402	11	3,420	3,436	0
UK	174	*	*	3,087	*	*	364	*	*	3,451	*	*

AHDB wheat variety survey results 2023

Source: AHDB

Units: % and '000 hectares

Last updated: 27/07/2023

Region	UK flour groups by region (%)							Planting survey wheat area estimate	UK flour groups by region ('000 hectares)						
	Group 1	Group 2	Group 3	Group 4	Group 4 soft	Group 4 hard	Other		Group 1	Group 2	Group 3	Group 4	Group 4 soft	Group 4 hard	Other
North East	*	*	16%	57%	*	*	*	63	*	*	10	36	*	*	*
North West	*	*	*	72%	*	*	9%	32	*	*	*	23	*	*	3
Yorks and Humber	14%	14%	2%	60%	16%	45%	10%	219	30	31	4	132	34	98	21
East Mids	21%	20%	*	53%	12%	42%	*	319	66	64	*	170	38	132	*
Eastern	31%	15%	7%	43%	9%	34%	5%	454	139	66	30	196	42	154	23
South East	40%	31%	*	26%	*	*	*	209	83	64	*	54	*	*	*
South West	6%	40%	*	46%	*	*	7%	148	9	60	*	68	*	*	11
West Mids & Wales ¹⁾	32%	24%	*	41%	*	*	*	193	61	46	*	79	*	*	*
Scotland	*	*	*	69%	39%	29%	13%	102	*	*	*	70	40	30	14
Northern Ireland	*	*	*	*	*	*	*	8	*	*	*	*	*	*	*
GB	23%	21%	4%	48%	11%	36%	5%	1,738	398	358	62	827	196	631	92
UK	*	*	*	*	*	*	*	1,746	*	*	*	*	*	*	*

GB wheat varieties as a percentage of surveyed area

GB planting survey wheat area estimate: **1,738** Kha

Variety	UK flour group	% of total
KWS Extase	2	17%
KWS Dawsum	4H	11%
Crusoe	1	9%
LG Skyscraper	4S	9%
Skyfall	1	7%
Graham	4H	6%
Gleam	4H	6%
Other**		36%

Notes

The wheat variety survey area was approximately 49,000 hectares which represents 3% of the total 2023 GB area estimate.

Varieties are categorised as per the AHDB Recommended List 2022/23. Other is the uncategorised varieties from the same guide.

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

¹⁾ Due to a low response rate, West Midlands and Wales have been combined.

* Insufficient sample to produce robust figure.

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

Totals may not agree due to rounding.

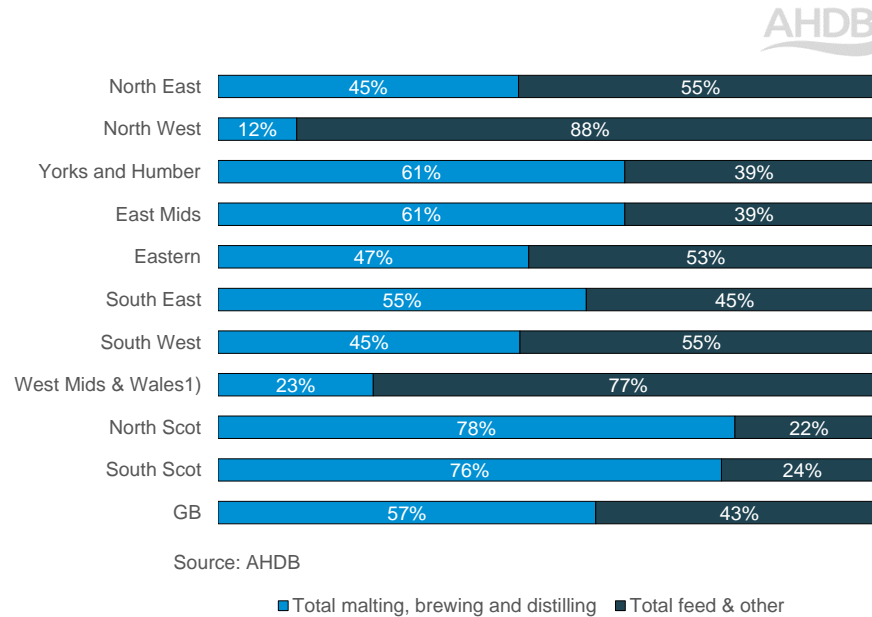
AHDB barley variety survey results 2023

Source: AHDB

Units: %

Last updated: 27/07/2023

Barley varieties as a percentage of surveyed area



GB barley varieties as a percentage of surveyed area

GB planting survey barley area estimate: 1,135 Kha

Variety	% of total
Laureate	32%
RGT Planet	9%
KWS Tardis	8%
LG Diablo	7%
SY Kingsbarn	5%
Other*	39%

Notes

The barley variety survey area was approximately 28,000 hectares which represents 2% of the total 2023 GB area estimate.

Malting, brewing and distilling: Varieties with full approval only on the Institute of Brewing and Distilling Approved List for harvest 2023. Breakdown at regional levels are based on smaller sample sizes than at the GB level and are therefore subject to more uncertainty.

¹⁾ Due to a low response rate, West Midlands and Wales have been combined.

*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 oilseed rape variety survey results 2023

Source: AHDB

Units: %

Last updated: 27/07/2023

GB OSR varieties as a percentage of surveyed area

GB planting survey OSR area estimate: 402 Kha

Variety	% of total
Aurelia	14%
Acacia	11%
Ambassador	10%
Aspire	7%
Campus	5%
Crome	5%
Other*	48%

Notes

The OSR variety survey area was approximately 12,000 hectares which represents 3% of the total 2023 GB area estimate.

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

AHDB oat variety survey results 2023

Source: AHDB

Units: %

Last updated: 27/07/2023

GB oat varieties as a percentage of surveyed area

GB planting survey oat area estimate: 161 Kha

Variety	% of total
Mascani	31%
Canyon	19%
WPB Isabel	15%
Merlin	7%
Other*	27%

Notes

The oat variety survey area was approximately 5,000 hectares which represents 3% of the total 2023 GB area estimate.

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

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

Source: AHDB

Units: %

Last updated: 27/07/2023

Region: Great Britain

Year	% area estimate of plantings			
	Spring wheat	Winter wheat	Spring oats	Winter oats
2019	*	*	57%	43%
2020	*	*	72%	28%
2021	8%	92%	66%	34%
2022	3%	97%	50%	50%
2023	3%	97%	59%	41%