05/07/2024

Lowest cereals and OSR area for over two decades

The total cereal and oilseed rape (OSR) area in Great Britain (GB) is down 5% in 2024 to the lowest level for over two decades, shows AHDB's Planting and Variety survey. A modest rise in the barley (6%) and oats (9%) area, is more than offset by the considerable decline in wheat (9%) and OSR (21%) areas.

Rainfall over the UK from September 2023 to May 2024 was the greatest on record (since 1836) at 1,157 mm. It was 25% above the five-year average (2018/19 – 2022/23).

"This substantial rainfall across the UK considerably limited the opportunity farmers had to undertake winter and then spring planting" said AHDB Analyst Matt Darragh. "Furthermore, it has meant unfavourable growing conditions for crops that were planted, e.g. sunshine hours were the lowest since 1995/96."

"The falls in winter cropping and rises in spring cropping are less severe than AHDB's Early Bird Survey (EBS) indicated back in early March. However, this likely reflects the wetter than usual conditions continuing through the spring. Some winter crops, which were in poor condition and targeted to be replaced with spring options, may have been kept because the weather offered limited windows to sow spring crops."

"Overall, the reduced area and poorer crop conditions, especially for winter crops, points to lower cereals and oilseed rape production in 2024. There is also likely to be a notable rise in the area left fallow, with growers in England also switching land into agri-environment schemes."

While some regions in GB were more impacted than others, most saw declines in cropping. In Northern Ireland, the total wheat and barley area is estimated up 2% on the year and 6% over the five-year average at 30.5 Kha.

The key findings of the survey:

- For UK, the total wheat area is estimated to be 1,560 Kha, 9% down on the year. This is the second smallest planted area since 1981, behind 2020.
- For UK, the total barley area is up by 6%, at 1,207 Kha. However, this is only 1% over the five-year average. The spring barley area rose considerably (18%) to an estimated 804 Kha, the third largest area since the turn of the century. Meanwhile, winter barley fell by 12% to 402 Kha; 2% below the five-year average.
- In GB, the oats area is estimated at 180 Kha, a 9% increase from last year. While this is historically high, the area is 2% below the five-year average.
- For GB, the OSR area is estimated to decline by 21% to 307 Kha. This would be the second lowest area since at least two decades and 59% below the peak area in 2012 for the same period.
- For GB, total cereals area falls by 3% to 2,916 Kha, the lowest area since 2007.

- For GB, total cereals and oilseeds area falls by 5% to 3,223 Kha, the lowest area since at least the turn of the century, notably pressured by a historically low OSR area.

The full AHDB Planting and Variety Survey results are available to download on the AHDB survey results page.

Wheat

While larger than the wheat area of 2020 by 12%, the 2024 UK wheat area is estimated to be the second smallest wheat area since 1981 at 1,560 Kha.

The considerably challenging conditions for winter crops, in addition to restricted opportunities for spring drilling, resulted with a 9% fall for UK wheat area. Although this year-on-year fall in area is not as large as suggested by the Early Bird Survey, many growers may not have had the opportunity to re-plant wheat crops in poor condition. Therefore, in addition to being a smaller area, conditions are also under pressure.

Most regions in the UK experienced a decline of varying degrees, though a stable wheat area is reported in the North East, with a small rise in Northern Ireland. Eastern England and the East Midlands faced the largest declines in wheat area, together down 76 Kha.

Year-on-year, as a percentage of the area, UK flour Groups 1 remains relatively stable across GB at 24%. It is important to note that while area share is broadly stable, the hectarage has fallen considerably as a result of the smaller wheat area. The Group 2 share has fallen from 21% in 2023 to 19% this year, while the Group 3 share halved from 4% to 2%. Therefore, and especially when considering current crop conditions as well, production of these varieties is likely to fall on the year.

Meanwhile, the area share of Group 4 has gained. Group 4s have been estimated to cover 49% of GB wheat area in 2024, the highest share since 2016.

Group 4 KWS Dawsum is the most prevalent wheat variety in GB at 17% of area. Crusoe and Skyfall remain the top choices for Group 1s, both accounting for 9% respectively of the GB wheat area. Amongst Group 2s, KWS Extase area has dropped 3 percentage points on the year, estimated to account for 14% of 2024 GB wheat area.

Barley

As broadly anticipated, the UK's spring barley area saw a notable increase. So, despite the drop in winter barley area, total barley area in the UK is expected to rise on the year by 6% to 1,207 Kha. This would be the largest total barley area since 2020.

Rises in the share of malting, brewing and distilling varieties is supported by the increase in spring barley planting. Across GB, total malting, brewing and distilling varieties account for 68% of area (up from 57% in 2023), while total feed and other only accounts for 32%.

For the fourth year in a row, Laureate is the most prevalent barley variety with its popularity rising from last year. Laureate accounts for 40% of the GB barley area in 2024.

Winter Barley

For the UK, winter barley is estimated at 402 Kha, down 12% on the year from a sizable 2023 area.

Across the UK, the winter barley area only rose in the North East, declining in all other regions by varying degree. The largest drop in area by hectarage was seen in Eastern England, estimated to fall 20 Kha to 77 Kha.

Spring Barley

Following the eleventh wettest autumn on record (since 1836), spring barley looked to be an attractive option for cereal growers who had not had the opportunity to plant all of their planned winter crops or where winter crops were in too poor a condition to continue with. For the UK, spring barley area is estimated to be up 18% from last year, at 804 Kha. While less than farmers had intended in March, this would still be the third largest spring barley crop since the turn of the century, following 2020 and 2013.

While the area only rose slightly (3%) in Scotland, at 258 Kha, this would still be above the five-year average. There is expected to be a considerably greater rise in England and Wales to 532 Kha, up 27% from last year.

Oats

The oat area for GB is likely to have been supported by increased spring planting following the challenging autumn. This year, the oat area is expected to be 180 Kha, up 9% from last year but it is still 2% below the five-year average.

Although area for GB is estimated to increase from last year, there were some modest contractions in Northern England, Eastern England, and South East. However, these reductions were offset by the large 38% year on year increase of oat area in the East Midlands, as well as smaller increases seen in other regions across GB.

WPB Isabel is the most prevalent variety accounting for 29.0% of area, followed closely by Mascani at 28.9%. Mascani had been the top variety choice for at least four years.

Oilseed rape

Across all of the crops reported, OSR saw the largest area decline as a percentage, down 21% year-on-year to 307 Kha. This is the second lowest OSR area in GB since at least 2000 and less than half of the area seen ten years ago.

In addition to the challenging winter weather, OSR remains under pressure from cabbage steam flea beetle. Also, margins have been tightened this year as the crops value has depreciated considerably since 2022.

There are declines for most areas of GB, the largest proportionally in Yorkshire & The Humber (-57%). There's a notable rise for the Eastern region of England, up 17%, though the area is still well below the 10-year average.

For the third consecutive year, Aurelia is the top variety choice accounting for 18% of area, with only Acacia and Crome the only other varieties accounting for greater than 5% of area at 6% each.

Additional information

- The survey had 1,175 valid responses which cover approximately 5% of the UK total cereals and oilseeds planted area in 2023. Growers were asked to submit intended harvest areas and the area harvested last year. Data for this survey was collected from 15 April to 14 June 2024.
- The following footnotes are used:

  1) Final 2023 Defra and Scottish Government area data. Please note, the North Scotland and South Scotland OSR figures include 49 hectares of linseed. As a result, the Scottish, GB and UK figures differ slightly from the Defra published statistics.

  2) West Midlands and Wales have been combined for all crops due to confidentiality.

  3) The total Scotland figures are derived from the North and South Scotland breakdowns. As a result, the totals differ slightly from the Defra published statistics due to rounding.

  4) The UK figures are derived from the regional figures. As a result, the totals may differ slightly from the Defra published statistics due to rounding.

  5) North East and North West have been combined for oats and OSR due to confidentiality.

* Insufficient information 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 breakdown at regional levels are based on smaller sample sizes than at the national level and are therefore subject to more uncertainty.

AHDB

AHDB Cereals & Oilseeds Planting Survey Results 2024

Source: AHDB, Defra, Scottish Government
Units: '000 hectares
Last updated: 05/07/2024

Region	Wheat			Spring barley			Winter barley			Total barley		
	Final 2023[1)]	Estimate 2024	% change on 2023	Final 2023[1)]	Estimate 2024	% change on 2023	Final 2023[1)]	Estimate 2024	% change on 2023	Final 2023[1)]	Estimate 2024	% change on 2023
North East	64	64	0	13	13	2	27	28	4	40	41	3
North West	33	26	-20	22	25	14	16	12	-24	38	37	-2
Yorks and Humber	221	191	-14	52	78	50	70	65	-8	122	142	17
East Mids	313	275	-12	68	98	44	59	57	-3	127	156	23
Eastern	440	400	-9	92	122	32	98	77	-21	190	199	5
South East	206	201	-2	62	63	0	38	28	-25	100	91	-9
South West	150	129	-14	75	89	17	50	47	-6	126	136	8
West Mids and Wales[2)]	178	166	-7	35	45	29	43	36	-16	78	81	4
North Scotland	22	20	-9	137	141	4	17	17	-0	154	159	3
South Scotland	86	79	-8	113	116	3	29	27	-6	142	144	1
England & Wales	**1,604**	**1,453**	**-9**	**419**	**532**	**27**	**400**	**351**	**-12**	**819**	**883**	**8**
Scotland[3)]	**107**	**98**	**-8**	**249**	**258**	**3**	**46**	**44**	**-4**	**296**	**302**	**2**
Northern Ireland	**8**	**9**	**4**	**13**	**15**	**11**	**8**	**7**	**-12**	**21**	**22**	**2**
GB	**1,712**	**1,551**	**-9**	**669**	**790**	**18**	**446**	**395**	**-11**	**1,115**	**1,185**	**6**
UK[4)]	**1,720**	**1,560**	**-9**	**682**	**804**	**18**	**455**	**402**	**-12**	**1,137**	**1,207**	**6**

Region	Oats			Total cereals			Oilseed rape			Total cereals & oilseed rape		
	Final 2023[1)]	Estimate 2024	% change on 2023	Final 2023[1)]	Estimate 2024	% change on 2023	Final 2023[1)]	Estimate 2024	% change on 2023	Final 2023[1)]	Estimate 2024	% change on 2023
Northern[5)]	14	12	-12	188	181	-4	28	17	-41	216	197	-9
Yorks and Humber	10	11	6	353	344	-2	58	25	-57	411	369	-10
East Mids	21	29	38	460	460	-0	68	46	-32	529	506	-4
Eastern	22	21	-8	652	620	-5	70	82	17	722	701	-3
South East	26	25	-4	332	317	-4	44	38	-14	375	354	-6
South West	22	26	18	298	290	-2	35	24	-30	332	315	-5
West Mids and Wales[2)]	23	27	15	280	274	-2	46	37	-20	326	311	-5
North Scotland	8	*	*	183	*	*	15	15	0	199	*	*
South Scotland	18	*	*	246	*	*	26	23	-10	271	*	*
England & Wales	**138**	**150**	**8**	**2,562**	**2,485**	**-3**	**350**	**269**	**-23**	**2,912**	**2,754**	**-5**
Scotland[3)]	**26**	**30**	**16**	**429**	**431**	**0**	**41**	**38**	**-6**	**470**	**469**	**-0**
Northern Ireland	**2**	*****	*****	**32**	*****	*****	**1**	*****	*****	**33**	*****	*****
GB	**165**	**180**	**9**	**2,991**	**2,916**	**-3**	**390**	**307**	**-21**	**3,382**	**3,223**	**-5**
UK[4)]	**167**	*****	*****	**3,023**	*****	*****	**391**	*****	*****	**3,414**	*****	*****

AHDB

AHDB wheat variety survey results 2024

Source: AHDB
Units: % and '000 hectares
Last updated: 05/07/2024

	UK flour groups by region (%)							Planting survey wheat area estimate	UK flour groups by region ('000 hectares)						
Region	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	*	23%	7%	*	10%	*	8%	**64**	*	15	5	*	6	*	5
North West	*	*	*	*	*	*	*	**26**	*	*	*	*	*	*	*
Yorks and Humber	15%	16%	*	59%	7%	52%	*	**191**	29	30	*	113	14	99	*
East Mids	17%	18%	*	57%	6%	51%	*	**275**	47	50	*	157	17	140	*
Eastern	30%	13%	4%	47%	5%	42%	6%	**400**	119	53	15	187	20	168	25
South East	46%	24%	*	*	*	23%	5%	**201**	93	48	*	*	*	46	10
South West	15%	32%	*	*	*	48%	5%	**129**	19	41	*	*	*	61	6
West Mids & Wales[1)]	31%	26%	*	*	*	37%	4%	**166**	51	43	*	*	*	61	7
Scotland	*****	*****	*****	**82%**	**40%**	**42%**	**12%**	**98**	*****	*****	*****	**81**	**40**	**42**	**12**
Northern Ireland	*****	**21%**	*****	*****	*****	**74%**	*****	**9**	*****	**2**	*****	*****	*****	**6**	*****
GB	**24%**	**19%**	**2%**	**49%**	**6%**	**43%**	**6%**	**1,551**	**367**	**288**	**35**	**763**	**101**	**662**	**98**
UK	*****	**19%**	*****	*****	*****	**43%**	*****	**1,560**	*****	**290**	*****	*****	*****	**668**	*****

GB wheat varieties as a percentage of surveyed area

GB planting survey wheat area estimate:	1,551	Kha

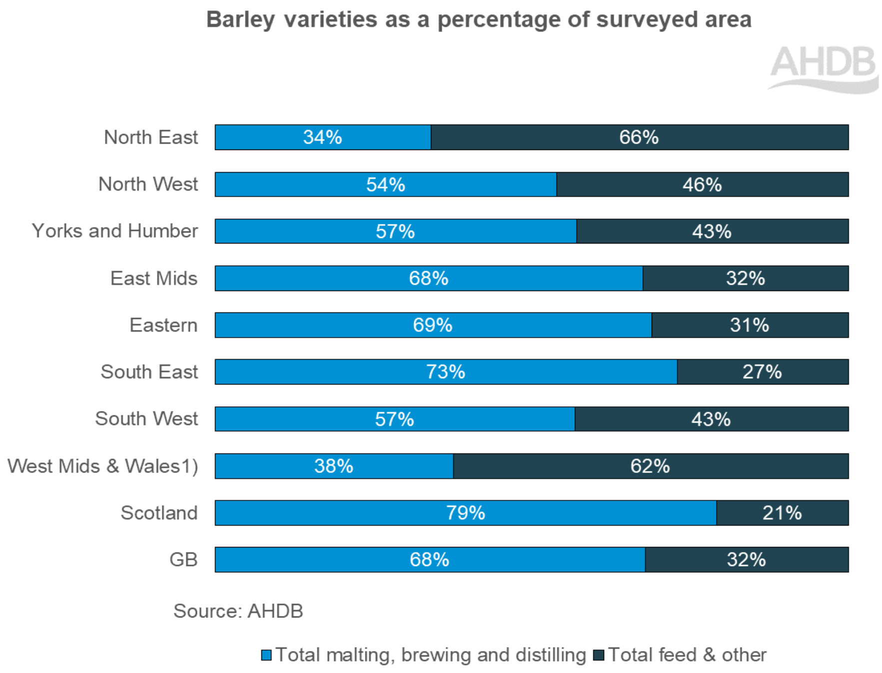
Variety	UK flour group	% of total
KWS Dawsum	4H	17%
KWS Extase	2	14%
Crusoe	1	9%
Skyfall	1	9%
Champion	4H	8%
Other**		44%

Notes

The wheat variety survey area was approximately 75,000 hectares which represents 5% of the total 2024 GB area estimate.
Varieties are categorised as per the AHDB Recommended List 2023/24. 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 information 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 2024

Source: AHDB
Units: %
Last updated: 05/07/2024



GB barley varieties as a percentage of surveyed area

GB planting survey barley area estimate:	1,185	Kha

Variety	% of total
Laureate	40%
RGT Planet	8%
KWS Tardis	7%
Skyway	7%
LG Diablo	6%
Other*	32%

Notes
The barley variety survey area was approximately 55,000 hectares which represents 5% of the total 2024 GB area estimate.
Malting, brewing and distilling: Varieties with full approval only on the Malting Barley Committee's Approved List for harvest 2024 (including Special Use).
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 2024

Source: AHDB
Units: %
Last updated: 05/07/2024

GB OSR varieties as a percentage of surveyed area

GB planting survey OSR area estimate:	307 Kha

Variety	% of total
Aurelia	18%
Acacia	6%
Crome	6%
Other*	69%

Notes
The OSR variety survey area was approximately 15,000 hectares which represents 5% of the total 2024 GB area estimate.
*Other varieties each make up less than 5% of the surveyed area.

AHDB oat variety survey results 2024

Source: AHDB
Units: %
Last updated: 05/07/2024

GB Oat varieties as a percentage of surveyed area

GB planting survey oat area estimate:	**180** Kha

Variety	% of total
WPB Isabel	29%
Mascani	29%
Merlin	12%
Canyon Oats	8%
Other*	22%

Notes
The oat variety survey area was approximately 8,000 hectares which represents 5% of the total 2024 GB area estimate.
*Other varieties each make up less than 5% of the surveyed area or do not meet the thresholds for publication.

AHDB

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

Source: AHDB
Units: %
Last updated: 05/07/2024

% area estimate of GB plantings				
Year	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%
2024	7%	93%	65%	35%

Notes

1) Final 2023 Defra and Scottish Government area data. Please note, the North Scotland and South Scotland OSR figures include 49 hectares of linseed. As a result, the Scottish, GB and UK figures differ slightly from the Defra published statistics.

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Disclaimer

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