

05/07/2019

## **Pest pressure for oilseed rape incentivises cereals area growth**

The English oilseed rape area has fallen to a 16-year low, following a year of challenging agronomics and pest pressure.

According to the results of the annual AHDB Planting and Variety Survey, the oilseed rape area has been replaced by an increased cereal area, notably wheat and oats. The overall barley area has remained largely static, although more winter barley has been planted and the area of spring barley reduced.

Peter Collier, AHDB Analyst: “The challenges being faced with oilseed rape have resulted in the lowest area since 2003. In place of oilseed rape has been an increased cereal area. With potentially good yields and Brexit uncertainty, a greater importance should be placed on marketing grain effectively.

The key findings of the survey are:

- GB wheat area is estimated at 1.802Mha, a 4% increase from 2018
- GB spring barley area is estimated at 708Kha, down 4% from 2018
- GB winter barley area is estimated at 422Kha, 11% higher than 2018
- Area of oilseed rape in England and Scotland is estimated at 514Kha, down 11% from 2018
- Area of oats in England and Scotland is estimated at 178Kha, an 8% increase from 2018

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

### **Oilseed Rape**

Due to poor establishment in the dry autumn, followed by cabbage stem flea beetle damage, the oilseed rape area in England has been reduced to the lowest level since 2003. Damaged oilseed rape crops in many circumstances were replaced with other cereal options.

However where oilseed rape established well and have not suffered from larvae, crops have the potential to record good yields and crops in Northern England have seen less pest damage.

In Scotland the area has reduced to a lesser extent, down 6% at 31Kha, also suffering from significantly less pest damage.

### **Wheat**

Almost all regions of England and Scotland recorded an increased wheat area. Supported market prices of the 2018/19 marketing season may have incentivised this.

Following the tight supply year of 2018/19, the outlook for 2019/20 is for a more pressured domestic market. With a potential return to a net export position, this may pose possible Brexit challenges.

In terms of varieties, estimated areas for [nabim Group 1 and 2 varieties](#) account for 36% of the 2019 GB wheat area, back two percentage points from last year. The decrease in the Group 2 area has been to the benefit of nabim Group 3 varieties. Accounting for 11% of the GB wheat area, these varieties recorded a 49Kha rise on the year and 99Kha on 2017. Higher-yielding Group 3 varieties, such as KWS Barrel and Basset, have aided the recovery in the Group 3 area.

Group 3 wheats have likely replaced some nabim Group 4 area, which is reduced. Both the Group 4 hard and Group 4 soft areas estimated decreases, back 43Kha and 19Kha respectively.

## Barley

While the overall GB barley area remained largely similar to last year, the areas apportioned to winter and spring varieties changed. With crops overall looking in good condition, higher yields than last year could be expected. This increased production would add to domestic supply, potentially keeping markets pressured.

The GB winter barley area has recovered from last year's lows. At 422Kha, the area reported is up 11% from 2018, with a timely 2018 Scottish harvest aiding the recovery in Scotland's planted area.

Conversely, the estimated GB spring barley area is 4% lower than last year, ending the previous four years expansion. However, in Eastern and South Eastern regions the area has continued to increase in order to control black grass.

Overall, 56% of the total GB barley area are malting barley varieties with full approval from the [Malting Barley Committee](#). This is virtually unchanged from 2018. However, growing conditions so far have been less challenging for low nitrogen malting barley. This may result in the malting premium over feed barley being less pronounced than at the start of 2018/19.

## Oats

At a combined 178Kha, the total oat area across England and Scotland is up 9% from 2018. A rise in the South East and East Midlands areas lifted the English estimate by 8%, with these regions potentially planting oats as an alternative to oilseed rape. As such, production is likely to increase for 2019/20 for a limited domestic market.

Due to a low Welsh survey response rate for oats, the AHDB is unable to provide an area for Wales and therefore GB. In the previous 5 years, Wales has represented a maximum of 4% of the GB oat area.

## Notes

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- The survey was sent out to a representative sample of 6655 farms and had a 48% response rate. 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 2019.
- Due to a low response rate, the Welsh oilseed rape area and Welsh oats figures are not available for individual publication.
- Percentage changes are based on comparison to the Defra 2018 June Survey of Agriculture. This is due to the Defra June survey covering the entire United Kingdom and providing a consistent methodology. Please note, that for oilseed rape Defra provide only winter crop areas for the English regions. Therefore, to enable a consistent comparison with Scottish results, the English spring oilseed rape area from harvest 2018 has been apportioned in the same ratio as the winter crops and included in the regional totals for harvest 2019.
- Please note that totals may not agree due to rounding.
- The full AHDB Planting and Variety Survey results are [available to download](#) on the AHDB Survey Results page.

# AHDB Planting Survey Results 2019

'000 hectares

	Wheat			Spring Barley			Winter Barley			Total Barley		
	Final 2018 <sup>1)</sup>	Estimate 2019	% change on 2018	Final 2018 <sup>1)</sup>	Estimate 2019	% change on 2018	Final 2018 <sup>1)</sup>	Estimate 2019	% change on 2018	Final 2018 <sup>1)</sup>	Estimate 2019	% change on 2018
North East	68	68	-0	12	12	-5	27	28	2	40	40	-0
North West	36	41	13	25	14	-45	14	21	50	39	35	-10
Yorks	230	245	6	56	50	-11	65	68	6	121	119	-2
East Mids	313	323	3	78	78	-1	43	49	15	121	127	5
West Mids	160	163	2	28	22	-22	30	34	12	59	56	-5
Eastern	446	461	3	105	112	7	83	91	10	187	203	8
South East	209	217	4	78	84	7	32	36	12	110	119	8
South West	156	160	3	89	87	-2	42	44	3	131	131	-0
North Scot	17	18	12	134	131	-2	14	18	23	149	149	0
South Scot	83	84	1	116	108	-7	23	26	11	139	134	-4
England	1,619	1,678	4	471	457	-3	336	371	10	807	828	3
Scotland	100	103	3	250	239	-5	38	43	16	288	283	-2
Wales	22	21	-5	15	12	-21	8	7	-6	23	19	-16
GB	1,741	1,802	4	737	708	-4	381	422	11	1,117	1,130	1

	Oats			Total Cereals			Oilseed Rape			Total Cereals and Oilseed Rape		
	Final 2018 <sup>1)</sup>	Estimate 2019	% change on 2018	Final 2018 <sup>1)</sup>	Estimate 2019	% change on 2018	Final 2018 <sup>1)2)</sup>	Estimate 2019	% change on 2018	Final 2018 <sup>1)2)</sup>	Estimate 2019	% change on 2018
North East	11	13	19	119	120	1	25	26	1	144	146	1
North West	6	7	25	81	83	3	6	4	-22	86	87	1
Yorks	10	10	-0	361	374	3	76	67	-12	438	441	1
East Mids	14	17	19	449	467	4	143	125	-13	592	592	0
West Mids	21	21	-2	240	240	-0	55	51	-6	294	291	-1
Eastern	21	21	-2	654	685	5	111	102	-8	765	786	3
South East	24	29	20	343	365	6	75	58	-23	418	424	1
South West	24	24	0	311	315	1	54	50	-8	366	365	-0
North Scot	10	11	13	175	179	2	12	10	-15	187	189	1
South Scot	22	25	11	245	242	-1	21	21	-1	266	263	-1
England	132	142	8	2,558	2,649	4	545	483	-11	3,103	3,132	1
Scotland	32	36	12	420	421	0	33	31	-6	453	452	-0
Wales	5	*	*	50	*	*	5	*	*	54	*	*
GB	169	*	*	3,027	*	*	583	*	*	3,610	*	*

\*Due to a low response rate oats and oilseed rape figures for Wales are not available for publication

Source: AHDB, Defra, Scottish Government

1) Final 2018 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 2018 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

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



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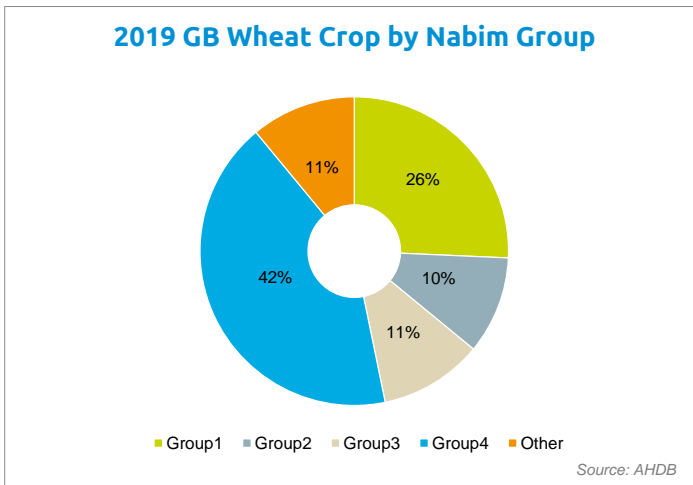
# AHDB Wheat Variety Survey Results 2019

	Nabim Groups by Region %							Planting Survey Wheat Area Estimate	Nabim Groups by Region '000 (ha)						
	Group1	Group2	Group3	Group4	Group4 soft	Group4 hard	Other		Group1	Group2	Group3	Group4	Group4 soft	Group4 hard	Other
North East	9%	7%	22%	48%	17%	32%	14%	68	6	5	15	33	11	21	10
North West	*	*	*	64%	*	*	*	41	*	*	*	26	*	*	*
Yorks	15%	9%	9%	57%	12%	45%	10%	245	36	22	23	140	30	109	25
East Mids	22%	12%	8%	46%	9%	37%	12%	323	70	40	25	149	29	120	39
West Mids	29%	8%	4%	52%	2%	50%	7%	163	47	13	6	85	4	81	11
Eastern	26%	12%	13%	35%	5%	30%	15%	461	118	54	61	160	22	139	68
South East	57%	8%	10%	19%	3%	16%	6%	217	125	17	22	41	6	35	13
South West	34%	14%	6%	41%	4%	36%	5%	160	54	23	10	65	7	58	9
Scotland	1%	6%	31%	44%	39%	5%	18%	103	1	6	32	45	40	5	18
Wales	*	*	*	78%	*	*	*	21	*	*	*	16	*	*	*
GB	26%	10%	11%	42%	9%	34%	11%	1,802	463	185	195	761	156	605	198

Source: AHDB

\*Due to a low response rate in the North West region and Wales, some figures are not available for publication  
 Varieties are categorised as per the nabim Wheat Guide 2019. Other = uncategorised by nabim for harvest 2019

Notes: Totals may not agree due to rounding  
 Breakdown at regional levels are based on smaller sample sizes than at the GB level and are therefore subject to more uncertainty

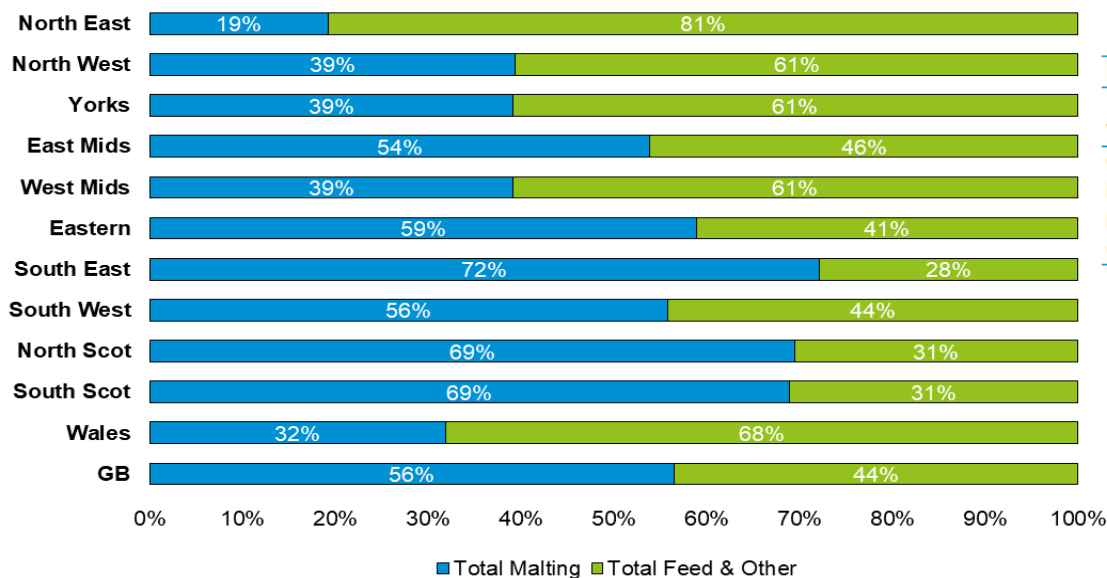


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## AHDB Barley Variety Survey Results 2019



Source: AHDB

Malting = varieties with full approval only on the Institute of Brewing and Distilling Approved List for harvest 2019

## AHDB Oilseed Rape Variety Survey Results 2019 (England & Scotland\*)

Planting Survey Oilseed Rape Area Estimate: **514 Kha**

### Variety names

Campus	10%
Elgar	10%
DK-Exalte	5%
Other varieties**	75%

Source: AHDB

\*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 area surveyed was approximately 65,100 (ha) which represents 13% of the estimated 2019 oilseed rape area



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