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Spring barley popularity continues to grow in GB

An increase in the area planted to spring barley but smaller wheat and oilseed rape areas are among the key findings from AHDB's 2017 Planting and Variety Survey. Spring barley continues to benefit from a surge in interest in spring cropping, as part of efforts to tackle agronomic challenges, including the control of black-grass, plus as a replacement for previously lost oilseed rape crops.

The key findings of the survey are:

- GB wheat area is estimated at 1.76Mha, a 3 per cent decrease from 2016
- GB spring barley area is estimated at 725,000ha, up 9 per cent from 2016
- GB winter barley area is estimated at 428,000ha, 1 per cent lower than 2016
- Area of oilseed rape in England and Scotland is estimated at 553,000ha, down 4 per cent from 2016
- Area of oats in England and Scotland is estimated at 151,000ha, a 14 per cent increase from 2016

Helen Plant, AHDB Senior Analyst, said: "In addition to the agronomic challenges, the profitability of many winter crops was also poor when planting decisions were being made. Much of the rise in grain and oilseed prices seen last autumn occurred after planting was underway, giving less opportunity for growers to respond."

Wheat

At 1.76Mha, the GB wheat area is estimated 3 per cent lower than in 2016. The largest reductions were reported in the eastern regions of England, where black-grass remains a key challenge. Additionally, when many growers were making their planting decisions for harvest 2017, UK wheat prices were still historically low, pressured by high global and UK wheat stocks. Prices in eastern England and Scotland were particularly pressured by local supply and demand factors.

With smaller stocks expected to be carried over from 2016/17 and a smaller GB wheat area, yields will need to exceed 2016 levels for UK supplies to increase in 2017/18. AHDB will be looking at this in more detail and producing production scenarios later this summer. These will be published on the AHDB website.

In terms of varieties, **nabim** Group 1 and 2 varieties are estimated to account for 40 per cent of the GB wheat area, up from 31 per cent in 2016. This is the highest proportion reported since the inaugural variety survey in 2006 (43 per cent). Interest in Group 1 and 2 varieties has witnessed a resurgence in recent years since the introduction of higher-yielding varieties, which offer greater marketing flexibility to growers.

Despite the recent introduction of higher-yielding Group 3 varieties, this survey did not pick up an increase across all GB regions. **nabim** Group 3 varieties accounted for five per cent of the GB area, unchanged from 2016. Over the past season, tight supplies pushed prices for Group 3 wheat to parity with, or even above, those for bread wheat. However, the greatest price rises took place after planting was complete. As Group 3 varieties occupy a smaller proportion of the area than other types of varieties, this figure is subject to a greater degree of uncertainty.

As a result of the resurgence in milling varieties, the area of Group 4 varieties (combined hard and soft) has declined to 48 per cent of the total area, the lowest since 2009. Subject to yields and quality, feed wheat supplies may be relatively tight again in 2017/18.

Barley

The GB winter barley area remains high in a historical context. At 428,000ha, the area reported was just one per cent lower than 2016 and similar to the acreage estimated in earlier winter planting surveys by AHDB and the Scottish Government.

At 725,000ha, the GB spring barley area is estimated to be nine per cent larger than 2016 – the third year in a row the crop area has expanded. The latest increase is primarily driven by greater areas in the East Midlands, South East and Eastern England. This suggests that spring barley is benefiting from a continued and growing interest in spring cropping in efforts to control black-grass, plus as a replacement for previously lost oilseed rape crops.

Overall, malting barley varieties with full approval from the Institute of Brewing and Distilling for harvest 2017 account for 50 per cent of the total GB barley area. This is up from 2016, when malting barley varieties accounted for 47 per cent of GB area. Neither the 2016 nor 2017 figure includes varieties with provisional approval, so a greater proportion of the area may be suitable for use by some maltsters.

Oilseed rape

The oilseed rape area in England and Scotland has declined for the fifth consecutive year to an estimated 553,000ha, the lowest area since 2004. This is largely attributable to a sharp drop in the area reported in the East of England, which is likely a reflection of both the difficulties of controlling cabbage stem flea beetle and the very dry conditions last autumn.

The area declines in the east are partly offset by increases elsewhere in GB, including the West Midlands and North West of England. These gains were potentially stimulated by the rise in UK rapeseed prices recorded through summer and autumn 2016, which boosted the relative profitability of the crop (read more here).

Elgar and DK Extrovert were jointly the largest varieties reported (each with 11 per cent of the area reported) in 2017, followed by Campus at eight per cent.

Oats

At a combined 151,000ha, the total oat area across England and Scotland is up 14 per cent from 2016. The Scottish area (35,000ha) is the largest since 1989, while the English area (116,000ha) is the largest since 2013.

The year-on-year increases for both countries are larger than those indicated by the winter planting surveys, suggesting that the total oat area has benefited from the general upward trend for spring crops. In Scotland, reduced wheat plantings was likely a key factor. However, as the oat area is relatively small in comparison to that for other crops, estimations should be treated with additional caution.

Notes

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- AHDB Cereals & Oilseeds aims to deliver a world-class arable industry through independence, innovation and investment. It funds research, knowledge transfer, marketing, export and promotional activities for the cereals and oilseeds sector in the UK.
- The survey was sent out to a representative sample of 6,842 farms and had a 44% response rate. Growers were asked to submit intended harvest areas and the area harvested last year.
- Due to a low response rate the Welsh oilseed rape and oats figures are not available for publication.
- Percentage changes are based on comparison to the Defra 2016 June Survey of Agriculture (which can be found on the Defra website). 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 2016 has been apportioned in the same ratio as the winter crops and included in the regional totals for harvest 2016.
- Please note that totals may not agree due to rounding.
- Results for smaller crop areas such as oats or smaller regions should be treated with additional caution as they are subject to a higher level of uncertainty.
- AHDB Cereals & Oilseeds will be publishing its Cereal Quality Survey from the 2017 harvest in the autumn.

AHDB Cereals & Oilseeds Planting Survey Results 2017

'000 hectares

	Wheat			Spring Barley			Winter Barley			Total Barley		
	Final 2016[1]	Estimate 2017	*% change on 2016*	Final 2016[1]	Estimate 2017	*% change on 2016*	Final 2016[1]	Estimate 2017	*% change on 2016*	Final 2016[1]	Estimate 2017	*% change on 2016*
North East	66	69	*4*	16	15	*-6*	29	29	*0*	45	44	*-2*
North West	34	30	*-11*	29	30	*4*	17	17	*-1*	45	46	*2*
Yorks	232	233	*0*	51	54	*6*	76	73	*-4*	127	127	*0*
East Mids	344	321	*-7*	54	74	*35*	48	46	*-3*	102	120	*17*
West Mids	158	154	*-2*	30	31	*1*	36	34	*-4*	66	65	*-2*
Eastern	468	453	*-3*	84	98	*17*	89	98	*10*	173	196	*13*
South East	224	213	*-5*	65	83	*28*	33	28	*-15*	98	111	*14*
South West	157	160	*2*	87	90	*3*	48	45	*-6*	135	135	*0*
North Scot	19	18	*-7*	125	125	*0*	19	20	*3*	144	144	*0*
South Scot	90	87	*-4*	114	114	*0*	29	31	*7*	143	145	*2*
England	**1,684**	**1,634**	***-3***	**416**	**474**	***14***	**376**	**370**	***-2***	**791**	**844**	***7***
Scotland	**110**	**104**	***-5***	**239**	**239**	***0***	**48**	**51**	***6***	**287**	**290**	***1***
Wales	**21**	**23**	***5***	**14**	**12**	***-13***	**8**	**7**	***-11***	**22**	**19**	***-12***
GB	**1,815**	**1,761**	***-3***	**668**	**725**	***9***	**432**	**428**	***-1***	**1,100**	**1,153**	***5***

	Oats			Total Cereals			Oilseed Rape			Total Cereals and Oilseed Rape		
	Final 2016[1]	Estimate 2017	*% change on 2016*	Final 2016[1]	Estimate 2017	*% change on 2016*	Final 2016[1,2]	Estimate 2017	*% change on 2016*	Final 2016[1,2]	Estimate 2017	*% change on 2016*
North East	8	8	*0*	119	121	*1*	23	22	*-7*	142	142	*0*
North West & West Mids [3]	22	25	*13*	326	321	*-2*	50	56	*11*	376	377	*0*
Yorks	8	10	*16*	368	370	*0*	73	75	*2*	441	444	*1*
East Mids	13	16	*27*	459	457	*0*	142	142	*0*	600	599	*0*
Eastern	11	15	*34*	652	664	*2*	130	99	*-24*	783	763	*-3*
South East	20	21	*6*	342	345	*1*	75	79	*6*	416	424	*2*
South West	21	22	*8*	312	317	*2*	50	49	*-2*	362	367	*1*
North Scot	10	12	*21*	173	174	*1*	11	13	*19*	184	188	*2*
South Scot	21	23	*7*	254	254	*0*	20	20	*-1*	274	274	*0*
England	**102**	**116**	***14***	**2,577**	**2,595**	***1***	**543**	**520**	***-4***	**3,120**	**3,115**	***0***
Scotland	**31**	**35**	***12***	**428**	**429**	***0***	**31**	**33**	***6***	**458**	**462**	***1***
Wales [4]	**5**	**-**	**-**	**48**	**-**	**-**	**5**	**-**	**-**	**53**	**-**	**-**
GB	**139**	**-**	**-**	**3,053**	**-**	**-**	**579**	**-**	**-**	**3,632**	**-**	**-**

Source: Defra, AHDB

1) Final 2016 Defra data.

2) For oilseed rape, Defra only provide winter crop areas for the English regions. Therefore, to enable a consistent comparison, the English spring oilseed rape area from harvest 2016 has been apportioned in the same ratio as the winter crops and included in the regional totals for harvest 2016.

3) Due to a low response rate in the North West region for oilseed rape and oats, figures have been merged with West Midlands.

4) Due to a low response rate the Welsh oilseed rape and oats figures are not available for publication.

Notes: Total 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 Cereals & Oilseeds Variety Survey Results 2017

	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	12%	13%	4%	64%	22%	42%	6%	**69**	8	9	3	44	15	29	4
North West	20%	13%	0%	61%	11%	49%	6%	**30**	6	4	0	18	3	15	2
Yorks	16%	12%	5%	61%	14%	47%	6%	**233**	38	28	11	143	33	109	14
East Mids	23%	14%	5%	51%	10%	41%	8%	**321**	73	47	15	163	31	132	24
West Mids	32%	9%	0%	57%	7%	50%	2%	**154**	50	13	1	88	10	77	3
Eastern	27%	16%	6%	44%	6%	38%	7%	**453**	124	72	29	197	25	172	31
South East	51%	16%	8%	18%	2%	16%	7%	**213**	109	34	18	39	5	34	14
South West	38%	12%	2%	40%	4%	35%	8%	**160**	61	19	3	64	7	57	13
North Scot	0%	1%	8%	77%	74%	3%	14%	**18**	0	0	1	14	13	1	2
South Scot	2%	7%	15%	60%	54%	6%	17%	**87**	1	6	13	52	47	5	15
Wales	14%	5%	6%	75%	11%	65%	0%	**23**	3	1	1	17	2	15	0
GB	**27%**	**13%**	**5%**	**48%**	**11%**	**37%**	**7%**	**1,761**	**474**	**233**	**95**	**838**	**193**	**646**	**122**

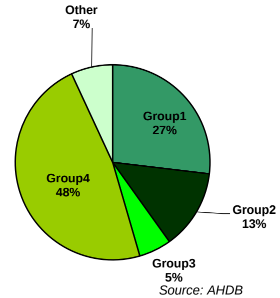
% '000 hectares

Varieties are categorised as per the nabim Wheat Guide 2017, Other = uncategorised by nabim for harvest 2017 *Source: AHDB*

Totals may not agree due to rounding.

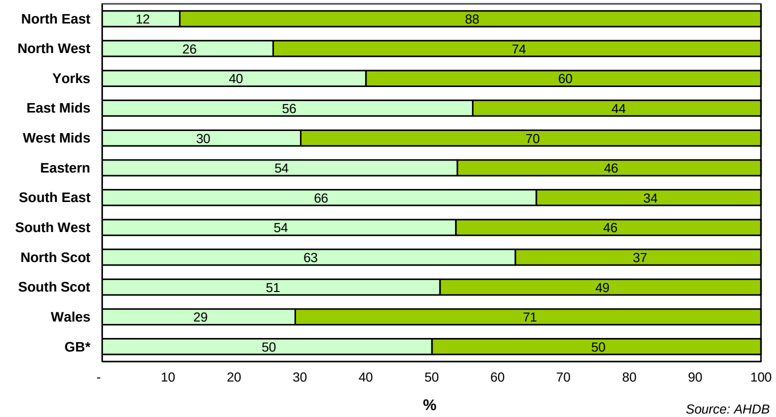
Breakdown at regional levels are based on smaller sample sizes than at the GB level and are therefore subject to more uncertainty.

2017 GB Wheat Crop by Nabim Group



Source: AHDB

Regional Barley Variety Types as Percentage of Crop



Source: AHDB

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

Planting Survey OSR Area Estimate:	**553** Kha
Variety names	
Elgar	**11** %
DK-Extrovert	**11** %
Campus	**8** %
Incentive	**6** %
DK-Exalte	**6** %
Anastasia	**5** %
Picto	**5** %
Others*	**47** %

Source: AHDB

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

The OSR variety survey actual area was approx 56,000Ha which represents approx 10% of the total area estimate

Malting – varieties with full approval only on the Institute of Brewing and Distilling Approved List for harvest 2017

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