

Supply & Demand

29 November 2017



End of Season 2016/17 Defra UK Cereals Supply and Demand – residuals unallocated

The tables below provide the Defra estimates of UK cereals supply and demand in the 2016/17 (July-June) season. For the 2016/17 wheat and barley end of season balance sheets residuals have been identified after the full season official statistics were taken into account, stated in Appendix 1. 2016/17 end of season balance sheets are also available with the identified residuals apportioned using the Defra reliability scores method – [click here](#).

Please note that after investigations into full season trade data, HMRC have made some revisions to UK imports. In particular these revisions relate to wheat and maize imports from Romania in April, which were substantially high. The amended import figures have been accounted for in the relevant balance sheets below.

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DEFRA ANNUAL UK CEREAL SUPPLY AND DEMAND ESTIMATES (a)

Estimates made in September

000 tonnes

In 2015, Defra reviewed how it uses survey estimates to achieve consistent cereals balance sheet estimates. The outcome of the review was the introduction of the reliability scores method used to allocate identified residuals across the balance sheet as and when required. Cereals balance sheets are published by AHDB Cereals & Oilseeds on behalf of Defra at <http://cereals.ahdb.org.uk/markets/supply-and-demand.aspx>.

(JULY - JUNE YEARS)

Links connect to relevant Defra/AHDB data pages

| | | WHEAT | | | | | | | BARLEY | | | | | | |
|------|--|-------------------------------|-----------------------|-----------------------|-------------------|-------------------|------------------------------|-------------------------|-------------------------------|---------------------|---------------------|-------------------|-------------------|------------------------------|-------------------------|
| | | 2011/12 2015/16 average | 2014/15 estimate** | 2015/16 estimate** | 2016/17 Jun-17 | 2016/17 Sep-17 | Absolute change Jun-17 | % change on 15/16 | 2011/12 2015/16 average | 2014/15 estimate | 2015/16 estimate | 2016/17 Jun-17 | 2016/17 Sep-17 | Absolute change Jun-17 | % change on 15/16 |
| (1) | Opening Stocks | 1,842 | 1,559 | 2,434 | 2,792 | 2,787 | -5 | 15% | 1,137 | 1,379 | 1,497 | 1,367 | 1,367 | 0 | -9% |
| (2) | Production | 14,639 | 16,363 | 16,506 | 14,383 | 14,383 | 0 | -13% | 6,478 | 6,911 | 7,370 | 6,655 | 6,655 | 0 | -10% |
| (3) | Imports | 1,847 | 1,669 | 1,509 | 1,700 | 1,870 | 170 | 24% | 158 | 139 | 159 | 105 | 132 | 27 | -17% |
| (4) | Total Availability | 18,328 | 19,591 | 20,449 | 18,875 | 19,040 | 165 | -7% | 7,772 | 8,429 | 9,026 | 8,127 | 8,154 | 27 | -10% |
| (5) | Human and Industrial Consumption (b) | 7,407 | 7,831 | 7,360 | 8,106 | 8,100 | -6 | 10% | 1,881 | 1,949 | 1,833 | 1,860 | 1,860 | 0 | 1% |
| (5a) | (of which home grown) | 6,165 | 6,640 | 6,416 | 7,171 | 7,160 | -11 | 12% | n/a | n/a | n/a | n/a | n/a | - | * |
| (6) | Usage as Animal Feed (c) | 6,756 | 6,991 | 7,094 | 7,224 | 7,243 | 19 | 2% | 3,285 | 3,276 | 3,613 | 3,633 | 3,658 | 25 | 1% |
| (6a) | (of which home grown) | 6,180 | 6,501 | 6,444 | 6,547 | 6,522 | -25 | 1% | n/a | n/a | n/a | n/a | n/a | - | * |
| (6b) | (of which Compounders) | 3,610 | 3,632 | 3,845 | 4,011 | 4,042 | 31 | 5% | 1,026 | 1,079 | 1,108 | 1,112 | 1,136 | 24 | 3% |
| (6c) | (of which Integrated Poultry Units) | 1,428 | 1,427 | 1,210 | 1,222 | 1,210 | -12 | 0% | 62 | 47 | 49 | 51 | 52 | 1 | 6% |
| (7) | Seed (d) | 294 | 291 | 281 | 283 | 283 | 0 | 1% | 171 | 177 | 182 | 181 | 181 | 0 | -1% |
| (8) | Other | 75 | 88 | 79 | 72 | 72 | 0 | -9% | 32 | 35 | 37 | 33 | 33 | 0 | -11% |
| (9) | Total Domestic Consumption | 14,532 | 15,201 | 14,814 | 15,685 | 15,698 | 13 | 6% | 5,370 | 5,437 | 5,665 | 5,707 | 5,732 | 25 | 1% |
| (10) | Balance (4) - (9) | 3,797 | 4,390 | 5,635 | 3,190 | 3,342 | 152 | -41% | 2,403 | 2,992 | 3,361 | 2,420 | 2,422 | 2 | -28% |
| (11) | Exports (e) | 1,704 | 1,957 | 2,848 | 1,500 | 1,444 | -56 | -49% | 1,167 | 1,495 | 1,994 | 1,000 | 1,050 | 50 | -47% |
| (12) | Intervention Stocks (e) | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| (13) | Commercial End-Season Stocks (e) | 2,093 | 2,434 | 2,787 | 2,040 | 1,758 | -282 | -37% | 1,236 | 1,497 | 1,367 | 1,183 | 1,106 | -77 | -19% |
| (14) | (of which Estimated Operating stock requirement) (f) | 1,459 | 1,500 | 1,500 | 1,600 | 1,560 | -40 | 4% | 730 | 750 | 760 | 760 | 760 | - | 0% |
| (15) | (of which free stock) (g) | 634 | 934 | 1,287 | 440 | 198 | -242 | -85% | 506 | 747 | 607 | 423 | 346 | -77 | -43% |
| (16) | Surplus available for either export or free stock (10)-(12)-(14) | 2,337 | 2,890 | 4,135 | 1,590 | 1,782 | 192 | -57% | 1,673 | 2,242 | 2,601 | 1,660 | 1,662 | 2 | -36% |
| (17) | Residual (10)-(11)-(13) | | | | - 350 | 140 | | | | | | 237 | 266 | | |

| | | MAIZE | | | | | | | OATS | | | | | | |
|------|--|-------------------------------|---------------------|-----------------------|-------------------|-------------------|------------------------------|-------------------------|-------------------------------|---------------------|---------------------|-------------------|-------------------|------------------------------|-------------------------|
| | | 2011/12 2015/16 average | 2014/15 estimate | 2015/16 estimate** | 2016/17 Jun-17 | 2016/17 Sep-17 | Absolute change Jun-17 | % change on 15/16 | 2011/12 2015/16 average | 2014/15 estimate | 2015/16 estimate | 2016/17 Jun-17 | 2016/17 Sep-17 | Absolute change Jun-17 | % change on 15/16 |
| (1) | Opening Stocks | 209 | 259 | 309 | 145 | 148 | 3 | -52% | 94 | 168 | 107 | 96 | 93 | -3 | -13% |
| (2) | Production | - | - | - | - | - | - | * | 765 | 820 | 799 | 816 | 816 | 0 | 2% |
| (3) | Imports | 1,723 | 1,856 | 1,742 | 1,978 | 2,059 | 81 | 18% | 58 | 37 | 39 | 40 | 53 | 13 | 35% |
| (4) | Total Availability | 1,932 | 2,115 | 2,051 | 2,123 | 2,207 | 84 | 8% | 916 | 1,025 | 945 | 952 | 962 | 10 | 2% |
| (5) | Human and Industrial Consumption | 480 | 566 | 465 | 548 | 569 | 21 | 22% | 498 | 492 | 525 | 530 | 521 | -9 | -1% |
| (5a) | (of which home grown) | - | - | - | - | - | - | * | 443 | 450 | 499 | 485 | 455 | -30 | -9% |
| (6) | Usage as Animal Feed | 1,084 | 1,144 | 1,310 | 1,254 | 1,186 | -68 | -9% | 254 | 326 | 239 | 267 | 286 | 19 | 20% |
| (6a) | (of which home grown) | - | - | - | - | - | - | * | 254 | 326 | 239 | 267 | 286 | 19 | 20% |
| (7) | Seed | - | - | - | - | - | - | * | 19 | 18 | 19 | 21 | 20 | -1 | 5% |
| (8) | Other (h) | 49 | 4 | 9 | 4 | 4 | 0 | -56% | 4 | 4 | 4 | 4 | 4 | 0 | 0% |
| (9) | Total Domestic Consumption | 1,613 | 1,714 | 1,784 | 1,806 | 1,759 | -47 | -1% | 776 | 840 | 787 | 822 | 831 | 9 | 6% |
| (10) | Balance (4) - (9) | 319 | 401 | 267 | 317 | 448 | 131 | 68% | 141 | 184 | 158 | 130 | 131 | 1 | -17% |
| (11) | Exportable surplus | 103 | 92 | 120 | 170 | 177 | 7 | 48% | 41 | 77 | 65 | 21 | 21 | 0 | -68% |
| (12) | Commercial End-Season Stocks | 216 | 309 | 148 | 147 | 271 | 124 | 83% | 100 | 107 | 93 | 109 | 110 | 1 | 19% |

(a) These are revised during the year. Figures rounded to the nearest 1000 tonnes

(b) Defra updated the registry for the UK flour millers survey in spring 2016, the wheat H&I usage has been adjusted to take account of this change.

(c) Animal feed usage has been split by sector. Note, other users are only included in the total.

(d) Seed numbers have been updated based on a number of assumptions, calculated for the purposes of the balance sheet only

(e) Split of exports, intervention and total commercial end-season stocks only published for historical seasons

(f) Estimated Operating Stocks Requirement is a calculated estimate of the minimum tonnage that users of grain require to get through to a point at which new crop can be utilised

(g) Free stock is the stock available after both exports and estimated operating stock requirements have been fulfilled

(h) 2014/15 new format: Maize demand in "Other food use" has been added to the H&I total for maize. This was previously included in the "Other" category

* Percentage change not meaningful

** These balance sheets have been adjusted as per Defra's reliability allocation method

| | | OTHER CEREALS <i>(i)</i> | | | | | | |
|-------------|-------------------------------------|-------------------------------|---------------------|---------------------|-------------------|-------------------|------------------------------|-------------------------|
| | | 2011/12 2015/16 average | 2014/15 estimate | 2015/16 estimate | 2016/17 Jun-17 | 2016/17 Sep-17 | Absolute change Jun-17 | % change on 15/16 |
| (1) | Opening Stocks | 5 | 5 | 5 | 5 | 5 | 0 | 0% |
| (2) | Production | 117 | 131 | 121 | 110 | 110 | 0 | -9% |
| (3) | Imports | 3 | 1 | 3 | 3 | 3 | 0 | 0% |
| (4) | Total Availability | 125 | 137 | 129 | 118 | 118 | 0 | -9% |
| (5+6) | H&I and Animal Feed | 115 | 129 | 121 | 110 | 110 | 0 | -9% |
| (5a+6a) | (of which home grown) | 112 | 128 | 118 | 107 | 107 | 0 | -9% |
| (7) | Seed | 3 | 3 | 3 | 3 | 3 | 0 | 0% |
| (8) | Other | - | - | - | - | - | - | * |
| (9) | Total Domestic Consumption | 118 | 132 | 124 | 113 | 113 | 0 | -9% |
| (10) | Balance (4) - (9) | 6 | 5 | 5 | 5 | 5 | 0 | 0% |
| (11) | Exportable surplus | 1 | 0 | 0 | 0 | 0 | - | * |
| (12) | Intervention Stocks | 0 | 0 | 0 | 0 | 0 | - | * |
| (13) | Commercial End-Season Stocks | 5 | 5 | 5 | 5 | 5 | 0 | 0% |

| | | TOTAL CEREALS | | | | | | |
|-------------|---|-------------------------------|-----------------------|-----------------------|-------------------|-------------------|------------------------------|-------------------------|
| | | 2011/12 2015/16 average | 2014/15 estimate** | 2015/16 estimate** | 2016/17 Jun-17 | 2016/17 Sep-17 | Absolute change Jun-17 | % change on 15/16 |
| (1) | Opening Stocks | 3,287 | 3,370 | 4,351 | 4,405 | 4,400 | -5 | 1% |
| (2) | Production | 21,999 | 24,225 | 24,796 | 21,964 | 21,964 | 0 | -11% |
| (3) | Imports | 3,788 | 3,702 | 3,452 | 3,826 | 4,117 | 291 | 19% |
| (4) | Total Availability | 29,074 | 31,297 | 32,599 | 30,195 | 30,481 | 286 | -6% |
| (5) | H&I (wheat, barley, maize, oats) (h) | 10,310 | 10,838 | 10,183 | 11,044 | 11,050 | 6 | 9% |
| (6) | Animal Feed (wheat, barley, maize oats) (h) | 11,394 | 11,737 | 12,256 | 12,378 | 12,373 | -5 | 1% |
| (5a +6a) | Other cereals (H&I and Animal Feed) | 115 | 129 | 121 | 110 | 110 | 0 | -9% |
| (7) | Seed | 487 | 490 | 485 | 488 | 487 | -1 | 0% |
| (8) | Other | 160 | 131 | 129 | 113 | 113 | 0 | -12% |
| (9) | Total Domestic Consumption | 22,467 | 23,325 | 23,174 | 24,133 | 24,133 | 0 | 4% |
| (10) | Balance (4) - (9) | 6,607 | 7,972 | 9,425 | 6,062 | 6,348 | 286 | -33% |
| (11) | Exports | 3,016 | 3,621 | 5,027 | 2,691 | 2,692 | 1 | -46% |
| (12) | Intervention Stocks | - | - | - | - | - | 0 | * |
| (13) | Commercial End-Season Stocks | 3,649 | 4,351 | 4,400 | 3,484 | 3,250 | -234 | -26% |
| (14) | Estimated Operating stock requirement (wheat & barley only) | 2,189 | 2,250 | 2,260 | 2,360 | 2,320 | -40 | 3% |
| (15) | Free stock for wheat and barley | 1,140 | 1,681 | 1,894 | 863 | 544 | -319 | -71% |
| (16) | Surplus available for either export or free stock (all) | 4,476 | 5,722 | 7,166 | 3,702 | 4,028 | 326 | -44% |
| (17) | Residual (10)-(11)-(13) | | | | - 113 | 406 | | |

(i) Includes mainly rye, triticale, mixed grain and sorghum

Source: DEFRA

*** These balance sheets have been adjusted as per Defra's reliability allocation method*

APPENDIX II

CUMULATIVE MONTHLY STATISTICS Usage of Cereals by Processors, External Trade and Stocks

| Situation as at end of June 2017 | | | | | | | | | | | | Thousand tonnes | | | |
|----------------------------------|---------------------------------|----------------|-------------|----------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|-----------------------------------|--|
| | | | | 2010/11 to 2014/15 Average | 2008/09 52 weeks | 2009/10 52 weeks | 2010/11 52 weeks | 2011/12 52 weeks | 2012/13 52 weeks | 2013/14 52 weeks | 2014/15 52 weeks | 2015/16 52 weeks | 2016/17 52 weeks | % Change 2016/17 on 2015/16 | Actual Change 2016/17 on 2015/16 |
| WHEAT | | | | | | | | | | | | | | | |
| (1) Usage | Human and | -Flour Millers | -imported | 1205 | 1202 | 1055 | 767 | 688 | 1794 | 1439 | 1168 | 935 | 940 | 1% | 5 |
| (2) | Industrial | | -home-grown | 5260 | 4894 | 5135 | 5685 | 5267 | 4787 | 4957 | 5675 | 5616 | 6289 | 12% | 673 |
| (3) | Processors | | -Total | 6465 | 6096 | 6190 | 6451 | 5955 | 6581 | 6396 | 6843 | 6551 | 7229 | 10% | 678 |
| (4) | | -Distillers | | 743 | 580 | 527 | 531 | 662 | 818 | 815 | 772 | 649 | 705 | 9% | 56 |
| (5) | | -Others | | 173 | 117 | 120 | 159 | 157 | 174 | 181 | 175 | 176 | 166 | -5% | -10 |
| (6) | Animal Feed Processors (a) | | | 3098 | 2841 | 2797 | 2739 | 3079 | 3085 | 2875 | 3099 | 3353 | 3493 | 4% | 139 |
| (7) | Poultry Integrated Units | | | 1425 | 1496 | 1540 | 1614 | 1606 | 1505 | 1381 | 1420 | 1215 | 1210 | 0% | -5 |
| (8) Imports | From July (b) | | | 1750 | 1304 | 1240 | 1000 | 907 | 2956 | 2210 | 1677 | 1504 | 1870 | 24% | 366 |
| (9) Exports | From July (b) | | | 1662 | 3524 | 2427 | 2654 | 2545 | 734 | 431 | 1948 | 2857 | 1444 | -49% | -1413 |
| (14) | Intervention | -Actual | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | - | - |
| (15) | | -Projected | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | - | - |
| BARLEY | | | | | | | | | | | | | | | |
| (1) Usage | Maltsters/Distillers | | -imported | - | - | - | - | - | - | - | - | - | - | - | - |
| (2) | | | -home-grown | - | - | - | - | - | - | - | - | - | - | - | - |
| (3) | | | -Total | 1853 | 1743 | 1592 | 1730 | 1818 | 1832 | 1902 | 1893 | 1821 | 1847 | 1% | 26 |
| (4) | Animal Feed Processors (a) | | | 903 | 692 | 863 | 854 | 650 | 880 | 1047 | 953 | 986 | 998 | 1% | 12 |
| (5) | Poultry Integrated Units | | | 62 | 80 | 94 | 69 | 57 | 70 | 86 | 47 | 49 | 52 | 7% | 4 |
| (6) Imports | From July (b) | | | 151 | 142 | 86 | 125 | 156 | 237 | 100 | 139 | 159 | 132 | -17% | -27 |
| (7) Exports | From July (b) | | | 925 | 812 | 1034 | 772 | 804 | 395 | 1158 | 1495 | 1994 | 1050 | -47% | -944 |
| (11) | Intervention | -Actual | | 22 | 0 | 62 | 106 | 5 | 0 | 0 | 0 | 0 | 0 | - | - |
| (12) | | -Projected | | 9 | 0 | 140 | 40 | 5 | 0 | 0 | 0 | 0 | 0 | - | - |
| MAIZE | | | | | | | | | | | | | | | |
| (1) Usage | Human and Industrial | | | 346 | 267 | 252 | 295 | 278 | 308 | 375 | 447 | 322 | 396 | 23% | 73 |
| (2) | Animal Feed Processors (a) | | | 253 | 119 | 114 | 109 | 108 | 238 | 360 | 281 | 276 | 267 | -3% | -9 |
| (3) Imports | From July (b) | | | 1612 | 952 | 898 | 1041 | 985 | 1687 | 2394 | 1954 | 1814 | 2059 | 13% | 245 |
| (4) Exports | From July (b) | | | 89 | 14 | 15 | 34 | 30 | 60 | 203 | 119 | 115 | 177 | 54% | 62 |
| OATS | | | | | | | | | | | | | | | |
| (1) Usage | Human and Industrial Processors | | | 498 | 419 | 429 | 460 | 474 | 492 | 508 | 492 | 525 | 522 | -1% | -4 |
| (2) | Animal Feed Processors (a) | | | 80 | 61 | 89 | 91 | 59 | 78 | 118 | 95 | 52 | 40 | -24% | -12 |
| (3) Exports | From July (b) | | | 39 | 86 | 50 | 53 | 16 | 13 | 36 | 77 | 65 | 21 | -68% | -44 |

n/a - Not Available/Applicable

(a) Great Britain only.

(b) HM Customs/Intrastat

* Percentage changes not meaningful.

There were 53 weeks in the Statistical year 2010. In order to incorporate the change January 2010 was increased to a 5 week period compared to 4 weeks in 2009.

There were 53 weeks in the Statistical year 2016. In order to incorporate the change April 2016 was increased to a 5 week period compared to 4 weeks in 2015.

Note: This Appendix reflects the position as at 26 September 2017. The figures above may differ slightly from the most recent published data.

Survey data for GB Compounders and Cereals Usage by Millers, Brewers and Maltsters can be found using the following link:

<https://www.gov.uk/government/organisations/departement-for-environment-food-rural-affairs/about/statistics>

SOURCE: Defra Agricultural Statistics and Analysis, HM Customs and Excise/Intrastat, HGCA