

## KEY POINTS

- While domestic consumption of wheat is forecast to ease slightly in 2018/19, a larger fall in total availability has led to the forecast wheat balance tightening for the third consecutive year
- The surplus of barley available for export or free stocks is forecast at the lowest level since 2012/13
- Maize imports are forecast to rise driven by strong animal feed demand
- Milling demand for oats continues to be robust in 2018/19

## INTRODUCTION

1. This release covers the first official estimates made of UK cereal supply and demand for 2018/19 (Appendix I). These estimates follow from the annual [AHDB Wheat and Barley Early Balance Sheets](#) for the 2018/19 marketing season.

2. The UK Cereals Supply and Demand Balance Sheets continue to include the official production figures for all cereals published in the results of [Defra's Cereal and Oilseed Rape Production Survey](#). Defra are investigating how the crop areas in England from the RPA Basic Payment Scheme can be used to support the official production figures.

3. **In 2018/19 total cereals demand for animal feed is forecast to increase by 2% (267Kt) compared with 2017/18, to 13.332Mt.** The annual growth in animal feed production is largely driven by poultry and cattle feed output and to an extent sheep feed. Pig feed production is expected to be marginally down on year earlier levels. The continuing rise in ruminant feed output, driven by adverse conditions in the summer, is expected to slow somewhat, partly due to easing concerns around winter forage availability. While pig feed output has been decreasing so far this season, it is reported that the rate of decline will slow as the season progresses. This is due to pig production patterns returning back to more usual levels, following the long period of hot weather earlier in the year.

## WHEAT

4. **UK wheat availability is forecast to be 5% or 882Kt lower year on year at 17.504Mt, predominately driven by a fall in production.** Provisional results from the [Defra Cereals and Oilseed Rape Production Survey](#) reported a lower average yield in 2018, which outweighed a marginal increase in planted area, leading to a 751Kt annual decline in wheat production to 14.086Mt. Opening stocks are also estimated to be lower (-2%) than in 2017/18, at 1.718Mt.

5. **Imports of wheat in 2018/19 are forecast at 1.700Mt, 5% or 93Kt lower year on year.** From July – September the UK imported 772Kt tonnes of wheat, 80% higher than the same period in 2017. While imports have been high during the first quarter of the

season, the pace is expected to slow somewhat as the season progresses. This is due to a reduction in bioethanol demand, as well as competition from maize for animal feed usage, due to its relative price to wheat. Demand for imported wheat from UK flour millers is also expected to be lower on the season, partly due to the good functionality and availability of the domestic crop.

6. **At 7.067Mt, Human and Industrial (H&I) consumption of wheat is forecast to fall by 10% compared with 2017/18, driven largely by a reduction in usage by the bioethanol sector.** With Vivergo Fuels announcing it ceased production at the end of September 2018 and Ensus announcing a pause in production from the end of November 2018, it is assumed for these forecasts that both plants will remain off line for the rest of 2018/19. Bioethanol usage will be monitored throughout the season. Wheat usage by UK flour millers is expected to remain relatively stable on year earlier levels, while usage of wheat by brewers, maltsters and distillers (BMD) is expected to decline, partly due to temporary plant maintenance closures.

7. **Wheat demand for animal feed is forecast to be 3% higher than in 2017/18 at 7.738Mt.** From July – September, wheat used to produce GB compound and Integrated Poultry Unit (IPU) feed totalled 1.223Mt, 3% higher than the same point in 2017. The rise in wheat used in animal feed is largely driven by the poultry sector and to an extent cattle and sheep. While wheat usage is projected to rise in animal diets, the scale of the increase is, to some extent, capped by an expected rise in maize usage, due to its relative price to other cereals.

8. **The estimated balance of availability and domestic consumption in 2018/19 is 2.350Mt, 353Kt lower than 2017/18.** The estimated operating stocks requirement is forecast at 1.550Mt, 50Kt lower year on year. This leaves a surplus available for free stock or exports of 800Kt, 233Kt higher than in 2017/18, but remains well below the previous five season average of 1.954Mt.

## BARLEY

9. **At 7.772Mt, UK barley availability in 2018/19 is estimated to be 7% or 607Kt lower than in 2017/18, largely driven by an estimated reduction in output.** Provisional results from the [Defra Cereal and Oilseed Rape Production Survey](#) reported a lower average yield in 2018. This combined with a smaller planted area, led to a fall in production of 563Kt, to 6.606Mt in 2018. Opening stocks for the season are also estimated to be lower (-3%) on year earlier levels at 1.076Mt. With reports of a below average barley harvest in Europe, UK imports of barley are also expected to be lower on the year. UK barley imports are forecast to fall by 15Kt on the year in 2018/19 to 90Kt.

10. **In 2018/19 H&I barley consumption is forecast to remain relatively unchanged on the season at 1.886Mt.** Season to date (Jul-Sep) usage of barley by the UK BMD sector is 464Kt, 1% lower on the year. The majority of this decrease was driven by a year on year fall in barley usage in July 2018. However, it has been reported that usage in July 2017 was relatively high. Usage for the rest of the season is forecast to remain near year earlier levels, with no unscheduled closures, or large capacity changes expected for the season.

11. **Barley demand for animal feed is forecast to decrease by 3% in 2018/19 to 3.929Mt.** From July – September the amount of barley used in GB animal feed production (including IPU) was 6% lower on the year at 281Kt. With the discount of UK feed barley to feed wheat prices smaller than last season, usage of barley in animal feed diets is expected to be lower. While barley inclusions are lower in rations due to its relative price to other cereals, the dietary requirements for some animals, such as pigs, will mean barley usage will be retained to a certain extent. The level of barley fed on farm is expected to remain at similar levels to 2017/18. Although reports of tight forage availability in some regions is expected to lead to more barley fed on farm, this is not the situation across the whole of the UK.

12. **The barley supply and demand balance is estimated at 1.738Mt, 22% lower than in 2017/18.** With an estimated operating stock requirement of 780Kt, the surplus available for export or free stock is forecast at 958Kt, 450Kt lower than 2017/18.

## MAIZE

13. **Total availability of maize in 2018/19 is forecast to increase by 2% on the year to 2.352Mt, with a rise in forecast imports, offsetting a fall in opening stocks.** Opening stocks of maize are estimated at 247Kt, 9% lower than in 2017/18. In the season to date (Jul-Sep) the UK has imported 544Kt

of maize, 37% higher on year earlier levels. Full season imports are forecast at 2.105Mt in 2018/19, 4% (81Kt) higher than in 2017/18, with the current pace of imports expected to slow as the season progresses. The anticipated increase in maize imports is on account of increased demand in animal feed, outweighing a reduction in H&I usage.

14. **H&I usage of maize is forecast at 545Kt, 15% lower than in 2017/18,** driven predominately by a fall in bioethanol usage outweighing a small increase in usage by the distilling sector. **Demand for maize in animal feed is forecast to increase by 13% in 2018/19 to 1.393Mt.** So far this season (Jul-Sep) maize usage in GB animal feed production (including IPU) is 26% up on year earlier levels at 103.4Kt. While demand for maize is currently expected to remain strong up until the spring, due to its relative price compared to other cereals and current commitments, the rise is expected to slow during the last quarter of the season. However, this is dependent on spring weather.

15. **At 410Kt, the balance of availability and consumption for maize is forecast to be 8Kt lower on the year.** Maize exports for 2018/19 are forecast at 155Kt, 16Kt down on the year, while commercial end-season stocks are forecast to increase by 8Kt to 255Kt.

## OATS

16. **Oats availability, at 1.012Mt, is 8Kt higher than in 2017/18, with an increase in estimated opening stocks outweighing a fall in imports and production.** Opening stocks of oats are estimated at 138Kt, 25% up on the year. Defra have provisionally estimated 2018 oat production at 857Kt, 2% down on year earlier levels, driven by a fall in estimated yields. Imports are forecast to fall by 2Kt on the year to 17Kt, due to tight global supply of the grain.

17. **At 550Kt, H&I demand for oats in 2018/19 is 2% higher on the year.** Demand for oats by millers is expected to remain strong for the whole season. Usage of oats for animal feed is forecast to remain relatively unchanged on the year at 272Kt.

18. **The balance of oats availability and demand is estimated to be 2% lower on the year in 2018/19 to 162Kt.** Full season exports are forecast to be 3Kt lower than year earlier levels at 25Kt, with 14Kt exported to date (Jul-Sep). It is currently forecast that 137Kt of oats will be carried forward into 2019/20, relatively unchanged on the year.

## ADDITIONAL DATA

19. Appendix II shows cumulative usage and trade data to end-September. This release and related information can be found at [cereals.ahdb.org.uk/markets](http://cereals.ahdb.org.uk/markets).

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CEREALS & OILSEEDS

# UK CEREAL SUPPLY AND DEMAND ESTIMATES (a)

## Estimates made in November

(JULY - JUNE YEARS)

Links connect to relevant Defra/AHDB data pages

Thousand tonnes

|  | WHEAT                         |                       |                     |                     |                   |                         | BARLEY                        |                     |                     |                     |                   |                         |
|--|-------------------------------|-----------------------|---------------------|---------------------|-------------------|-------------------------|-------------------------------|---------------------|---------------------|---------------------|-------------------|-------------------------|
|  | 2013/14<br>2017/18<br>average | 2015/16<br>estimate** | 2016/17<br>estimate | 2017/18<br>estimate | 2018/19<br>Nov-18 | %<br>change<br>on 17/18 | 2013/14<br>2017/18<br>average | 2015/16<br>estimate | 2016/17<br>estimate | 2017/18<br>estimate | 2018/19<br>Nov-18 | %<br>change<br>on 17/18 |
| (1) <a href="#">Opening Stocks</a>   | 2,144                         | 2,434                 | 2,787               | 1,755               | 1,718             | -2%                     | 1,269                         | 1,497               | 1,367               | 1,105               | 1,076             | -3%                     |
| (2) <a href="#">Production</a>   | 14,779                        | 16,506                | 14,383              | 14,837              | 14,086            | -5%                     | 7,039                         | 7,370               | 6,655               | 7,169               | 6,606             | -8%                     |
| (3) <a href="#">Imports</a>  | 1,804                         | 1,509                 | 1,855               | 1,793               | 1,700             | -5%                     | 122                           | 159                 | 106                 | 105                 | 90                | -14%                    |
| <b>(4) Total Availability</b>  | <b>18,727</b>                 | <b>20,449</b>         | <b>19,025</b>       | <b>18,386</b>       | <b>17,504</b>     | <b>-5%</b>              | <b>8,430</b>                  | <b>9,026</b>        | <b>8,128</b>        | <b>8,379</b>        | <b>7,772</b>      | <b>-7%</b>              |
| (5) <a href="#">Human and Industrial Consumption (b)</a>                   | 7,715                         | 7,360                 | 8,110               | 7,816               | 7,067             | -10%                    | 1,897                         | 1,833               | 1,863               | 1,881               | 1,886             | 0%                      |
| (5a) (of which home grown)   | 6,585                         | 6,416                 | 7,169               | 6,787               | 6,019             | -11%                    | n/a                           | n/a                 | n/a                 | n/a                 | n/a               | *                       |
| (6) <a href="#">Usage as Animal Feed (c)</a>                               | 7,042                         | 7,094                 | 7,236               | 7,515               | 7,738             | 3%                      | 3,617                         | 3,613               | 3,655               | 4,047               | 3,929             | -3%                     |
| (6a) (of which home grown)   | 6,358                         | 6,444                 | 6,523               | 6,794               | 6,988             | 3%                      | n/a                           | n/a                 | n/a                 | n/a                 | n/a               | *                       |
| (6b) (of which Compounders)  | 3,825                         | 3,845                 | 4,034               | 4,232               | 4,464             | 5%                      | 1,153                         | 1,108               | 1,132               | 1,279               | 1,201             | -6%                     |
| (6c) (of which Integrated Poultry Units)                                   | 1,297                         | 1,210                 | 1,211               | 1,241               | 1,233             | -1%                     | 59                            | 49                  | 53                  | 59                  | 53                | -10%                    |
| (7) Seed (d)   | 284                           | 281                   | 278                 | 279                 | 279               | 0%                      | 178                           | 182                 | 189                 | 186                 | 186               | 0%                      |
| (8) Other  | 76                            | 79                    | 72                  | 74                  | 70                | -5%                     | 35                            | 37                  | 33                  | 36                  | 33                | -8%                     |
| <b>(9) Total Domestic Consumption</b>                                      | <b>15,117</b>                 | <b>14,814</b>         | <b>15,696</b>       | <b>15,683</b>       | <b>15,154</b>     | <b>-3%</b>              | <b>5,727</b>                  | <b>5,665</b>        | <b>5,740</b>        | <b>6,150</b>        | <b>6,034</b>      | <b>-2%</b>              |
| <b>(10) Balance (4) - (9)</b>  | <b>3,610</b>                  | <b>5,635</b>          | <b>3,329</b>        | <b>2,703</b>        | <b>2,350</b>      | <b>-13%</b>             | <b>2,703</b>                  | <b>3,361</b>        | <b>2,388</b>        | <b>2,228</b>        | <b>1,738</b>      | <b>-22%</b>             |
| (11) <a href="#">Exports (e)</a>   | 1,425                         | 2,848                 | 1,438               | 448                 | -                 | *                       | 1,355                         | 1,994               | 1,026               | 1,101               | -                 | *                       |
| (12) Intervention Stocks (e)   | -                             | -                     | -                   | -                   | -                 | -                       | -                             | -                   | -                   | -                   | -                 | -                       |
| <b>(13) Commercial End-Season Stocks (e)</b>                               | <b>2,051</b>                  | <b>2,787</b>          | <b>1,755</b>        | <b>1,718</b>        | <b>-</b>          | <b>*</b>                | <b>1,285</b>                  | <b>1,367</b>        | <b>1,105</b>        | <b>1,076</b>        | <b>-</b>          | <b>*</b>                |
| (14) <a href="#">(of which Estimated Operating stock requirement) (f)</a>  | 1,522                         | 1,500                 | 1,560               | 1,600               | 1,550             | -3%                     | 751                           | 760                 | 760                 | 770                 | 780               | 1%                      |
| (15) (of which free stock) (g)   | 529                           | 1,287                 | 195                 | 118                 | -                 | *                       | 534                           | 607                 | 345                 | 306                 | -                 | *                       |
| (16) Surplus available for either export or free stock (10)-(12)-(14)-(17) | <b>1,954</b>                  | <b>4,135</b>          | <b>1,633</b>        | <b>567</b>          | <b>800</b>        | <b>41%</b>              | <b>1,889</b>                  | <b>2,601</b>        | <b>1,371</b>        | <b>1,408</b>        | <b>958</b>        | <b>-32%</b>             |
| (17) Residual (10)-(11)-(13)   |                               |                       | <b>136</b>          | <b>536</b>          |                   |                         |                               |                     | <b>257</b>          | <b>50</b>           |                   |                         |

|  | MAIZE                         |                       |                     |                     |                   |                         | OATS                          |                     |                     |                     |                   |                         |
|--|-------------------------------|-----------------------|---------------------|---------------------|-------------------|-------------------------|-------------------------------|---------------------|---------------------|---------------------|-------------------|-------------------------|
|  | 2013/14<br>2017/18<br>average | 2015/16<br>estimate** | 2016/17<br>estimate | 2017/18<br>estimate | 2018/19<br>Nov-18 | %<br>change<br>on 17/18 | 2013/14<br>2017/18<br>average | 2015/16<br>estimate | 2016/17<br>estimate | 2017/18<br>estimate | 2018/19<br>Nov-18 | %<br>change<br>on 17/18 |
| (1) <a href="#">Opening Stocks</a>                   | 241                           | 309                   | 148                 | 271                 | 247               | -9%                     | 109                           | 107                 | 93                  | 110                 | 138               | 25%                     |
| (2) <a href="#">Production</a>                       | -                             | -                     | -                   | -                   | -                 | -                       | 855                           | 799                 | 816                 | 875                 | 857               | -2%                     |
| (3) <a href="#">Imports</a>                          | 1,993                         | 1,742                 | 2,007               | 2,024               | 2,105             | 4%                      | 35                            | 39                  | 32                  | 19                  | 17                | -10%                    |
| <b>(4) Total Availability</b>                        | <b>2,233</b>                  | <b>2,051</b>          | <b>2,155</b>        | <b>2,295</b>        | <b>2,352</b>      | <b>2%</b>               | <b>999</b>                    | <b>945</b>          | <b>941</b>          | <b>1,004</b>        | <b>1,012</b>      | <b>1%</b>               |
| (5) <a href="#">Human and Industrial Consumption</a> | 585                           | 465                   | 570                 | 643                 | 545               | -15%                    | 517                           | 525                 | 521                 | 537                 | 550               | 2%                      |
| (5a) (of which home grown)                           | -                             | -                     | -                   | -                   | -                 | -                       | 482                           | 499                 | 476                 | 519                 | 533               | 3%                      |
| (6) <a href="#">Usage as Animal Feed</a>             | 1,244                         | 1,310                 | 1,135               | 1,230               | 1,393             | 13%                     | 290                           | 239                 | 263                 | 273                 | 272               | 0%                      |
| (6a) (of which home grown)                           | -                             | -                     | -                   | -                   | -                 | -                       | 290                           | 239                 | 263                 | 273                 | 272               | 0%                      |
| (7) Seed   | -                             | -                     | -                   | -                   | -                 | -                       | 20                            | 19                  | 23                  | 24                  | 24                | 0%                      |
| (8) Other (h)  | 5                             | 9                     | 4                   | 4                   | 4                 | 0%                      | 4                             | 4                   | 4                   | 4                   | 4                 | 0%                      |
| <b>(9) Total Domestic Consumption</b>                | <b>1,833</b>                  | <b>1,784</b>          | <b>1,709</b>        | <b>1,877</b>        | <b>1,942</b>      | <b>3%</b>               | <b>831</b>                    | <b>787</b>          | <b>811</b>          | <b>837</b>          | <b>850</b>        | <b>1%</b>               |
| <b>(10) Balance (4) - (9)</b>                        | <b>400</b>                    | <b>267</b>            | <b>446</b>          | <b>418</b>          | <b>410</b>        | <b>-2%</b>              | <b>168</b>                    | <b>158</b>          | <b>130</b>          | <b>166</b>          | <b>162</b>        | <b>-2%</b>              |
| (11) <a href="#">Exportable surplus</a>              | 153                           | 120                   | 175                 | 171                 | 155               | -9%                     | 45                            | 65                  | 21                  | 28                  | 25                | -12%                    |
| (12) <a href="#">Commercial End-Season Stocks</a>    | <b>247</b>                    | <b>148</b>            | <b>271</b>          | <b>247</b>          | <b>255</b>        | <b>3%</b>               | <b>123</b>                    | <b>93</b>           | <b>110</b>          | <b>138</b>          | <b>137</b>        | <b>-1%</b>              |

(a) These are revised during the year. Figures rounded to the nearest 1000 tonnes. Due to rounding, totals may not agree with the sum of the individual items.

(b) Defra updated the registry for the UK flour millers survey in spring 2016, the wheat H&amp;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&amp;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

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|             |                                     | OTHER CEREALS (i)             |                     |                     |                     |                   |                         |
|-------------|-------------------------------------|-------------------------------|---------------------|---------------------|---------------------|-------------------|-------------------------|
|             |                                     | 2013/14<br>2017/18<br>average | 2015/16<br>estimate | 2016/17<br>estimate | 2017/18<br>estimate | 2018/19<br>Nov-18 | %<br>change<br>on 17/18 |
| (1)         | Opening Stocks                      | 5                             | 5                   | 5                   | 5                   | 5                 | 0%                      |
| (2)         | Production                          | 118                           | 121                 | 110                 | 119                 | 194               | 63%                     |
| (3)         | Imports                             | 3                             | 3                   | 3                   | 4                   | 4                 | 0%                      |
| <b>(4)</b>  | <b>Total Availability</b>           | <b>125</b>                    | <b>129</b>          | <b>118</b>          | <b>129</b>          | <b>203</b>        | <b>58%</b>              |
| (5+6)       | H&I and Animal Feed                 | 117                           | 121                 | 110                 | 121                 | 195               | 62%                     |
| (5a+6a)     | (of which home grown)               | 115                           | 118                 | 107                 | 116                 | 191               | 65%                     |
| (7)         | Seed                                | 3                             | 3                   | 3                   | 3                   | 3                 | 0%                      |
| (8)         | Other                               | -                             | -                   | -                   | -                   | -                 | -                       |
| <b>(9)</b>  | <b>Total Domestic Consumption</b>   | <b>120</b>                    | <b>124</b>          | <b>113</b>          | <b>124</b>          | <b>198</b>        | <b>60%</b>              |
| <b>(10)</b> | <b>Balance (4) - (9)</b>            | <b>5</b>                      | <b>5</b>            | <b>5</b>            | <b>5</b>            | <b>5</b>          | <b>9%</b>               |
| (11)        | Exportable surplus                  | -                             | -                   | -                   | -                   | -                 | -                       |
| (12)        | Intervention Stocks                 | -                             | -                   | -                   | -                   | -                 | -                       |
| <b>(13)</b> | <b>Commercial End-Season Stocks</b> | <b>5</b>                      | <b>5</b>            | <b>5</b>            | <b>5</b>            | <b>5</b>          | <b>0%</b>               |

|             |   | TOTAL CEREALS                 |                       |                     |                     |                   |                         |
|-------------|---|-------------------------------|-----------------------|---------------------|---------------------|-------------------|-------------------------|
|             |   | 2013/14<br>2017/18<br>average | 2015/16<br>estimate** | 2016/17<br>estimate | 2017/18<br>estimate | 2018/19<br>Nov-18 | %<br>change<br>on 17/18 |
| (1)         | Opening Stocks  | 3,768                         | 4,352                 | 4,400               | 3,247               | 3,184             | -2%                     |
| (2)         | Production  | 22,791                        | 24,796                | 21,964              | 22,999              | 21,743            | -5%                     |
| (3)         | Imports   | 3,955                         | 3,452                 | 4,003               | 3,945               | 3,917             | -1%                     |
| <b>(4)</b>  | <b>Total Availability</b>                                   | <b>30,515</b>                 | <b>32,600</b>         | <b>30,366</b>       | <b>30,191</b>       | <b>28,844</b>     | <b>-4%</b>              |
| (5)         | H&I (wheat, barley, maize, oats) (h)                        | 10,714                        | 10,183                | 11,064              | 10,876              | 10,048            | -8%                     |
| (6)         | Animal Feed (wheat, barley, maize oats) (h)                 | 12,192                        | 12,256                | 12,288              | 13,065              | 13,332            | 2%                      |
| (5a +6a)    | Other cereals (H&I and Animal Feed)                         | 117                           | 121                   | 110                 | 121                 | 195               | 62%                     |
| (7)         | Seed  | 485                           | 485                   | 493                 | 492                 | 492               | 0%                      |
| (8)         | Other   | 120                           | 129                   | 113                 | 118                 | 111               | -6%                     |
| <b>(9)</b>  | <b>Total Domestic Consumption</b>                           | <b>23,629</b>                 | <b>23,174</b>         | <b>24,068</b>       | <b>24,672</b>       | <b>24,178</b>     | <b>-2%</b>              |
| <b>(10)</b> | <b>Balance (4) - (9)</b>                                    | <b>6,886</b>                  | <b>9,426</b>          | <b>6,298</b>        | <b>5,520</b>        | <b>4,666</b>      | <b>-15%</b>             |
| (11)        | Exports   | 2,979                         | 5,027                 | 2,660               | 1,749               | -                 | *                       |
| (12)        | Intervention Stocks   | -                             | -                     | -                   | -                   | -                 | *                       |
| <b>(13)</b> | <b>Commercial End-Season Stocks</b>                         | <b>3,710</b>                  | <b>4,400</b>          | <b>3,247</b>        | <b>3,184</b>        | <b>-</b>          | <b>*</b>                |
| (14)        | Estimated Operating stock requirement (wheat & barley only) | 2,273                         | 2,260                 | 2,320               | 2,370               | 2,330             | -2%                     |
| (15)        | Free stock for wheat and barley                             | 1,063                         | 1,894                 | 541                 | 424                 | -                 | *                       |
| (16)        | Surplus available for either export or free stock (all)     | <b>4,041</b>                  | <b>7,167</b>          | <b>3,587</b>        | <b>2,563</b>        | <b>2,335</b>      | <b>-9%</b>              |
| (17)        | Residual (10)-(11)-(13)                                     |                               |                       | <b>392</b>          | <b>587</b>          | <b>-</b>          |                         |

(i) Includes mainly rye, triticale and mixed grain

Source: AHDB; Defra

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



## CUMULATIVE MONTHLY STATISTICS

### Usage of cereals by processors, external trade and stocks

Situation as at end of September 2018

Thousand tonnes

|               |                                 |                                       |             | 2013/14<br>to 2017/18<br>Average | 2011/12<br>13 weeks | 2012/13<br>13 weeks | 2013/14<br>13 weeks | 2014/15<br>13 weeks | 2015/16<br>13 weeks | 2016/17<br>13 weeks | 2017/18<br>13 weeks | 2018/19<br>13 weeks | % Change<br>2018/19 on<br>2017/18 | Actual Change<br>2018/19 on<br>2017/18 |
|---------------|---------------------------------|---------------------------------------|-------------|----------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|-----------------------------------|--|
| <b>WHEAT</b>  |                                 |                                       |             |                                  |                     |                     |                     |                     |                     |                     |                     |                     |                                   |  |
| Usage         | Human and Industrial            | -Flour Millers <sup>†</sup>           | -imported   | 337                              | 175                 | 248                 | 587                 | 395                 | 242                 | 220                 | 242                 | 436                 | 80%                               | 194                                    |
|               |                                 |                                       | -home-grown | 1351                             | 1316                | 1351                | 984                 | 1289                | 1370                | 1539                | 1575                | 1299                | -17%                              | -275                                   |
|               |                                 |                                       | -Total      | 1688                             | 1490                | 1599                | 1571                | 1683                | 1612                | 1759                | 1817                | 1736                | -4%                               | -81                                    |
|               |                                 | -Distillers                           |             | 192                              | 138                 | 180                 | 206                 | 195                 | 172                 | 179                 | 208                 | 172                 | -17%                              | -36                                    |
|               |                                 | Animal Feed Processors <sup>(a)</sup> |             | 819                              | 696                 | 744                 | 775                 | 744                 | 814                 | 880                 | 884                 | 924                 | 5%                                | 40                                     |
|               |                                 | Poultry Integrated Units              |             | 330                              | 398                 | 395                 | 369                 | 355                 | 319                 | 302                 | 304                 | 299                 | -2%                               | -5                                     |
| Imports       | From July <sup>(b)</sup>        |                                       |             | 547                              | 218                 | 581                 | 827                 | 608                 | 447                 | 424                 | 430                 | 772                 | 80%                               | 343                                    |
| Exports       | From July <sup>(b)</sup>        |                                       |             | 295                              | 537                 | 289                 | 44                  | 288                 | 325                 | 671                 | 147                 | 79                  | -46%                              | -68                                    |
|               | Intervention                    | -Actual                               |             | 0                                | 0                   | 0                   | 0                   | 0                   | 0                   | 0                   | 0                   | 0                   | *                                 | *                                      |
|               |                                 | -Projected                            |             | 0                                | 0                   | 0                   | 0                   | 0                   | 0                   | 0                   | 0                   | 0                   | *                                 | *                                      |
| <b>BARLEY</b> |                                 |                                       |             |                                  |                     |                     |                     |                     |                     |                     |                     |                     |                                   |  |
| Usage         | Maltsters/Distillers            | -imported                             |             | -                                | -                   | -                   | -                   | -                   | -                   | -                   | -                   | -                   | -                                 | -                                      |
|               |                                 |                                       | -home-grown | -                                | -                   | -                   | -                   | -                   | -                   | -                   | -                   | -                   | -                                 | -                                      |
|               |                                 |                                       | -Total      | 461                              | 433                 | 438                 | 460                 | 480                 | 448                 | 447                 | 469                 | 464                 | -1%                               | -5                                     |
|               |                                 | Animal Feed Processors <sup>(a)</sup> |             | 235                              | 193                 | 212                 | 213                 | 254                 | 226                 | 200                 | 281                 | 266                 | -5%                               | -15                                    |
|               |                                 | Poultry Integrated Units              |             | 15                               | 21                  | 18                  | 17                  | 19                  | 11                  | 13                  | 17                  | 16                  | -8%                               | -1                                     |
| Imports       | From July <sup>(b)</sup>        |                                       |             | 33                               | 42                  | 36                  | 25                  | 28                  | 47                  | 32                  | 35                  | 22                  | -36%                              | -12                                    |
| Exports       | From July <sup>(b)</sup>        |                                       |             | 319                              | 191                 | 202                 | 258                 | 295                 | 360                 | 338                 | 343                 | 129                 | -62%                              | -214                                   |
|               | Intervention                    | -Actual                               |             | 0                                | 151                 | 5                   | 0                   | 0                   | 0                   | 0                   | 0                   | 0                   | *                                 | *                                      |
|               |                                 | -Projected                            |             | 0                                | 151                 | 5                   | 0                   | 0                   | 0                   | 0                   | 0                   | 0                   | *                                 | *                                      |
| <b>MAIZE</b>  |                                 |                                       |             |                                  |                     |                     |                     |                     |                     |                     |                     |                     |                                   |  |
| Usage         | Human and Industrial            |                                       |             | 81                               | 73                  | 77                  | 90                  | 101                 | 85                  | 72                  | 57                  | **                  | *                                 | *                                      |
|               |                                 | Animal Feed Processors <sup>(a)</sup> |             | 68                               | 24                  | 47                  | 64                  | 74                  | 69                  | 62                  | 71                  | 95                  | 33%                               | 24                                     |
| Imports       | From July <sup>(b)</sup>        |                                       |             | 370                              | 203                 | 233                 | 382                 | 293                 | 388                 | 387                 | 398                 | 544                 | 37%                               | 145                                    |
| Exports       | From July <sup>(b)</sup>        |                                       |             | 21                               | 9                   | 6                   | 13                  | 12                  | 18                  | 26                  | 35                  | 38                  | 10%                               | 3                                      |
| <b>OATS</b>   |                                 |                                       |             |                                  |                     |                     |                     |                     |                     |                     |                     |                     |                                   |  |
| Usage         | Human and Industrial Processors |                                       |             | 124                              | 115                 | 114                 | 120                 | 118                 | 125                 | 126                 | 130                 | 142                 | 9%                                | 12                                     |
|               |                                 | Animal Feed Processors <sup>(a)</sup> |             | 15                               | 15                  | 14                  | 17                  | 22                  | 14                  | 10                  | 10                  | 16                  | 55%                               | 6                                      |
| Imports       | From July <sup>(b)</sup>        |                                       |             | 13                               | 10                  | 10                  | 20                  | 11                  | 15                  | 9                   | 11                  | 6                   | -46%                              | -5                                     |
| Exports       | From July <sup>(b)</sup>        |                                       |             | 14                               | 5                   | 2                   | 7                   | 22                  | 17                  | 7                   | 17                  | 14                  | -16%                              | -3                                     |

Source: AHDB, Defra, HMRC

<sup>(a)</sup> Great Britain only.<sup>(b)</sup> HMRC

\* Changes not meaningful

\*\*Insufficient sample to produce robust figure

† Includes bioethanol and starch usage

**Footnotes:**

Due to rounding, totals may not agree with the sum of the individual items.

There are 53 weeks in the Statistical year 2016. In order to incorporate the change April 16 was increased to a 5 week period compared to 4 weeks in 2015.

Figures in Appendix II were updated on 29 November 2018. The data above may differ from the most recent published data.