SUPPLY AND DEMAND

29 May 2025

AHDB

KEY POINTS

- Wheat end-season stocks remain above the five-year average as exports continue to be lacklustre
- Despite a tighter barley balance, steady exports lead to a 10 year high for carry out stocks
- Competitive prices earlier in the season leads to further rises in maize imports
- Despite a slight uptick in oat usage by millers from March, the oat balance sheet remains relatively heavy

INTRODUCTION

1. This release covers the fourth official estimates made of UK cereal supply and demand for 2024/25 (Appendix 1).

2. The UK Cereals Supply and Demand Estimates include the official production figures for wheat, barley and oats published by Defra in the results of the [Cereal and Oilseed Rape Production Survey](#).

3. **Total cereals demand for animal feed in 2024/25 is estimated at 12.754 Mt, up 98 Kt from March's estimate but down 168 Kt on the year.** In recent months, the growth in cattle feed, sheep feed, other animal feed and NI poultry feed production has been stronger than previously expected, outweighing a larger than anticipated drop in total GB poultry feed production. This, combined with a projected rise in the amount of wheat fed on farm, compared with previous estimates, has led to the increase in cereals used in animal feed compared to March. However, the rate of cereal inclusions in animal feed production is back on both March's estimate and year earlier levels. The lower cereal inclusion rate and an expected decline in the total volume of cereals fed on farm, outweighs the climb in compound feed production this season, leading to the overall annual decline in cereals demand for animal feed in 2024/25.

4. **Human and industrial (H&I) total cereals usage this season is estimated at 10.463 Mt, up 62 Kt from March, but back 390 Kt from 2023/24 levels.** The increase from the previous estimate is mainly driven by a larger volume of maize being used by the bioethanol sector. Compared with 2023/24, the decline comes largely from a fall in the use of wheat by the bioethanol sector, as well as a drop in demand for barley for brewing, malting and distilling (BMD). Wheat usage by flour millers and oat usage by oat millers is also forecast to drop slightly on the year.

WHEAT

5. **At 17.033 Mt, total availability of wheat in 2024/25 is forecast up 200 Kt from the previous estimate. However, this is down 1.336 Mt on the year, due to the smaller crop outweighing a rise in opening stocks and imports.** At 2.900 Mt, full season wheat imports are 200 Kt higher than March's estimate and 463 Kt higher than year earlier levels. Wheat imports have continued to come in at a stronger pace than previously expected, leading to the rise from March's estimate. From July to March, the UK has imported 2.401 Mt of wheat, with a large proportion expected to be of milling quality. Import pace is now anticipated to slow somewhat for the rest of the season, with millers well supplied and a significant proportion expected to be carried into next season. Feed wheat imported into the UK is expected to mostly be delivered into Northern Ireland and northern parts of England.

6. **In 2024/25, H&I wheat consumption is estimated at 7.125 Mt, down slightly (10 Kt) from March's estimate, and 395 Kt lower than 2023/24 levels.** The decline on the year, is largely down to a fall in wheat demand from the bioethanol sector. Neither UK bioethanol plant is expected to be running at full capacity this season, largely due to squeezed margins on the back of competitive US ethanol imports weighing on the domestic market. Also, due to its competitive price earlier in the season, maize usage by the sector is forecast higher on the year at the expense of wheat. While the proposed UK-US trade deal is not expected to have an impact on UK bioethanol demand this season, the situation will be closely monitored. UK flour production is estimated to fall slightly this season. While a lower extraction rate is offsetting some of the decline, total wheat usage by flour millers is expected to fall slightly this year. The proportion of imported wheat in the grist remains high but is expected to drop slightly towards the end of the season.

7. **Wheat used in animal feed in 2024/25 is estimated at 6.428 Mt, down marginally (-7 Kt) from March's estimate, and 707 Kt lower than year earlier levels.** Wheat used by GB compounders, integrated poultry units (IPUs) and NI compounders, has fallen compared to previous estimates, due to greater use of maize. A slightly lower cereal inclusion rate than originally expected also contributes to this decline, with proteins pricing more competitively. A smaller domestic wheat crop leads to a fall in the amount of wheat fed on farm in 2024/25, although this forecast has increased slightly from March's estimate.

8. **In 2024/25, the balance of total availability and domestic consumption of wheat is estimated at 3.187 Mt, 217 Kt higher than in March due to increased imports. However, compared to a year earlier, the balance is back 220 Kt, with a drop in supply outweighing the drop in demand.** Full season exports remain unchanged from the previous estimate, at 250 Kt. From July to March, exports totalled 131 Kt, with the pace expected to pick up for the remainder of the season. At 2.937 Mt, commercial

end-season stocks are back slightly (-50 Kt) on the year, but 821 Kt higher than the five-year average. Imported wheat carry-out stocks are expected to be considerably higher this season.

BARLEY

9. **Total barley availability in 2024/25 is estimated at 8.484 Mt. This is unchanged from March's estimate, but up 50 Kt on the year.** Full season barley imports are expected to be well above average, but back 26 Kt from 2023/24, at 175 Kt. This season to date (Jul-Mar), UK barley imports totalled 148 Kt, with pace expected to slow for the rest of the season.

10. **H&I barley usage is estimated at 1.783 Mt, up marginally (2 Kt) from the previous estimate but down 126 Kt on year earlier levels.** The yearly fall in usage is due to sluggish season to date BMD demand, which is largely due to the increase in cost of living, as well as the longer-term trend of fewer younger people consuming alcohol.

11. **Usage of barley in animal feed is estimated at 4.383 Mt, relatively unchanged (up 8 Kt) from March, but up 197 Kt on the year.** Due to its relative price over wheat, barley has featured more heavily in rations this season compared to last. However, the increase is largely attributed to a rise in fed on farm usage, again, due to its relative availability, as well as pressure on malting barley premiums.

12. **In 2024/25, the barley supply and demand balance is estimated at 2.090 Mt, 10 Kt lower than in March, and down 20 Kt on the year.** Full season exports are forecast up 50 Kt from the previous estimate at 650 Kt. However, this is down 130 Kt on the year, and well below average. From July to March, UK barley exports totalled 459 Kt. Commercial end-season stocks are estimated at 1.440 Mt, down 60 Kt from March, but up 223 Kt on 2023/24 levels. Taking into account exports to date (Jul-Mar) and an operating stock requirement of 800 Kt, the UK has 831 Kt of barley to either export or carry into next season as free stock.

MAIZE

13. **Total maize availability in 2024/25 is estimated at 3.025 Mt, up 173 Kt from March's estimate and up 238 Kt year on year.** The rise from the previous estimate is due to increased imports, with full season maize imports estimated at 2.825 Mt, 183 Kt higher than 2023/24 levels. Imported maize priced more competitively than domestic wheat earlier in the season, and a high volume is expected to have been bought forward. However, imported maize has been less competitive as of late, with import pace expected to slow somewhat for the rest of the 2024/25 season.

14. **H&I maize usage this season is estimated at 1.069 Mt, up 62 Kt from the previous estimate, and 147 Kt higher year on year.** In fact, if achieved, this would be the largest volume of maize used by the H&I sector since 2001/02. The increase in usage since March is due to greater bioethanol usage. Despite neither of the UK bioethanol plants operating at full capacity, the greater volume of maize purchased earlier in the season has seen usage surpass expectations in recent months. However, total cereals demand for the bioethanol sector remains down on the year. **Maize usage for animal feed is estimated at 1.572 Mt, up 96 Kt from March, and 224 Kt from 2023/24.** The proportion of maize in feed rations has continued at higher levels than previously expected, leading to the increase from March's estimate. The increase in maize usage from the previous estimate and on the year is driven by favourable prices and the availability of the grain compared with domestic crops at the start of the season.

15. **The balance of maize supply and demand is up 15 Kt from March's estimate, but 133 Kt lower than 2023/24 levels at 380 Kt.** While down on the year, 2023/24 had a larger than typical balance. Exports have been revised up by 15 Kt from the previous estimate to 175 Kt (taking into account the export pace to date) and end-season stocks remain unchanged at 205 Kt. Exports and end-season stocks remain relatively similar to the levels recorded in 2023/24.

OATS

16. **Total oats availability in 2024/25 is estimated at 1.123 Mt, unchanged from March, but 138Kt higher year on year driven by a larger crop in 2024.** Full season imports are forecast at 13 Kt, once again unchanged from previous estimates and marginally lower (2 Kt) year on year.

17. **H&I usage of oats is 9 Kt higher than the previous estimate but 15Kt lower on the year in 2023/24.** Oat usage by millers is down 3% on the year from July to March and is expected to remain stable during the last quarter of the season. Reports suggest that the extraction rate for oats is higher this season, leading to fewer oats being milled. **The amount of oats used in animal feed in 2024/25 is relatively unchanged from March (1 Kt) and 118 Kt higher year on year at 371 Kt.** With a larger crop in 2024, more oats are expected to be fed on farm this season, largely driving the annual increase. Oats have also featured at a stronger rate in compound feed so far this season.

18. **The balance of oat supply and demand is estimated at 237 Kt, down 9Kt from March, but up 34 Kt year on year.** Full season exports are forecast at 50 Kt, up 10 Kt from the previous estimate given the stronger pace to date. However, exports are estimated to be 66 Kt lower than year earlier levels. With a slight uptick in H&I usage and exports, end-season stocks are expected to fall 19 Kt from the previous estimate to 187 Kt. However, end-season stocks remain higher than 2023/24 levels of 125 Kt.

19. Appendix II shows cumulative usage and trade data to end-March. This release and related information can be found at ahdb.org.uk/cereals-oilseeds-markets

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Appendix I

UK CEREAL SUPPLY AND DEMAND ESTIMATES [(a)]

Estimates made in May 2025

July to June crop years **Thousand tonnes**

		WHEAT								BARLEY							
		2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 Mar-25	2024/25 May-25	Absolute change Mar-25	% change on 23/24	2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 Mar-25	2024/25 May-25	Absolute change Mar-25	% change on 23/24
(1)	Opening stocks	1,901	1,413	1,788	1,953	2,987	2,987	-	53%	1,148	1,058	964	1,268	1,218	1,218	-	-4%
(2)	Production	13,878	13,988	15,540	13,980	11,146	11,146	-	-20%	7,495	6,961	7,385	6,963	7,091	7,091	-	2%
(3)	Imports	1,856	1,994	1,360	2,437	2,700	2,900	200	19%	108	89	88	201	175	175	-	-13%
(4)	**Total availability**	**17,634**	**17,394**	**18,688**	**18,369**	**16,833**	**17,033**	**200**	**-7%**	**8,750**	**8,108**	**8,437**	**8,433**	**8,484**	**8,484**	**-**	**1%**
(5)	Human and industrial consumption	7,110	7,156	7,326	7,520	7,135	7,125	-10	-5%	1,856	1,885	1,983	1,910	1,782	1,783	2	-7%
(5a)	(of which home grown)	6,020	6,056	6,407	6,339	5,526	5,518	-8	-13%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6)	Usage as animal feed (b)	6,992	7,242	6,906	7,135	6,435	6,428	-7	-10%	4,364	4,237	3,941	4,186	4,374	4,383	8	5%
(6a)	(of which home grown)	6,368	6,542	6,486	6,385	5,585	5,528	-57	-13%	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
(6b)	(of which compounders)	3,918	4,043	3,771	3,804	3,765	3,661	-103	-4%	1,516	1,553	1,342	1,394	1,441	1,446	5	4%
(6c)	(of which integrated poultry units)	1,147	1,143	1,104	1,225	1,215	1,211	-4	-1%	88	83	74	92	84	87	4	-5%
(7)	Seed (c)	255	280	267	237	237	237	-	-	192	178	183	192	192	192	-	-
(8)	Other	68	70	70	70	56	56	-	-20%	38	35	37	35	35	35	-	-
(9)	**Total domestic consumption**	**14,425**	**14,748**	**14,569**	**14,962**	**13,863**	**13,846**	**-17**	**-7%**	**6,449**	**6,335**	**6,144**	**6,323**	**6,383**	**6,393**	**10**	**1%**
(10)	**Balance (4) - (9)**	**3,209**	**2,646**	**4,119**	**3,407**	**2,970**	**3,187**	**217**	**-6%**	**2,301**	**1,773**	**2,293**	**2,111**	**2,100**	**2,090**	**-10**	**-1%**
(11)	Exports (d)	754	511	1,586	258	250	250	-	-3%	1,150	764	1,123	780	600	650	50	-17%
(12)	Intervention stocks (d)	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks (d)**	**2,116**	**1,788**	**1,953**	**2,987**	**2,720**	**2,937**	**217**	**-2%**	**1,173**	**964**	**1,268**	**1,218**	**1,500**	**1,440**	**-60**	**18%**
(14)	(of which estimated operating stock requirement) (e)	1,510	1,500	1,500	1,500	1,550	1,550	-	-	794	800	800	800	800	800	-	-
(15)	(of which free stock) (g)	606	288	453	1,487	1,170	1,387	217	-7%	379	164	468	418	700	640	-60	53%
(16)	**Surplus available for either export or free stock (10)-(12)-(14)-(18)**	**1,360**	**799**	**2,038**	**1,745**	**1,420**	**1,637**	**217**	**-6%**	**1,528**	**928**	**1,592**	**1,197**	**1,300**	**1,290**	**-10**	**8%**
(18)	**Residual (10)-(11)-(13)**		**347**	**581**	**162**						**45**	**-98**	**113**				

		MAIZE								OATS							
		2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 Mar-25	2024/25 May-25	Absolute change Mar-25	% change on 23/24	2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 Mar-25	2024/25 May-25	Absolute change Mar-25	% change on 23/24
(1)	Opening stocks	228	211	248	145	200	200	-	38%	133	147	157	140	125	125	-	-11%
(2)	Production	-	-	-	-	-	-	-	-	1,013	1,123	1,007	830	986	986	-	19%
(3)	Imports	2,441	2,207	2,123	2,642	2,652	2,825	173	7%	18	17	18	15	13	13	-	-16%
(4)	**Total availability**	**2,669**	**2,417**	**2,371**	**2,787**	**2,853**	**3,025**	**173**	**9%**	**1,164**	**1,287**	**1,182**	**985**	**1,123**	**1,123**	**-**	**14%**
(5)	Human and industrial consumption	878	859	801	922	1,007	1,069	62	16%	516	501	492	501	477	486	9	-3%
(5a)	(of which home grown)	-	-	-	-	-	-	-	-	499	483	474	486	464	473	9	-3%
(6)	Usage as animal feed	1,330	1,172	1,234	1,348	1,476	1,572	96	17%	364	476	350	253	370	371	1	47%
(6a)	(of which home grown)	-	-	-	-	-	-	-	-	364	476	350	253	370	371	1	47%
(7)	Seed	-	-	-	-	-	-	-	-	26	24	23	25	25	25	-	-
(8)	Other (h)	4	4	4	4	4	4	-	-	5	6	5	4	5	5	-	25%
(9)	**Total domestic consumption**	**2,213**	**2,035**	**2,039**	**2,274**	**2,488**	**2,645**	**158**	**16%**	**910**	**1,007**	**870**	**783**	**877**	**886**	**9**	**13%**
(10)	**Balance (4) - (9)**	**456**	**383**	**332**	**513**	**365**	**380**	**15**	**-26%**	**254**	**280**	**312**	**203**	**246**	**237**	**-9**	**17%**
(11)	Exportable surplus	141	134	131	167	160	175	15	5%	114	123	172	116	40	50	10	-57%
(12)	**Commercial end-season stocks**	**205**	**248**	**145**	**200**	**205**	**205**	**-**	**2%**	**135**	**157**	**140**	**125**	**206**	**187**	**-19**	**50%**
(13)	**Residual (10)-(11)-(12)**			**56**	**146**								**-38**				

Links connect to relevant Defra/AHDB data pages

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

* Change not meaningful

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

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

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

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

(e) 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.

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

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		OTHER CEREALS (i)							
		2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 Mar-25	2024/25 May-25	Absolute change Mar-25	% change on 23/24
(1)	Opening stocks	6	5	10	6	12	12	-	108%
(2)	Production	247	297	330	271	226	226	-	-17%
(3)	Imports	5	11	4	5	14	11	-3	139%
(4)	**Total availability**	**258**	**313**	**345**	**282**	**252**	**249**	**-3**	-12%
(5+6)	H&I and animal feed	237	289	300	262	235	233	-2	-11%
(5a+6a)	(of which home grown)	231	279	290	256	230	229	-1	-11%
(7)	Seed	7	10	10	7	7	7	-	-
(8)	Other	-	-	-	-	-	-	-	-
(9)	**Total domestic consumption**	**244**	**299**	**310**	**269**	**242**	**240**	**-2**	-11%
(10)	**Balance (4) - (9)**	**14**	**14**	**35**	**13**	**10**	**9**	**-1**	-28%
(11)	Exportable surplus	7	4	29	0	1	1	-1	153%
(12)	Intervention stocks	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks**	**8**	**10**	**6**	**12**	**9**	**9**	**-1**	-31%

		TOTAL CEREALS							
		2019/20 2023/24 average	2021/22 estimate	2022/23 estimate	2023/24 estimate	2024/25 Mar-25	2023/24 May-25	Absolute change Mar-25	% change on 23/24
(1)	Opening stocks	3,416	2,834	3,167	3,512	4,542	4,542	-	29%
(2)	Production	22,633	22,369	24,262	22,044	19,448	19,448	-	-12%
(3)	Imports	4,426	4,318	3,594	5,300	5,554	5,924	370	12%
(4)	**Total availability**	**30,475**	**29,521**	**31,023**	**30,856**	**29,544**	**29,914**	**370**	**-3%**
(5)	H&I (wheat, barley, maize, oats) (h)	10,360	10,402	10,602	10,853	10,401	10,463	62	-4%
(6)	Animal feed (wheat, barley, maize oats) (h)	13,050	13,126	12,431	12,922	12,656	12,754	98	-1%
(5a +6a)	Other cereals (H&I and animal feed)	237	289	300	262	235	233	-2	-11%
(7)	Seed	480	492	483	461	461	461	-	-
(8)	Other	114	115	116	113	100	100	-	-12%
(9)	**Total domestic consumption**	**24,241**	**24,424**	**23,932**	**24,610**	**23,853**	**24,011**	**158**	**-2%**
(10)	**Balance (4) - (9)**	**6,234**	**5,096**	**7,091**	**6,246**	**5,691**	**5,903**	**212**	**-5%**
(11)	Exports	2,166	1,537	3,041	1,321	1,051	1,126	75	-
(12)	Intervention stocks	-	-	-	-	-	-	-	-
(13)	**Commercial end-season stocks**	**3,637**	**3,167**	**3,512**	**4,542**	**4,640**	**4,778**	**137**	**5%**
(14)	Estimated operating stock requirement (wheat & barley only)	2,304	2,300	2,300	2,300	2,350	2,350	-	0
(15)	Free stock for wheat and barley	985	452	921	1,905	1,870	2,027	157	6%
(16)	**Surplus available for either export or free stock (10)-(12)-(14)-(18)**	**3,930**	**2,404**	**4,253**	**3,563**	**3,341**	**3,553**	**212**	**0%**
(17)	**Residual (10)-(11)-(13)**		**392**	**539**	**383**				

Source: AHDB, Defra

Links connect to relevant Defra/AHDB data pages
Due to rounding, totals may not agree with the sum of individual items
(i) Includes mainly rye, triticale and mixed grain.
* Change not meaningful

Appendix II

CUMULATIVE MONTHLY STATISTICS

Usage of cereals by processors, external trade and stocks

Situation as at end of March 2025 — Thousand tonnes

		2019/20 to 2023/24 average	2019/20 39 weeks	2020/21 39 weeks	2021/22 39 weeks	2022/23 39 weeks	2023/24 39 weeks	2024/25 39 weeks	% Change 2024/25 on 2023/24	Actual Change 2024/25 on 2023/24
WHEAT										
Usage	Flour millers [1]	4,512	4,605	4,202	4,497	4,503	4,751	4,410	-7%	-341
	of which home-grown	3,698	4,020	3,078	3,651	3,846	3,896	3,177	-18%	-720
	of which imported	813	585	1,124	845	658	855	1,233	44%	379
	Brewers, maltsters and distillers	**	**	608	729	807	805	872	8%	67
	Animal Feed Processors [2]	3,424	3,799	3,189	3,501	3,274	3,355	3,250	-3%	-106
	of which feed compounders	2,564	2,915	2,376	2,642	2,456	2,431	2,356	-3%	-75
	of which intergrated poultry units	860	885	813	860	818	924	893	-3%	-31
Imports	From July [3]	1,382	837	1,886	1,525	1,004	1,657	2,401	45%	745
Exports	From July [3]	567	1,001	177	302	1,152	202	131	-35%	-71
BARLEY										
Usage	Brewers, maltsters and distillers	1,391	1,422	1,243	1,383	1,460	1,445	1,326	-8%	-119
	Animal Feed Processors [2]	**	963	1,353	1,171	**	993	1,013	2%	20
	of which feed compounders	1,020	932	1,248	1,101	895	924	946	2%	22
	of which intergrated poultry units	**	31	105	70	**	69	67	-3%	-2
Imports	From July [3]	67	40	47	60	55	131	148	13%	17
Exports	From July [3]	951	1,475	1,145	622	884	629	459	-27%	-170
MAIZE										
Usage	Human and Industrial [4]	**	**	**	**	**	**	**	*	*
	Animal Feed Processors [2]	**	344	476	**	**	**	**	*	*
	of which feed compounders	310	292	431	265	295	267	365	37%	98
	of which intergrated poultry units	**	52	45	**	**	**	**	*	*
Imports	From July [3]	1,867	1,885	2,199	1,588	1,725	1,939	2,365	22%	426
Exports	From July [3]	111	108	114	98	97	137	140	3%	4
OATS										
Usage	Human and Industrial [5]	394	415	404	387	380	385	372	-3%	-13
	Animal Feed Processors [2]	60	49	58	99	59	38	32	-16%	-6
Imports	From July [3]	14	12	19	16	15	9	8	-13%	-1
Exports	From July [3]	88	106	35	54	136	110	36	-67%	-74

Source: AHDB, Defra, HMRC

[1] Includes bioethanol and starch usage
[2] Great Britain only
[3] HMRC
[4] Data no longer available. For quarterly data to end of 2017/18, please access using historic balance sheets.
[5] Oat milled data published quarterly. Data displayed as at end-March (39 weeks).

* Changes not meaningful
**Insufficient sample to produce robust figure

Notes

Due to rounding, totals may not agree with the sum of the individual items.
There are 53 weeks in the statistical year 2024. In order to incorporate the change January 2024 was increased to a 5 week period compared to 4 weeks in 2023.
There are 53 weeks in the statistical year 2020. In order to incorporate the change January 2020 was increased to a 5 week period compared to 4 weeks in 2019.
Figures in Appendix II were updated on 29 May 2025. The data above may differ from the most recent published data.

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