

## Oilseed rape area bounces back in England and Scotland

An increase in the oilseed rape area in England and Scotland and the continued trend for a declining GB wheat area are among the key findings from AHDB's 2018 Planting and Variety Survey.

The area of spring barley in 2018 has also undergone an area increase, with significant area increases revealed in Scotland and the northern regions of England.

The key findings of the survey are:

- GB wheat area is estimated at 1.74Mha, a 2% decrease from 2017
- GB spring barley area is estimated at 768Kha, up 4% from 2017
- GB winter barley area is estimated at 385Kha, 7% lower than 2017
- Area of oilseed rape in England and Scotland is estimated at 608Kha, up 9% from 2017
- Area of oats in England and Scotland is estimated at 156Kha, a 2% increase from 2017

Peter Collier, AHDB Analyst, said: "The oilseed rape area, while showing a significant increase year on year, is still low in comparison to recent history. The increased area for 2018 is arguably a reflection on how poor planting conditions were for harvest 2017. The continued trend for a declining GB wheat area, combined with lower stocks and the current dry conditions could leave the 2018/19 domestic supply tight once more."

## Wheat

At 1.74Mha, the 2018 GB wheat area is estimated 2% lower than in 2017.

The largest wheat area reductions are in the Eastern region and the South East and London, where black-grass remains a key challenge. For harvest 2018, the declining wheat area in the Eastern region has seemingly been replaced by oilseed rape rather than spring barley as in previous years.

With the 2017/18 wheat end season stocks estimated to be the lowest since 2013/14, and the continued declining GB wheat area into 2018, yields will need to be above the five year average for domestic wheat supply to increase in 2018/19. Given the current dry conditions, and the potential impact on yields if continued, this will be unlikely. AHDB will be looking at supply and demand 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 38% of the 2018 GB wheat area, slightly down from 40% in 2017. Regionally, the Eastern area of Group 1 and 2 represents 110kha and 65kha respectively, and the South East and London 103kha and 19kha. These two regions represent just under half of the nabim Group 1 and 2 area.

In 2018 the **nabim** Group 3 varieties account for 8% of the GB wheat area, up from 5% in 2017, a 50Kha rise. Following the introduction of higher-yielding Group 3 varieties, such as KWS Barrel and Basset, which were added to the recommended list in 2016/17, there has been a notable increase in the 2018 Group 3 area.

The **nabim** Group 4 area change is split between Hard and Soft. The Group 4 Hard area for GB as a whole remains unchanged. Meanwhile, the Group 4 Soft area has seen a 9% reduction, mainly driven by a 27% reduction in Scotland, seemingly replaced by the Group 3 wheats.

## Barley

Overall the GB barley area in 2018 remains unchanged year on year. However, with lower yielding spring barley accounting for a greater percentage of the total, yields will need to be above average to maintain production levels. Given the current dry conditions, this will be challenging. Furthermore, given that forage availability is tight, there is a possibility that not all crops will be harvested for grain.

The GB winter barley area has undergone a significant reduction for harvest 2018. At 385Kha, the area reported is down 7% from 2017, a reduction of 31Kha year on year. In Scotland, the reduction in winter barley to 39Kha will be the lowest area this millennium.

At 768Kha, the GB spring barley area is estimated to be 4% higher than in 2017, the fourth year in a row that the spring barley area has expanded. The increase is primarily driven by an area expansion in Scotland, the North West and Yorkshire. This suggests that spring barley was a necessary planting decision in areas unable to plant winter cropping options for 2018, combined with a lower cost of production than winter barley.

Overall, malting barley varieties with full approval from the [Malting Barley Committee](#) for harvest 2018 account for 57% of the total GB barley area. This is up from 2017, when malting barley varieties accounted for 50% of GB area. However, the figures only include varieties with full approval. Due in part to the full approval of Laureate for 2018, the area suitable for maltsters may not have risen by the same extent.

## Oilseed rape

The oilseed rape area in England and Scotland has risen for the first time in seven years to an estimated 608Kha. However, area is still well below the 2015 area and is still 19% (143Kha) lower than the record set in 2012.

The year on year increase in planted area is likely a reflection of the better planting conditions for oilseed rape in autumn 2017, following the previous season's prohibitively dry autumn conditions and cabbage stem flea beetle impact. The significant area increases are in the Eastern and South East English regions, which recorded particularly sharp declines in 2017.

Due to a low Welsh survey response rate for oilseed rape, the AHDB is unable to provide an area for Wales and therefore a GB area. However, across the previous 5 years, Wales has represented less than 1% of the GB oilseed rape area.

Elgar, a variety recommended for the East and West regions in 2018 continues to represent the largest proportion of the oilseed rape area, rising to 14% of the English and Scottish area. At 9%, Campus accounts for the second highest area, followed by DK Extrovert with 8%.

## Oats

At a combined 156Kha, the total oat area across England and Scotland is up 2% from 2017. At 32Kha, the Scottish area represents a 1% decline from 2017, driven by a decline in winter oats, which is not fully compensated by a rise in spring oats. The English area at 124Kha is a 3% increase from 2017, driven predominantly by a 4kha rise in the South West.

The oat area is relatively small in comparison to that of other crops, so estimations should be treated with additional caution.

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

## Notes

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- 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 6832 farms and had a 44% response rate. Growers were asked to submit intended harvest areas and the area harvested last year. Data for this survey was collected during the months of May and June 2018.
- Due to a low response rate the Welsh and North West oilseed rape area and Welsh oats figures are not available for individual publication.
- Percentage changes are based on comparison to the Defra 2017 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 2018 has been apportioned in the same ratio as the winter crops and included in the regional totals for harvest 2017.
- The Defra 2017 June Survey of Agriculture has been used rather than an experimental set of statistics based on Basic Payment Scheme area data. This was due to the Defra June survey covering the entire United Kingdom and over a longer time period.
- 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, due to being based on a limited sample.
- AHDB Cereals & Oilseeds will be publishing its Cereal Quality Survey from the 2018 harvest in the autumn.
- The full AHDB Planting and Variety Survey results are [available to download](#) on the AHDB Survey Results page.

# AHDB Cereals & Oilseeds Planting Survey Results 2018



'000 hectares

	Wheat			Spring Barley			Winter Barley			Total Barley		
	Final 2017 <sup>1)</sup>	Estimate 2018	% change on 2017	Final 2017 <sup>1)</sup>	Estimate 2018	% change on 2017	Final 2017 <sup>1)</sup>	Estimate 2018	% change on 2017	Final 2017 <sup>1)</sup>	Estimate 2018	% change on 2017
North East	68	68	-0	14	14	4	28	28	0	42	43	1
North West	37	32	-13	26	34	30	16	12	-24	42	46	10
Yorks	233	229	-2	57	63	10	69	67	-3	126	130	3
East Mids	325	323	-1	74	72	-2	46	43	-7	120	115	-4
West Mids	160	156	-3	32	33	1	33	32	-3	66	65	-1
Eastern	457	448	-2	104	99	-5	87	78	-10	191	177	-7
South East	214	206	-4	79	83	5	35	34	-3	114	117	3
South West	158	156	-2	96	98	2	46	45	-2	142	143	1
North Scot	19	18	-4	130	135	4	19	18	-8	149	153	3
South Scot	91	88	-3	114	121	6	28	22	-24	142	142	-0
England	1,652	1,617	-2	482	496	3	361	340	-6	842	836	-1
Scotland	109	106	-3	244	256	5	48	39	-18	291	295	1
Wales	21	21	-2	14	16	14	7	6	-20	22	22	3
GB	1,783	1,744	-2	740	768	4	416	385	-7	1,156	1,153	-0

	Oats			Total Cereals			Oilseed Rape			Total Cereals and Oilseed Rape		
	Final 2017 <sup>1)</sup>	Estimate 2018	% change on 2017	Final 2017 <sup>1)</sup>	Estimate 2018	% change on 2017	Final 2017 <sup>1) 2)</sup>	Estimate 2018	% change on 2017	Final 2017 <sup>1) 2)</sup>	Estimate 2018	% change on 2017
North East	10	10	2	120	121	1	28	28	-1	233	233	0
North West <sup>3)</sup>	6	6	15	85	85	0						
Yorks	10	10	2	369	369	-0	73	73	-1	442	442	-0
East Mids	13	13	-5	458	451	-2	136	150	10	594	601	1
West Mids	20	18	-10	246	239	-3	49	54	10	295	293	-1
Eastern	16	17	3	664	642	-3	116	140	21	780	782	0
South East	22	22	3	349	345	-1	70	78	12	419	422	1
South West	24	28	17	324	327	1	51	50	-2	375	377	0
North Scot	10	10	-4	178	181	1	13	13	-1	191	194	1
South Scot	22	22	-0	255	252	-1	21	23	6	276	274	-1
England	121	124	3	2,616	2,577	-1	523	573	10	3,139	3,150	0
Scotland	33	32	-1	433	433	-0	34	35	3	468	468	0
Wales <sup>4)</sup>	5	*	*	49	*	*	4	*	*	53	*	*
GB	159	*	*	3,097	*	*	562	*	*	3,659	*	*

Source: Defra, AHDB

1) Final 2017 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 2017 has been apportioned in the same ratio as the winter crops and included in the regional totals for harvest 2017

3) Due to a low response rate in the North West region for oilseed rape, figures have been combined with North East

4) Due to a low response rate the Welsh oats and oilseed rape 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 national level and are therefore subject to more uncertainty



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# AHDB Cereals & Oilseeds Variety Survey Results 2018



	Nabim Groups by Region %							Planting Survey Wheat Area Estimate	Nabim Groups by Region '000 hectares						
	Group1	Group2	Group3	Group4	Group4 soft	Group4 hard	Other		Group1	Group2	Group3	Group4	Group4 soft	Group4 hard	Other
North East	4%	17%	10%	61%	17%	44%	7%	68	3	11	7	42	12	30	5
North West	14%	*	*	65%	*	*	*	32	4	*	*	21	*	*	*
Yorks	18%	12%	6%	58%	13%	45%	6%	229	41	27	15	132	29	103	14
East Mids	23%	14%	6%	52%	10%	41%	4%	323	75	45	21	168	34	134	14
West Mids	21%	16%	1%	58%	6%	53%	4%	156	33	25	1	91	9	82	6
Eastern	25%	14%	12%	42%	6%	35%	8%	448	110	65	53	186	28	159	34
South East	50%	9%	9%	24%	4%	20%	8%	206	103	19	18	49	8	40	17
South West	32%	12%	2%	48%	5%	43%	5%	156	50	18	4	75	8	67	8
Scotland	2%	7%	26%	47%	42%	5%	18%	106	2	8	27	50	44	6	19
Wales	35%	*	*	48%	*	*	*	21	7	*	*	10	*	*	*
GB	25%	13%	8%	47%	10%	37%	7%	1,744	429	226	146	823	175	648	120

Source: AHDB

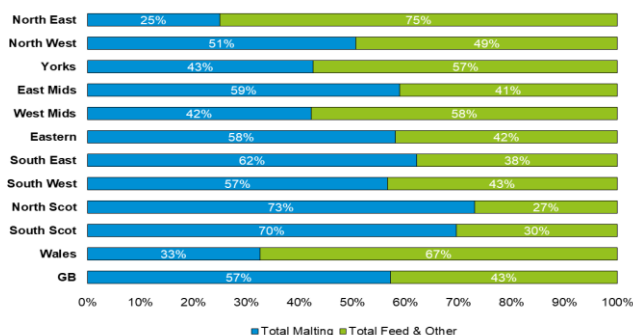
Varieties are categorised as per the nabim Wheat Guide 2018, Other = uncategorised by nabim for harvest 2018

Totals may not agree due to rounding.

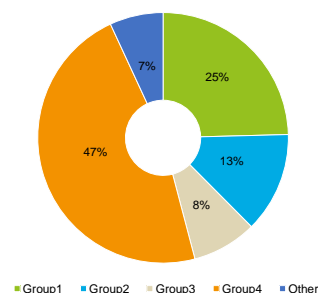
Breakdown at regional levels are based on smaller sample sizes than at the GB level and are therefore subject to more uncertainty

\* Due to a low response rate in North West and Wales regions, some figures are not available for publication

## Regional Barley Variety Types as Percentage of Crop



## 2018 GB Wheat Crop by Nabim Group



Source: AHDB

Mating: Varieties with full approval only on the Institute of Brewing and Distilling Approved List for harvest 2018

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

Planting Survey OSR Area Estimate:	608 Kha
Variety names	
Elgar	14 %
Campus	9 %
DK-Extrovert	8 %
DK-Exalte	6 %
Barbados	6 %
Others*	58 %

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

The OSR variety survey actual area was approximately 65,500Ha which represents approx 11% of the total area estimate

Source: AHDB



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