

Foreign Agricultural Service

Global Market Analysis

International Production Assessment Division

Web: <https://ipad.fas.usda.gov>

June 1, 2021

**Commodity
Intelligence
Report****UK WHEAT PRODUCTION TO REBOUND FROM LAST YEAR;
UK AND ITS AGRICULTURE SPLIT FROM EU**

Effective January 1, 2021, the separation of the United Kingdom (UK) from the European Union (EU), commonly referred to as Brexit, was complete, including separation of trade between both entities. Starting in May 2021 with the release of 2021/22 data, field crop data in the database Production, Supply and Distribution (PSD) reflect EU27 (shown in the PSD system as "European Union") and UK separately. Beginning with the release of 2021/22 (or calendar year 2022) data, historical data for both EU27 and the UK will be provided for 5 years (2016/17 through 2020/21; or calendar years 2017 through 2021).

Wheat: UK wheat production (see Figure 1) in 2021/2022 is expected to rebound significantly from 2020/2021 when a wet autumn in 2019 limited plantings, ultimately lowering production to 9.7 million metric tons (mmt), the lowest level in decades. Wheat area in 2021/2022 is expected to rise 0.4 million hectares (mha) year-over-year in the UK, to 1.8 mha, with production estimated at 14.1 mmt, and yield at 7.94 tons per hectare (t/ha) (see Figure 2).

Barley: Winter barley area is expected to recover from the 2020/2021 crop when 2019 autumn rainfall also reduced sown area. Spring barley, the UK's main barley crop, was the primary beneficiary of the inclement fall 2019 weather. Farmers chose to plant spring barley in 2020 in many of the fields that had been initially intended for winter wheat. Spring barley is one of the few summer crop options available to farmers in the UK, due to its cool climate. Total 2021/22 barley production (see Figure 1) is estimated at 7.1 mha, with a yield of 6.18 t/ha, and area of 1.1 mha. Last year's total barley area of 1.4 mha was the highest since 1991 (see Figure 3).

Rapeseed: Rapeseed production (see Figure 4) in the UK for 2021/2022 is estimated at 1.1 mmt from 0.3 mha, and with a 3.41 t/ha yield (see Figure 5). Rapeseed--typically sown in August and September before wheat--escaped most of the area reduction that was experienced with last season's wheat crop. The EU's ban on neonicotinoids, which are used as a seed coating to prevent insect damage, has led to negative consequences for producers of rapeseed in the UK, which has continued its disuse. The most destructive pest in rapeseed fields is the cabbage stem flea beetle, which has become more prevalent with the elimination of neonicotinoids. Yields for rapeseed have trended down during the past ten years, but with occasional rises for seasons with favorable weather. Area has been declining for nine consecutive years as farmers re-think their cropping mix (see Figure 5). Farmers are often reluctant to plant rapeseed due to the uncertainty of both its

performance and its financial returns. With fewer effective pesticide options allowed, the choice becomes more applications with less effective pesticides, which is more expensive and more time-consuming for farmers. Additionally, farmers have been expanding their crop rotation by adding spring barley in an effort to control black grass, which has become the prevalent weed in the typical wheat-rapeseed crop rotation of the UK.

Oats: The UK also produces oats, a minor grain in the UK. Oats production for 2021/22 is estimated at 1.2 mmt from 0.2 mha, compared to last year's 1.0 mmt and 0.2 mha.

Current Conditions: Weather conditions in the UK during spring 2021, particularly in April, have been notably dry after a wet January and February. England's heavy soils retain moisture well, often mitigating short-term precipitation deficits. Favorable rains occurred during early May, causing previously dry regions to improve significantly by the first half of May (see Figure 6). April 2021 was one of the UK's coldest April months in recent years (see Figure 7), contributing to slowed crop growth and causing minor concerns to early flowering rapeseed. Satellite-derived Percent Average Seasonal Greenness (PASG) for the most recent 30-days ending May 8, 2021, depicts dryness (see Figure 8) across the growing region of England. Additionally, satellite-derived MODIS Normalized Difference Vegetation Index (NDVI) for the season so far (see Figure 9) shows slow and below normal vegetation green-up during April due to the dry and cold conditions. Harvest of grains usually takes place in June and July, so additional rainfall will determine yields.

As mentioned earlier, starting in May 2021 with the release of 2021/22 data, USDA uses the term "European Union" for the 27 member countries of the European Union for field crops. Beginning with the year 2016/17, field crop data (grains, oilseeds, cotton) in the PSD database for the updated "European Union," therefore represents the 27 EU member states (without the UK). UK field crop data can be accessed via the query function for grains and oilseeds beginning with 2016/17. To access historical field crop production data for the UK and other current EU member states, please visit <https://apps.fas.usda.gov/psdonline/app/index.html#/app/downloads> and select the "PSD Data Sets" tab and click on the EU Countries Area & Production file for the CSV data file. UK data exists in this downloadable data file through 2015/16.

For additional information please visit [Global Agricultural Information Network \(GAIN\)](#) reports [UK Grain and Feed Annual 2021](#) and [UK Oilseeds and Products Annual 2021](#). Note that GAIN reports are compiled by USDA overseas staff and are the opinions of the overseas embassies, not necessarily the official view of USDA.

Please also visit [IPAD](#)'s global crop condition sites, [GADAS](#) and [Crop Explorer](#), for region specific, agro-meteorological information based on weather and satellite data.

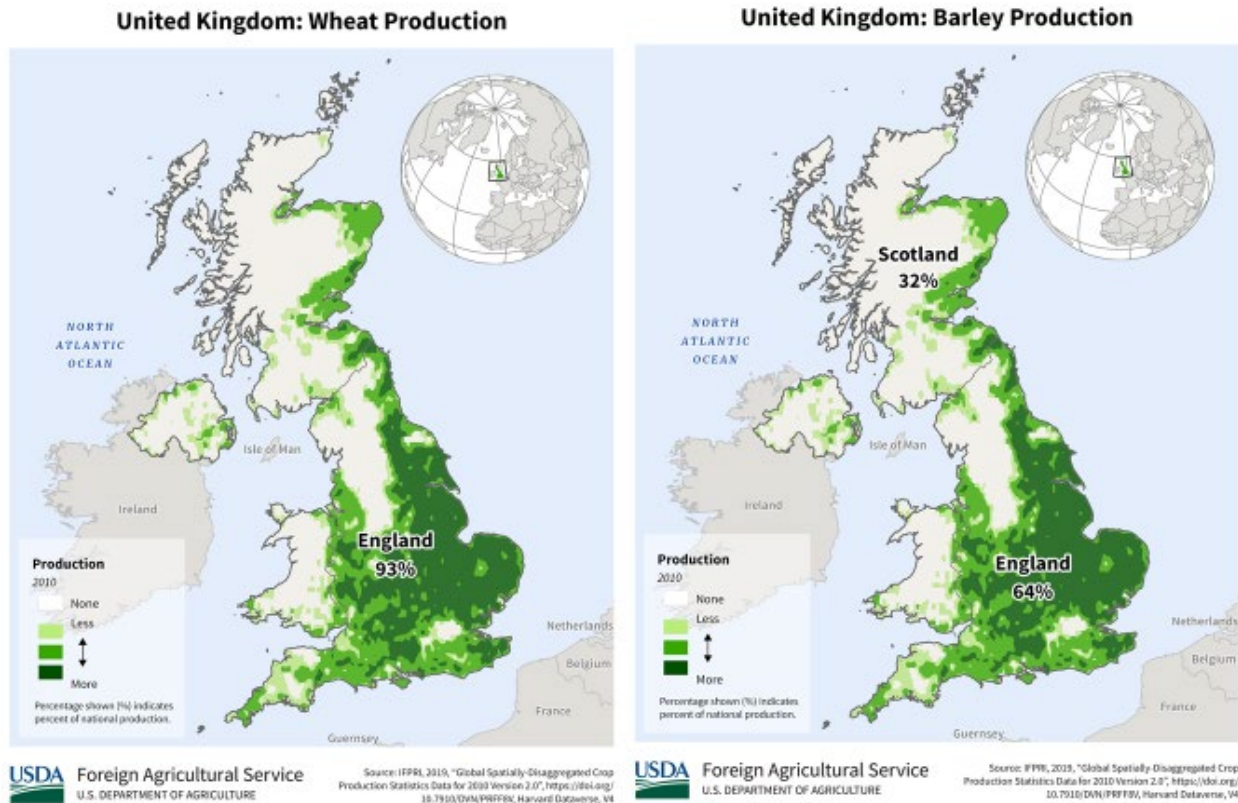


Figure 1. United Kingdom Cereals Production Maps. UK cereal production is concentrated in southern and eastern regions of the country. Scotland contributes significantly to the UK Barley total.

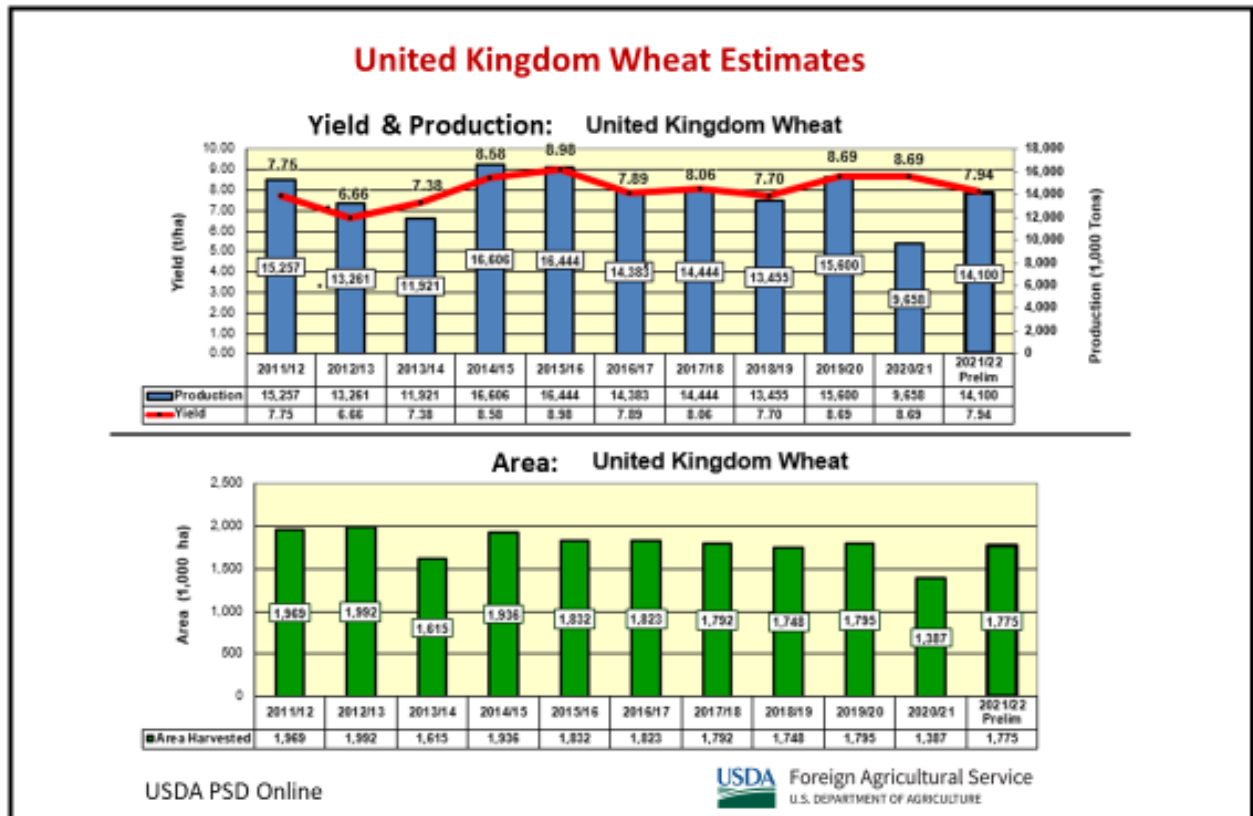


Figure 2. United Kingdom Wheat Estimates. Both UK wheat area and production are expected to rebound in 2021/2022, after abundant autumn 2019 rains prevented sowings which affected the 2020/21 season.

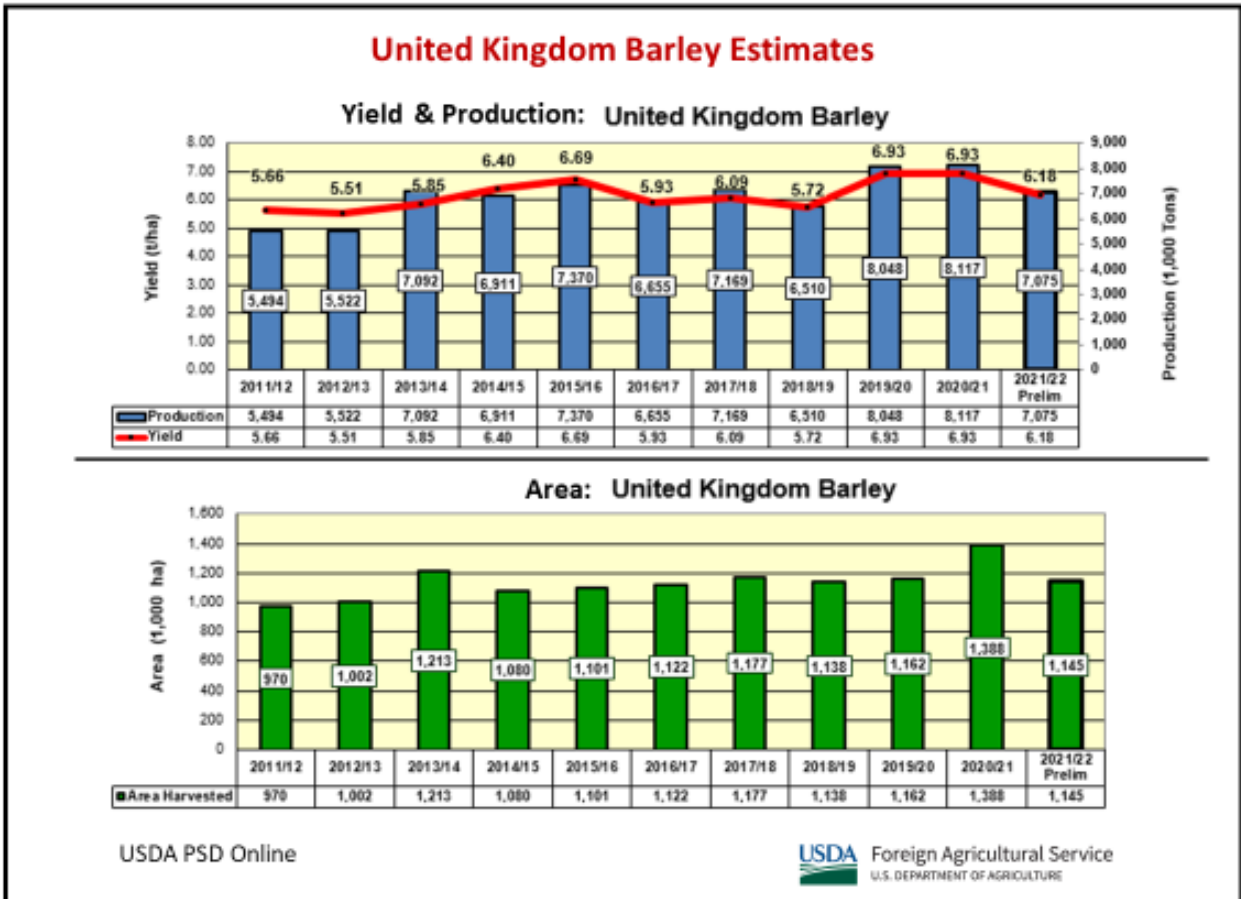


Figure 3. United Kingdom Barley Estimates. Total barley area and production is expected to drop to average levels in 2021/22, after last year’s unprecedented increase in spring barley area, attributed to the disruptive 2019 autumn rains.

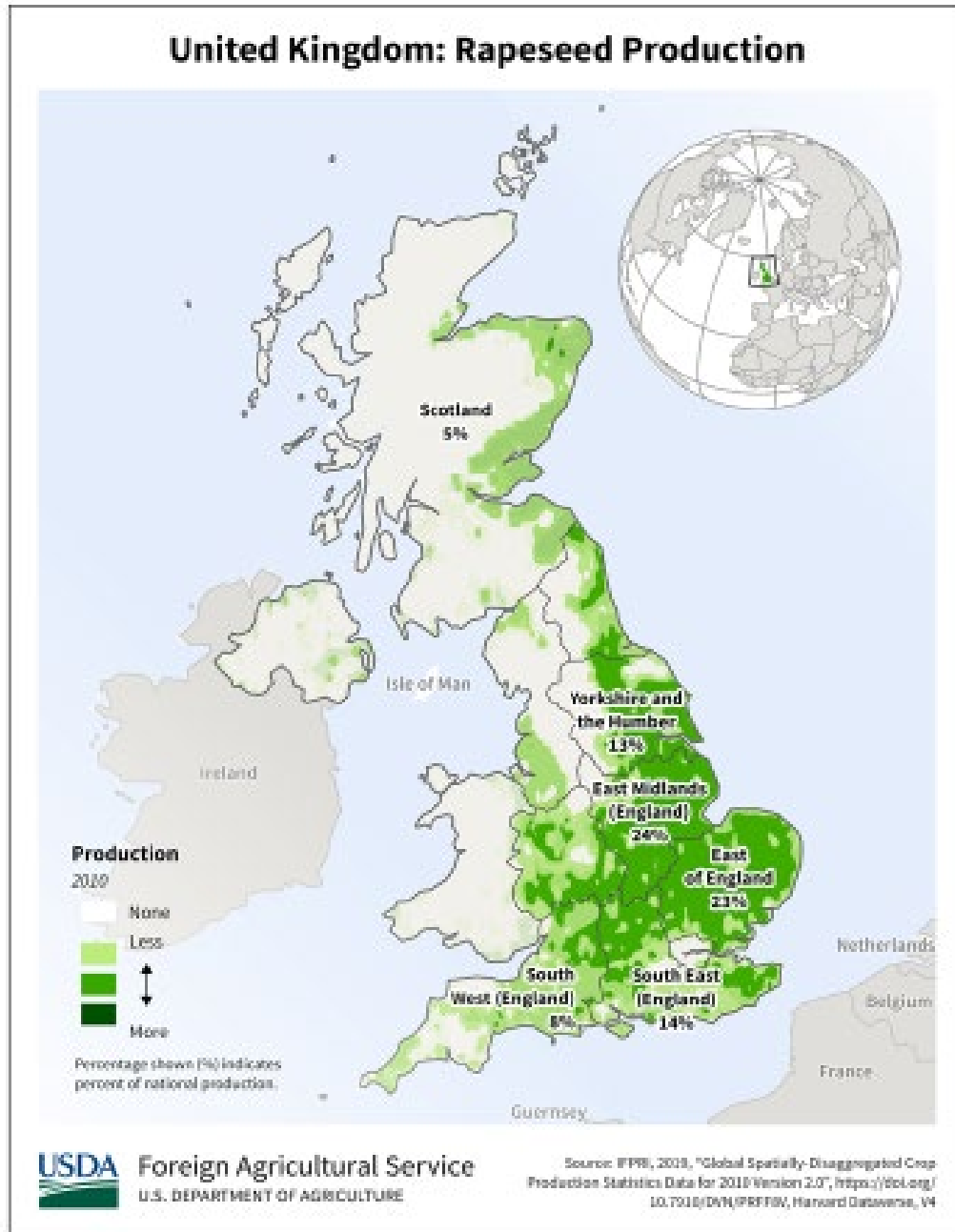


Figure 4. United Kingdom Rapeseed Production Map. UK rapeseed production is concentrated in southeastern England.

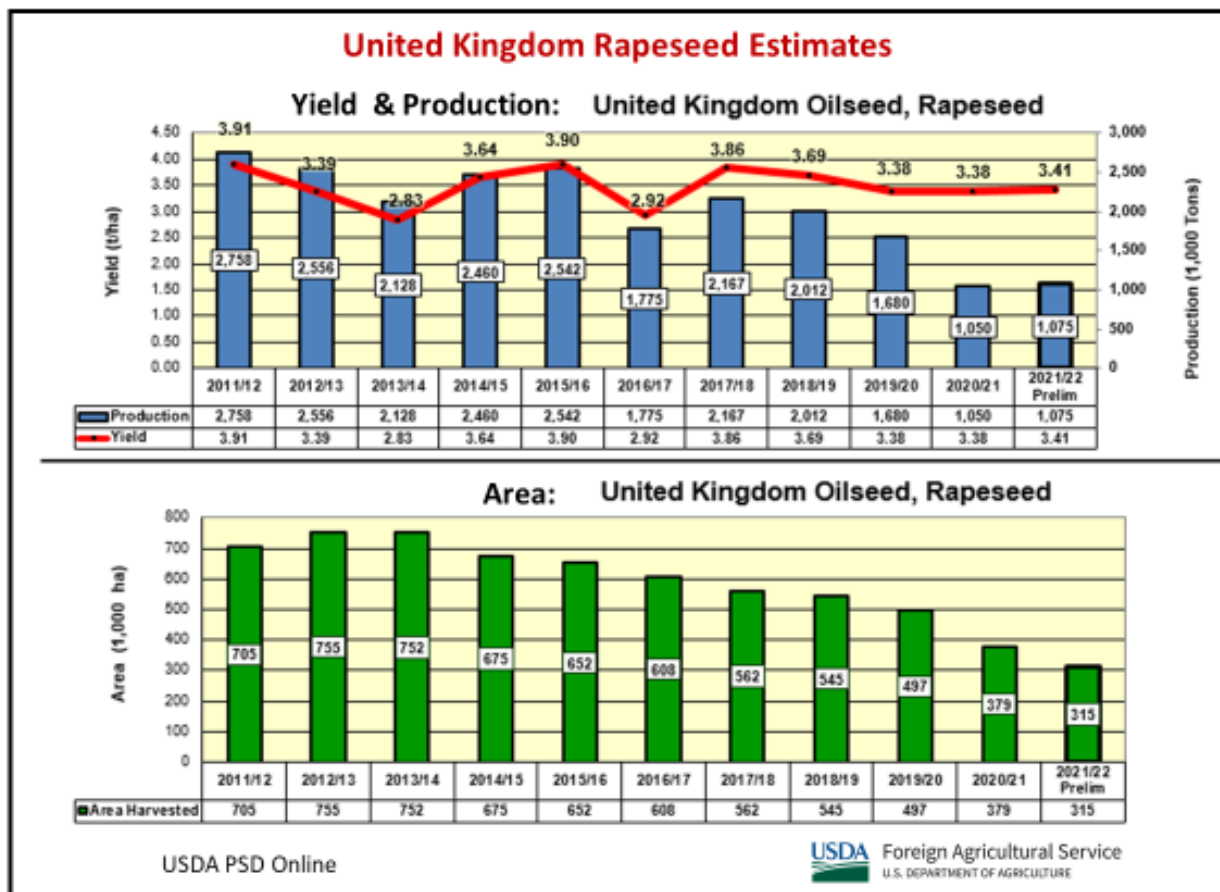


Figure 5. United Kingdom Rapeseed Estimates. UK rapeseed area has continued to drop as farmers are losing interest in the crop. The ban on neonicotinoids has prevented farmers to effectively manage pests and has contributed to a stagnant or falling yield trend.

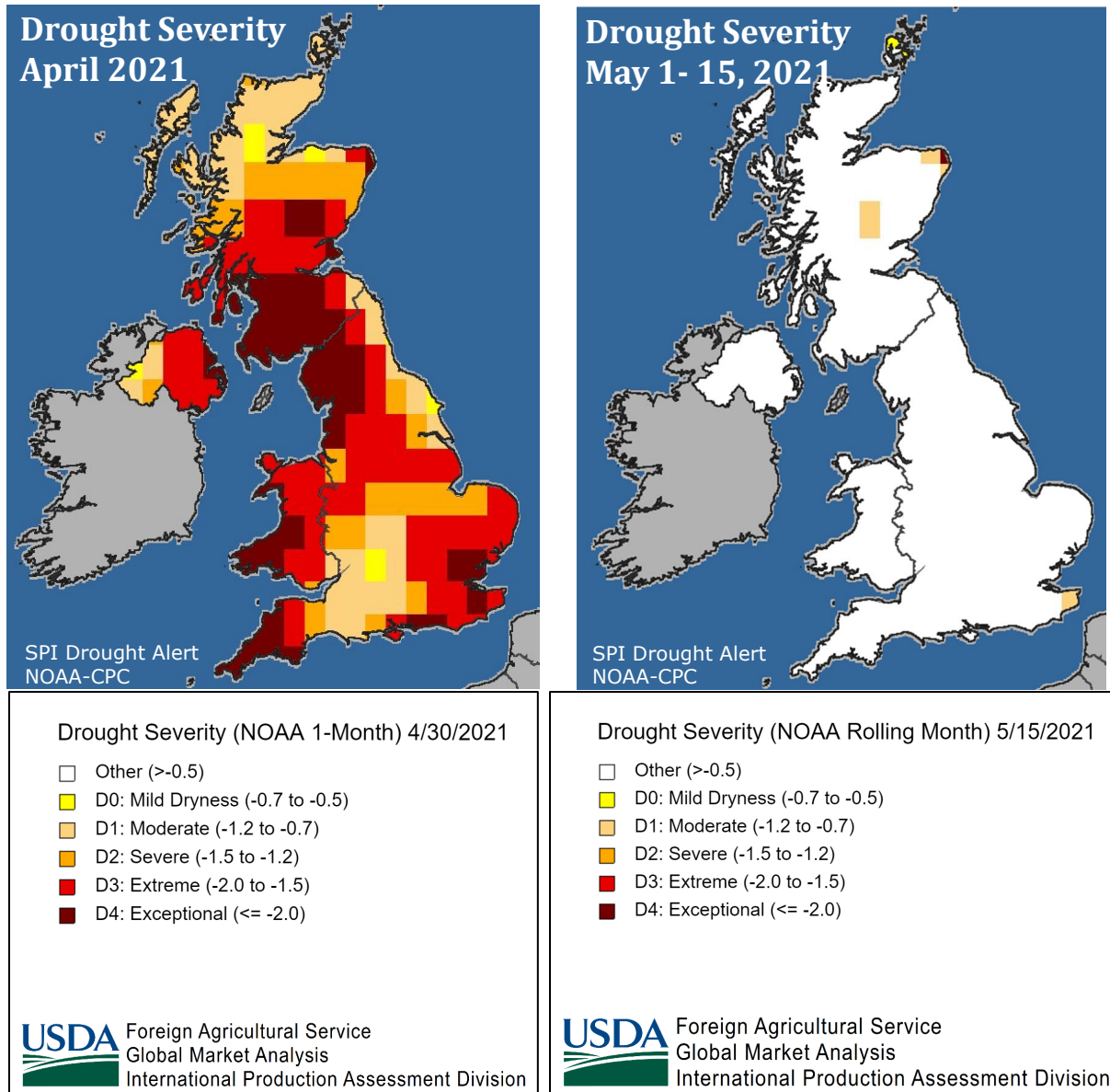


Figure 6. United Kingdom Drought Severity Maps. April drought conditions rapidly improved with heavy rains during the first half of May.

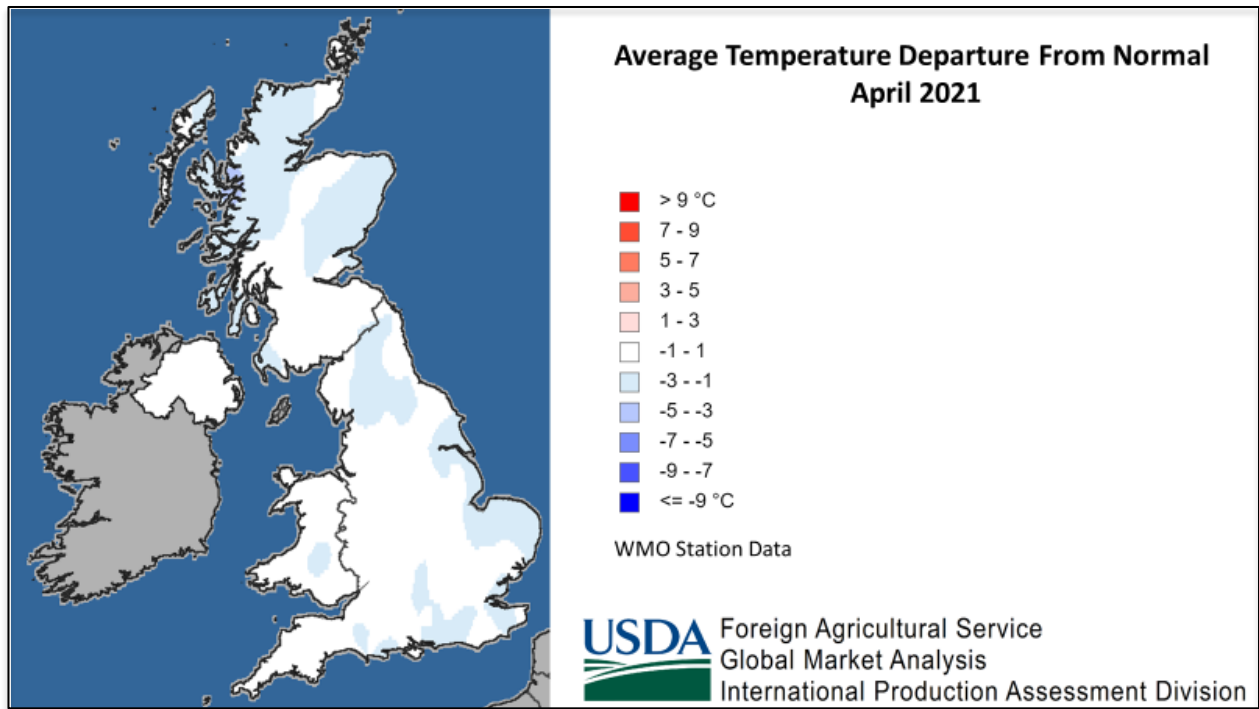


Figure 7. United Kingdom Average Temperature Departure for April 2021. Temperatures in much of the UK were below normal in April, likely slowing crop development.

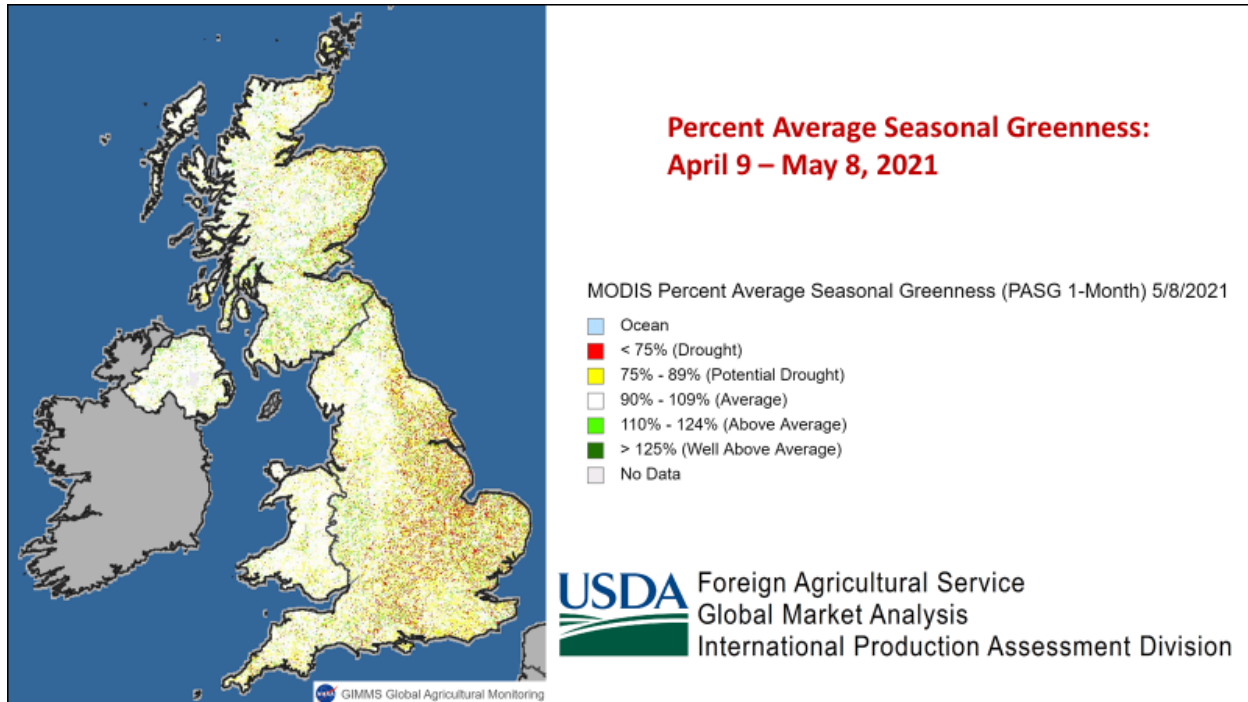


Figure 8. United Kingdom Percent Average Seasonal Greenness. The satellite-derived product from April 9 – May 8, 2021 depicts dry conditions throughout the grain and oilseed region of the United Kingdom.

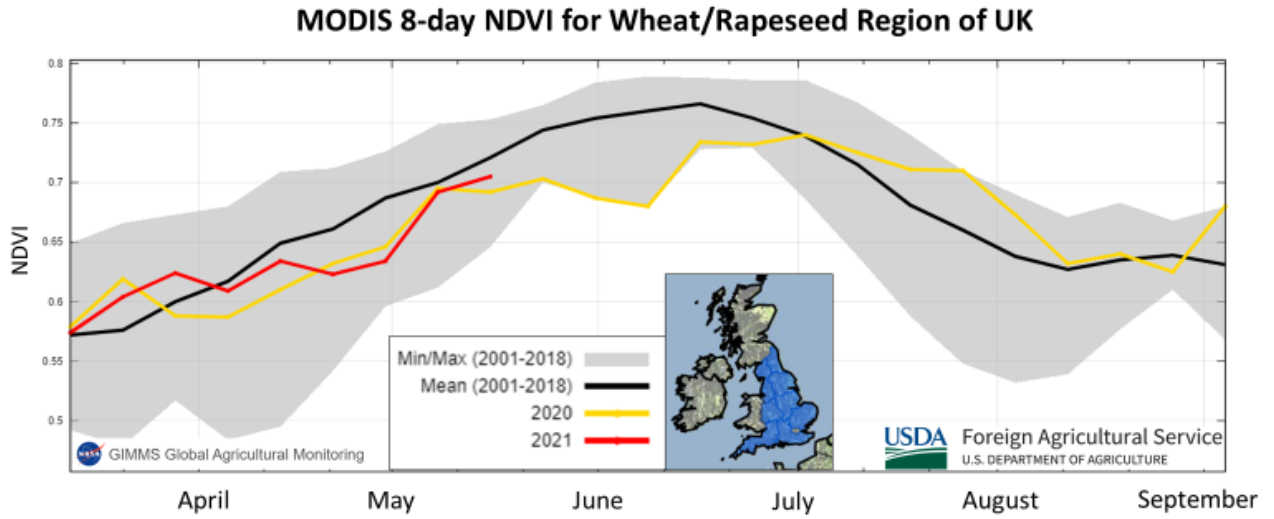


Figure 9. United Kingdom MODIS Seasonal NDVI of Wheat and Rapeseed Region. As measured by satellite, vegetation vigor is depicted as below average in mid-May 2021. This is indicative of a cold and dry April, which likely slowed and hampered early development. The season is early and recent May rains have likely increased the pace of crop development.

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For more information and to access FAS databases and reports please visit:

Current World Agricultural Production Reports
<https://www.fas.usda.gov/data/world-agricultural-production>

Production, Supply and Distribution Database (PSD Online)
<https://apps.fas.usda.gov/psdonline/app/index.html#/app/home>

Global Agricultural Information Network (Agricultural Attaché Reports)
<https://www.fas.usda.gov/databases/global-agricultural-information-network-gain>

Crop Explorer
<https://ipad.fas.usda.gov/cropexplorer/>

Global Agricultural and Disaster Assessment System (GADAS)
<https://geo.fas.usda.gov/GADAS/index.html>