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Report Highlights:

While the UK exited the shadow of Brexit and COVID-19 in marketing year (MY)2021/22 and put the 40-year low wheat crop of MY2020/21 behind it, the developments in Ukraine over the past few months have brought new uncertainties to the market. Already high input prices, especially for fertilizer and fuel, have risen further and some producers are reported to be considering alternate inputs as well as reducing crop applications. Even so, the outlook for the UK grains crop currently remains positive. Spring planting is under way in good conditions, and the winter crops are reported to have developed well and be mainly in good to excellent condition. With forecast demand for feed grains only marginally down year-on-year and demand from the biofuels sector rising once more, low opening stocks means the overall UK grain balance is expected to remain tight.

Disclaimer: Effective January 1, 2021, the United Kingdom (UK) completed its departure from the European Union (EU). This report presents Post's first outlook for grain and feed, and production, supply, and distribution (PSD) forecasts for the marketing year (MY)2022/23, as well as estimates for MY 2020/21 and MY 2021/22. Unless stated otherwise, data in this report is based on the views of Foreign Agricultural Service analysts in the UK and is not official USDA data.

Abbreviations used in this report:

EU	European Union
FAS	Foreign Agricultural Service
Ha	Hectares
MHa	Thousand hectares
MMT	Million Metric Tons
MT	Metric Ton (1000 kg)
MY	Marketing Year. Post and USDA official data both follow the EU local marketing year of July to June except for rice which follows a September to August calendar
CY	Calendar Year
TMT	Thousand Metric Tons
TY	Trade Year. July to June for wheat and October to September for coarse grains
UK	United Kingdom
U.S.	United States

Executive Summary

Total UK grain production (wheat, barley, oats, and mixed grains) in MY 2022/23 is forecast to be 22.85 million metric tons (MMT), nearly 450,000 MT up from MY 2021/22, and over 3.8 MMT above MY 2020/21 and its 40-year low wheat crop.

While wheat production in MY 2021/22 was very much improved year-on-year, at 14 MMT it was below expectations following mixed growing conditions and a rain-disrupted harvest. Despite this, incorporation of wheat in the feed ration increased, mainly at the expense of domestic barley and imported corn. Domestic wheat also replaced some of the previous increased incorporation of imported corn in the biofuel sector.

Fall conditions for winter plantings in MY 2022/23 were their best for a number of years across the UK. The mild and dry weather allowed producers to complete their planting and initial treatments in a timely fashion, meaning good reports of crop establishment by the end of November. Already high fertilizer prices at the time meant growers were reported to be reducing their inputs and looking to alternatives such as biosolids, digestate and organic manures. Winter weather was benign with January and March recording cold nights but long periods of dry weather, and February more unsettled with wet and windy weather at times. In general, winter crops are now reported to be well established, disease pressure is being controlled, and spring planting is now under way in dry conditions meaning good progress. While planting decisions have long been made, and despite commodity price rises, producers are reported to be increasingly concerned about the recent surge in the costs of inputs and fuel due to the developments in Ukraine. This may lead to less management of the crops, with some producers reported to be considering reducing fertilizer and other input use on the current crop and storing product for use on the MY 2023/24 crop. In contrast to the otherwise favorable outlook, this could reduce both the potential yield and the quality of the UK harvest, irrespective of the weather over the coming months.

A contraction of the UK livestock herd in 2022, principally pigs but also cattle, in part driven by high feed costs, means total feed use of grains is forecast down again in MY 2022/23. The record small wheat crop in MY 2020/21 led to increased incorporation of predominantly domestic barley and imported corn in the feed mix that season.

Feed and Residual	2019/20	2020/21	2021/22	2022/23
Wheat	7705	5922	7273	7350
Barley	4013	5267	4175	4100
Oats	405	409	518	500
Corn	1571	1968	1282	1200
Rye	36	37	26	24
Sorghum	23	28	25	25
Mixed Grain	168	151	276	200
Total	**13921**	**13782**	**13575**	**13399**

(1000 MT)

A much-recovered wheat crop in MY 2021/22 significantly reduced the reliance on imported corn, mostly from Ukraine, despite a smaller barley harvest and corresponding decline in feed barley usage. The current crop outlook for MY 2022/23 suggests wheat will once again account for over half of UK feed usage, followed by barley, and the UK will remain an importer of corn, albeit below the already reduced level of MY 2021/22. Given the situation in Ukraine, this may present an opportunity for imports from other origins. Additionally, the United States will benefit from the lifting of a 25 percent retaliatory tariff on corn (and rice) in June 2022.

The bioethanol sector remains the most interesting dynamic in the UK's food, seed and industrial (FSI) sector, buoyed by the UK Government's rollout of E10 fuel from September 2021 which has outweighed the increase in its input costs, specifically grain. Vivergo, a previously closed facility that processes wheat, has undergone a phased reopening in MY 2021/22, while the other of the UK's two facilities, Ensus, is understood to have increased production and continued to switch back to processing mainly domestic feed quality wheat after a price driven switch to imported corn in MY 2020/21. Both operations are expected to have the ability to be fully operational in MY 2022/23 meaning a forecast increase in the use of grain in the bioethanol sector.

While the crop is currently reported to be in good condition and developing well, the expectation that yield will be below full potential, combined with strong demand, means only some recovery from the very tight overall grain balance and low ending stocks in MY 2021/22 is expected in MY 2022/23.

Table 1.

Production, Supply and Distribution - Wheat

Wheat	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul 2020		Jul 2021		Jul 2022	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1387	1387	1790	1790	0	1805
Beginning Stocks (1000 MT)	2438	2438	1416	1416	0	1664
Production (1000 MT)	9658	9658	14000	13988	0	14700
MY Imports (1000 MT)	3221	3222	2300	2250	0	2250
TY Imports (1000 MT)	3221	3222	2300	2250	0	2250
TY Imp. from U.S. (1000 MT)	13	14	0	0	0	0
Total Supply (1000 MT)	15317	15318	17716	17654	0	18614
MY Exports (1000 MT)	446	426	700	700	0	750
TY Exports (1000 MT)	446	426	700	700	0	750
Feed and Residual (1000 MT)	5955	5922	7350	7273	0	7350
FSI Consumption (1000 MT)	7500	7554	7950	8017	0	8578
Total Consumption (1000 MT)	13455	13476	15300	15290	0	15928
Ending Stocks (1000 MT)	1416	1416	1716	1664	0	1936
Total Distribution (1000 MT)	15317	15318	17716	17654	0	18614
Yield (MT/HA)	6.9632	6.9632	7.8212	7.8145	0	8.144

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2022/2023 = July 2022 - June 2023

Production

The total wheat area is forecast to increase marginally in MY 2022/23, by just 15,000 hectares. A mild, dry, and settled fall was good for crop establishment. Most winter wheat was planted by the end of November and was described as in good to excellent condition. The planted area increased in both the Eastern and Central regions at the expense of spring barley. Even before the recent events in Ukraine, fertilizer applications were reported to be reduced due to high prices. In contrast, there was no reported reduction in applications of pre-emergence herbicides, and low levels of blackgrass are reported. Some pest issues have been observed, especially slugs where a winter wheat crop has followed rapeseed, and the mild fall has increased aphid incidence. At the end of March, over 80 percent of the winter wheat crop was still in good to excellent condition and is reported to be showing good yield potential. Most of the wheat crop is winter planted, but preparations for spring plantings commenced in February despite some heavy rain and then made good progress through March. Production is currently forecast to rise to 14.7 MMT but the questions over input costs, especially fertilizer and fuel, mean crop treatment may be reduced, with potential yield and quality reductions. On the latter, for those producers not under contract, the current relatively narrow price premium between milling and feed quality wheat is reported to be acting as a disincentive for some producers to apply all of the crop management tools at their disposal. This could lead to an increased proportion of domestically produced feed quality wheat in the UK in MY 2022/23, other factors such as weather aside.

Consumption

Total FSI use of wheat is forecast to rise by over 600,000 MT in MY 2022/23, driven by an increase in the bioethanol sector. This follows a 450,000 MT rise in MY 2021/22. As part of its ambition to reach net zero carbon dioxide emissions by 2050, Her Majesty's Government's (HMG) commenced the rollout of E10 fuel (gasoline containing up to 10 percent ethanol) in September 2021. This has increased confidence in the UK's ethanol sector. There are two biofuel plants in the UK, Ensus and Vivergo, which are both capable of processing over 1 MMT of grain. Ensus incorporated additional volumes of imported corn in MY 2020/21, following the reduced availability of domestic wheat that year, but has since switched back to using mainly wheat. This is forecast to continue in MY 2022/23. Vivergo is currently undertaking a phased reopening using wheat as its main input and is expected to be fully on-line during the first half of 2022. Total usage of wheat by flour millers in MY 2022/23 is forecast to remain unchanged year-on-year. However, an increased proportion of domestic wheat has been incorporated by the sector in MY 2021/22. The functionality of UK wheat in MY 2021/22 is reported to be proving better than anticipated given the earlier quality concerns. For MY 2022/23, the unknowns regarding the quality of the upcoming CY 2022 wheat harvest may again lead to increased incorporation of imported wheat.

MY 2022/23 feed use of wheat in the animal feed sector is currently forecast marginally up over MY 2021/22, and significantly above the low of MY 2020/21. A backlog of livestock on farm in late 2021, predominantly due to labor issues in abattoirs, has continued into CY 2022 and supported demand for feed wheat. While herd reductions are forecast for MY 2022/23, in part due to increased feed costs, an increased reliance on domestic wheat and barley over imported corn, combined with forecast good availability, is expected to support both compound feed usage of wheat as well as fed-on-farm consumption.

Trade

The UK is typically a net importer of milling wheat, with any surplus feed wheat being exported. Imports of wheat have fallen in MY 2021/22, in part due to the much-improved crop following the 40-year low in MY 2020/21, but also due to logistical challenges and increased freight costs. Indeed, imports started MY 2021/22 at a historically high pace but have slowed as the season has progressed. These challenges are forecast to remain in MY 2022/23 and imports are currently forecast unchanged year-on-year, albeit subject to the ultimate quality of the harvest and availability of sufficient milling quality wheat.

Most UK imports of wheat are sourced from the EU, but UK millers also import high quality wheat from North America to supplement that coming from the EU. Canada has significantly increased its market share versus the United States in recent years, and in the seven months through January 2022 is the single largest origin for UK wheat imports at nearly 300,000 MT. One complicating factor for the incorporation of non-domestic wheat in baked goods are the Rules of Origin (RoO) introduced under the post-Brexit Trade & Cooperation Agreement (TCA) between the UK and the EU. Before Brexit, millers in Great Britain (GB) – England, Wales, and Scotland - could use non-EU wheat to make flour and then export throughout the EU tariff-free. A limit of 15 percent of non-originating materials, be that EU origin or otherwise, now applies if tariffs are to be avoided if onward exported to the EU. Even below this threshold, paperwork and segregation has added additional costs.

Most of the UK's wheat exports are destined for the EU, with occasional shipments to Africa, including destinations such as Algeria and Nigeria, where it competes with mainly French wheat. Exports in MY 2022/23 are currently forecast similar to MY 2021/22, after the low of MY 2020/21, but the uncertainty on international grain markets could lead to traders taking the opportunity to export at the expense of domestic supplies.

Stocks

Stock levels are expected to rise nearly 250,000 MT in MY 2021/22 following their low opening. The expectations of a further increase in the size of the wheat harvest in 2022 means MY 2022/23 ending stocks are currently forecast to recover to around 1.9 MMT, pending developments both in domestic demand and on trade.

Table 2.

Production, Supply and Distribution - Barley

Barley	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul 2020		Jul 2021		Jul 2022	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1388	1388	1150	1150	0	1108
Beginning Stocks (1000 MT)	1357	1357	1040	1058	0	1051
Production (1000 MT)	8117	8117	7000	6961	0	6850
MY Imports (1000 MT)	94	94	100	85	0	100
TY Imports (1000 MT)	116	116	100	85	0	100
TY Imp. from U.S. (1000 MT)	1	1	0	0	0	0
Total Supply (1000 MT)	9568	9568	8140	8104	0	8001
MY Exports (1000 MT)	1303	1303	1000	750	0	750
TY Exports (1000 MT)	1292	1292	1000	750	0	750
Feed and Residual (1000 MT)	5278	5267	4000	4175	0	4100
FSI Consumption (1000 MT)	1947	1940	2092	2128	0	2121
Total Consumption (1000 MT)	7225	7207	6092	6303	0	6221
Ending Stocks (1000 MT)	1040	1058	1048	1051	0	1030
Total Distribution (1000 MT)	9568	9568	8140	8104	0	8001
Yield (MT/HA)	5.848	5.848	6.087	6.053	0	6.1823

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

Production

The winter barley area is forecast to increase 15,000 Ha in MY 2022/23 but be more than offset by a decline in the area planted to spring barley, currently forecast to fall over 55,000 Ha. With these changes, total barley area is forecast at 1.1 MHa, not dissimilar to MY 2019/20 and MY 2021/22 but nearly 300,000 Ha below the intervening year when the area planted to spring barley surged. As with wheat, the winter barley crop was planted in very favorable conditions, good progress was made, and

virtually all of the crop was in the ground by the end of October and established quickly. Again, like wheat, producer applications of fertilizer were tempered by high costs, but pre-emergence herbicides have been applied in good time and with good results. Only in the South East, where drilling was early, are blackgrass issues reported. Aphid incidence is up due to the mild weather, but disease pressure is low. As at the end of March, 80 percent of the winter planted barley was in good to excellent condition. Spring planting commenced promptly in February and an estimated 70 percent of the crop was in the ground by the end of March. Like wheat, although too early to predict yield with certainty, the outlook is positive albeit with the uncertainty of input applications by producers. Total barley production is currently forecast to reach 6.85 MMT, just 100,000 MT down year-on-year.

Consumption

UK barley production is predominately focused on the malting and livestock feed sectors. Like wheat, barley for feed is forecast to be in demand in MY 2022/23 with the limiting factors being production and competing demands from the FSI sector. After a significant post-COVID recovery in demand from the brewing, malting, and distilling (BMD) sector in MY 2021/22, driven by the lifting of all restrictions on the hospitality sector, FSI usage in MY 2022/23 is forecast to remain at around 1.9 MMT. Ongoing post-Brexit labor issues in hospitality, and rising inflation impacts on consumer spending, are both expected to be limiting factors for further growth. With barley production forecast down slightly, feed use of barley is also currently forecast marginally lower year-on-year, but much remains uncertain.

Trade

UK exports of barley are predominately destined for the EU market, with some exports to the Middle East and North Africa. Malt exports fell 10,000 MT to 180,000 MT in MY 2021/22, but the United States remained the UK's second largest export market, after Japan. Total barley exports are currently forecast to fall in MY 2022/23 due to the tightness of the balance.

Stocks

MY 2022/23 opening stocks are expected to be just 1.1 MMT and the continued strong forecast demand for barley, both for animal feed and by the FSI sector, means closing stocks are forecast to remain low. Even if production is higher than currently expected, demand for barley is forecast to be a limiting factor for any recovery in stocks.

Table 3.

Production, Supply and Distribution - Oats

Oats	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul 2020		Jul 2021		Jul 2022	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	210	210	200	200	0	187
Beginning Stocks (1000 MT)	106	106	147	147	0	175
Production (1000 MT)	1031	1031	1100	1123	0	1040
MY Imports (1000 MT)	26	26	20	25	0	25
TY Imports (1000 MT)	22	22	20	25	0	25
TY Imp. from U.S. (1000 MT)	8	8	0	0	0	0
Total Supply (1000 MT)	1163	1163	1267	1295	0	1240
MY Exports (1000 MT)	43	43	115	40	0	50
TY Exports (1000 MT)	31	31	115	40	0	50
Feed and Residual (1000 MT)	408	409	400	518	0	500
FSI Consumption (1000 MT)	565	564	600	562	0	565
Total Consumption (1000 MT)	973	973	1000	1080	0	1065
Ending Stocks (1000 MT)	147	147	152	175	0	125
Total Distribution (1000 MT)	1163	1163	1267	1295	0	1240
Yield (MT/HA)	4.9095	4.9095	5.5	5.615	0	5.5615

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Oats begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

Production

The UK area planted to oats in MY 2022/23 is forecast to fall back to near the level of MY 2019/20 following two successive years of increased plantings. Most of the winter oat crop was planted by the end of November and is reported to be in good to excellent condition. Spring planting is ongoing with 60 percent planted at the end of March. While there are no concerns about the crop at this time, as with wheat and barley, producers are expected to moderate their input use due to the increased costs. Production is currently forecast to reach 1 MMT.

Consumption

The tightening of the UK feed grain market in the latter half of MY 2021/22 means feed use of oats is now expected to rise to over 500,000 MT. MY 2022/23 feed use is currently forecast marginally lower year-on-year but remaining relatively high. FSI usage, mainly for breakfast cereals and oat flour, is flat.

Table 4.

Production, Supply and Distribution - Corn

Corn	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul 2020		Jul 2021		Jul 2022	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	8	8	8	8	0	8
Beginning Stocks (1000 MT)	222	222	211	211	0	180
Production (1000 MT)	25	25	25	25	0	25
MY Imports (1000 MT)	3050	3050	2700	2000	0	1800
TY Imports (1000 MT)	2766	2766	2700	2000	0	1800
TY Imp. from U.S. (1000 MT)	10	11	0	0	0	0
Total Supply (1000 MT)	3297	3297	2936	2236	0	2005
MY Exports (1000 MT)	139	139	75	90	0	50
TY Exports (1000 MT)	124	124	75	90	0	50
Feed and Residual (1000 MT)	1927	1968	1800	1282	0	1200
FSI Consumption (1000 MT)	1020	979	785	684	0	589
Total Consumption (1000 MT)	2947	2947	2585	1966	0	1789
Ending Stocks (1000 MT)	211	211	276	180	0	166
Total Distribution (1000 MT)	3297	3297	2936	2236	0	2005
Yield (MT/HA)	3.125	3.125	3.125	3.125	0	3.125

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Corn begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

The UK imports corn for its breakfast cereal market, and to supplement primarily domestic wheat and barley in the feed ration and in the biofuel sector. In recent years, the UK's major supplier of corn for feed and biofuels has been Ukraine followed by several EU countries, and Argentina for food use. Imports of corn from the United States have been effectively priced out of the UK market by the steel and aluminum dispute with the European Union (EU). In June 2018, the EU imposed a 25 percent retaliatory duty on a list of products from the United States, including corn. While the EU removed the tariff effective January 1, 2022, separate negotiations with the UK continued. An agreement was announced in March and the tariff will be lifted effective June 1, 2022. The tariff has meant importers have expressed a preference for other origins during this period, such as the aforementioned Ukraine.

Prior to the imposition of tariffs, in MY 2017 over 250,000 MT of U.S. corn was imported into the UK. While this was not typical with much lower tonnages reported in most years, it demonstrates the UK trade's willingness to import U.S. corn if the market presents an opportunity. Following the recent developments in Ukraine, and the tightening of global corn supplies, the announced lifting of the tariff has been welcomed by the UK trade and has raised the possibility of increased imports of U.S. corn in MY 2022 and beyond.

With the UK biofuel sector largely returning to processing wheat in MY 2022, any fluctuation in import demand will be closely linked to the requirements of feed compounders, and this to the previously discussed availability of feed wheat and feed barley.

By the end of January 2022, the UK had imported nearly 1.3 MMT of corn with the leading origins being France, Ireland, Ukraine, and Canada. Total MY 2021 imports are now estimated to reach just 2 MMT, with a corresponding decline in feed use. Imports are currently forecast slightly down in MY 2022/23 but, again, much will depend on the domestic feed situation and price competitiveness and availability of imported corn for the feed mix.

Table 5.

Production, Supply and Distribution - Rice

Rice, Milled	2020/2021		2021/2022		2022/2023	
Market Year Begins	Sep 2020		Sep 2021		Sep 2022	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Milled Production (1000 MT)	0	0	0	0	0	0
Rough Production (1000 MT)	0	0	0	0	0	0
Milling Rate (.9999) (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	600	600	650	640	0	665
TY Imports (1000 MT)	600	600	650	640	0	665
TY Imp. from U.S. (1000 MT)	26	26	0	0	0	0
Total Supply (1000 MT)	600	600	650	640	0	665
MY Exports (1000 MT)	39	39	60	40	0	40
TY Exports (1000 MT)	27	27	60	40	0	40
Consumption and Residual (1000 MT)	561	561	590	600	0	625
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	600	600	650	640	0	665
Yield (Rough) (MT/HA)	0	0	0	0	0	0
(1000 HA) ,(1000 MT) ,(MT/HA) MY = Marketing Year, begins with the month listed at the top of each column TY = Trade Year, which for Rice, Milled begins in January for all countries. TY 2022/2023 = January 2023 - December 2023						

UK rice consumption continues to trend upwards year-on-year. Consumer stockpiling of rice during the first COVID-19 lockdown in March 2020 affirmed this product as a staple for many, and consumption patterns have since returned to normal.

MY 2021/22 rice imports are estimated at 640,000 MT. Rice imports through the end of January are up just under 30,000 MT year-on-year but total imports in MY 2020/21 were below trend following increased imports in MY 2019/20. A further slight rise in imports is forecast for MY 2022/23, as consumption demand continues to increase. India and Pakistan remain the top two suppliers to the UK, together accounting for over 40 percent of UK imports of rice. Italy and Spain are the main EU suppliers, together accounting for around 20 percent of UK imports.

Since June 2018, imports of rice from the United States have been affected by the EU's steel and aluminum dispute with the United States. At that time, the European Union (EU) imposed a 25 percent retaliatory duty on imported milled, semi-milled and broken rice from the United States. As mentioned for corn, while the EU removed the tariff effective January 1, 2022, separate negotiations with the UK

continued. An agreement was announced in March and the tariff will be lifted effective June 1, 2022. Trade sources report imports from the United States have remained around 30,000 MT. However, the imposition of the tariff has caused a shift to imports of brown rice for milling in the UK. The lifting of the tariff is expected to see a return to imports of milled rice from the United States. Despite the disruption to the trade, consumer demand for U.S. rice, especially within the ethnic sector, has continued to be met and there remain good opportunities to expand market share, especially in the retail sector.

Table 6.

Production, Supply and Distribution – Mixed Grain

Mixed Grain	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul 2020		Jul 2021		Jul 2022	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	44	48	50	66	0	50
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	149	151	165	276	0	200
MY Imports (1000 MT)	0	0	0	0	0	0
TY Imports (1000 MT)	0	0	0	0	0	0
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	149	151	165	276	0	200
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	149	151	165	276	0	200
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	149	151	165	276	0	200
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	149	151	165	276	0	200
Yield (MT/HA)	3.3864	3.1458	3.3	4.1818	0	4

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Mixed Grain begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

Table 7.

Production, Supply and Distribution - Rye

Rye	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul 2020		Jul 2021		Jul 2022	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5	5	5	5	0	5
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	35	35	35	21	0	20
MY Imports (1000 MT)	3	3	5	10	0	5
TY Imports (1000 MT)	6	6	2	6	0	5
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	38	38	40	31	0	25
MY Exports (1000 MT)	1	1	0	5	0	1
TY Exports (1000 MT)	1	1	0	5	0	1
Feed and Residual (1000 MT)	37	37	40	26	0	24
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	37	37	40	26	0	24
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	38	38	40	31	0	25
Yield (MT/HA)	7	7	7	4.2	0	4

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Rye begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

Table 8.

Production, Supply and Distribution - Sorghum

Sorghum	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jul 2020		Jul 2021		Jul 2022	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	0	0	0	0	0	0
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	0	0	0	0	0	0
MY Imports (1000 MT)	28	28	25	25	0	25
TY Imports (1000 MT)	24	23	25	25	0	25
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	28	28	25	25	0	25
MY Exports (1000 MT)	0	0	0	0	0	0
TY Exports (1000 MT)	0	0	0	0	0	0
Feed and Residual (1000 MT)	28	28	25	25	0	25
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	28	28	25	25	0	25
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	28	28	25	25	0	25
Yield (MT/HA)	0	0	0	0	0	0

(1000 HA) ,(1000 MT) ,(MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Sorghum begins in October for all countries. TY 2022/2023 = October 2022 - September 2023

Policy

With its departure from the EU, the UK introduced its Global Tariff, a simplification of the EU regime. In other areas, it continues to generally follow the EU, but some divergence is expected over time. For example, with its departure from the EU, the UK has departed the Common Agricultural Policy (CAP) and has introduced a Domestic Agricultural Policy in England, with Wales, Scotland, and Northern Ireland developing their own CAP replacements.

The UK and EU agreed the Trade and Cooperation Agreement (TCA) on December 24, 2020, and trade between the two remains tariff free, albeit subject to increased paperwork due to the UK's departure from the EU's customs union and single market. Post-Brexit trade has been disrupted by non-tariff barriers in the form of additional paperwork and delays at EU borders. There has also been a shift in trade from the UK to the EU as the UK no longer has a role as gateway to EU markets. The UK has regained powers to set maximum residue levels (MRLs) for imports and approve chemicals for use in UK crops. The UK will not be pursuing the same MRL review process as the EU and will set up a review mechanism in approximately two years. There will only be a change to existing MRLs and import tolerances where there is evidence of a public health risk.

On March 30, the Department for Environment, Food and Rural Affairs (Defra) announced some policy changes intended to assist farmers with the availability of fertilizers and reduce costs. The changes include a delay to the introduction of restrictions on the use of urea fertilizer by at least one year. Restrictions on urea fertilizer were trailed in a 2021 consultation, the purpose of the restrictions was to reduce ammonia pollution through a ban on urea use. The government has not formally responded to the consultation but has confirmed that after the delay the restrictions will include a requirement for ammonia inhibitors instead of a complete urea ban. Defra has also published revised statutory guidance on how farmers should limit the use of slurry and other farmyard manure at certain times of year. The aim of the guidance is to provide clarity to farmers on how they can use slurry and other manures during autumn and winter to meet agronomic needs. Farmers will be further supported through new slurry storage grants, the grant is intended to help deliver the Farming Rules for Water and reduce dependence on artificial fertilizers by storing more organic nutrients on farm. Alongside these measures, further details of the Sustainable Farming Incentive have also been published. The government interventions on fertilizers reflect Defra's position that the priority must be to pioneer new technologies to manufacture more organic-based fertilizer products, and rediscover techniques such as using nitrogen fixing legumes and clovers as an alternative to fertilizer. This position is a continuation of post-Brexit agricultural policy and there is no indication from Defra that the war in Ukraine will result in a reversal in this policy position, or any other agricultural policies.

Attachments:

No Attachments