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Report Name: Grain Harvest Update

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Report Highlights:

A cold, dry April led into a cool, wet May which was followed by warmer weather in June and July with intermittent heavy showers. This combination of weather accelerated crop development and crop condition is generally described as good to excellent. The winter barley harvest is now under way, albeit a little behind normal, and hopes are for generally improved overall crop yield and quality, especially for wheat after the very poor harvest of 2020.

Disclaimer: This report presents an updated outlook for grain and feed, and Production, Supply and Distribution (PSD) forecasts for the marketing year (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.

Note: Effective January 1, 2021, the United Kingdom (UK) completed its departure from the European Union (EU).

Abbreviations used in this report:

EU	European Union
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
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

UK wheat production is now forecast to reach 15 MMT, up marginally on the previous forecast following a cold and dry April, a cool and wet May, and warmer weather in June and July interrupted by intermittent heavy showers. This is despite a slight downward revision to planted area. If realized, this will be over 5 MMT up on the very small harvest of 2020 but 600,000 MT below MY2019/20, albeit that was on a larger planted area. According to the Agricultural and Horticultural Development Board (AHDB)'s Crop Development tool, two thirds of the winter wheat crop is reported as good to excellent with very little described as poor or very poor. Condition does vary with the crop looking its best in the North East, central England and Wales. Black-grass has once again proved a challenge for UK wheat growers, particularly in earlier sown crops, while Septoria benefitted from the wet weather in May. For spring wheat, AHDB reports 50 percent to be in good to excellent condition, although the slight majority (45 percent) is rated as fair. Like the winter crop, very little is described as poor or very poor but again there are strong regional differences – 100 percent of Scottish crops are reported to be good to excellent while this figure is just 25 percent in the South East due to the heavy June rains.

UK barley production is forecast to be 7.2 MMT, despite a slightly lower than previously forecast planted area. Like winter wheat, just over two thirds of the winter barley crop is described as in good to excellent condition, with the most favorable outlook being for the crop in the North East and central England. Weed, pest, and disease pressure are reported to be generally low. The spring crop, the majority of which was planted in March and April, is reported to have established well, with initially dry conditions giving way to rain and good crop development.

UK oat production is now forecast to reach 1.1 MMT, with nearly 80 percent reported as being in good to excellent condition.

Of most interest for the MY2021/22 grains balance, and as previously reported, will be increased wheat use by Ensus, as it increases production while simultaneously reducing corn usage, and the reopening of the Vivergo plant, likely in early 2022. For MY2020/21, imports of wheat have exceeded previous estimates. Food, Seed & Industrial (FSI) use has correspondingly been increased. This is mainly increased food use although it also incorporates an upward revision to industrial usage of wheat at the expense of corn. Barley exports in MY2020/21 are slightly below the previous estimate, meaning ending stocks should not be quite as tight as previously thought. For corn, MY2020/21 imports are higher than previously estimated, supported by the tight availability of other feed grains.

Wheat	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1795	1795	1387	1387	1775	1750
Beginning Stocks (1000 MT)	1911	1911	2637	2699	1445	1459
Production (1000 MT)	15600	15600	9658	9658	14800	15000
MY Imports (1000 MT)	1739	1739	2800	3200	2000	2000
TY Imports (1000 MT)	1739	1739	2800	3200	2000	2000
TY Imp. from U.S. (1000 MT)	0	27	0	14	0	0
Total Supply (1000 MT)	19250	19250	15095	15557	18245	18459
MY Exports (1000 MT)	1621	1622	400	440	700	850
TY Exports (1000 MT)	1621	1622	400	440	700	850
Feed and Residual (1000 MT)	7842	7438	6100	5963	7700	7550
FSI Consumption (1000 MT)	7150	7491	7150	7695	8200	8035
Total Consumption (1000 MT)	14992	14929	13250	13658	15900	15585
Ending Stocks (1000 MT)	2637	2699	1445	1459	1645	2024
Total Distribution (1000 MT)	19250	19250	15095	15557	18245	18459
Yield (MT/HA)	8.6908	8.6908	6.9632	6.9632	8.338	8.5714

(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 2021/2022 = July 2021 - June 2022

Barley	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	1162	1162	1388	1388	1145	1140
Beginning Stocks (1000 MT)	1091	1091	1290	1357	846	992
Production (1000 MT)	8048	8048	8117	8117	7075	7200
MY Imports (1000 MT)	80	80	60	90	80	60
TY Imports (1000 MT)	86	87	60	90	80	60
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	9219	9219	9467	9564	8001	8252
MY Exports (1000 MT)	1876	1876	1425	1300	1000	1100
TY Exports (1000 MT)	1397	1401	1425	1300	1000	1100
Feed and Residual (1000 MT)	4000	3937	5300	5343	3900	4000
FSI Consumption (1000 MT)	2053	2049	1896	1929	2045	2046
Total Consumption (1000 MT)	6053	5986	7196	7272	5945	6046
Ending Stocks (1000 MT)	1290	1357	846	992	1056	1106
Total Distribution (1000 MT)	9219	9219	9467	9564	8001	8252
Yield (MT/HA)	6.926	6.926	5.848	5.848	6.179	6.3158

(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 2021/2022 = October 2021 - September 2022

Oats	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	182	182	210	210	215	213
Beginning Stocks (1000 MT)	116	116	135	106	127	164
Production (1000 MT)	1076	1076	1031	1031	1200	1100
MY Imports (1000 MT)	27	27	23	25	20	25
TY Imports (1000 MT)	28	29	23	25	20	25
TY Imp. from U.S. (1000 MT)	1219	0	0	0	0	0
Total Supply (1000 MT)	1219	1219	1189	1162	1347	1289
MY Exports (1000 MT)	121	121	50	45	115	125
TY Exports (1000 MT)	112	112	50	45	115	125
Feed and Residual (1000 MT)	375	404	589	383	500	400
FSI Consumption (1000 MT)	588	588	423	570	600	595
Total Consumption (1000 MT)	963	992	1012	953	1100	995
Ending Stocks (1000 MT)	135	106	127	164	132	169
Total Distribution (1000 MT)	1219	1219	1189	1162	1347	1289
Yield (MT/HA)	5.9121	5.9121	4.9095	4.9095	5.5814	5.1643

(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 2021/2022 = October 2021 - September 2022

Corn	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	8	8	8	8	8	8
Beginning Stocks (1000 MT)	313	313	222	222	210	210
Production (1000 MT)	25	25	25	25	25	25
MY Imports (1000 MT)	2430	2430	2700	2850	2200	2400
TY Imports (1000 MT)	2515	2515	2700	2850	2200	2400
TY Imp. from U.S. (1000 MT)	3	3	0	0	0	0
Total Supply (1000 MT)	2768	2768	2947	3097	2435	2635
MY Exports (1000 MT)	136	136	75	145	75	130
TY Exports (1000 MT)	122	140	75	145	75	130
Feed and Residual (1000 MT)	1566	1566	1583	1763	1445	1600
FSI Consumption (1000 MT)	844	844	1079	979	685	685
Total Consumption (1000 MT)	2410	2410	2662	2742	2130	2285
Ending Stocks (1000 MT)	222	222	210	210	230	220
Total Distribution (1000 MT)	2768	2768	2947	3097	2435	2635
Yield (MT/HA)	3.125	3.125	3.125	3.125	3.125	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 2021/2022 = October 2021 - September 2022

Rye	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	5	5	5	5	5	5
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	35	35	35	35	35	35
MY Imports (1000 MT)	1	1	2	2	1	1
TY Imports (1000 MT)	1	1	2	2	1	1
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	36	36	37	37	36	36
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)	36	36	37	37	36	36
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	36	36	37	37	36	36
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	36	36	37	37	36	36
Yield (MT/HA)	7	7	7	7	7	7

(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 2021/2022 = October 2021 - September 2022

Sorghum	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
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)	22	23	30	25	25	25
TY Imports (1000 MT)	25	25	30	25	25	25
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	22	23	30	25	25	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)	22	23	30	25	25	25
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	22	23	30	25	25	25
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	22	23	30	25	25	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 2021/2022 = October 2021 - September 2022

Mixed Grain	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jul 2019		Jul 2020		Jul 2021	
United Kingdom	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	51	51	44	44	50	50
Beginning Stocks (1000 MT)	0	0	0	0	0	0
Production (1000 MT)	168	168	149	149	165	165
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)	168	168	149	149	165	165
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)	168	168	149	149	165	165
FSI Consumption (1000 MT)	0	0	0	0	0	0
Total Consumption (1000 MT)	168	168	149	149	165	165
Ending Stocks (1000 MT)	0	0	0	0	0	0
Total Distribution (1000 MT)	168	168	149	149	165	165
Yield (MT/HA)	3.2941	3.2941	3.3864	3.3864	3.3	3.3

(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 2021/2022 = October 2021 - September 2022

Attachments:

No Attachments.