



## Cereals usage by Millers, Brewers, Distillers and Maltsters UK - February 2015

This statistical release contains information on the use of cereal grain, flour production and stocks of cereal by these cereal processors on a monthly and crop year basis (July to June) and includes use of wheat for starch and bioethanol production. The Oatmeal Millers data is now collected and reported on a quarterly basis.

The results for the usage of wheat, barley and brewers and maltsters are released monthly and will next be updated at 9:30am on 07 May 2015.

The Oatmeal millers survey will be updated quarterly, the next update will be at 09:30 on 07th May 2015.

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### Key Points for Wheat & Barley in February 2015 compared with February 2014:

#### **Wheat Usage:**

- The total amount of wheat milled was 511 thousand tonnes, up 6%, mainly due to increased usage by UK bioethanol plants which are working at a higher rate than last year.
- The total amount of home grown wheat milled was 425 thousand tonnes, up 5%.
- The total amount of imported wheat milled was 86 thousand tonnes, up 8%.
- Brewers, maltsters and distillers total wheat usage was 64 thousand tonnes, down 3%.

#### **Barley Usage:**

- Brewers, maltsters and distillers total barley usage was 141 thousand tonnes, down 11%.

### Key Points for Oats usage in October to December 2014 compared with October to December 2013 :

- The total amount of oats milled was 122 thousand tonnes, down 5%.

### Data, Notes and Revisions

Flour millers: Revisions have been made to the flour milling survey data back to November 2014, this is due to actual data replacing estimate:

**General:** This statistical notice includes final 2013 data for those smaller mills which are only surveyed annually (please refer to the methodology). This statistical notice includes revisions to previous months data.

The latest version of this notice and historic datasets are available at:

<https://www.gov.uk/government/publications/cereal-usage>

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**WHEAT USAGE BY THE FLOUR MILLING INDUSTRY**  
(including production of starch and bioethanol)

**UK - February 2015**

**Table 1 : Wheat milled**

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2014	2015	% change	2013/14	2014/15	% change
<i>4 weeks to 22 February 2014</i>	<i>4 weeks to 21 February 2015</i>	<i>34 weeks to 22 February 2014</i>		<i>34 weeks to 21 February 2015</i>		
<b>WHEAT MILLED</b>						
<b>Total</b>	<b>482.5</b>	<b>510.9</b>	<b>+5.9</b>	<b>4,232.5</b>	<b>4,624.4</b>	<b>+9.3</b>
Imported	79.1	85.5	+8.1	1,068.6	858.2	-19.7
Home Grown	403.3	425.4	+5.5	3,163.9	3,766.2	+19.0
<i>of which: % home grown</i>	83.6%	83.3%	-0.4	74.8%	81.4%	+8.9
<b>Closing Stocks</b>						
Home Grown	175.7	184.7	+5.1	175.7	184.7	+5.1
Imported	106.4	106.5	+0.2	106.4	106.5	+0.2

The crop year begins in July each year.

**Table 2 : Flour production**

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2014	2015	% change	2013/14	2014/15	% change
<i>4 weeks to 22 February 2014</i>	<i>4 weeks to 21 February 2015</i>	<i>34 weeks to 22 February 2014</i>		<i>34 weeks to 21 February 2015</i>		
<b>FLOUR PRODUCTION (INCLUDING STARCH MANUFACTURE AND BIOETHANOL PRODUCTION)</b>						
<b>Total</b>	<b>382.1</b>	<b>405.5</b>	<b>+6.1</b>	<b>3,303.5</b>	<b>3,554.2</b>	<b>+7.6</b>
Bread Flour	217.8	214.3	-1.6	1,903.5	1,855.8	-2.5
<i>of which: White</i>	187.5	187.4	-0.1	1,653.6	1,613.5	-2.4
Brown	4.8	3.6	-25.1	40.8	38.2	-6.4
Wholemeal	25.4	23.3	-8.2	209.1	204.1	-2.4
Biscuit-Making Flour	44.8	37.3	-16.8	373.5	313.2	-16.1
Cake Flour	10.3	9.5	-7.7	82.3	82.2	-0.1
Household Flour	8.7	9.3	+7.2	80.1	65.8	-17.8
Self-raising Flour	n/a	n/a	n/a	n/a	n/a	n/a
Food Ingredients	14.4	22.6	+56.5	122.2	181.3	+48.4
Other (inc. for starch and bioethanol production) *	86.1	112.6	+30.7	741.9	1,055.8	+42.3
<b>Closing Stocks</b>						
All Flour	60.3	57.5	-4.7	60.3	57.5	-4.7

\* For data confidentiality reasons it is not possible to give the breakdown of the individual items in this category.

The crop year begins in July each year.

## WHEAT USAGE BY THE BREWING, DISTILLING AND MALTING INDUSTRY

UK - February 2015

**Table 3 : Wheat usage**

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2014 <i>4 weeks to</i> <i>22 February 2014</i>	2015 <i>4 weeks to</i> <i>21 February 2015</i>	%	2013/14 <i>34 weeks to</i> <i>22 February 2014</i>	2014/15 <i>34 weeks to</i> <i>21 February 2015</i>	%
		change			change	
<b>WHEAT USAGE</b>	<b>66.1</b>	<b>64.0</b>	<b>-3.2</b>	<b>557.3</b>	<b>538.2</b>	<b>-3.4</b>
<i>of which:</i>						
Used for malting	1.2	2.2	+80.1	20.4	20.5	+0.3
Used as straight grain for brewing/distilling	64.8	61.7	-4.8	536.8	517.7	-3.6
Closing Stocks	9.5	10.0	+5.0	9.5	10.0	+5.0

\* For data confidentiality reasons it is not possible to give the breakdown of the individual items in this category. The crop year begins in July each year.

## TOTAL WHEAT USAGE UK - February 2015

**Table 4 : Total wheat usage**

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2014 <i>4 weeks to</i> <i>22 February 2014</i>	2015 <i>4 weeks to</i> <i>21 February 2015</i>	%	2013/14 <i>34 weeks to</i> <i>22 February 2014</i>	2014/15 <i>34 weeks to</i> <i>21 February 2015</i>	%
		change			change	
<b>TOTAL WHEAT USAGE</b>	<b>548.5</b>	<b>574.9</b>	<b>+4.8</b>	<b>4789.8</b>	<b>5162.6</b>	<b>+7.8</b>
<i>of which:</i>						
By millers	482.5	510.9	+5.9	4232.5	4624.4	+9.3
By brewers, maltsters and distillers	66.1	64.0	-3.2	557.3	538.2	-3.4
<b>TOTAL WHEAT CLOSING STOCKS</b>	<b>291.6</b>	<b>301.2</b>	<b>+3.3</b>	<b>291.6</b>	<b>301.2</b>	<b>+3.3</b>
<i>of which:</i>						
Held by millers	282.0	291.2	+3.3	282.0	291.2	+3.3
Held by brewers, maltsters and distillers	9.5	10.0	+5.0	9.5	10.0	+5.0

The crop year begins in July each year.

## BARLEY USAGE BY THE BREWING, DISTILLING AND MALTING INDUSTRY

UK - February 2015

**Table 5 : Total barley usage**

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2014 <i>4 weeks to</i> <i>22 February 2014</i>	2015 <i>4 weeks to</i> <i>21 February 2015</i>	%	2013/14 <i>34 weeks to</i> <i>22 February 2014</i>	2014/15 <i>34 weeks to</i> <i>21 February 2015</i>	%
		change			change	
<b>TOTAL BARLEY USAGE</b>	<b>159.7</b>	<b>141.4</b>	<b>-11.5</b>	<b>1245.8</b>	<b>1266.1</b>	<b>+1.6</b>
<i>of which:</i>						
Used for malting	154.5	136.1	-11.9	1197.4	1220.2	+1.9
Used as straight grain for brewing/distilling	5.2	5.3	+2.1	48.4	46.0	-5.0
Sales of barley and barley screenings	3.6	5.5	+52.9	42.2	35.6	-15.8
Closing Stocks	869.8	884.1	+1.6	869.8	884.1	+1.6

The crop year begins in July each year.

## OATS USAGE BY THE OATMILLING INDUSTRY

UK Oct - Dec 2014

**Table 6 : Oats milled**

	Thousand Tonnes					
	Quarterly period			Crop-year to date		
	2013 <i>13 weeks to</i> <i>28 December 2013</i>	2014 <i>13 weeks to</i> <i>27 December 2014</i>	%	2013/14 <i>26 weeks to</i> <i>28 December 2013</i>	2014/15 <i>26 weeks to</i> <i>27 December 2014</i>	%
		change			change	
<b>OATS</b>						
Total Milled	129.5	122.4	-5.5	249.8	240.7	-3.6
Gross Production	75.3	73.8	-2.0	147.6	144.6	-2.0
<i>of which</i>						
Oat Flakes & Rolled Oats	52.5	51.9	-1.1	102.0	100.1	-1.9
Oat Flour & Other Cuts (including Groats)	22.8	21.9	-4.1	45.5	44.5	-2.3
Closing Stocks	22.6	26.2	+15.6	22.6	26.2	+15.6

**Please note:**

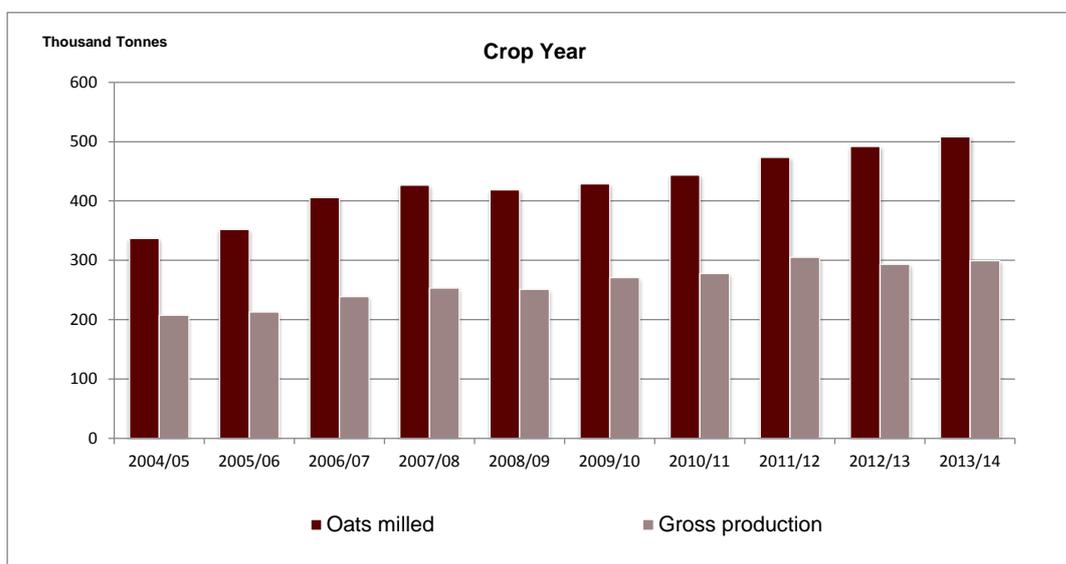
Oats figures for total milled and closing stocks incorporate DEFRA estimates with the survey data and are subject to future revisions.

**Notes**

The crop year begins in July each year.

The difference between oats milled and gross production is accounted for by losses in the production process and by-products.

**Chart 1: Oats usage by Crop Year**

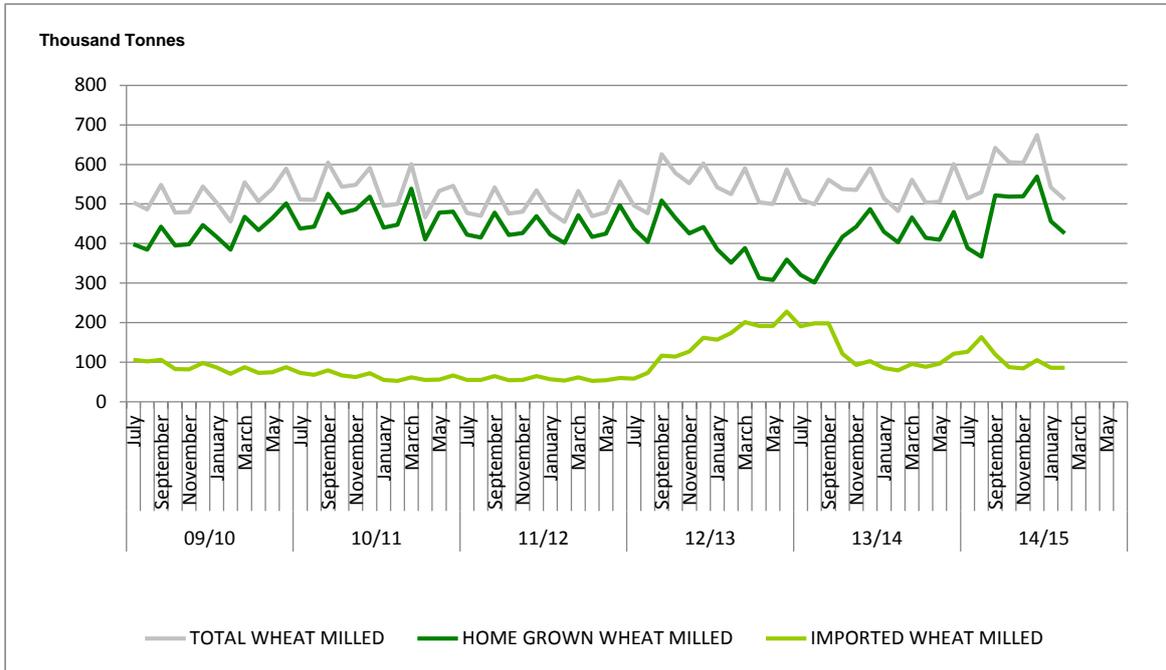


2013/14 saw the quantity of oats milled exceed 500kt for the first time. There has been steady growth in the market, with the claimed health benefits oats increasing demand for breakfast foods and cereal bars.

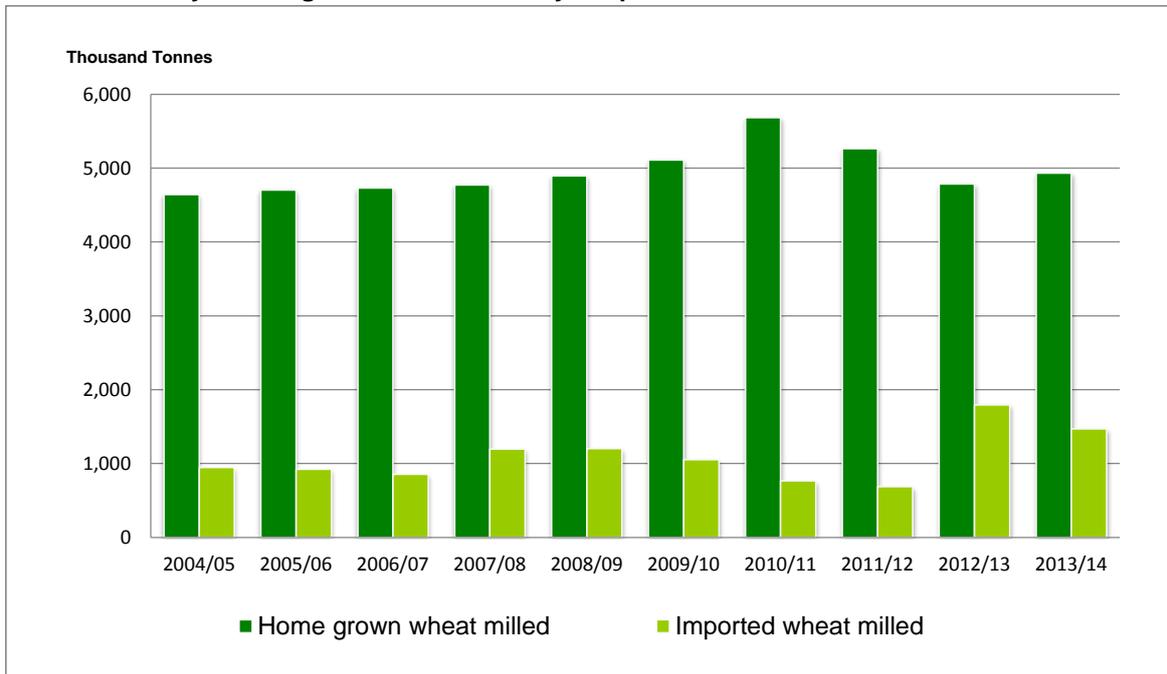
## WHEAT USAGE BY THE FLOUR MILLING INDUSTRY (including production of starch and bioethanol)

UK - February 2015

**Chart 2: Quantity and Origin of Wheat Milled by Month and Crop Year**



**Chart 3: Quantity and Origin of Wheat Milled by Crop Year**

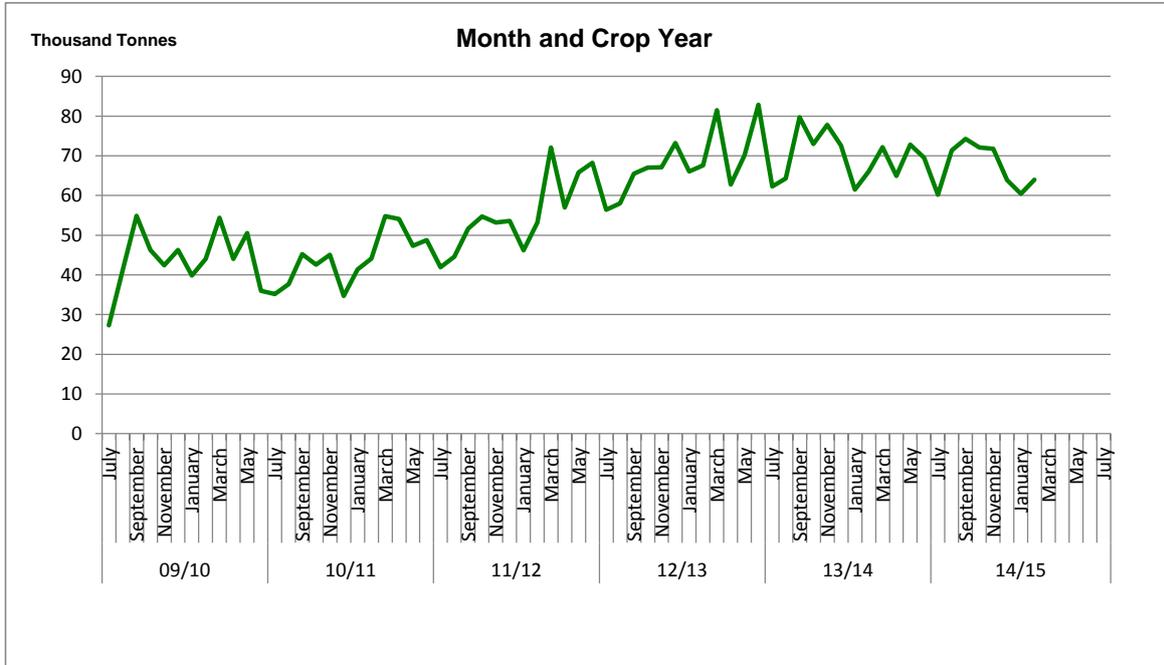


The 2013 UK wheat harvest was of good quality but small at 11.9Mt, this coupled with the legacy of the poor quality 2012 harvest meant millers using greater than average quantities of imported wheat for the second successive year. Since 2010 the development of the UK bioethanol industry has provided another market for UK wheat. 2013/14 has seen a wider range of grains used for processing.

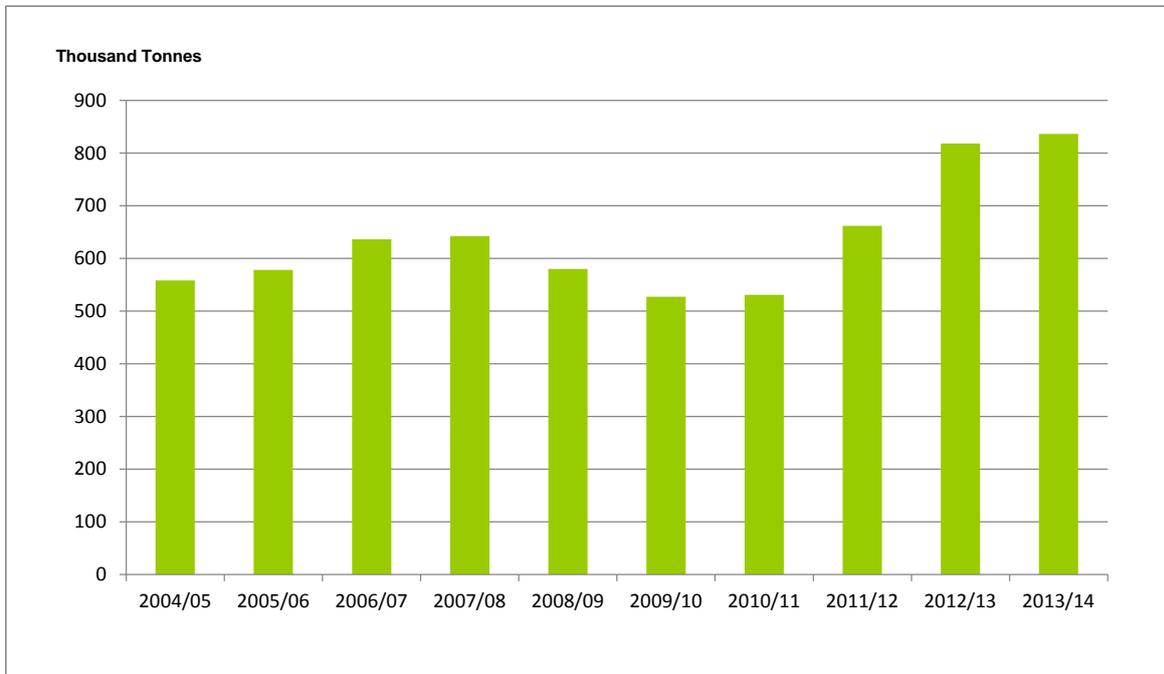
# WHEAT USAGE BY THE BREWING, DISTILLING AND MALTING INDUSTRY

UK - February 2015

**Chart 4: Monthly usage of wheat by the Brewing, Distilling and Malting Industry** □



**Chart 5: Wheat used by the Brewing, Distilling and Malting Industry by Crop Year**



Since 2009/10 the quantity of wheat used by the brewing, malting and distilling sector has increased with rapid growth observed in 2011/12 and 2012/13.

# BARLEY USAGE BY THE BREWING, DISTILLING AND MALTING INDUSTRY

UK - February 2015

Chart 6: Monthly usage of barley used by the Brewing, Distilling and Malting Industry

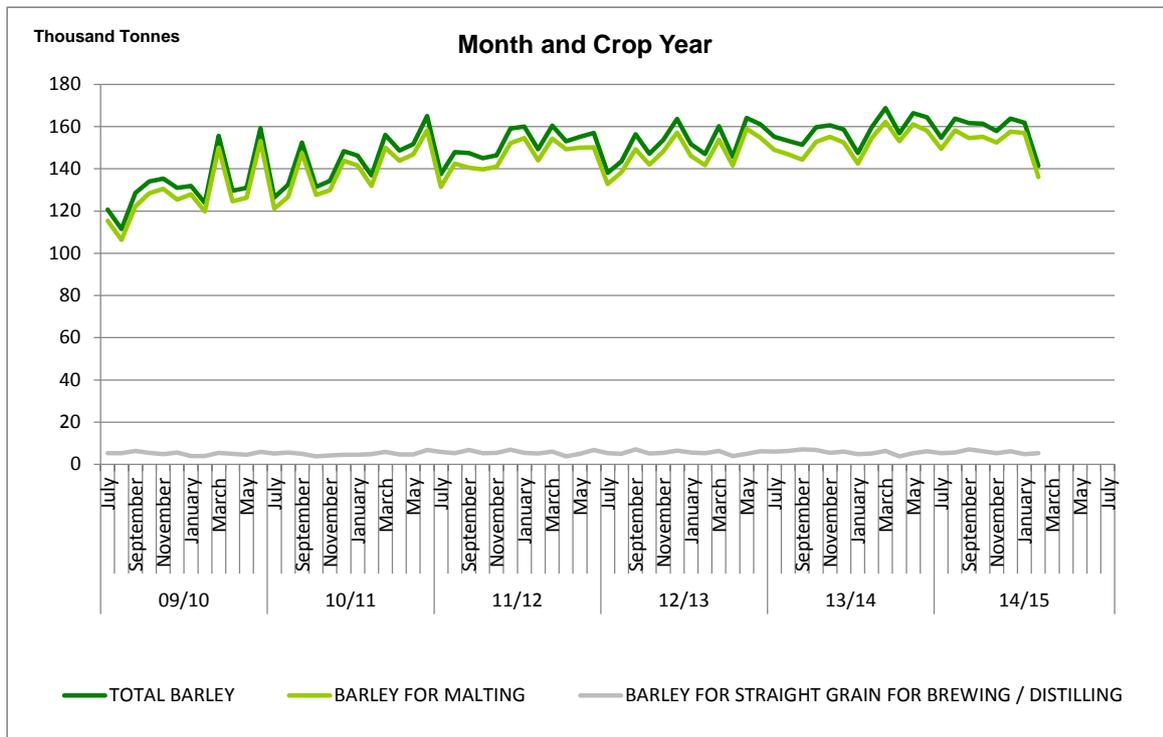
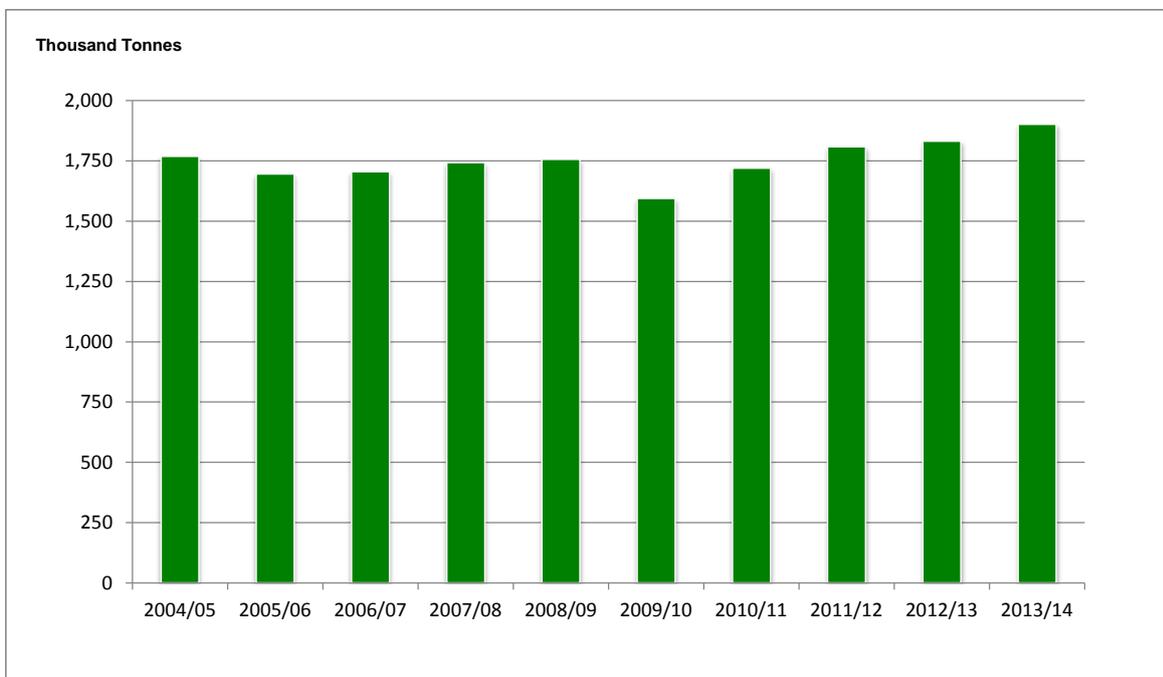


Chart 7: Barley used by the Brewing, Distilling and Malting Industry by Crop Year



Since 2009/10 the quantity of barley used by the brewing, distilling and malting industry has grown year on year. Demand has been driven by the strong distilling sector.

# CEREALS USAGE SURVEYS METHODOLOGIES

## ***Methodologies, Notes and Revisions Policy***

### **User Statement**

The information in this notice is used by the UK government and the EU as evidence for assessing market conditions and evaluating agricultural policy including regular market management activities eg import tariffs. A key use is for the construction of the UK forecast cereals balance sheet which is published on the Home Grown Cereal Authority website at the link provided below, This is updated regularly during the year and includes more detailed contextual commentary.

<http://www.hgca.com/content.output/99/99/Markets/Markets/Supply%20and%20Demand.msp>

Other users include the food, feed and farming industry, academia and the general public. Contact details are available on the front page of this notice, for you to send feedback or ask questions about the information provided.

### **Feedback**

We welcome feedback on the data from all users including how and why the data are used. This helps us to understand the value of the statistics to external users. Please see our contact details at the bottom of the first page of this notice.

### **Statistical Release History**

This combined statistical release shows usage and stocks statistics on a monthly basis for wheat, barley and maize and quarterly data for oats. Historical data can be viewed in the online dataset, along with the most recently published statistical release through the following link:

<https://www.gov.uk/government/publications/cereal-usage>

### **Publications you may also be interested in:**

Cereal Stocks: <https://www.gov.uk/government/publications/cereal-stocks>

Animal Feed Production: <https://www.gov.uk/government/publications/animal-feed-production>

Agriculture in the UK: <https://www.gov.uk/government/collections/agriculture-in-the-united-kingdom>

### **Survey Methodologies**

These compulsory surveys, the Wheat Milled and Flour Production, the Cereal Usage by the Brewers, Maltsters and Distillers and the Oatmeal Millers collect data under the Statistics of Trade Act 1947. The data reported in this statistical release are from survey returns of all of the major users of wheat, barley and oats in the UK.

Companies for the Wheat Milled and Flour Production and the Cereal Usage by the Brewers, Maltsters and Distillers are contacted monthly or annually and their usage, stock and sales statistics are recorded. Most companies are sampled monthly, but smaller companies are sampled annually. Estimates for the smaller companies that are not part of the monthly survey are made and included in the published figures. This reduces the chance of a large change in the crop-year to date totals when the actual annual returns are incorporated into the data. For both the Brewers, Maltsters and Distillers and the Wheat Milled and Flour Production Surveys the smaller companies account for less than 5% of the total production.

Companies for the Oatmeal Millers survey are contacted quarterly and data are published quarterly. All known companies are sampled quarterly.

Totals for the current crop year to date are shown (July to June) as well as for the most recent month/quarter.

### **Accuracy and Reliability of the Results**

The accuracy of the survey results is very high because a census is carried out of all companies and the typical response rate is 100% per year. However in a particular month it is possible that estimates for a small number of individual companies may need to be used which will be subsequently revised when actual data are received. Occasionally data is not published when it fails strict disclosure and dominance checks. This ensures that statistics cannot be traced back to a particular company. For the Wheat Milled and Flour Production Survey, since October 1999, self raising flour has only been used by a minority of companies so is no longer displayed. For the Cereals Usage by the Brewers, Maltsters and Distillers, maize has only been used by a small number of companies and therefore has not been published. The data for each individual return are subject to a variety of validation checks such as comparison against previous months/quarters, cross checks on stocks and totals and extraction rates and data trends which identify any inconsistencies in the data. These would then be verified with the relevant survey respondent and any incorrect figures would be amended prior to publication.

### **Revisions Policy**

Figures in this notice are provisional and subject to revision. We will provide information about any revisions we make to previously published information in this statistics notice, and the associated datasets. Revisions could occur for various reasons, including:

- a. if we have not received survey data from respondents we make an estimate based on their previous returns applying any particular trend in the data, as appropriate. These estimates will be replaced with actual survey data when it is received.
- b. when survey respondents occasionally supply amended figures for previous periods.
- c. revising previous estimated data for smaller companies with actual survey data on an annual basis.