



Cereals usage by Millers, Brewers, Distillers and Maltsters UK - July 2014

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 09 October 2014.

The Oatmillers survey will be updated quarterly, the next update will be at 09:30 on 06th November 2014.

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Key Points for Wheat & Barley in July 2014 compared with July 2013:

Wheat Usage:

- The total amount of wheat milled was 514 thousand tonnes, up 1%.
- The total amount of home grown wheat milled was 387 thousand tonnes, up 21%.
- The total amount of imported wheat milled was 127 thousand tonnes, down 34%.
- July 2014 is the first months data of the 2014/15 crop year and has seen the proportion of imported wheat increase 4% from June 2014.
- Brewers, maltsters and distillers total wheat usage was 60 thousand tonnes, down 4%.

Barley Usage:

- Brewers, maltsters and distillers total barley usage was 155 thousand tonnes, down 0%.

Key Points for Oats usage in April to June 2014 compared with April to June 2013 :

- The total amount of oats milled was 124 thousand tonnes, down 3%.

Data, Notes and Revisions

Flour: Please note there has been an element of estimation this month. This will be revised next month.

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 - July 2014

Table 1 : Wheat milled

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2013	2014	% change	2013/14	2014/15	% change
<i>4 weeks to 27 July 2013</i>	<i>4 weeks to 26 July 2014</i>	<i>4 weeks to 27 July 2013</i>		<i>4 weeks to 26 July 2014</i>		
WHEAT MILLED						
Total	511.3	514.2	+0.6	511.3	514.2	+0.6
Imported	190.9	126.9	-33.5	190.9	126.9	-33.5
Home Grown	320.4	387.4	+20.9	320.4	387.4	+20.9
<i>of which: % home grown</i>	62.7%	75.3%	+20.2	62.7%	75.3%	+20.2
Closing Stocks						
Home Grown	160.7	174.0	+8.3	160.7	174.0	+8.3
Imported	144.5	107.1	-25.9	144.5	107.1	-25.9

The crop year begins in July each year.

Table 2 : Flour production

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2013	2014	% change	2013/14	2014/15	% change
<i>4 weeks to 27 July 2013</i>	<i>4 weeks to 26 July 2014</i>	<i>4 weeks to 27 July 2013</i>		<i>4 weeks to 26 July 2014</i>		
FLOUR PRODUCTION (INCLUDING STARCH MANUFACTURE AND BIOETHANOL PRODUCTION)						
Total	402.8	402.3	-0.1	402.8	402.3	-0.1
Bread Flour	230.8	221.8	-3.9	230.8	221.8	-3.9
<i>of which: White</i>	201.6	193.2	-4.2	201.6	193.2	-4.2
Brown	5.8	4.4	-23.3	5.8	4.4	-23.3
Wholemeal	23.4	24.2	+3.1	23.4	24.2	+3.1
Biscuit-Making Flour	42.6	38.1	-10.7	42.6	38.1	-10.7
Cake Flour	9.3	9.5	+2.4	9.3	9.5	+2.4
Household Flour	8.7	7.3	-15.8	8.7	7.3	-15.8
Self-raising Flour	n/a	n/a	n/a	n/a	n/a	n/a
Food Ingredients	14.5	21.0	+45.0	14.5	21.0	+45.0
Other (inc. for starch and bioethanol production) *	96.9	104.6	+8.0	96.9	104.6	+8.0
Closing Stocks						
All Flour	50.9	60.3	+18.5	50.9	60.3	+18.5

* 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 - July 2014

Table 3 : Wheat usage

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2013	2014	%	2013/14	2014/15	%
	<i>4 weeks to</i>	<i>4 weeks to</i>	%	<i>4 weeks to</i>	<i>4 weeks to</i>	%
	<i>27 July 2013</i>	<i>26 July 2014</i>	change	<i>27 July 2013</i>	<i>26 July 2014</i>	change
WHEAT USAGE	62.3	60.2	-3.5	62.3	60.2	-3.5
<i>of which:</i>						
Used for malting	3.0	2.6	-15	3.0	2.6	-15
Used as straight grain for brewing/distilling	59.3	57.6	-3	59.3	57.6	-3
Closing Stocks	7.4	12.3	+65.4	7.4	12.3	+65.4

* 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 - July 2014

Table 4 : Total wheat usage

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2013	2014	%	2013/14	2014/15	%
	<i>4 weeks to</i>	<i>4 weeks to</i>	%	<i>4 weeks to</i>	<i>4 weeks to</i>	%
	<i>27 July 2013</i>	<i>26 July 2014</i>	change	<i>27 July 2013</i>	<i>26 July 2014</i>	change
TOTAL WHEAT USAGE	573.6	574.4	+0.1	573.6	574.4	+0.1
<i>of which:</i>						
By millers	511.3	514.2	+0.6	511.3	514.2	+0.6
By brewers, maltsters and distillers	62.3	60.2	-3.5	62.3	60.2	-3.5
TOTAL WHEAT CLOSING STOCKS	312.6	293.3	-6.2	312.6	293.3	-6.2
<i>of which:</i>						
Held by millers	305.2	281.0	-7.9	305.2	281.0	-7.9
Held by brewers, maltsters and distillers	7.4	12.3	+65.4	7.4	12.3	+65.4

The crop year begins in July each year.

BARLEY USAGE BY THE BREWING, DISTILLING AND MALTING INDUSTRY

UK - July 2014

Table 5 : Total barley usage

	Thousand Tonnes					
	One-month period			Crop-year to date		
	2013	2014	%	2013/14	2014/15	%
	<i>4 weeks to</i>	<i>4 weeks to</i>	%	<i>4 weeks to</i>	<i>4 weeks to</i>	%
	<i>27 July 2013</i>	<i>26 July 2014</i>	change	<i>27 July 2013</i>	<i>26 July 2014</i>	change
TOTAL BARLEY USAGE	155.2	154.7	-0.3	155.2	154.7	-0.3
<i>of which:</i>						
Used for malting	149.0	149.4	+0.3	149.0	149.4	+0.3
Used as straight grain for brewing/distilling	6.1	5.3	-13.9	6.1	5.3	-13.9
Sales of barley and barley screenings	4.1	3.8	-8.2	4.1	3.8	-8.2
Closing Stocks	452.5	601.2	+32.8	452.5	601.2	+32.8

The crop year begins in July each year. There have been revisions made to historic annual data from 2008 to 2011.

OATS USAGE BY THE OATMILLING INDUSTRY

UK Apr - Jun 2014

Table 6 : Oats milled

	Thousand Tonnes					
	Quarterly period			Crop-year to date		
	2013 <i>13 weeks to 29 June 2013</i>	2014 <i>13 weeks to 28 June 2014</i>	%	2012/13 <i>52 weeks to 29 June 2013</i>	2013/14 <i>52 weeks to 28 June 2014</i>	%
		change			change	
OATS						
Total Milled	128.2	124.3	-3.0	492.0	508.4	+3.3
Gross Production	74.5	73.3	-1.6	293.4	299.7	+2.1
<i>of which:</i>						
Oat Flakes & Rolled Oats	51.2	51.8	+1.1	201.0	207.8	+3.4
Oat Flour & Other Cuts (including Groats)	23.3	21.6	-7.6	92.4	91.9	-0.6
Closing Stocks	16.5	16.5	-0.2	16.5	16.5	-0.2

Please note:

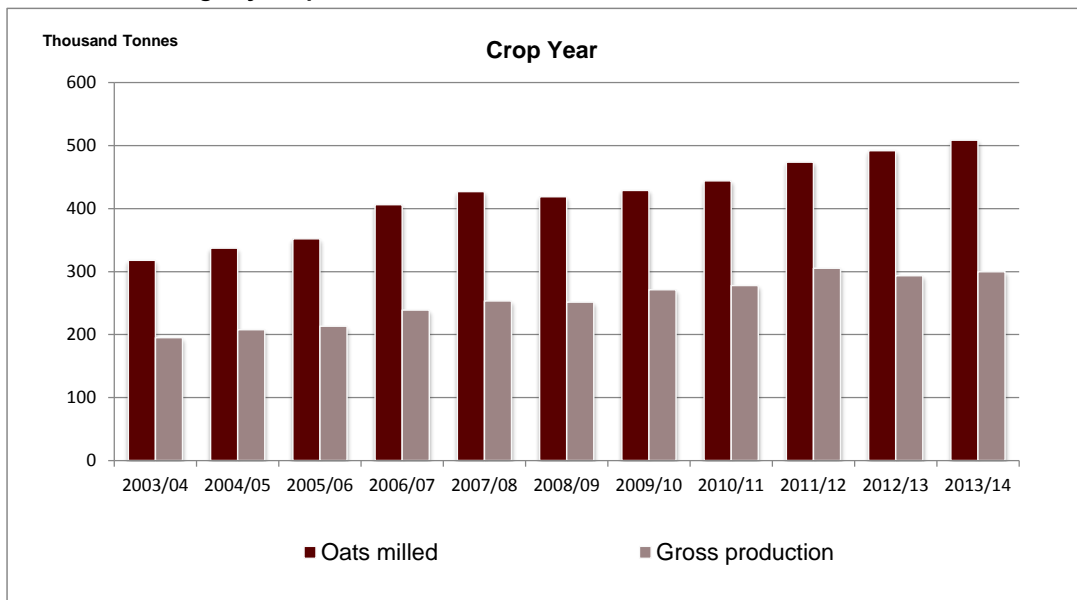
Oats figures for total milled and closing stocks incorporate DEFRA estimates with the survey data and are subject to future revisions.

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 - July 2014

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

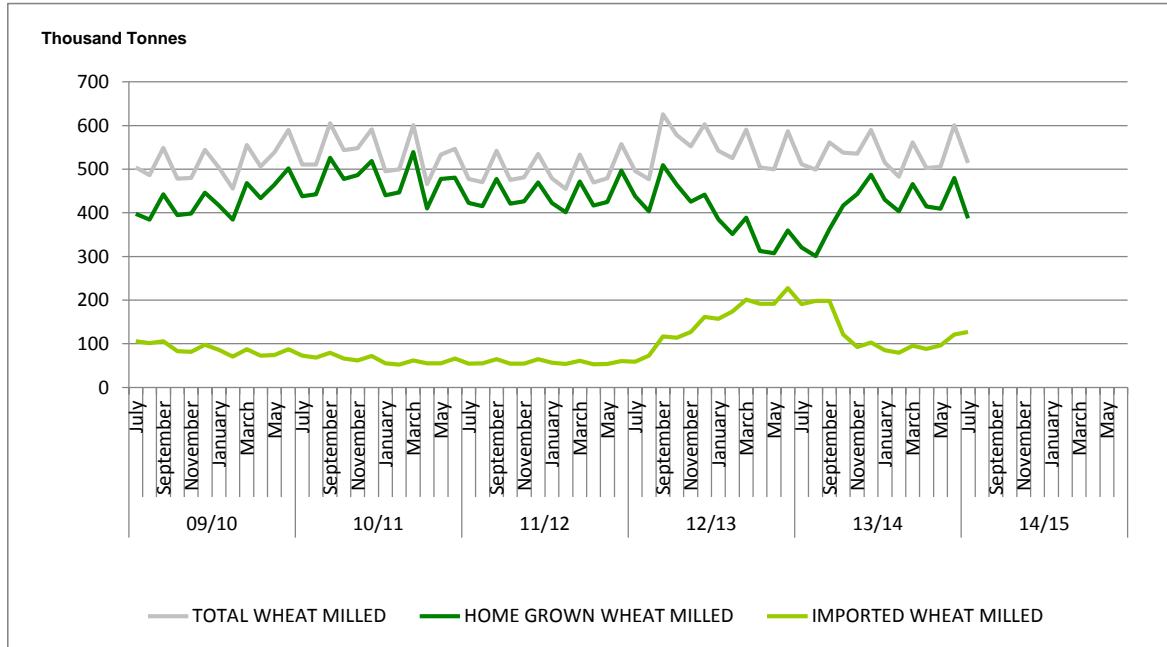
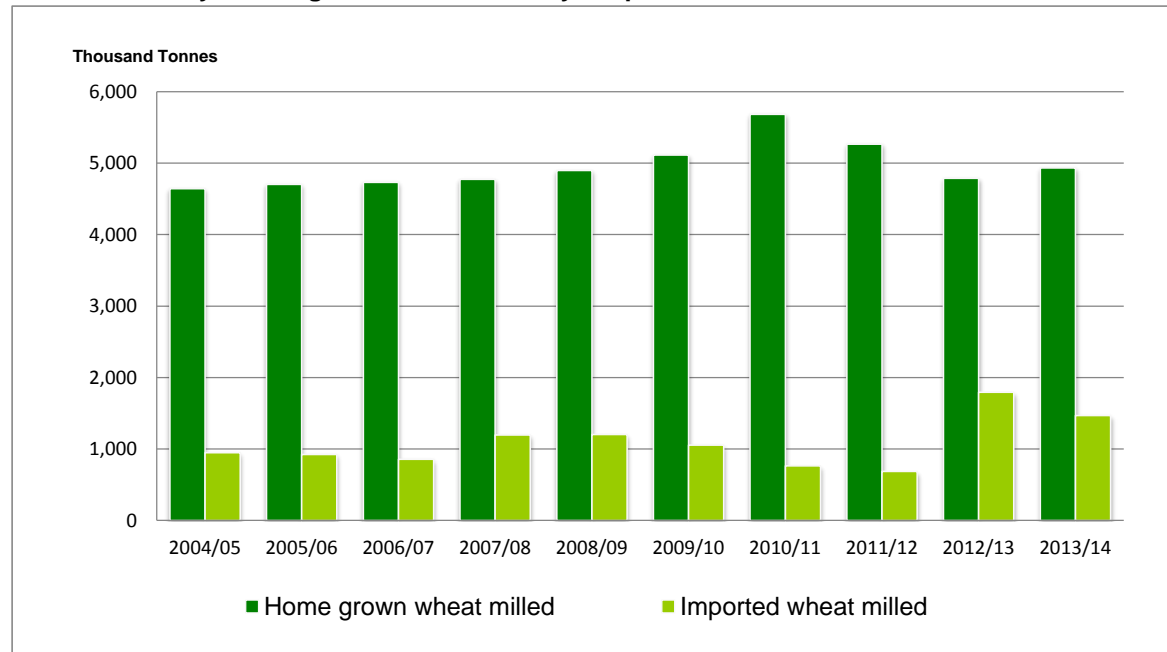


Chart 3: Quantity and Origin of Wheat Milled by Crop Year



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 - July 2014

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

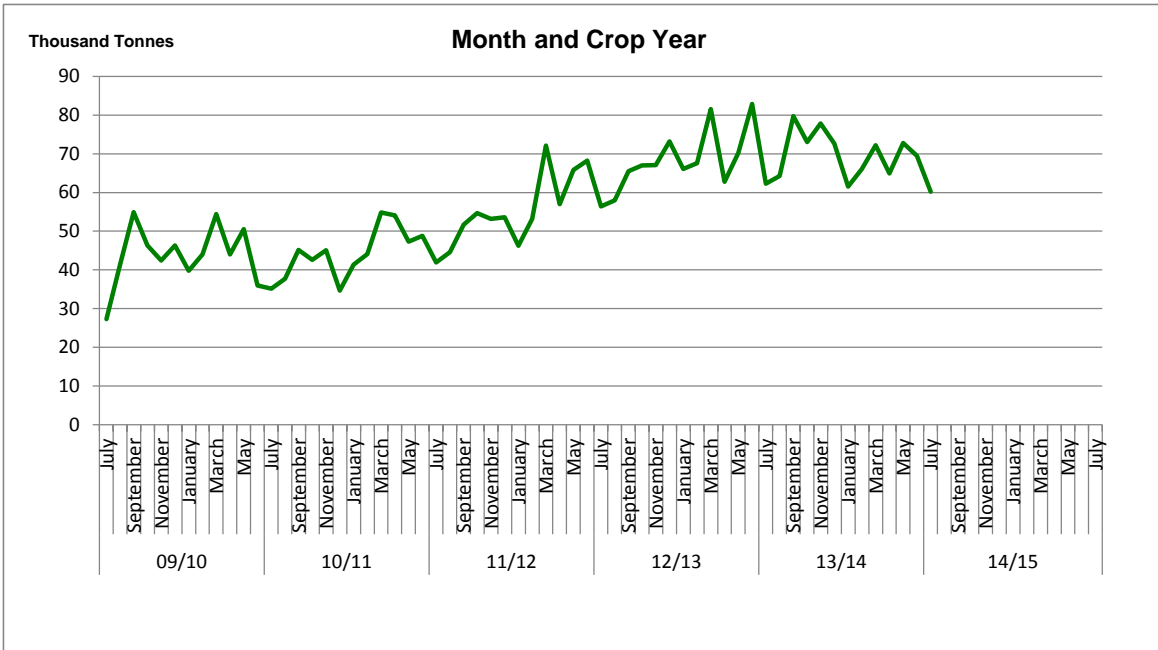
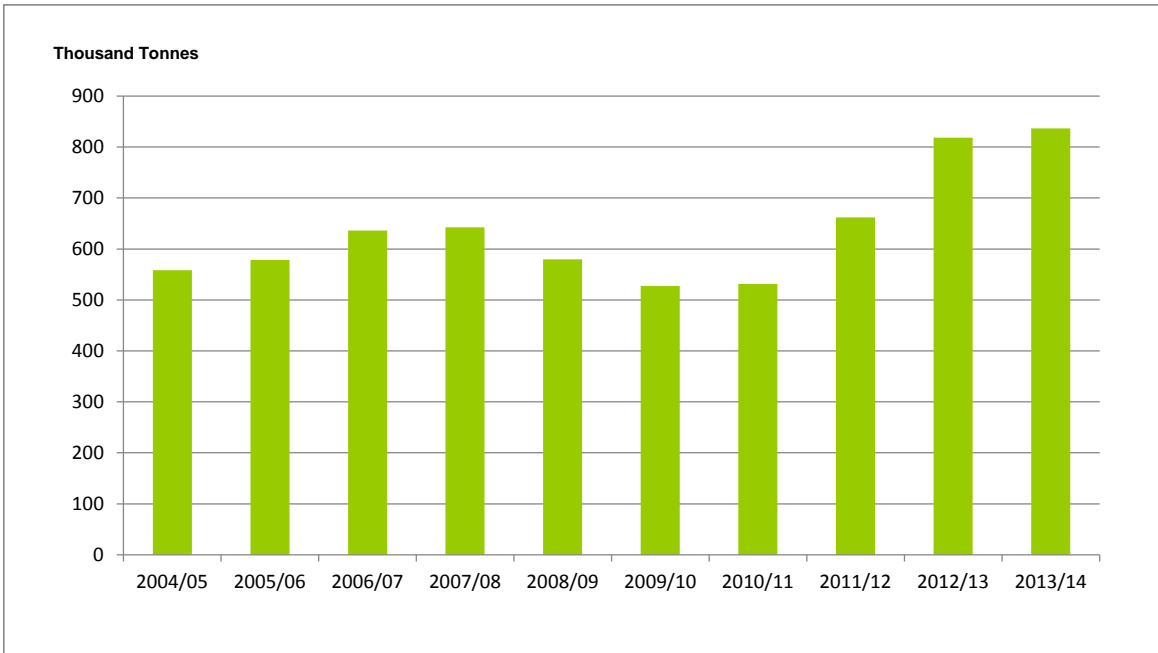


Chart 5: Wheat used by the Brewing, Distilling and Malting Industry by Crop Year



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 - July 2014

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

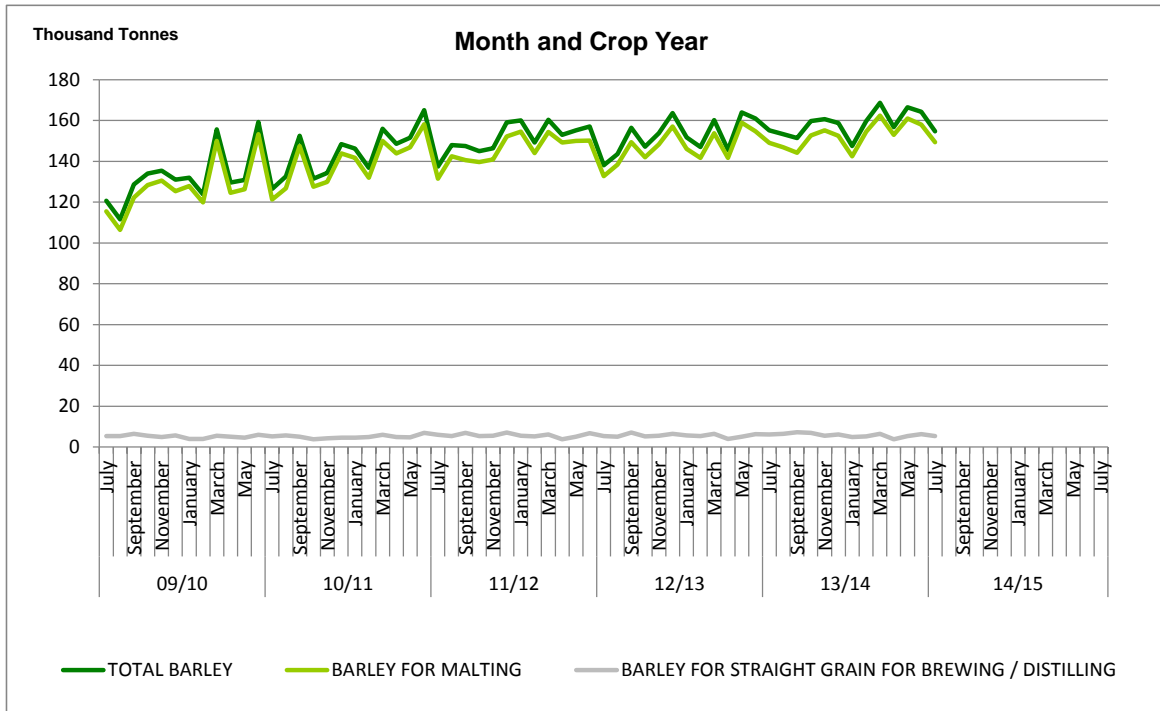
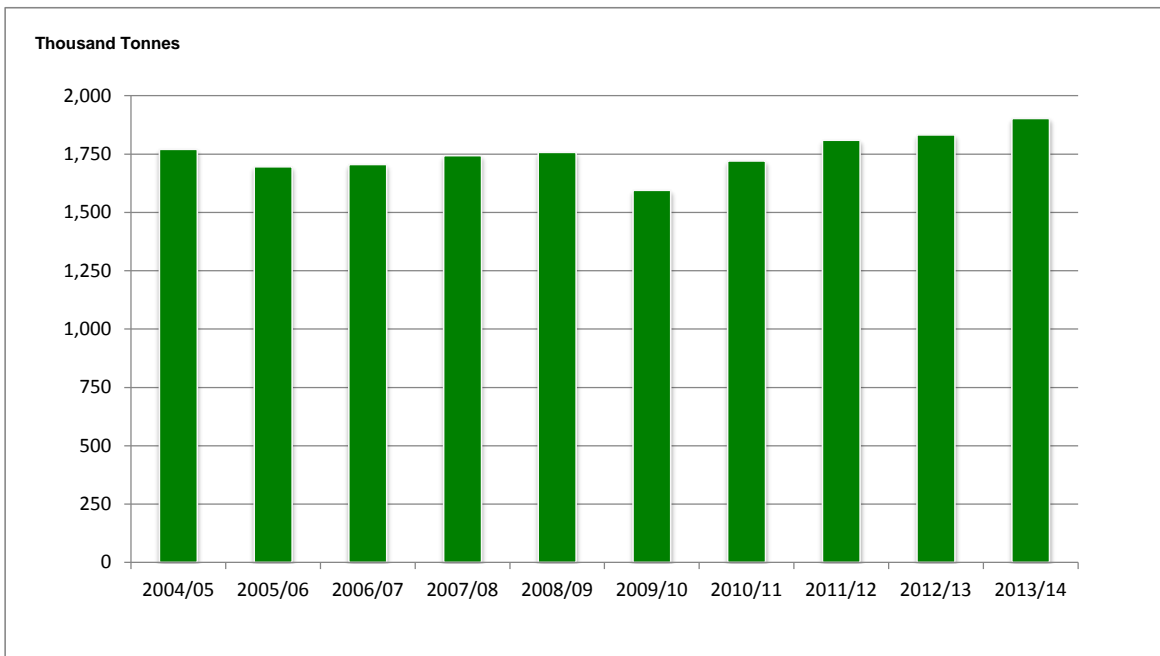


Chart 7: Barley used by the Brewing, Distilling and Malting Industry by Crop Year



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.

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.