

SUMMARY OF SURVEY OF CEREAL AREAS AND VOLUMES - TO OCTOBER 1, 2011

As part of the Arable Industry Marketing Initiative, Opinions Market Research Ltd conducted a survey of 150 grain farmers to provide current information on the production, sales, plantings and on-farm stocks of wheat, barley, oats and maize grains in New Zealand as at October 1, 2011. Note that maize silage estimates are not included in this report since it was found that maize silage growers were not adequately represented in the survey sample (which was biased towards maize grain growers).

Estimated national figures for 2010 and 2011 as at October 1, 2011

The estimated NZ totals are shown in the table below:

	Units	Milling wheat 48	Feed wheat 70	Malting barley 27	Feed barley 90	Milling oats 11	Feed oats 12	Milling and feed maize grain 29
Number of farmers in the survey who grew this crop								
2010 harvest								
Estimated NZ total hectares, 2010 harvest	Ha	16,125	38,675	9,637	42,663	5,028	3,861	17,500
Estimated NZ total tonnes, 2010 harvest	Tonnes	147,813	297,087	56,530	251,770	28,968	18,640	188,800
2011 harvest								
Estimated NZ total hectares, 2011 harvest	Ha	15,178	27,554	9,658	51,508	3,278	2,036	14,564
Estimated NZ total tonnes, 2011 harvest	Tonnes	131,029	240,880	53,843	294,485	18,586	12,563	173,347
Sold on contract and delivered by Oct 1, 2011	Tonnes	69,589	133,017	51,522	160,641	2,320	1,446	150,883
Sold on contract and stored on farm on Oct 1, 2011	Tonnes	30,281	38,471	2,052	31,992	12,736	1,565	3,986
Sold at a free price and delivered by Oct 1, 2011	Tonnes	13,571	49,298	0	47,213	971	799	13,483
Sold at a free price and stored on farm on Oct 1, 2011	Tonnes	6,901	8,593	0	12,184	0	0	938
(For milling or malting only) Downgraded and sold as feed by Oct 1, 2011	Tonnes	3,450	-	269	-	0	-	94
(For feed only) Used on own farm by Oct 1, 2011	Tonnes	-	3,689	-	19,459	-	5,839	2,251
Unsold (from 2011 harvest) on Oct 1, 2011	Tonnes	8,223	7,812	0	23,759	2,666	2,914	1,707
Sold on contract (total) by Oct 1, 2011	Tonnes	99,870	171,488	53,574	192,633	15,056	3,011	154,870
Sold at a free price (total) by Oct 1, 2011	Tonnes	20,472	57,891	0	59,397	971	799	14,421
Sold (contract + free price) by Oct 1, 2011	Tonnes	120,342	229,379	53,574	252,030	16,028	3,810	169,291
Sold and stored on farm (total) on Oct 1, 2011	Tonnes	37,181	47,064	2,052	44,176	12,736	1,565	4,924
Estimated % change in hectares, 2010 to 2011 harvest	%	-5.9	-28.8	0.2	20.7	-34.8	-47.3	-16.8
Estimated % change in tonnes, 2010 to 2011 harvest	%	-11.4	-18.9	-4.8	17.0	-35.8	-32.6	-8.2

Note: these estimated national figures were obtained by scaling up the survey totals for each question so that the 2010 national totals for each crop match the most recent (2010) Agricultural Production Statistics. Like all survey estimates, these national figures are not exact, and have an associated margin of error.

Autumn and spring plantings/ intentions as at October 1, 2011

Estimated NZ total plantings for 2011 are given in the table below, along with the hectares harvested in 2010 and 2011.

	Milling wheat (ha)	Feed wheat (ha)	Malting barley (ha)	Feed barley (ha)	Milling oats (ha)	Feed oats (ha)	Milling and feed maize grain (ha)
Number of farmers in the survey who grew this crop	48	70	27	90	11	12	29
Estimated NZ total hectares, 2010 harvest	16,125	38,675	9,637	42,663	5,028	3,861	17,500
Estimated NZ total hectares, 2011 harvest	15,178	27,554	9,658	51,508	3,278	2,036	14,564
Predicted NZ total hectares, 2012 harvest:							
Estimated NZ total autumn plantings 2011 (ha)	7,633	30,074	1,391	16,746	447	1,266	-
Estimated NZ total spring plantings/intentions 2011 (ha)	4,956	3,810	8,591	45,059	3,104	857	11,518
Estimated NZ total 2011 plantings/intentions (hectares, for harvest in 2012)	12,590	33,884	9,983	61,805	3,551	2,123	11,518
% change in hectares from 2010 to 2011 harvest	-5.9	-28.8	0.2	20.7	-34.8	-47.3	-16.8
% change in hectares from 2011 to 2012 harvest (latter based on plantings & intentions)	-17.1	23.0	3.4	20.0	8.3	4.3	-20.9

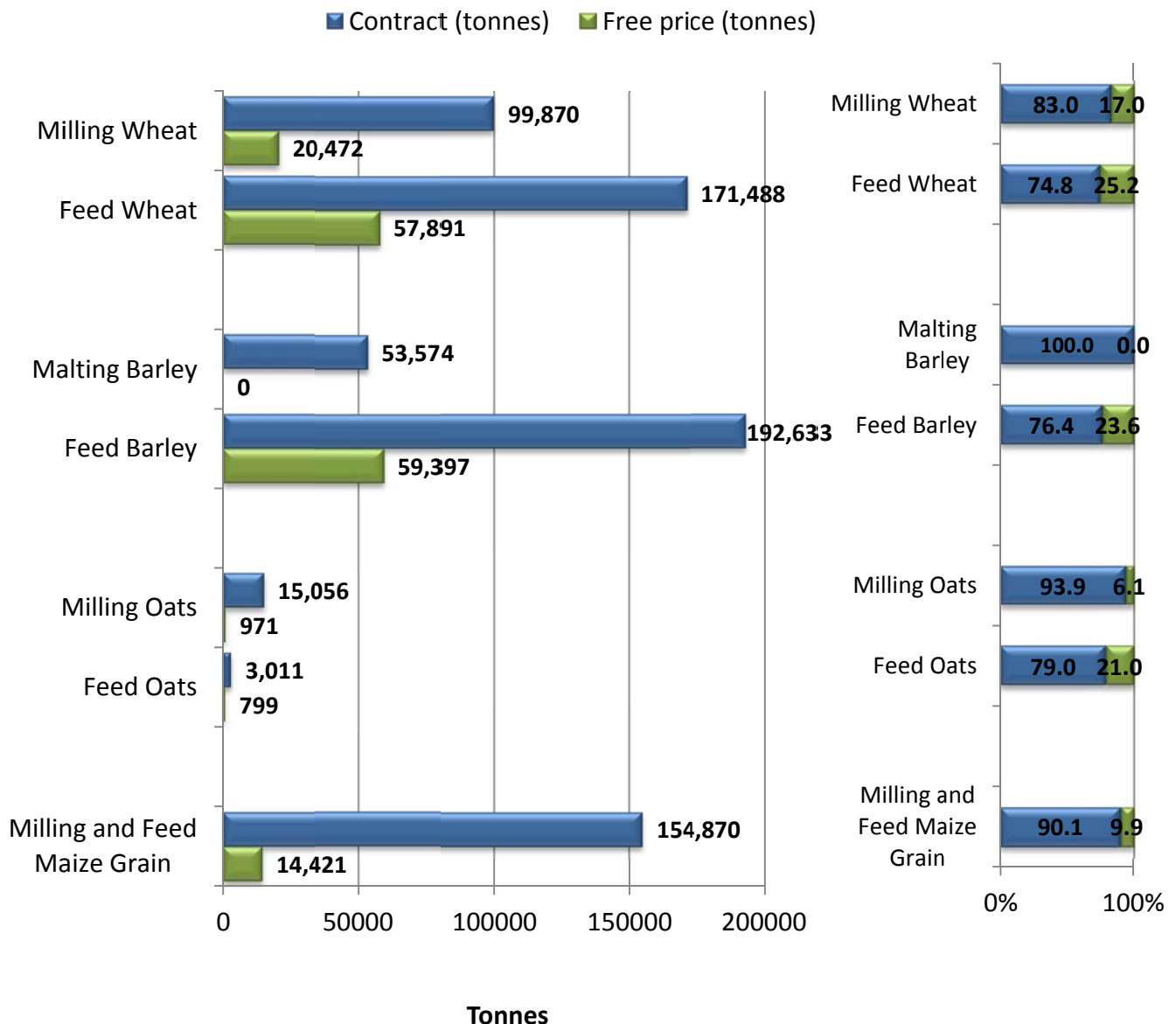
Note: these estimated national hectares were obtained by scaling up the survey total hectares for each question so that the 2010 national total hectares for each crop match the most recent (2010) Agricultural Production Statistics. Like all survey estimates, these national hectares are not exact, and have an associated margin of error.

Hectares of milling wheat planted showed a continuing drop from 2010 to 2011 to 2012. Feed wheat plantings showed a drop from 2010 to 2011 and a similar-sized increase from 2011 to 2012. Malting barley plantings remained roughly constant. Feed barley plantings were most noticeably on the increase, showing a 20% increase, both from 2010 to 2011, and from 2011 to 2012. Conversely, total maize grain plantings appeared to be on the decrease, both from 2010 to 2011 and from 2011 to 2012.

The following graphs present some of the above information in graphical form.

Estimated national sales channels for cereals sold as at October 1, 2011

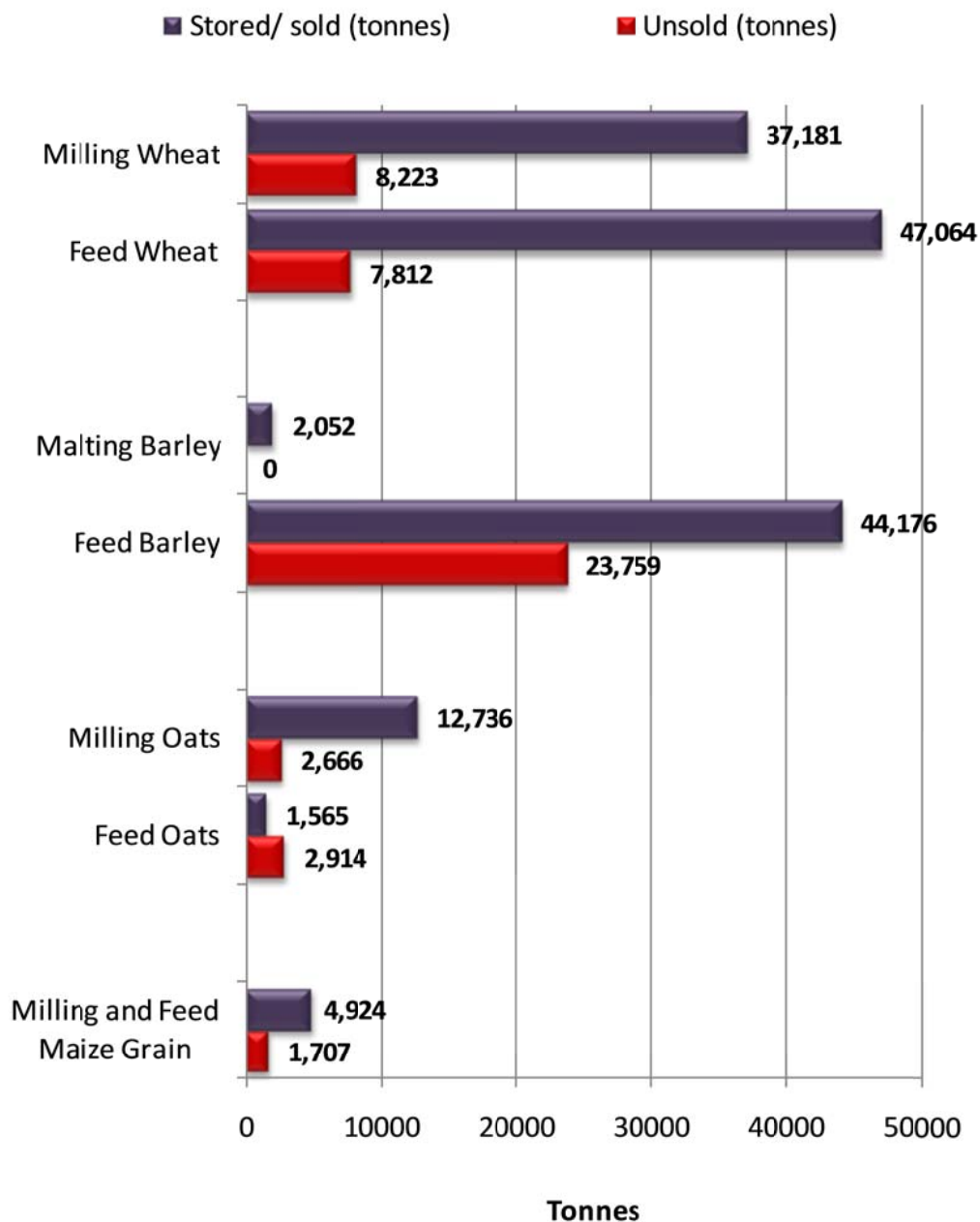
The graph below presents the estimated national tonnages of the 2011 harvest of milling wheat, feed wheat, malting barley, feed barley, milling oats, feed oats, and milling & feed maize grain, sold *on contract* and *at a free price* as at October 1, 2011.



Note: these are estimated totals derived from the survey, and have an associated margin of error.

Estimated national on farm storage of cereals as at October 1, 2011

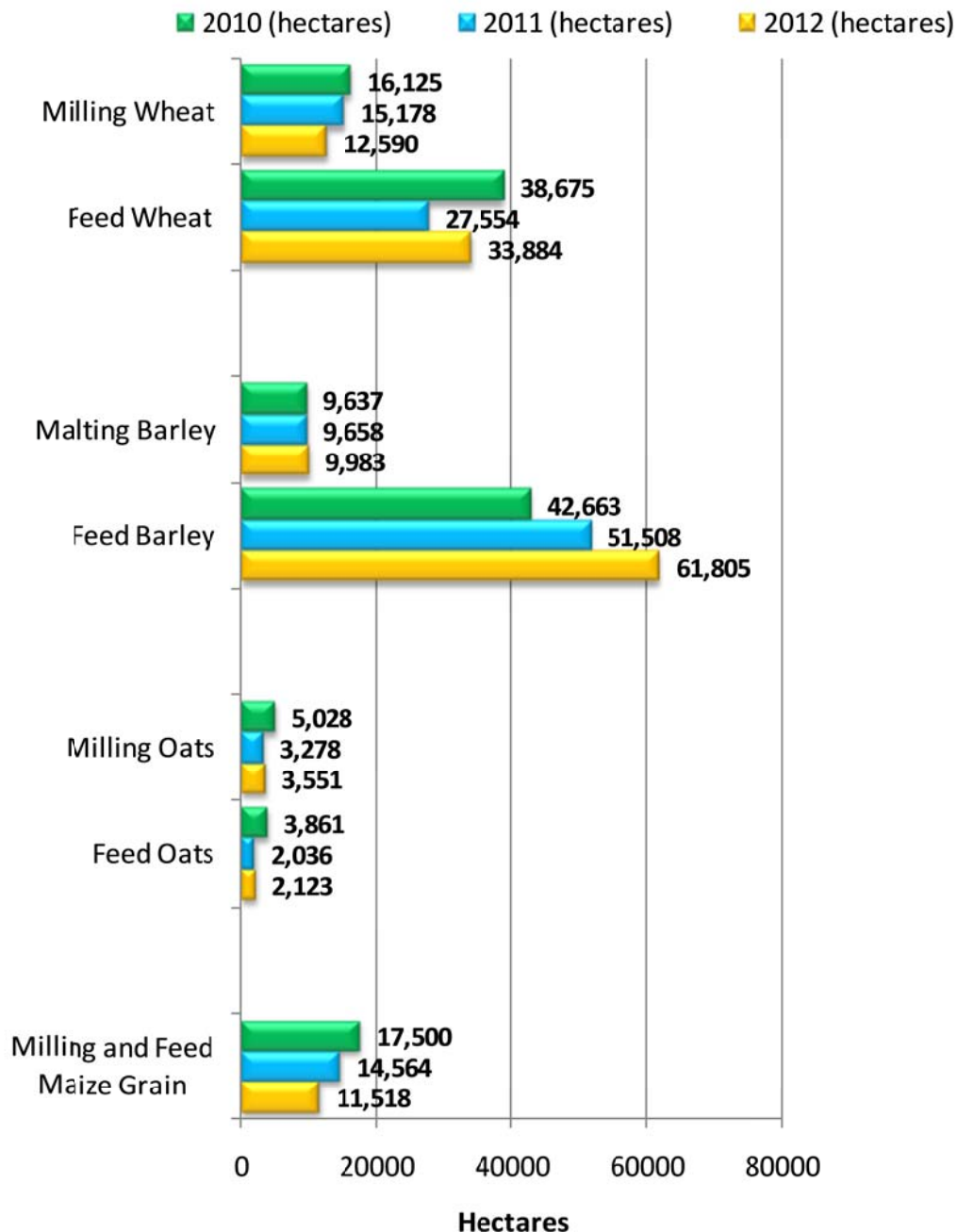
The graph below presents the estimated national tonnages of the 2011 harvest of milling wheat, feed wheat, malting barley, feed barley, milling oats, feed oats, milling and feed maize grain sold *and stored on farm*, and *unsold*.



Note: these are estimated totals derived from the survey, and have an associated margin of error.

Autumn and spring plantings/ intentions in hectares, for the 2012 harvest as at October 1, 2011

The graph below presents the estimated national hectares of milling wheat, feed wheat, malting barley, feed barley, milling oats, feed oats, and milling and feed maize grain, for the 2010, 2011, and (predicted) 2012 harvests.



Note: these are estimated totals derived from the survey, and have an associated margin of error.

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