

## SUMMARY - SURVEY OF CEREAL AREAS AND VOLUMES – APRIL 1, 2015

The objective of this AIMI survey of growers was to determine, as at April 1, 2015:

- the size of the 2015 harvest of wheat, barley and oats
- the sales channels, storage status and unsold amount of the 2015 harvest
- the tonnages of carry-over stocks on farms from the 2014 harvest
- the sowing intentions for the autumn/ winter of 2015

The data from 143 survey farms as at April 1, 2015 were scaled up to the national level using the most recent Agricultural Production Statistics. As with all surveys, there is a margin of error which needs to be considered in relation to this report. These figures reflect the position at the 1st April 2015 and there will have been changes since this time.

### **Key Points at 1 April 2015** (figures have been rounded to nearest 100):

Average yields were identical this season compared to last season, despite the drought in Canterbury. While some very low yields were noted on dryland farms, where irrigation was available crops were able to take advantage of good sunshine hours during the grain-fill period.

**Milling wheat:** Estimated total tonnage (102,100 t) including unharvested grain (3%) was down 5% compared to last year's harvest. Of this total 86% has been sold (87,900 t), although most of the sold grain is still stored on farm (96%). 14,200 tonnes (14%) remains unsold. Carryover of unsold grain from the 2014 harvest was small (70 t), taking the estimate of unsold grain in the market to approximately 14,300 tonnes which was lower than 2014 (28,800 t) and 2013 (61,200 t).

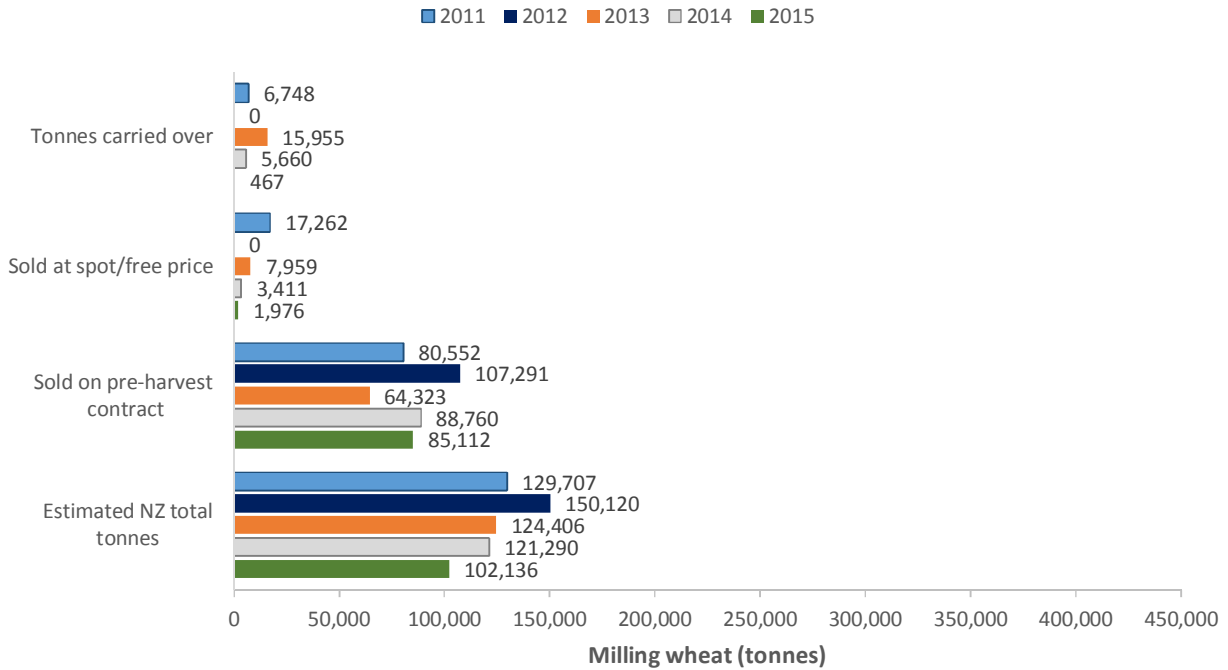
**Feed wheat:** Estimated total tonnage (300,500 t) including unharvested grain (3%) was up 3% compared to last year's harvest. Of this total 84% has been sold (252,400 t), with 80% of the sold grain still stored on farm. The amount of unsold grain is 47,900 tonnes (16%). Unsold stock carried over from last season was 1,700 tonnes, taking the estimate of total unsold grain to 49,600 tonnes, compared to approximately 68,100 in 2014 and 138,700 in the previous year.

**Feed barley:** Estimated total tonnage (389,300 t) including unharvested grain (14%) was up 11% compared to last year. Of this total tonnage 81% has been sold (314,600 t), with 71% of the sold grain still stored on farm. About 19% (74,700 t) remains unsold. Carryover of unsold grain was 660 t, taking the estimate of unsold grain in the market to approximately 75,400 tonnes which is higher than last season (56,300 t) and lower than 2013 (188,800 t).

**For other cereals:** Compared to last year, estimated total tonnages, including unharvested grain, for milling oats (24,900 t) were down by 16%, malting barley (56,200 t) increased by 3%, and feed oats made a huge 69% increase to 11,700 tonnes coupled with a jump in hectares. All malting barley crops had been harvested while 49% of milling oats and 39% of feed oats were yet to be harvested. Both malting barley and feed oats had 12% of the total harvest unsold, while milling oats had 4% unsold at 1 April, 2015. Unsold stocks carried over from last season were minimal for all three crops.

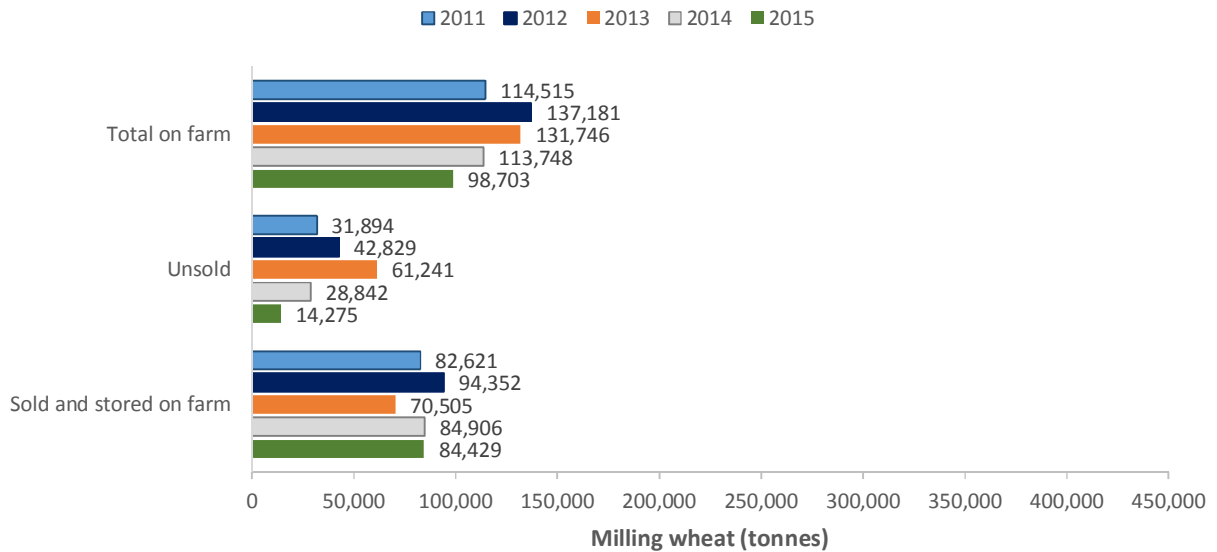
**Sowing intentions:** Only a few autumn/winter cereal crops had been sown by 1 April 2015. The area sown or intending to be sown in autumn/winter wheat or barley, as at 1 April 2015, was up 7% overall on sowings plus intentions as at 1 April 2014 (unadjusted for the fact that some intended sowings could not be made in 2014 due to wet conditions). Autumn/winter feed wheat area sown is predicted to decrease by 2% from 2014 to 2015, while feed barley and milling wheat area sown is predicted to increase by 15% (again, 2014 sowings plus intentions were not adjusted to actual sowings).

### Milling wheat (Tonnes)



**Figure 1a. Estimated NZ tonnage and sales channels: Milling Wheat (Tonnes)**

(Note: “Total tonnes” includes harvested and unharvested grain for that season’s harvest. “Sold on pre-harvest contract” and “Sold at spot/free price” exclude unharvested grain and carryover stock. “Sold at spot/free price” includes downgraded stock and stock used on own farm. “Tonnes carried over” is the sum of sold and unsold stock carried over (still on farm) from the previous season.)

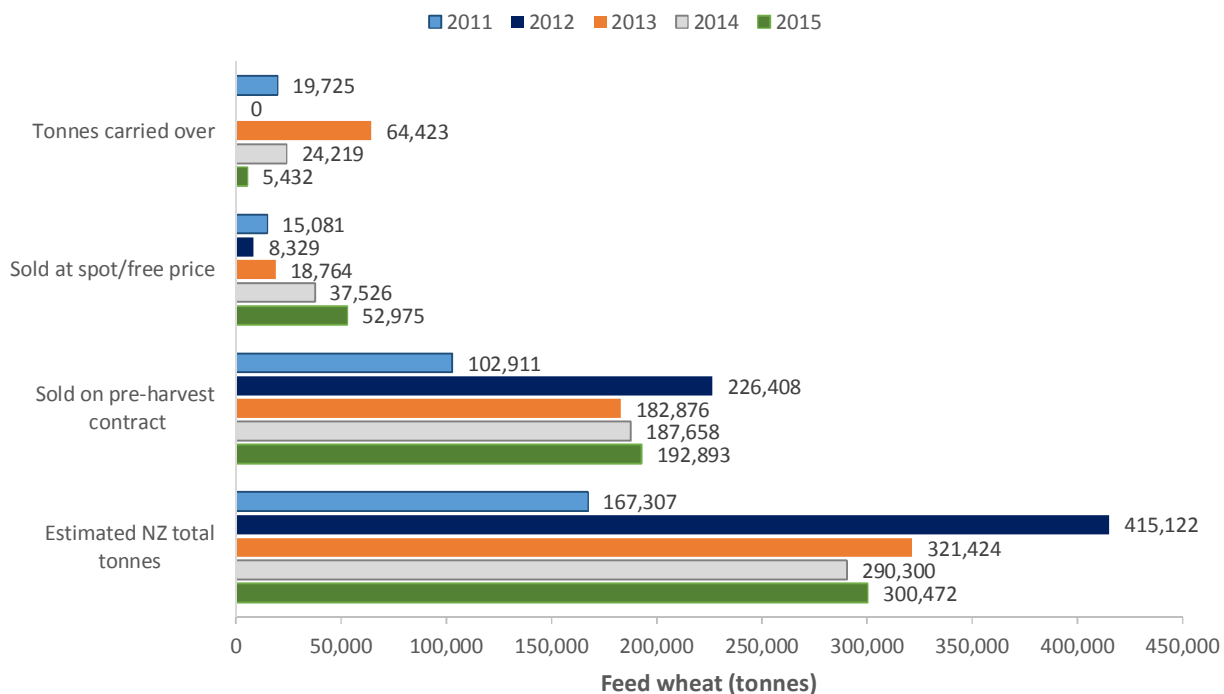


**Figure 1b. Estimated NZ stock on farms at 1 April 2015: Milling Wheat (Tonnes)**

(Note: Carryover stock from the previous season is included in all three bar graphs. Stock used on farm is excluded. Unharvested grain is included. For the 2011, 2012 and 2013 harvests, the sales status of the unharvested grain was unknown, so it was assumed unsold. For the 2014 and 2015 harvests, the sales status of the unharvested grain was determined and has been apportioned between “Sold and stored on farm” and “Unsold”.)

**NOTE:** Historical data in both graphs is sourced from previous AIMI April Reports

## Feed Wheat (Tonnes)



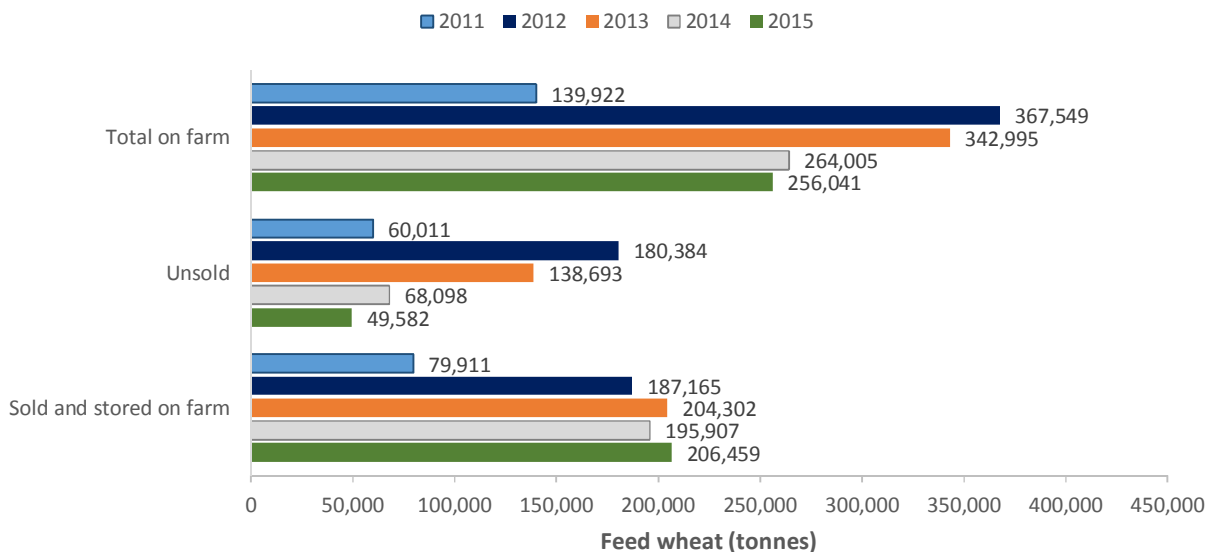
**Figure 2a. Estimated NZ tonnage and sales channels: Feed Wheat (Tonnes)**

(Note: "Total tonnes" includes harvested and unharvested grain for that season's harvest.)

"Sold on pre-harvest contract" and "Sold at spot/free price" exclude unharvested grain and carryover stock.

"Sold at spot/free price" includes downgraded stock and stock used on own farm.

"Tonnes carried over" is the sum of sold and unsold stock carried over (still on farm) from the previous season.)



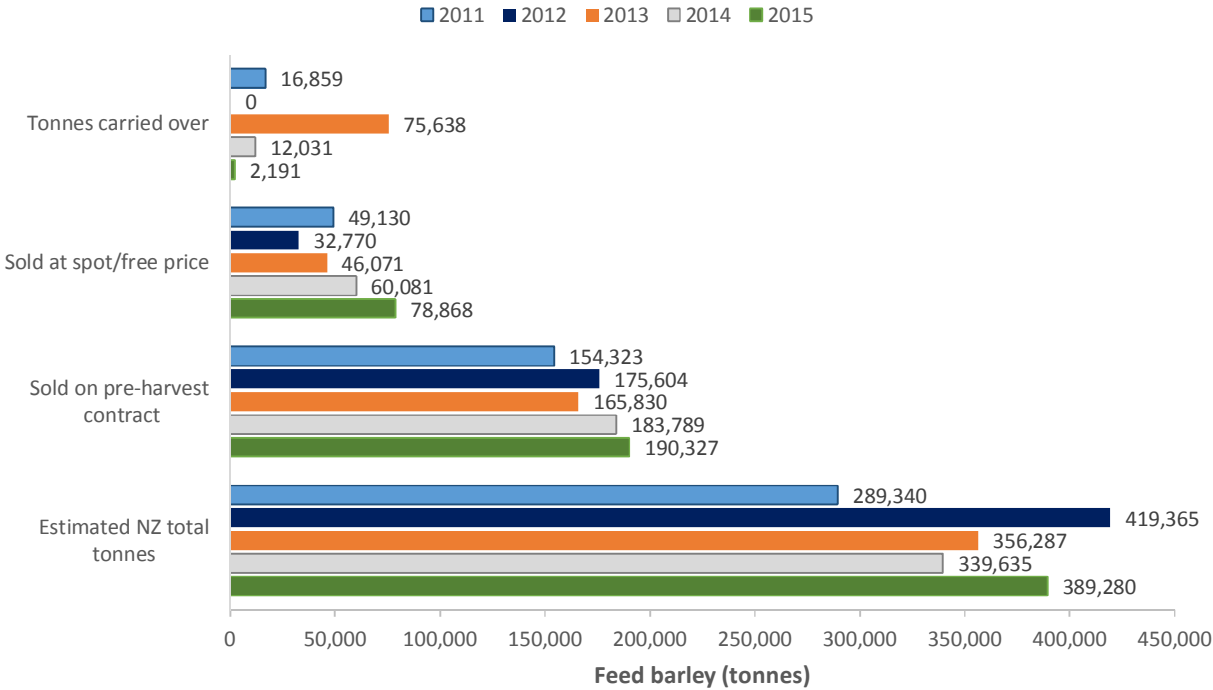
**Figure 2b. Estimated NZ stock on farms at 1 April 2015: Feed Wheat (Tonnes)**

(Note: Carryover stock from the previous season is included in all three bar graphs. Stock used on farm is excluded. Unharvested grain is included.)

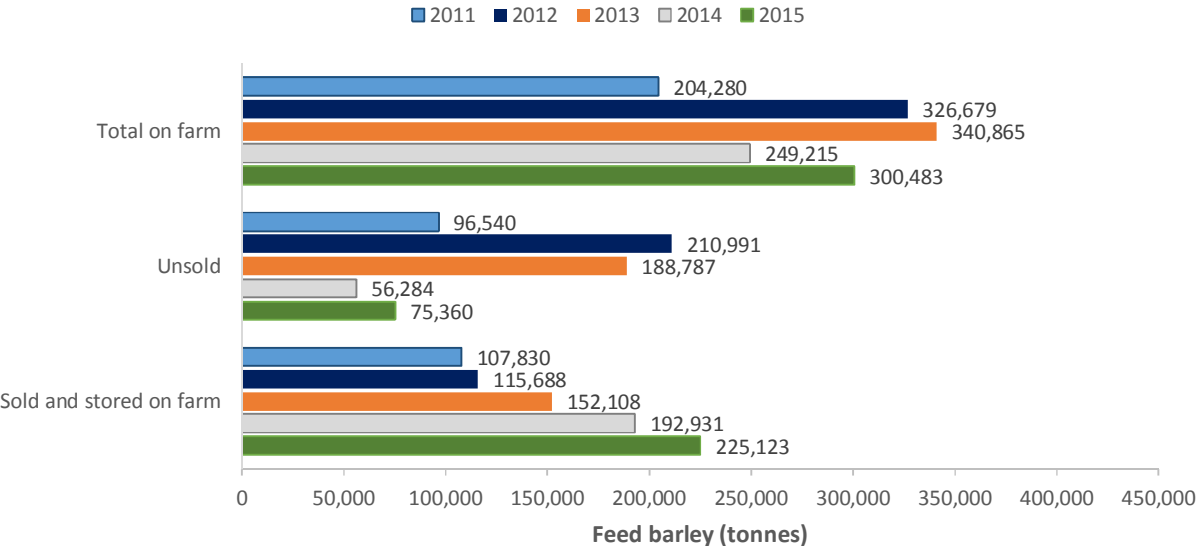
For the 2011, 2012 and 2013 harvests, the sales status of the unharvested grain was unknown, so it was assumed unsold. For the 2014 and 2015 harvests, the sales status of the unharvested grain was determined and has been apportioned between "Sold and stored on farm" and "Unsold".)

**NOTE:** Historical data in both graphs is sourced from previous AIMI April Reports

**Feed Barley (Tonnes)**

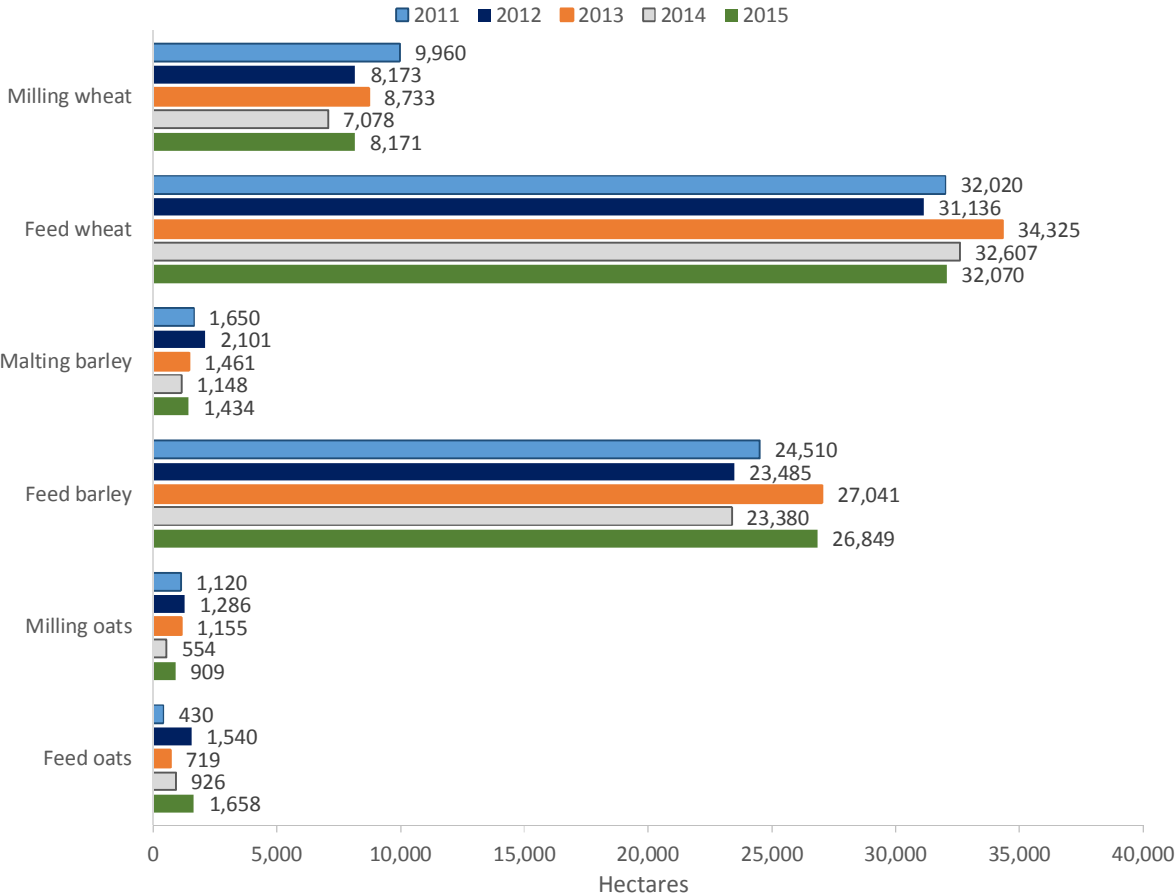


**Figure 3a. Estimated NZ tonnage and sales channels: Feed Barley (Tonnes)**  
 (Note: “Total tonnes” includes harvested and unharvested grain for that season’s harvest.  
 “Sold on pre-harvest contract” and “Sold at spot/free price” exclude unharvested grain and carryover stock.  
 “Sold at spot/free price” includes downgraded stock and stock used on own farm.  
 “Tonnes carried over” is the sum of sold and unsold stock carried over (still on farm) from the previous season.)

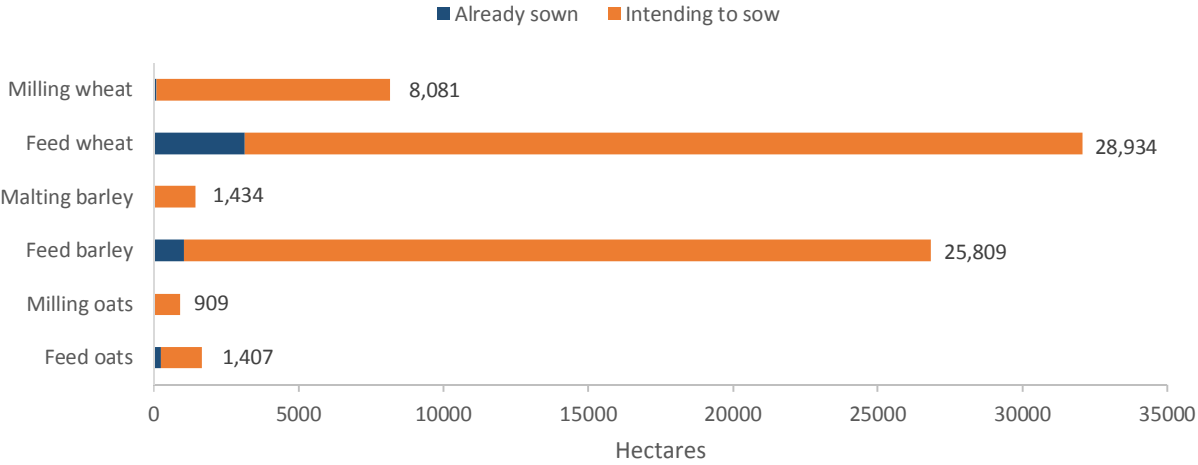


**Figure 3b. Estimated NZ stock on farms at 1 April 2015: Feed Barley (Tonnes)**  
 (Note: Carryover stock from the previous season is included in all three bar graphs. Stock used on farm is excluded. Unharvested grain is included.  
 For the 2011, 2012 and 2013 harvests, the sales status of the unharvested grain was unknown, so it was assumed unsold. For the 2014 and 2015 harvests, the sales status of the unharvested grain was determined and has been apportioned between “Sold and stored on farm” and “Unsold”.)  
**NOTE:** Historical data in both graphs is sourced from previous AIMI April Reports

**Autumn/winter sowings and sowing intentions as at 1<sup>st</sup> April, 2015**

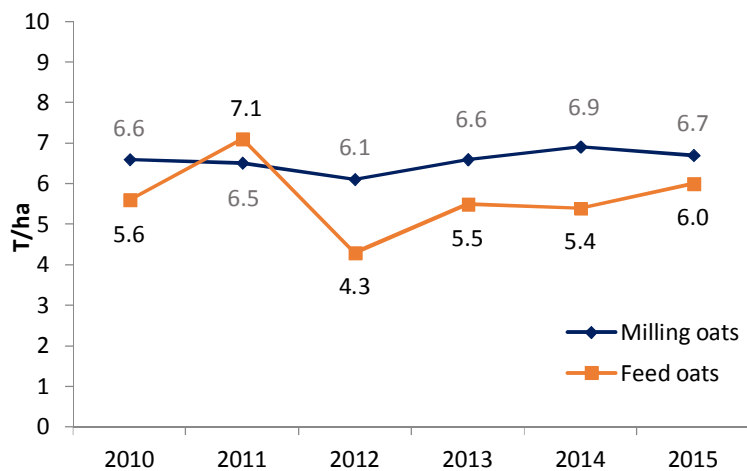
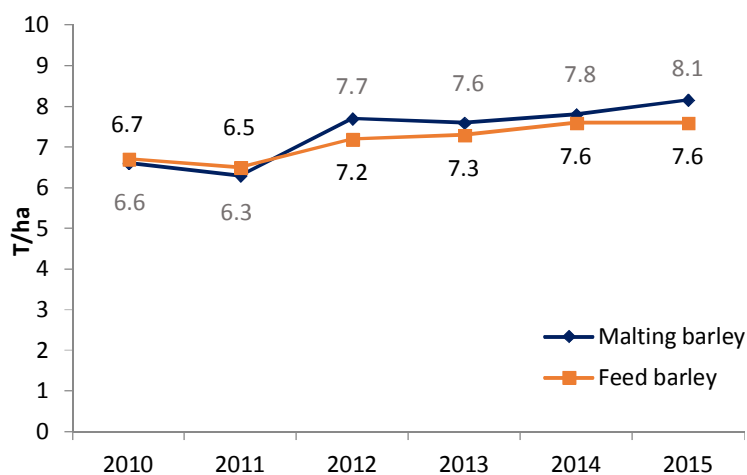
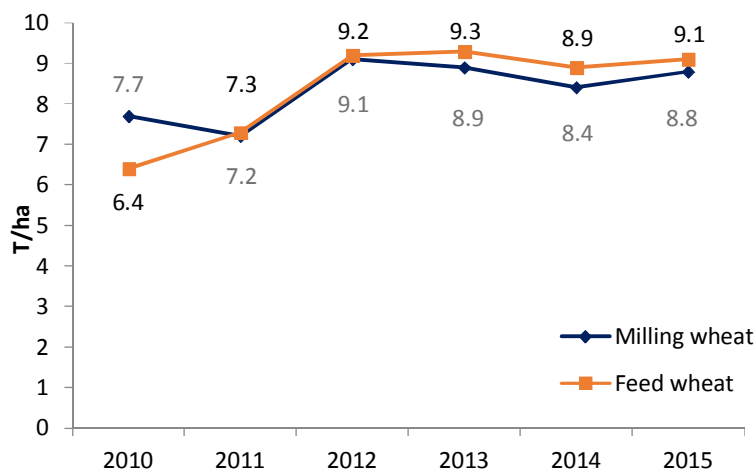


**Figure 4. Estimated NZ total hectares sown or intended to be sown in autumn/winter 2015, along with the corresponding estimates from the four previous April 1 AIMI survey reports.**  
This information is also presented in Table 3 above.



**Figure 5. Estimated NZ Autumn/winter sowings and sowing intentions (hectares) as at 1st April 2015.**  
(Note: Numbers at the end of the bars represent sowing intentions. These are estimated totals derived from the survey, and have an associated margin of error.)

### Comparison of yield (tonnes per ha) on survey farms between harvests



**Figure 6. Comparison of yields (T/Ha) over the 2010, 2011, 2012, 2013, 2014 and 2015 harvests for the six cereal crops. Data is from this survey, previous April 1 AIMI reports for 2012, 2013 and 2014, and the October 1, 2011 AIMI report (for the 2010 and 2011 yields). (Note: Milling wheat contains biscuit and gristing varieties.)**

**Table 1. Detailed estimated national figures for the 2015 harvest, plus sold and delivered tonnages, for six cereal crops as at April 1, 2015.**

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
<b>Number of farmers in the survey who harvested this crop in 2015</b>		<b>45</b>	<b>91</b>	<b>26</b>	<b>123</b>	<b>12</b>	<b>18</b>
<b>2014 harvest</b>							
Estimated NZ total hectares, 2014 harvest	Ha	13,216	33,384	7,789	51,711	5,367	1,633
Estimated NZ total tonnes, 2014 harvest	Tonnes	108,047	292,753	54,332	352,268	29,694	6,906
<b>2015 harvest</b>							
Estimated NZ total hectares, 2015 harvest	Ha	12,188	34,627	7,738	57,875	4,709	2,492
Estimated NZ total tonnes, 2015 harvest	Tonnes	102,136	300,472	56,158	389,280	24,900	11,667
Estimated NZ total hectares already harvested by 1 April 2015	Ha	11,714	33,235	7,738	49,041	2,373	1,470
Estimated NZ total tonnes already harvested by 1 April 2015	Tonnes	99,130	289,967	56,158	334,174	12,798	7,110
Estimated NZ total hectares yet to harvest as at 1 April 2015	Ha	474	1,392	0	8,834	2,336	1,022
Estimated NZ total tonnes yet to harvest as at 1 April 2015	Tonnes	3,006	10,505	0	55,106	12,101	4,558
<b>2015 harvest so far</b>							
Sold under pre-harvest contract and delivered by 1 April 2015	Tonnes	3,900	41,977	11,720	59,288	0	2,723
Sold under pre-harvest contract and stored on farm on 1 April 2015	Tonnes	81,212	150,916	36,545	131,039	11,937	2,335
Sold at spot/ free price and delivered by 1 April 2015	Tonnes	0	5,870	0	29,228	526	1,621
Sold at spot/ free price and stored on farm on 1 April 2015	Tonnes	1,976	45,249	1,206	47,167	105	0
(For milling or malting only) Downgraded and sold for feed by 1 April 2015	Tonnes	0	-	227	-	0	-
(For feed only) Used on own farm by 1 April 2015	Tonnes	-	1,856	-	2,472	-	138
Unsold stocks on hand (2015 harvest only) on 1 April 2015	Tonnes	12,043	43,940	6,460	64,980	230	293
<b>2015 yet to harvest</b>							
Unharvested grain sold under pre-harvest contract by 1 April 2015	Tonnes	843	6,548	0	45,386	11,444	3,440
Unharvested grain unsold on 1 April 2015	Tonnes	2,164	3,957	0	9,720	658	1,118
<b>Sales channels (2015 harvest): includes unharvested grain</b>							
Sold under pre-harvest contract (total) by 1 April 2015	Tonnes	85,955	199,441	48,265	235,712	23,381	8,497
Sold at spot/ free price (total) by 1 April 2015	Tonnes	1,976	51,119	1,206	76,396	631	1,621
<b>Delivery status of sold grain (2015 harvest): excludes unharvested grain</b>							
Sold and delivered (total) by 1 April 2015	Tonnes	3,900	47,847	11,720	88,516	526	4,344
Sold and stored on farm (total) on 1 April 2015	Tonnes	83,187	196,165	37,751	178,206	12,042	2,335
<b>Total sales (2015 harvest): includes unharvested grain</b>							
Sold (of total crop) by 1 April 2015 (includes used on farm)	Tonnes	87,930	252,416	49,698	314,580	24,012	10,257
Unsold (of total crop) on 1 April 2015	Tonnes	14,206	47,897	6,460	74,700	888	1,411
Estimated % change in hectares, 2014 to 2015 harvest	%	-7.8	3.7	-0.7	11.9	-12.3	52.6
Estimated % change in tonnes, 2014 to 2015 harvest	%	-5.5	2.6	3.4	10.5	-16.1	69.0

In Table 1 above (last two rows), the estimated 2015 harvest tonnes of feed barley were 11% higher than for the 2014 harvest. For milling wheat, feed wheat and malting barley, harvest tonnes were similar between the last two seasons, varying by less than 6% between 2014 and 2015. Milling oats tonnes were down slightly, and feed oats up, between 2014 and 2015.

**Table 2. Carry-over stock on hand from the 2014 harvest, as at April 1, 2015.**

	Milling wheat (Tonnes)	Feed wheat (Tonnes)	Malting barley (Tonnes)	Feed barley (Tonnes)	Milling oats (Tonnes)	Feed oats (Tonnes)
<b>Number of survey farmers who harvested crop in 2014</b>	<b>44</b>	<b>88</b>	<b>26</b>	<b>105</b>	<b>13</b>	<b>11</b>
Estimated NZ total sold and stored on farm (2014 crop) on 1 April 2015	399	3,747	227	1,532	0	0
Estimated NZ total unsold stocks on hand (2014 crop) on 1 April 2015	68	1,685	0	660	197	395
Estimated NZ Total 2014 harvest still on farms on 1 April 2015 (tonnes)	467	5,432	227	2,191	197	395
Estimated unsold stocks on hand of 2014 harvest on 1 April 2015 as a percentage of tonnes harvested in 2014 (%)	0.1%	0.6%	0.0%	0.2%	0.7%	5.7%
<b>Comparative figures from last year (1 April 2014 AIMI survey)</b>						
Estimated NZ total sold and stored on farm (2013 crop) on 1 April 2014	5,245	17,293	0	11,656	298	0
Estimated NZ total unsold stocks on hand (2013 crop) on 1 April 2014	415	6,927	0	375	223	722
<b>Comparative figures from year before that (1 April 2013 AIMI survey)</b>						
Estimated NZ total sold and stored on farm (2012 crop) on 1 April 2013	6,838	45,514	2,236	31,266	852	0
Estimated NZ total unsold stocks on hand (2012 crop) on 1 April 2013	9,117	18,909	0	44,372	852	501

Table 2 above shows that there was little in the way of unsold stocks on hand on 1 April 2015 from the previous (2014) harvest. For feed wheat and feed barley combined, unsold carryover stocks were estimated to be about 2,300 tonnes. By comparison, at the same time last year (1 April 2014), the unsold carryover stocks were estimated to be about 7,300 tonnes, and the year previous (1 April 2013), the unsold carryover stocks were estimated to be about 63,300 tonnes.

In addition, the amount of grain sold and stored on farm from the 2014 harvest was also much less than the amount of “sold and stored” grain from the two previous years’ harvests on 1 April 2014 and 2013 respectively (Table 2).



**Table 3. Sowings and sowing intentions as at April 1, 2015, and comparisons with previous years' estimates.**

	Milling wheat (ha)	Feed wheat (ha)	Malting barley (ha)	Feed barley (ha)	Milling oats (ha)	Feed oats (ha)
<b>Number of farmers in the survey who have sown or intend to sow this crop in the autumn or winter, as at 1 April 2015</b>	<b>35</b>	<b>82</b>	<b>5</b>	<b>67</b>	<b>7</b>	<b>9</b>
Estimated NZ total hectares, 2014 harvest (autumn/winter plus spring sown crops, combined)	13,216	33,384	7,789	51,711	5,367	1,633
Estimated NZ total hectares, 2015 harvest (autumn/winter plus spring sown crops, combined)	12,188	34,627	7,738	57,875	4,709	2,492
Estimated NZ total hectares already sown, as at 1 April 2015	90	3,136	0	1,040	0	251
Estimated NZ total hectares intending to sow in autumn or winter, as at 1 April 2015	8,081	28,934	1,434	25,809	909	1,407
Estimated percentage of autumn/ winter 2015 sowings already sown by 1 April 2015	1.1%	9.8%	0.0%	3.9%	0.0%	15.2%
Estimated NZ total autumn/ winter 2015 sowings and/or sowing intentions as at April 1 2015 (hectares, for harvest in 2016)	8,171	32,070	1,434	26,849	909	1,658
<b>Comparative figures from the same time in four previous years (1 April AIMI surveys)</b>						
Estimated NZ total autumn/ winter 2014 sowings & intentions (from the April 2014 AIMI Survey Report)	7,078	32,607	1,148	23,380	554	926
Estimated NZ total autumn/ winter 2013 sowings & intentions (from the April 2013 AIMI Survey Report)	8,733	34,325	1,461	27,041	1,155	719
Estimated NZ total autumn/ winter 2012 sowings & intentions (from the April 2012 AIMI Survey Report)	8,173	31,136	2,101	23,485	1,286	1,540
Estimated NZ total autumn/ winter 2011 sowings & intentions (from the April 2011 AIMI Survey Report)	9,960	32,020	1,650	24,510	1,120	430
Estimated change in autumn/ winter sowings & intentions, 2013 to 2014 (hectares)	-1,655	-1,718	-313	-3,661	-601	207
Estimated change in autumn/ winter sowings & intentions, 2014 to 2015 (hectares)	1,094	-537	287	3,469	355	732
Estimated % change in autumn/ winter sowings & intentions, 2014 to 2015 (%)	15%	-2%	25%	15%	64%	79%

Table 3 above shows that most autumn/ winter cereal crops had not been sown by 1 April 2015. For feed wheat, only 10% had been sown, while for feed barley, only 4% had been sown. For feed oats, the figure was 15%. For the milling and malting crops, almost none of the intended autumn/ winter sowings had been sown. Therefore the estimates in the table are primarily sowing *intentions*. As at 1 April 2015, autumn/ winter sowings plus sowing intentions for 2015 are higher for most crops than sowings plus sowing intentions at the same time in 2014 (with the exception of feed wheat). In addition, the 1 April 2014 estimates are over-estimates of what was *actually* sown that autumn/ winter, since wet conditions prevented some sowings.

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