

**Arable Industry Marketing Initiative  
Quarterly Survey of Cereals  
To November 1 2010**

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December 2010

Report to the  
Arable Marketing Initiative Committee



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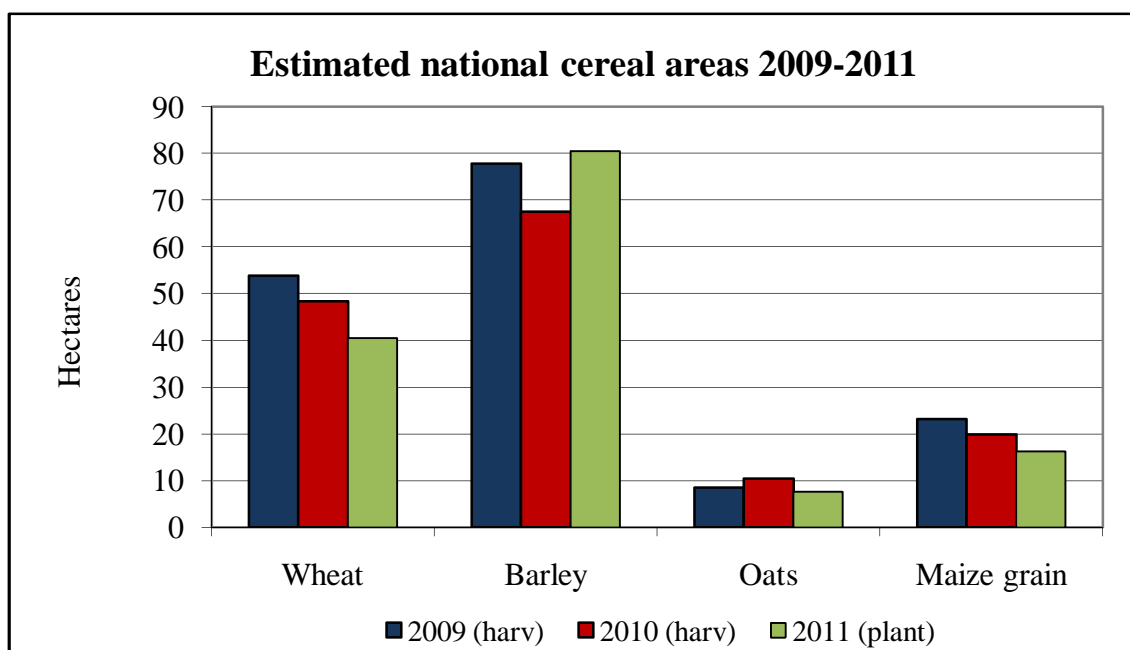
## Arable Industry Marketing Initiative

### SUMMARY OF QUARTERLY SURVEY OF CEREAL AREAS AND VOLUMES TO NOVEMBER 1 2010

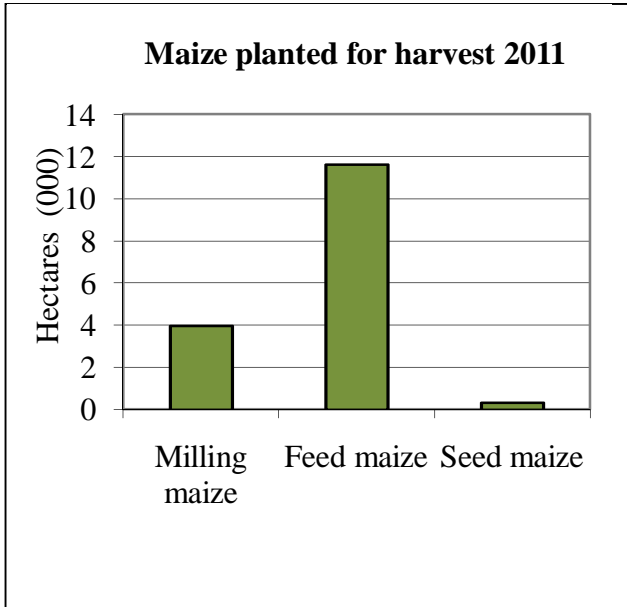
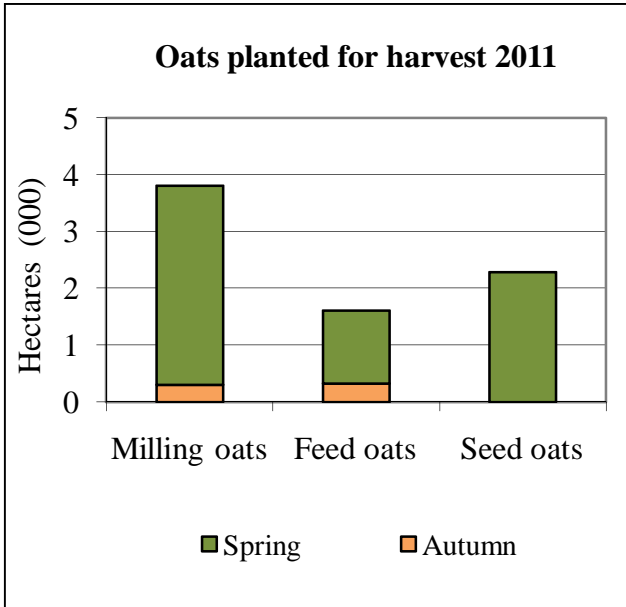
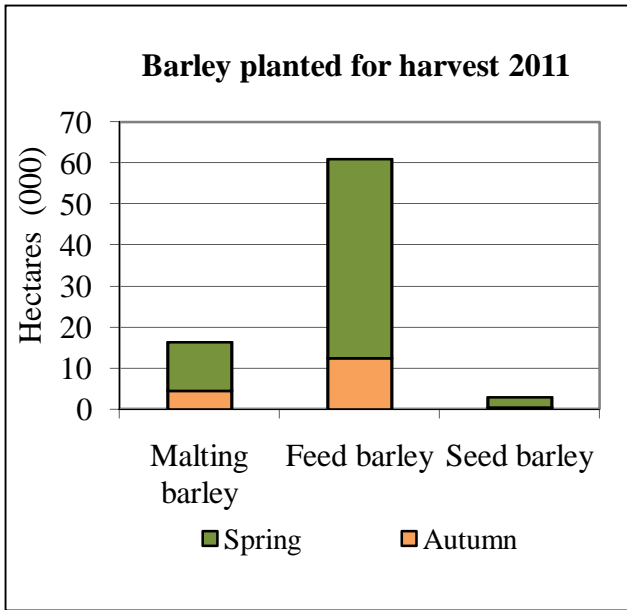
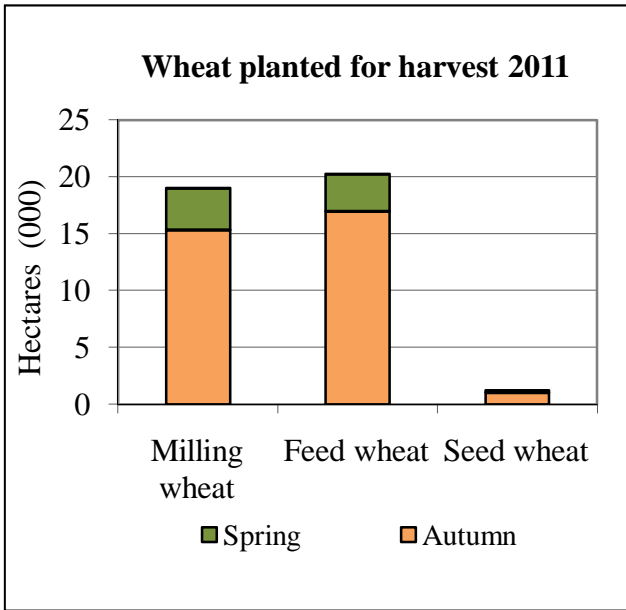
The Quarterly Survey of Cereals commissioned by the Arable Industry Marketing Initiative, and carried out by the AERU at Lincoln University, was started in September 2010 to provide current information on the production, sales, plantings and on-farm stocks of wheat, barley, oats and maize grains in New Zealand. The information presented below is a summary of the results of the November 2010 survey, which covered sales, stocks and plantings as at November 1 2010.

- **Crop areas:** The total area planted (or intended to be planted if planting was not complete at the time of the survey) in wheat, barley, oats and maize grain in 2010 has declined by less than one percent from the area harvested in 2010 (144,900 hectares compared with 146,200 hectares). However, with the exception of barley, individual cereal areas are expected to decline significantly in 2011 from 2010 levels. Between the 2009 and 2011 harvests there have been very large reductions in the areas of both wheat and maize grain.

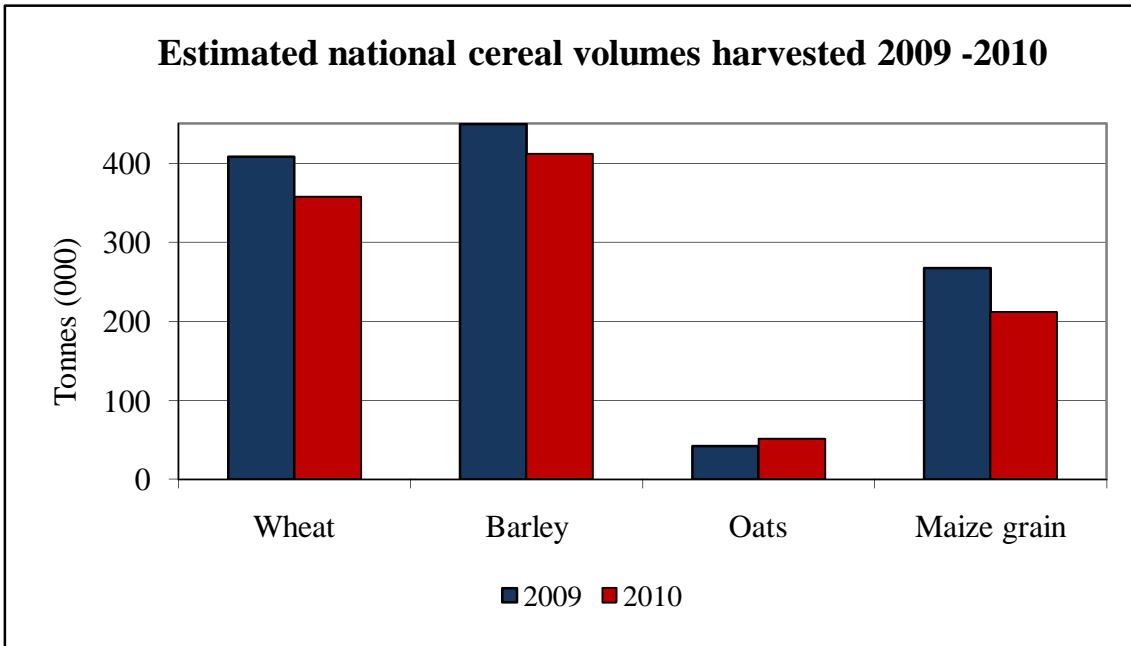
The area of maize silage planted by survey respondents in spring 2010 has increased markedly over 2010 harvest levels. It is not possible to estimate the total area of maize silage planted nationally from this survey as the proportion of the national total grown by survey participants cannot be estimated in the absence of statistical data total areas in past years.



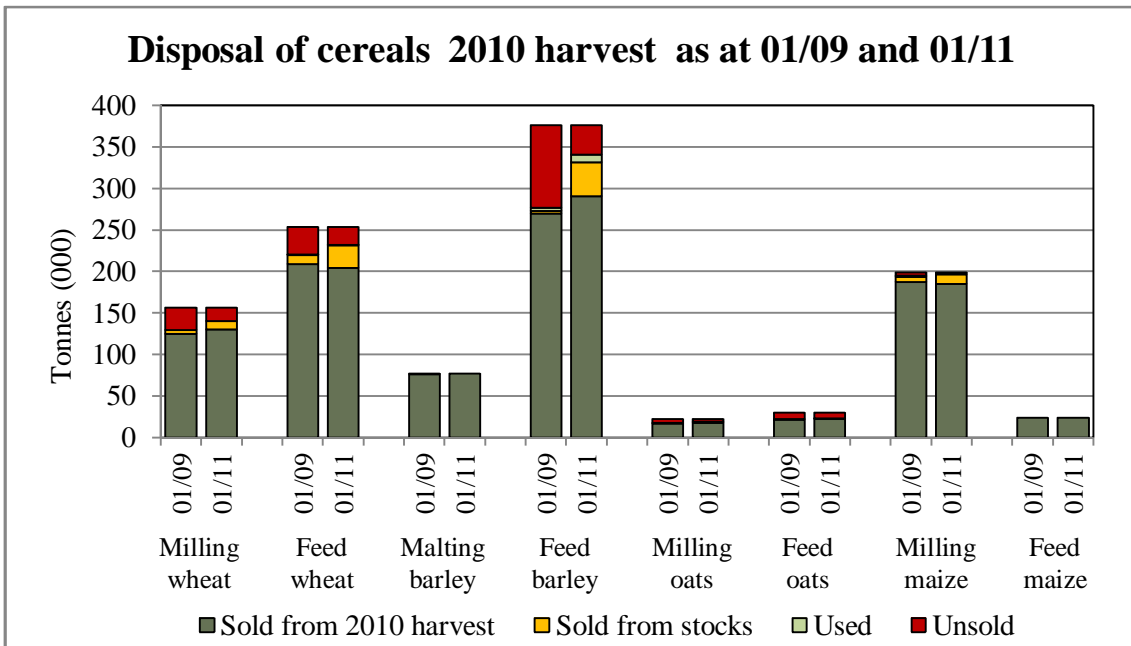
The intended end-uses of cereals planted for the 2011 harvest are shown on the next page.



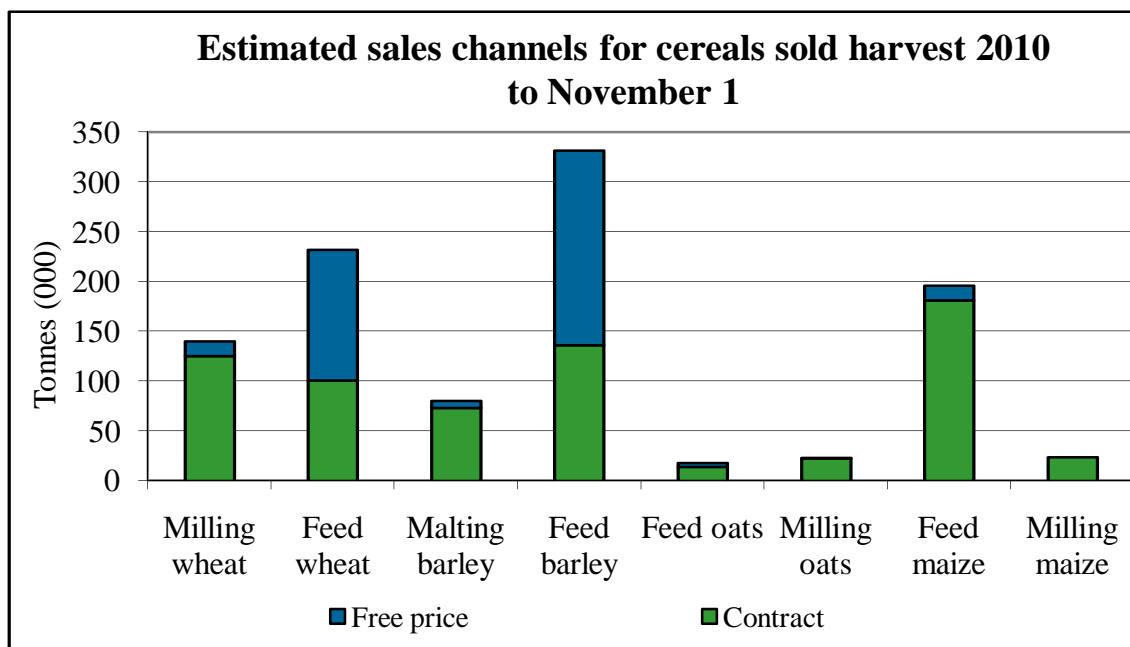
- Crop volumes:** While the volumes of both wheat and barley harvested declined from 2009 to 2010, the reductions in volume were smaller than changes in area, reflecting higher average yields. However, the reverse appeared to be true for oats and maize grain for which the change in volume was larger than the change in area harvested. In both years barley comprised the largest volume of cereal crops, followed by wheat, maize grain and oats.



- Crop disposal:** By November 1 2010 over 90 percent of the total wheat and barley grown in 2010 or carried over from previous harvests had been sold, and less than one percent of maize remained to be sold. Twenty percent of the total oats on hand after the 2010 harvest was still unsold. It is estimated that 36,000 tonnes of feed barley, 21,000 tonnes of feed wheat and 17,000 tonnes of milling wheat were still unsold on November 1.



- Sales channels:** Almost all milling and malting crops sold during the period were contracted for sale before harvest as might be expected (96 percent of wheat and barley and all oats and maize), and most of the free-price sales of these commodities were of stocks carried over from previous harvests. However, although only small quantities of feed oats and maize are traded at a free price approximately half of all feed wheat and barley were uncontracted at harvest.



- Crop storage:** Although the volumes of cereals stored on-farm declined significantly between September 1 and November 1 as shown below, almost half of the milling wheat on-hand after the 2010 harvest, approximately 60 percent of all oats, and 25 percent of feed barley remains on-farm.

