



## SUMMARY - SURVEY OF CEREAL AREAS AND VOLUMES - APRIL 1, 2012

### Introduction

As part of the Arable Industry Marketing Initiative, Opinions Market Research Ltd conducted a survey of 119 arable farmers to provide information as at 1 April, 2012, on the 2012 harvest production, sales channels and on-farm storage, plus 2012 autumn plantings/ intentions of wheat, barley and oats in New Zealand. In relation to maize, a separate May 1, 2012 survey has been conducted and will be reported separately.

### Summary of Key Points

- As expected, the total tonnes of feed wheat and feed barley harvested in 2012 are markedly up on last year, by 65% for feed wheat and 36% for feed barley. This is a reflection of two factors:
  - (1) a 32% increase in area of feed wheat and a 22% increase in area of feed barley on the previous year and
  - (2) the average yields being considerably higher than in the previous year (25% and 11% higher respectively).
- An increasing tonnage of feed wheat (255,000 tonnes) and feed barley (210,000 tonnes) is sold by contracts as of the 1st April 2012. This compares with 100,000 tonnes of feed wheat and 155,000 tonnes of feed barley in 2011.
- This high volume of contracted feed grains means that the free market for feed grains is likely to be quiet.
- The estimated areas to be planted in autumn wheat at 1<sup>st</sup> April are down for milling wheat but are very similar to 2011 for feed wheat and feed barley.

## Estimated national figures for 2010, 2011 and 2012 as at April 1, 2012

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
<b>Number of farmers in the survey who grew this crop</b>		<b>45</b>	<b>68</b>	<b>27</b>	<b>91</b>	<b>8</b>	<b>10</b>
<b>2010 harvest</b>							
Estimated NZ total hectares, 2010 harvest	Ha	20,766	50,118	10,720	45,536	6,055	4,216
Estimated NZ total tonnes, 2010 harvest	Tonnes	157,088	314,425	61,395	263,386	28,652	16,621
<b>2011 harvest</b>							
Estimated NZ total hectares, 2011 harvest	Ha	20,024	34,776	10,743	54,957	3,947	2,153
Estimated NZ total tonnes, 2011 harvest	Tonnes	141,933	251,467	58,476	309,224	18,382	10,718
<b>2012 harvest</b>							
Hectares already harvested in 2012 (by Apr 1, 2012)	Ha	15,831	38,725	9,918	54,935	1,301	1,091
Tonnes already harvested in 2012 (by Apr 1, 2012)	Tonnes	141,275	366,357	62,290	347,511	6,651	3,000
Hectares still to harvest in 2012 (as at Apr 1, 2012)	Ha	924	7,173	271	12,313	2,527	523
Tonnes still to harvest in 2012 (as at Apr 1, 2012)	Tonnes	8,845	48,765	5,069	71,855	9,906	1,900
Estimated NZ total hectares, 2012 harvest	Ha	16,754	45,898	10,189	67,248	3,827	1,615
Estimated NZ total tonnes, 2012 harvest	Tonnes	150,120	415,122	67,360	419,365	16,557	4,900
Sold on contract and delivered by Apr 1, 2012	Tonnes	12,939	42,998	26,271	68,050	352	374
Sold on contract and stored on farm on Apr 1, 2012	Tonnes	94,352	183,410	32,858	107,554	4,868	0
Sold at spot/ free price and delivered by Apr 1, 2012	Tonnes	-	4,574	-	24,636	-	278
Sold at spot/ free price and stored on farm on Apr 1, 2012	Tonnes	-	3,755	-	8,134	-	96
Unsold (from 2012 harvest) on Apr 1, 2012	Tonnes	33,984	131,620	3,162	139,137	1,430	2,252
Tonnes still to harvest on Apr 1, 2012	Tonnes	8,845	48,765	5,069	71,855	9,906	1,900

	Units	Milling wheat 45	Feed wheat 68	Malting barley 27	Feed barley 91	Milling oats 8	Feed oats 10
<b>Number of farmers in the survey who grew this crop</b>							
<b>Sales channels (2012 harvest)</b>							
Sold on contract (total) by Apr 1, 2012	Tonnes	107,291	226,408	59,128	175,604	5,220	374
Sold at spot/ free price (total) by Apr 1, 2012	Tonnes	-	8,329	-	32,770	-	374
<b>Delivery status of sold grain (2012 harvest)</b>							
Sold and delivered (total) by Apr 1, 2012	Tonnes	12,939	47,572	26,271	92,686	352	651
Sold and stored on farm (total) on Apr 1, 2012	Tonnes	94,352	187,165	32,858	115,688	4,868	96
<b>Total sales (2012 harvest)</b>							
Sold (grand total) by Apr 1, 2012	Tonnes	107,291	234,737	59,128	208,374	5,220	747
Unsold (from 2012 harvest to date) on Apr 1, 2012	Tonnes	33,984	131,620	3,162	139,137	1,430	2,252
Tonnes still to harvest on Apr 1, 2012 (sales status unknown)	Tonnes	8,845	48,765	5,069	71,855	9,906	1,900
Estimated % change in hectares, 2010 to 2011 harvest		-3.6	-30.6	0.2	20.7	-34.8	-48.9
Estimated % change in hectares, 2011 to 2012 harvest		-16.3	32.0	-5.2	22.4	-3.0	-25.0
Estimated % change in tonnes, 2010 to 2011 harvest		-9.6	-20.0	-4.8	17.4	-35.8	-35.5
Estimated % change in tonnes, 2011 to 2012 harvest		5.8	65.1	15.2	35.6	-9.9	-54.3

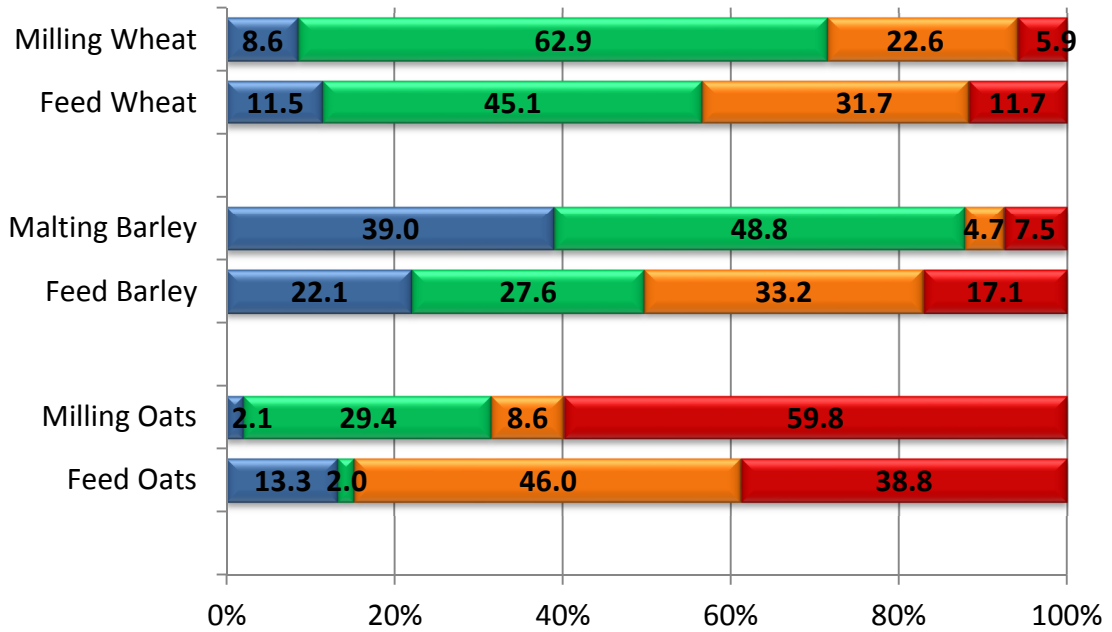
Note: these estimated national figures were obtained by scaling up the survey totals for each question so that the 2011 national totals for each crop match the most recent (Provisional 2011) Agricultural Production Statistics. Like all survey estimates, these national figures are not exact, and have an associated margin of error.

Note that in preparing the key points at the start of this report, the tonnages “still to harvest” were assumed to be split between contract and other categories in the same proportion as the harvested tonnages, and the resulting estimated figures for “contracted grain still to be harvested” were added to the contracted grain already harvested to obtain an overall figure for contracted grain.

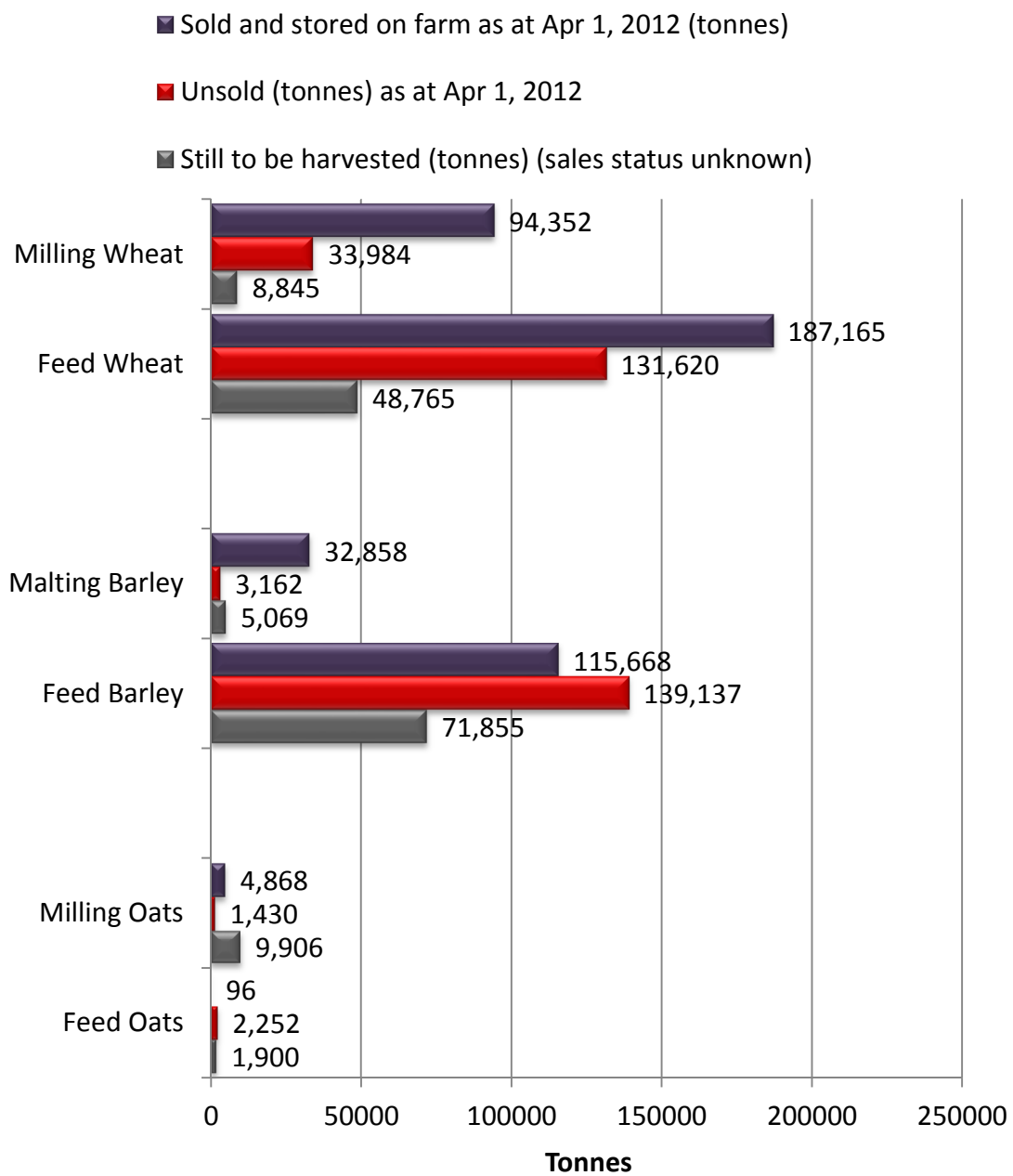
## Sales Status of 2012 cereal crops as at April 1, 2012

The following graph presents information from the above table in the form of percentages:

- sold and delivered as at Apr 1, 2012
- sold and stored on farm as at Apr 1, 2012
- unsold as at Apr 1, 2012
- still to harvest as at Apr 1, 2012



## Estimated national on farm storage of 2012 cereal crops as at April 1, 2012



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

## Autumn planting intentions as at 1st April 2012

	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 grew this crop</b>	<b>45</b>	<b>68</b>	<b>27</b>	<b>91</b>	<b>8</b>	<b>10</b>
Estimated NZ total hectares, 2010 harvest	20,766	50,118	10,720	45,536	6,055	4,216
Estimated NZ total hectares, 2011 harvest	20,024	34,776	10,743	54,957	3,947	2,153
Estimated NZ total hectares, 2012 harvest	16,754	45,898	10,189	67,248	3,827	1,615
Estimated NZ total autumn 2011 plantings/intentions (from the April 2011 AIMI Survey Report)	9,960	32,020	1,650	24,510	1,120	430
Estimated NZ total autumn 2012 plantings/intentions (from the current, April 2012 AIMI Survey Report) (for harvest in 2013) [NB: Spring intentions NOT asked till July]	8,173	31,136	2,101	23,485	1,286	1,540
Estimated % change in autumn plantings, 2011 to 2012	-17.9%	-2.8%	27.3%	-4.2%	14.8%	258.1%

Note: these estimated national hectares (except those from the April 2011 AIMI Report) were obtained by scaling up the survey total hectares for each question so that the 2011 national total hectares for each crop match the most recent (2011) Agricultural Production Statistics. Like all survey estimates, these national hectares are not exact, and have an associated margin of error.