SUMMARY - SURVEY OF CEREAL AREAS AND VOLUMES – OCTOBER 1, 2013

Introduction

The objective of this AIMI survey of growers was to determine:

- stocks of grain (sold and unsold) on hand on farms at October 1, 2013
- areas planted and planned plantings of cereals (wheat, barley, oats and maize) for the 2014 harvest

The data from the 87 (wheat, barley, oats) + 47 (maize) survey farms at October 1, 2013 are scaled up to the national level using the most recent Agricultural Production Statistics and maize seed sales. As with all surveys, there is a margin of error which needs to be considered in relation to this report.

At the 1st October 2013:

- As previously reported, yields per hectare of wheat and barley crops were unusually high for both of the last two harvests (2012 and 2013) due to good growing conditions in Canterbury. Oat yields were low for the 2012 harvest, but more normal for the 2013 harvest. Maize grain and maize silage yields were similar and fairly average for the last two harvests; for the 2013 harvest, low yields in some regions were off-set by good yields in other regions.

- As a result of these high volumes, there are medium volumes of feed wheat and barley grain unsold on farm at the time of the survey (October 1, 2013), although these are both down on last October. For feed wheat there was an estimated 52,700 tonnes unsold (compared to 75,100t on October 15, 2012 and 7,800t on October 1, 2011) and for feed barley there was an estimated 31,900 tonnes unsold (66,300t on October 15, 2012 and 23,800t on October 1, 2011). These figures also reflect the effects of the autumn 2013 drought in the North Island which was, however, followed by good pasture growth in most regions.

- The tonnages for oats are low but the volumes unsold are up compared to unsold volumes on October 15, 2012. The tonnage of unsold maize grain was estimated to be zero on October 1, 2013 (compared to 29,700t on October 15, 2012 and 1,700t on October 1, 2011).

- Total stocks on farm (sold and unsold) of both feed wheat and feed barley as at October 1 2013, were down on total stocks at the same time in 2012, but higher than in 2011. For feed wheat, total stocks were estimated to be 162,000 tonnes on October 1, 2013, compared to 206,000t on October 15, 2012 and 55,000t on October 1, 2011. For feed barley, total stocks were 119,000 tonnes on October 1, 2013, compared to 152,000t on October 15, 2012 and 68,000t on October 1, 2011.

- **The estimated reduction in unsold feed wheat from the 2013 harvest, between the AIMI Surveys on July 1, 2013 and on October 1, 2013, is about 32,000 tonnes. Similarly, the estimated reduction in unsold feed barley is about 27,000 tonnes. These reductions are perhaps lower than anticipated due to the unusually good pasture growth during the winter and early spring, following the breaking of the autumn drought.**

- **When plantings in the autumn and spring are added to the spring planting intentions (after October 1, 2013), the areas of most crops are similar to plantings last year (2012). The exceptions are milling wheat (predicted area up by 24%) and feed wheat (area up by 17%). The area of the biggest grain crop, feed barley, is predicted to be almost identical to last year (0.4% drop), although one third of the area was still unsown at the time of the survey. The area sown in oats is predicted to fall by about 1,000 ha, although 62% was still unsown at the time of the survey (October 1, 2013).**

- **The total area planted in maize is predicted to be 8% up on last year (though this estimate is within the margin of error of the survey, so in reality, there may be no change), and is almost identical to the area planted the previous year (2011); however, 95% of the maize crop was unsown at the time of the survey (October 1, 2013), so these were primarily planting intentions rather than actual plantings.**

These figures reflect the position at the 1st October 2013 and there will have been changes since this time.

Estimated national figures for 2012 and 2013 as at October 1, 2013

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Maize grain	Maize silage
Number of farmers in the survey who harvested this crop in 2013		29	52	17	69	6	15	13	38
2012 harvest									
Estimated NZ total hectares, 2012 harvest	Ha	17,755	37,045	10,641	55,059	3,127	773	19,400	50,744
Estimated NZ total tonnes, 2012 harvest	Tonnes	149,489	339,111	71,163	367,637	14,452	3,848	211,200	961,204
2013 harvest									
Estimated NZ total hectares, 2013 harvest	Ha	15,772	35,590	12,779	54,547	3,694	2,766	16,071	48,934
Estimated NZ total tonnes, 2013 harvest	Tonnes	140,316	326,958	89,618	363,369	21,464	16,179	174,380	986,825
Sold on pre-harvest contract and delivered by Oct 1 2013	Tonnes	49,187	115,237	57,040	164,824	6,892	8,859	137,126*	-
Sold on pre-harvest contract and stored on farm on Oct 1 2013	Tonnes	36,706	93,570	20,758	70,567	7,354	2,223	-	-
Sold at spot/ free price and delivered by Oct 1 2013	Tonnes	5,722	41,746	2,577	71,115	2,052	804	19,605*	-
Sold at spot/ free price and stored on farm on Oct 1 2013	Tonnes	18,373	16,273	0	16,748	0	513	-	-
(For milling or malting only)-Downgraded and sold as feed by Oct 1 2013	Tonnes	906	-	3,527	-	0	-	-	-
(For feed only) Used on own farm by Oct 1 2013	Tonnes	-	7,480	-	8,261	-	633	17,648	-
Unsold on Oct 1 2013	Tonnes	29,423	52,651	5,717	31,854	5,165	3,147	0	-
Sales channels (2013 harvest)									
Sold on pre-harvest contract (total) by Oct 1 2013	Tonnes	85,893	208,808	77,798	235,391	14,247	11,083	137,126	-
Sold at spot/ free price (total) by Oct 1 2013	Tonnes	24,095	58,019	2,577	87,863	2,052	1,317	19,605	-
On-farm storage (2013 harvest)									
Sold and delivered (total) by Oct 1 2013	Tonnes	54,909	156,983	59,617	235,939	8,945	9,663	-	-
Sold and stored on farm (total) on Oct 1 2013	Tonnes	55,079	109,843	20,758	87,316	7,354	2,736	-	-
Total sales (2013 harvest)									
Sold (grand total) by Oct 1 2013 (includes used on farm)	Tonnes	110,893	274,307	83,901	331,516	16,299	13,032	174,380	-
Unsold (from 2013 harvest) on Oct 1 2013	Tonnes	29,423	52,651	5,717	31,854	5,165	3,147	0	-
Estimated % change in hectares, 2012 to 2013 harvest	%	-11.2	-3.9	20.1	-0.9	18.1	258	-17.2	-3.6
Estimated % change in tonnes, 2012 to 2013 harvest	%	-6.1	-3.6	25.9	-1.2	48.5	320	-17.4	2.7

Plantings and planting intentions as at October 1, 2013

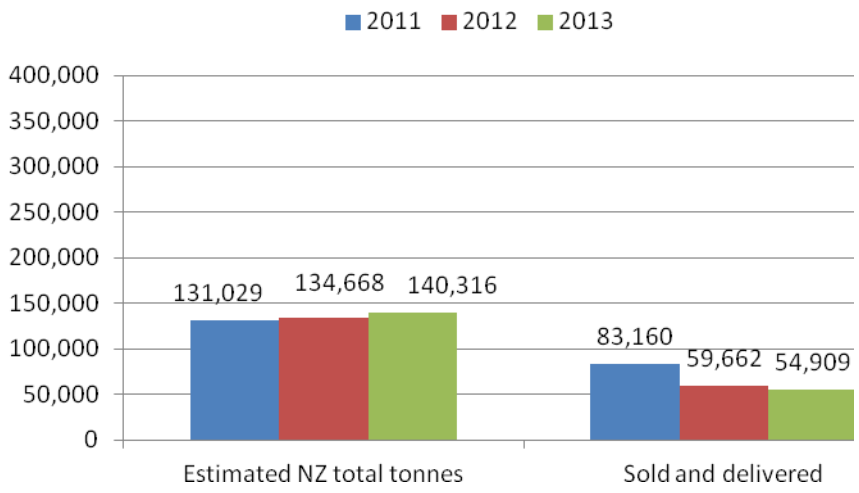
	Milling wheat (ha)	Feed wheat (ha)	Malting barley (ha)	Feed barley (ha)	Milling oats (ha)	Feed oats (ha)	Maize grain (ha)	Maize silage (ha)
Number of farmers in survey who planted or intend to plant this crop as at Oct 1 2013	29	50	20	67	5	12	13	38
Estimated NZ total hectares, 2012 harvest	17,755	37,045	10,641	55,059	3,127	773	19,400	50,744
Estimated NZ total hectares, 2013 harvest	15,772	35,590	12,779	54,547	3,694	2,766	16,071	48,934
Estimated NZ total autumn / winter 2013 plantings (hectares, for harvest in 2014)	12,242	34,929	742	19,673	326	1,185	-	-
Estimated NZ total spring 2013 plantings already sown as at Oct 1 2013 (hectares, for harvest in 2014)	6,399	6,372	7,141	16,562	189	361	2,744	711
Estimated NZ total spring 2013 plantings left to sow at at Oct 1 2013 (hectares, for harvest in 2014)	925	489	3,606	18,100	2,027	1,340	15,170	51,714
Estimated NZ total spring 2013 plantings plus intentions as at Oct 1 2013 (hectares, for harvest in 2014)	7,324	6,862	10,747	34,662	2,216	1,701	17,944	52,425
Predicted NZ total hectares, 2014 harvest (Autumn /winter 2013 plantings and Spring 2013 plantings & intentions all combined)	19,567	41,791	11,489	54,335	2,543	2,886	17,944	52,425
Estimated % change in NZ total plantings, 2012 to 2013 harvest	-11.2	-3.9	20.1	-0.9	18.1	258	-17.2	-3.6
Estimated % change in NZ total plantings, 2013 to 2014 harvest	24.1	17.4	-10.1	-0.4	-31.2	4.3	11.7	7.1

Summary results in October each year – graphs

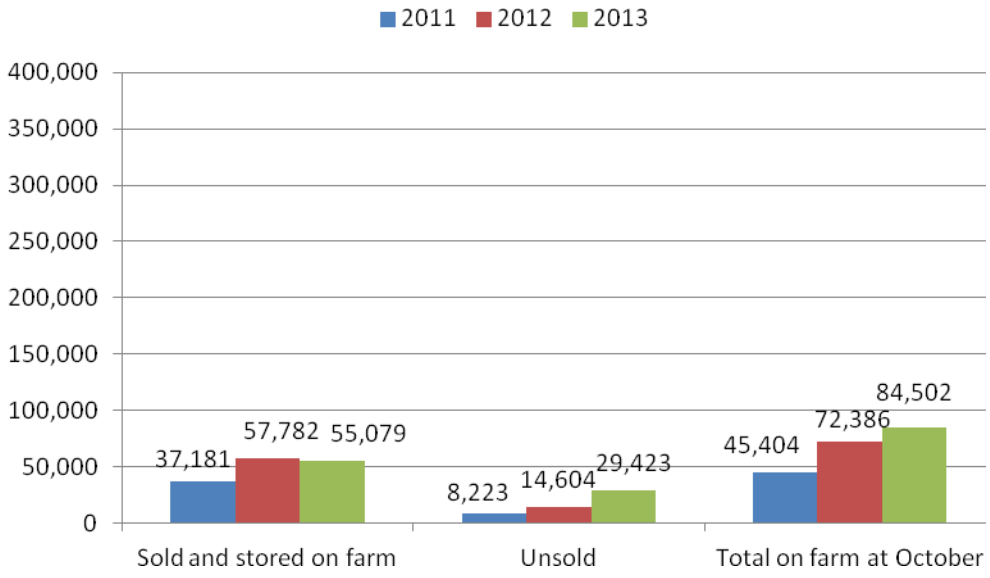
For the three main crops, the following graphs present information from the AIMI Survey Reports for October 2011, 2012 and 2013 in graphical form. Note that for 2012, the estimated NZ total harvest tonnages differ from those presented in the table above. The estimated harvest tonnages in the table are a more accurate, matched comparison of 2012 and 2013 harvest tonnages on the same survey farms (scaled up to national totals), so are the best figures for estimating changes in tonnage or hectares from 2012 to 2013. By comparison, the three October survey reports are based upon three different (though overlapping) survey samples, so the comparisons of estimated harvest tonnages from season to season are less precise. On the other hand, the successive October reports all provide information on the breakdown into the categories "sold and delivered", "sold and stored", "unsold" and so on, and these data are used here since this is the focus of these graphs.

Note: Survey dates were October 1 2011, October 15 2012 and October 1 2013.

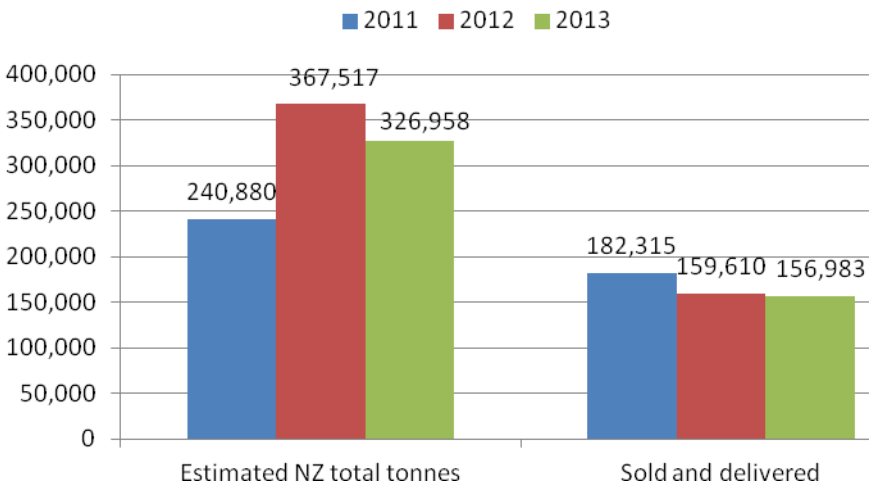
Harvest Tonnages and Delivered Sales (October): Milling Wheat (Tonnes)



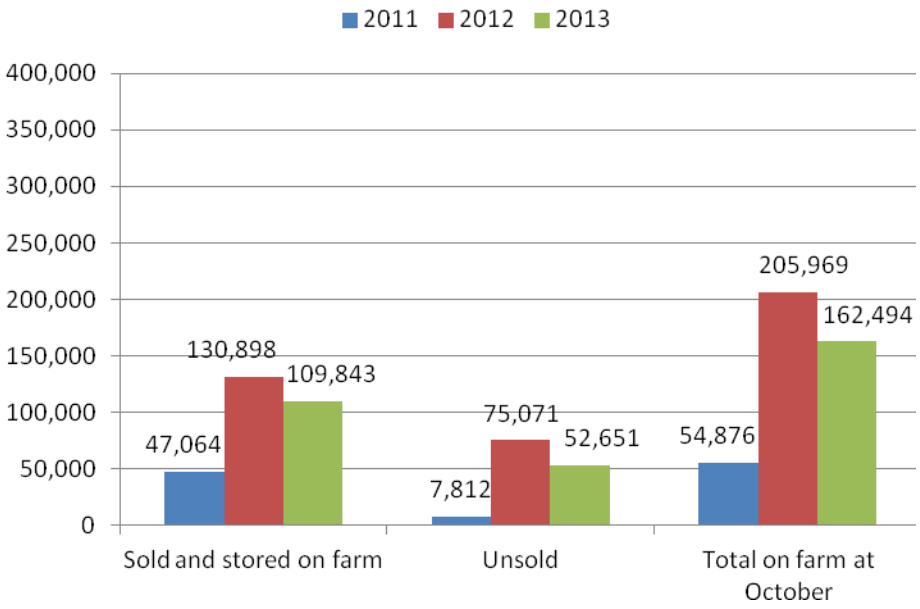
Stock on farms in October: Milling Wheat (Tonnes)



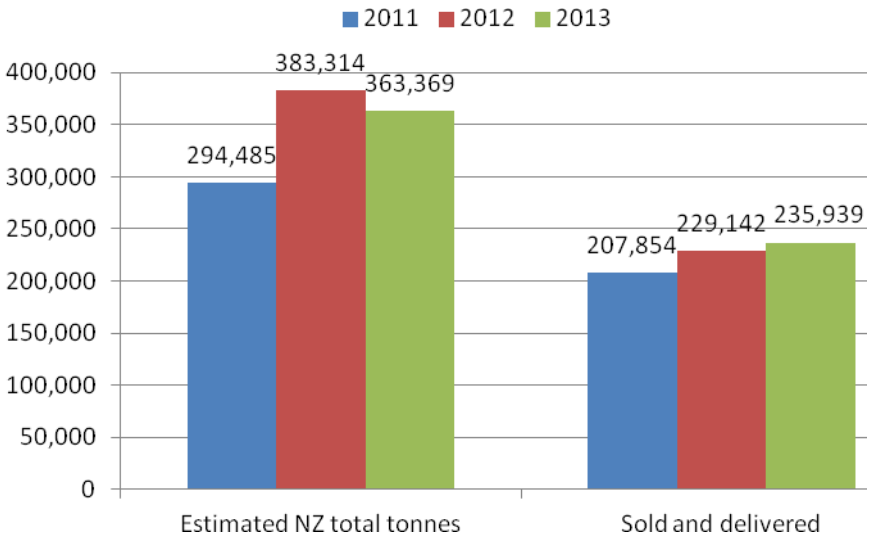
Harvest Tonnages and Delivered Sales (October): Feed Wheat (Tonnes)



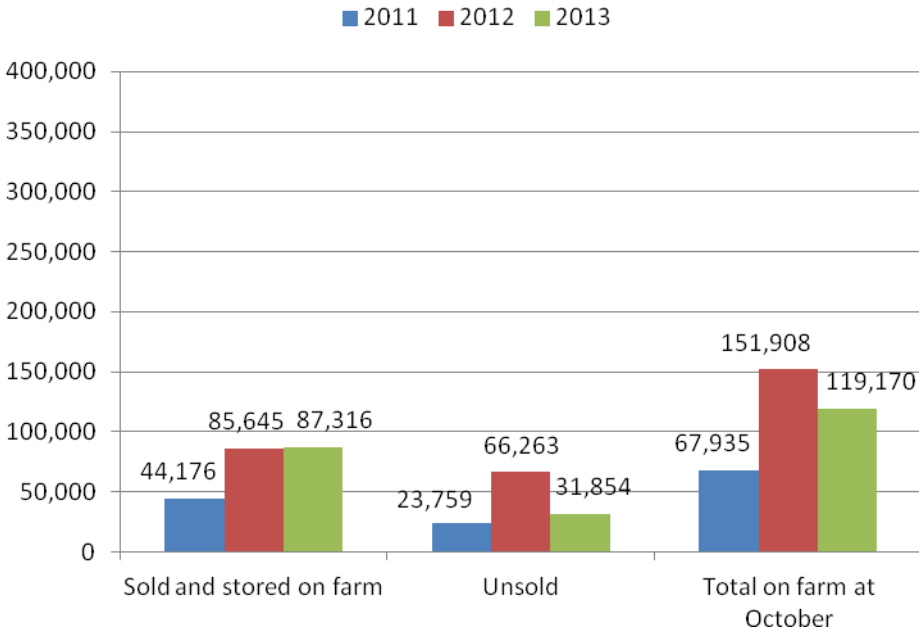
Stock on farms in October: Feed Wheat (Tonnes)



Harvest Tonnages and Delivered Sales (October): Feed Barley (Tonnes)

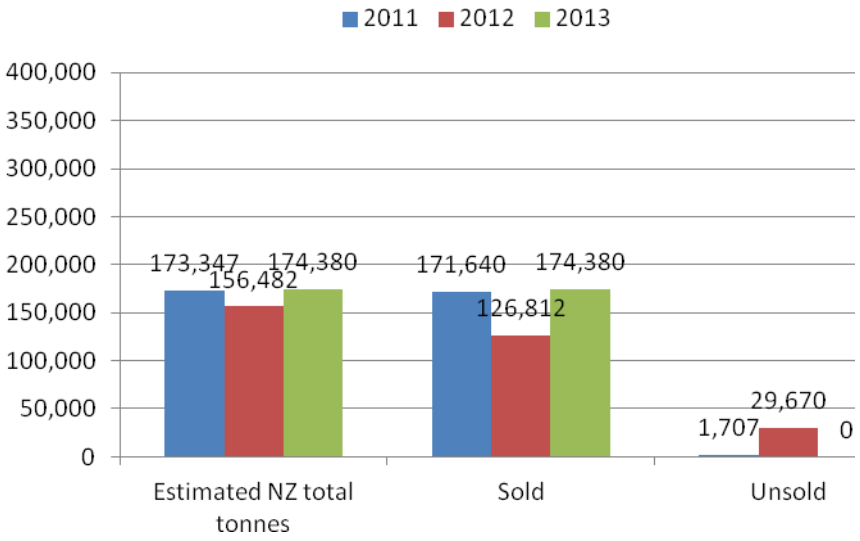


Stock on farms in October: Feed Barley (Tonnes)

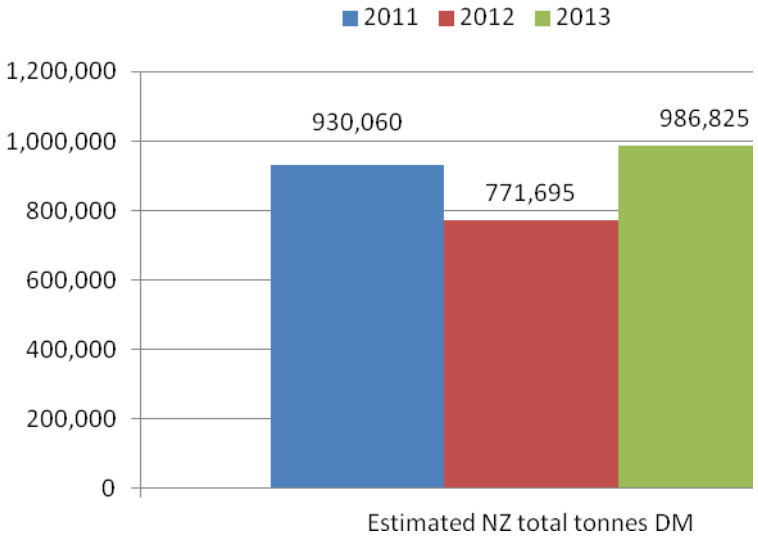


Harvest Tonnages, Sales, and Unsold Stock (October): Maize Grain

Note: Sold stock includes figures for crop used on own farm



Harvest Tonnages: Maize Silage



Estimated total hectares for harvest in 2014

The graph below shows the estimated total NZ hectares harvested in 2012 and 2013, as well as the predictions for the 2014 harvest. The 2014 figures are based on plantings in autumn and spring as well as remaining planting intentions for spring. This information is also presented in table form, earlier in this report.