

## SUMMARY - SURVEY OF CEREAL AREAS AND VOLUMES - OCTOBER 15, 2012

### Introduction

As part of the Arable Industry Marketing Initiative, Opinions Market Research Ltd conducted a survey of 109 (wheat, barley, oats) + 47 (maize) arable farmers to provide information as at October 15, 2012, on the 2012 harvest final production, sales channels and on-farm storage, plus 2012 final autumn/ winter/ spring plantings and spring planting intentions for wheat, barley, oats and maize in New Zealand.

### Summary of Key Points

At the 15<sup>th</sup> October 2012:

- As previously reported, yields per hectare of wheat and barley crops were unusually high in 2012, due to the good growing conditions in Canterbury. On the other hand, oat yields were low as a result of the dry season in Southland.
- These high yields, along with increased areas of feed wheat and feed barley, resulted in large increases in the tonnes of wheat and barley feed grains harvested in 2012.
- As a result of these high volumes, there are large volumes of feed wheat and barley grain unsold on farm at the time of the survey (October 15, 2012). For feed wheat there was 75,800t unsold (compared to 7,800t on October 1, 2011) and for feed barley there was 68,600t unsold (23,800t on October 1, 2011). The tonnages for oats are low but the volumes unsold are conversely, now about 2,000t *lower* for both milling and feed oats than on October 1, 2011. The tonnage of unsold maize grain was estimated at 29,700t (1,700t on October 1, 2011), though this figure has a high “margin of error”.
- Total stocks on farm (sold and unsold) as at October 15, 2012 are much higher in 2012 than in 2011 at 206,000t (54,900t on October 1, 2011) for feed wheat and 151,900t (67,900t on October 1, 2011) for feed barley.
- The estimated reduction in unsold feed wheat between the AIMI Surveys on July 1, 2012 and on October 15, 2012 is about 53,100 tonnes (= 128,200 - 75,100). Similarly, the estimated reduction in unsold feed barley is about 47,100 tonnes (= 113,400 - 66,300).
- When plantings in the autumn and spring are added to the spring planting intentions (after October 15, 2012), the areas of most crops are similar to plantings last year (2011). The exceptions are malting barley (area up) and feed oats (area up), although the areas involved are not large. The areas of the two biggest grain crops, feed wheat and feed barley, are predicted to be 1% up and 8% down respectively on last year (though both of these figures are less than the margin of error of the survey). The total area planted in maize is predicted to be similar to last year.
- These figures reflect the position at the 15th October 2012 and there will have been changes since this time.

## Estimated national figures for 2010, 2011 and 2012 (final) as at October 15, 2012

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Maize grain	Maize silage
<b>Number of farmers in the survey who harvested this crop in 2012</b>		41	69	22	91	8	7	15	34
<b>2010 harvest</b>									
Estimated NZ total hectares, 2010 harvest	Ha	20,298	48,417	10,036	44,756	6,940	4,592	-	-
Estimated NZ total tonnes, 2010 harvest	Tonnes	158,544	304,524	60,258	258,099	35,960	19,588	-	-
<b>2011 harvest</b>									
Estimated NZ total hectares, 2011 harvest	Ha	19,725	32,875	10,415	54,485	4,421	1,679	18,500	44,778
Estimated NZ total tonnes, 2011 harvest	Tonnes	143,444	239,856	59,136	308,864	22,709	6,391	210,200	930,060
<b>2012 harvest</b>									
Estimated NZ total hectares, 2012 harvest (final figures)	Ha	15,777	40,253	9,244	62,228	4,575	1,611	15,271	39,467
Estimated NZ total tonnes, 2012 harvest (final figures)	Tonnes	134,668	367,517	60,676	383,314	18,020	6,243	156,482	771,695
Sold on contract and delivered by October 15, 2012	Tonnes	55,873	134,490	58,942*	167,967	7,744	804	84,969**	-
Sold on contract and stored on farm on October 15, 2012	Tonnes	52,748	105,338	1,733*	48,165	8,668	1,072		-
Sold at spot/ free price and delivered by October 15, 2012	Tonnes	3,789	25,120	-	61,175	0	3,215	3,566**	-
Sold at spot/ free price and stored on farm on October 15, 2012	Tonnes	5,033	25,560	-	37,480	1,005	0		-
(For milling or malting only) % Downgraded and sold as feed by October 15, 2012	Tonnes	2,620	-	0	-	0	-	-	-
(For feed only) % Used on own farm by October 15, 2012	Tonnes	-	1,937	-	2,325	-	348	38,277	-
Unsold (from 2012 harvest) on October 15, 2012	Tonnes	14,604	75,071	0	66,263	603	844	29,670	-
<b>Sales channels (2012 harvest)</b>									
Sold on contract (total) by October 15, 2012	Tonnes	108,621	239,828	-	216,132	16,412	1,876	84,969	-
Sold at spot/ free price (total) by October 15, 2012	Tonnes	8,823	50,681	-	98,655	1,005	3,215	3,566	-

	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 2012		41	69	22	91	8	7	15	34
<b>Delivery status of sold grain (2012 harvest)</b>									
Sold and delivered (total) by October 15, 2012	Tonnes	59,662	159,611	58,942	229,142	7,744	4,019	-	-
Sold and stored on farm (total) on October 15, 2012	Tonnes	57,782	130,898	1,733	85,645	9,673	1,072	-	-
<b>Total sales (2012 harvest)</b>									
Sold (grand total) by October 15, 2012	Tonnes	120,064	290,509	60,676	314,788	17,417	5,091	88,535	-
Unsold on October 15, 2012	Tonnes	14,604	75,071	0	66,263	603	844	29,670	-
Estimated % change in hectares, 2010 to 2011 harvest		-2.8	-32.1	3.8	21.7	-36.3	-63.4	-	-
Estimated % change in hectares, 2011 to 2012 harvest		-20.0	22.4	-11.2	14.2	3.5	-4.1	-17.5	-11.9
Estimated % change in tonnes, 2010 to 2011 harvest		-9.5	-21.2	-1.9	19.7	-36.8	-67.4	-	-
Estimated % change in tonnes, 2011 to 2012 harvest		-6.1	53.2	2.6	24.1	-20.6	-2.3	-25.6	-17.0
Unsold on October 1, 2011 (from October 1, 2011 AIMI Survey)	Tonnes	8,223	7,812	0	23,759	2,666	2,914	1,707	-
Increase from October 1, 2011 to October 15, 2012 in tonnes unsold	Tonnes	6,381	67,259	0	42,504	-2,063	-2,070	27,963	-
Sold and stored on farm (total) on October 1, 2011 (from October 1, 2011 AIMI Survey)	Tonnes	37,181	47,064	2,052	44,176	12,736	1,565	-	-
Increase from October 1, 2011 to October 15, 2012 in tonnes sold and stored on farm (total)	Tonnes	20,601	83,834	-319	41,469	-3,063	-493	-	-

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 (2011) Agricultural Production Statistics. Like all survey estimates, these national figures are not exact, and have an associated margin of error.

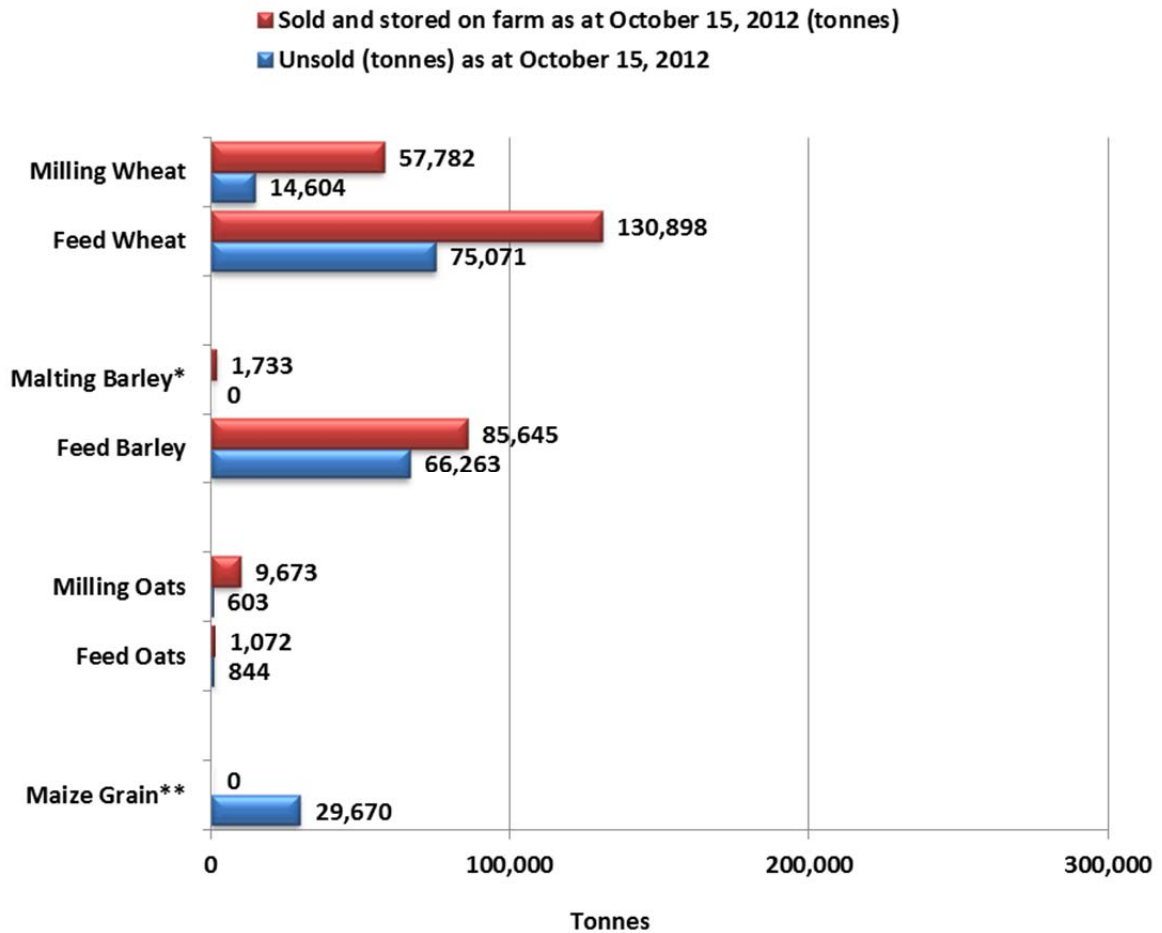
\* No distinction was made between malting barley sold on contract or sold at a spot/ free price

\*\* No distinction was made between maize grain sold and delivered or sold and stored on farm

Estimated percentage changes in hectares and tonnes between the 2010, 2011 and 2012 harvests are given in the fifth, sixth, seventh and eighth last rows of the table. For wheat, barley and oats, these estimates were obtained using data from the 109 growers who responded to both the current (October 15, 2012) AIMI Survey and the October 1, 2011 AIMI Survey, so are the percentage changes in the total hectares and tonnages summed over these exact same 109 growers in all three seasons. For maize, these estimates were obtained using data from the 47 growers who responded to both the current (October 15, 2012) AIMI Survey and the May 1, 2012 AIMI Survey, so are the percentage changes in the total hectares and tonnages summed over these exact same 47 growers in the two seasons (2011 and 2012) for which data were collected.

## Sales status of 2012 cereal crops as at October 15, 2012

The graph below presents the estimated national tonnages of the 2012 harvest of milling wheat, feed wheat, malting barley, feed barley, milling oats, feed oats and maize grain, sold and stored on farm and unsold as at October 15, 2012.



\*\* No distinction was made between maize grain sold and delivered or sold and stored on farm

\* No distinction was made between malting barley sold on contract or sold at a spot/ free price

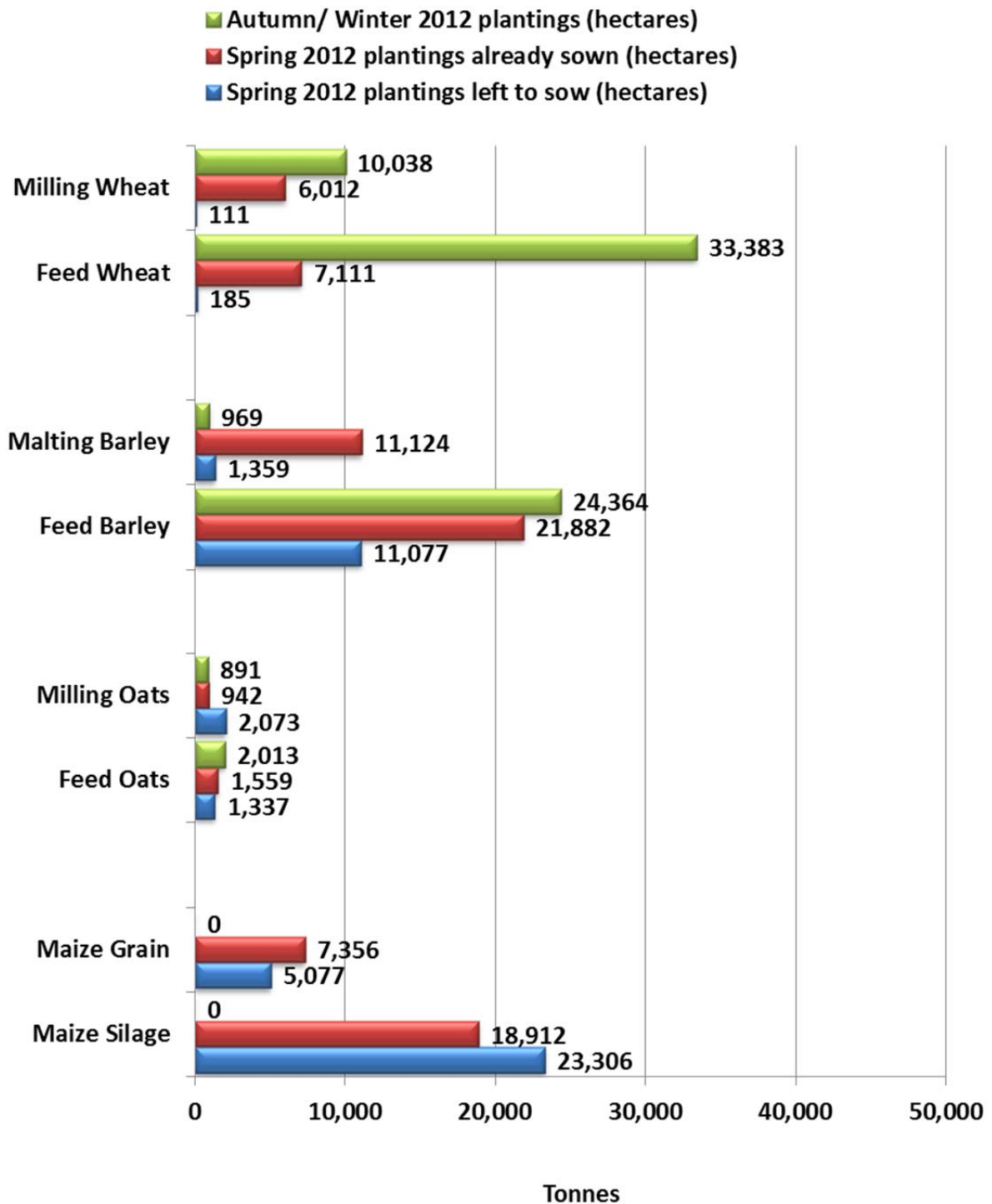
Note: these are estimated totals derived from the survey, and have an associated margin of error.

## Autumn plantings, and spring planting and spring planting intentions as at October 15, 2012

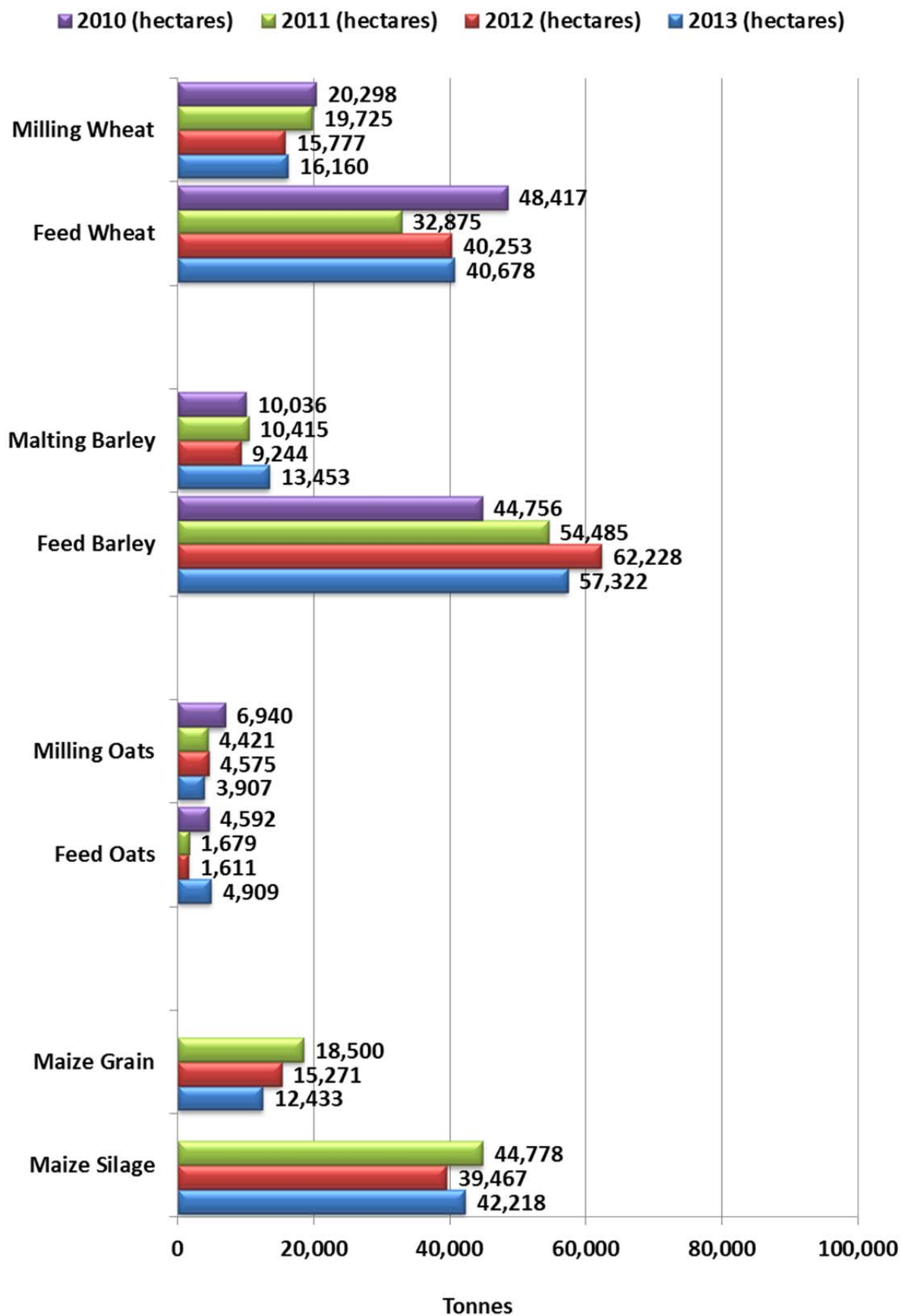
	Milling wheat (ha)	Feed wheat (ha)	Malting barley (ha)	Feed barley (ha)	Milling oats (ha)	Feed oats (ha)	Maize grain (ha)	Maize silage (ha)
<b>Number of farmers who planted or intend to plant as at October 15, 2012</b>	<b>38</b>	<b>65</b>	<b>23</b>	<b>77</b>	<b>7</b>	<b>16</b>	<b>15</b>	<b>34</b>
Estimated NZ total hectares, 2010 harvest	20,298	48,417	10,036	44,756	6,940	4,592	-	-
Estimated NZ total hectares, 2011 harvest	19,725	32,875	10,415	54,485	4,421	1,679	18,500	44,778
Estimated NZ total hectares, 2012 harvest	15,777	40,253	9,244	62,228	4,575	1,611	15,271	39,467
Estimated NZ total autumn/ winter 2012 plantings (hectares, for harvest in 2013)	10,038	33,383	969	24,364	891	2,013	-	-
Estimated NZ total spring 2012 planting already sown as at October 15, 2012 (hectares, for harvest in 2013)	6,012	7,111	11,124	21,882	942	1,559	7,356	18,912
Estimated NZ total spring 2012 planting left to sow as at October 15, 2012 (hectares, for harvest in 2013)	111	185	1,359	11,077	2,073	1,337	5,077	23,306
Estimated NZ total hectares, 2013 harvest (Autumn 2012 and Spring 2012 planting/planting intentions combined)	16,160	40,678	13,453	57,322	3,907	4,909	12,433	42,218
Estimated % change in NZ total plantings, 2012 to 2013	2.4	1.1	45.5	-7.9	-14.6	204.8	-18.6	7.0

Note: these estimated national hectares 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 (or maize seed sales, in the case of maize silage). Like all survey estimates, these national hectares are not exact, and have an associated margin of error.

**Autumn/ winter and spring plantings/ intentions for the 2012 harvest as at October 15 2012**



## History and forecast of total hectares planted per harvest



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