

SUMMARY - SURVEY OF CEREAL AREAS AND VOLUMES – APRIL 1, 2014

Introduction

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

- the size of the 2014 harvest of wheat, barley and oats
- the percentage of the 2014 harvest of wheat, barley and oats which was pre-sold as at April 1, 2014.

The data from the 130 survey farms (113 South Island and 17 North Island) as at April 1, 2014 are 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.

At the 1st April 2014:

- The estimated total tonnages of feed wheat (290,000 t) and feed barley (340,000 t) harvested in 2014 are slightly less than the previous two years. Feed wheat tonnage is estimated to be down by 6% and feed barley down by 1%, as compared to the 2013 harvest. This is a reflection of two factors:
 - (1) an estimated 2% decrease in the harvested areas of both feed wheat and feed barley as compared to the previous year; and
 - (2) a drop in the average yield of feed wheat crops in 2014 compared to the exceptionally good 2013 harvest (8.9 t/ha in 2014 and 9.4 t/ha in 2013), and identical average yields of feed barley crops in the last two seasons (7.6 t/ha in both of the 2013 and 2014 harvests).
- The weather conditions in Canterbury this season were dry in January and February. This meant that only a small percentage of the feed wheat tonnage (about 2%) was still to be harvested on 1 April, 2014. By comparison, a larger percentage of the feed barley tonnage (about 15%) was still to be harvested on 1 April, 2014; almost all of this tonnage (94%) was in South Otago or Southland, where weather conditions would have allowed harvest during April. Unharvested percentages of the other crops were: milling wheat about 6%; malting barley about 2%; milling oats about 49%; and feed oats about 10%.

- Pre-harvest contract sales of feed wheat grain that had been harvested by 1 April, 2014 (188,000 tonnes) were slightly up on the corresponding estimate of pre-harvest sales at the same time last year (2013 harvest: 183,000 tonnes). Similarly, pre-harvest contract sales of feed barley grain harvested by 1 April, 2014 (183,000 tonnes) were up on the corresponding estimate of pre-harvest sales at the same time last year (2013 harvest: 166,000 tonnes).
- In 2014 information was collected for the first time on pre-harvest contract sales of unharvested grain; this was estimated to be 4,000 tonnes of feed wheat and 40,000 tonnes of feed barley.
- Unsold stock on hand of harvested grain from the 2014 harvest, as at 1 April, 2014, was estimated to be 58,000 tonnes of feed wheat, 44,500 tonnes of feed barley, 21,000 tonnes of milling wheat, and smaller amounts of the other crops. In addition, unharvested grain that growers still hoped to harvest after April 1, 2014, that was not pre-sold, was estimated to be 3,000 tonnes of feed wheat, 11,500 tonnes of feed barley, 7,000 tonnes of milling wheat, and smaller amounts of the other crops.
- There were almost no stocks on hand of unsold grain carried over from the previous, 2013 harvest (feed wheat 7,000 tonnes, feed barley 400 tonnes and milling wheat 400 tonnes). Thus the estimate of total unsold grain in the market, as at April 1, 2014, is 65,000 tonnes of feed wheat, 45,000 tonnes of feed barley and 22,000 tonnes of milling wheat (as compared to figures as at 1 April, 2013 of 135,000 tonnes of feed wheat, 157,000 tonnes of feed barley and 49,500 tonnes of milling wheat). This is not taking account of the unsold portion of the unharvested grain that growers still hoped to harvest after April 1, 2014 (as detailed above).
- In a nutshell, there is little free grain in the market as at 1 April, 2014, as compared to the two previous seasons. Unsold tonnages of milling and feed wheat were both about half the unsold tonnages a year ago (1 April, 2013). The unsold tonnage of feed barley was about one third the unsold tonnage a year ago.
- The average 2014 yields for the key crops were generally acceptable: 8.9 t/ha for feed wheat, 8.4 t/ha for milling wheat (this includes biscuit and gristing wheats), 7.8 t/ha for malting barley and 7.6 t/ha for feed barley. A significant area of oats was still to harvest but yields were similar to the 2013 harvest.
- The estimated areas to be planted in autumn/winter wheat or barley, as at 1 April 2014, are down 10% overall on 2013, with estimated decreases of 5% for feed wheat and 14% for feed barley. These decreases may be weather related, with the ground in Canterbury being very wet throughout March and April. Further drops in area planted are likely if wet ground conditions persist.

These figures reflect the position at the 1st April 2014 and there will have been changes since this time.

Estimated national figures for 2013 and 2014 as at April 1, 2014

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Number of farmers in the survey who harvested this crop in 2014		43	81	25	96	12	13
2013 harvest							
Estimated NZ total hectares, 2013 harvest	Ha	14,023	33,177	9,053	49,647	4,120	1,480
Estimated NZ total tonnes, 2013 harvest	Tonnes	130,051	310,049	63,319	344,581	23,498	7,202
2014 harvest							
Estimated NZ total hectares, 2014 harvest	Ha	14,475	32,628	7,960	48,763	3,964	1,800
Estimated NZ total tonnes, 2014 harvest	Tonnes	121,290	290,300	56,767	339,635	23,461	8,431
Estimated NZ total hectares harvested by 1 April 2014	Ha	13,432	31,216	7,815	42,206	1,947	1,653
Estimated NZ total tonnes harvested by 1 April 2014	Tonnes	113,506	283,276	55,909	288,322	11,879	7,627
Estimated NZ total hectares still to harvest as at 1 April 2014	Ha	1,043	1,411	146	6,558	2,017	147
Estimated NZ total tonnes still to harvest as at 1 April 2014	Tonnes	7,785	7,024	858	51,313	11,581	804
2014 harvested grain							
Sold on pre-harvest contract and delivered by 1 April 2014	Tonnes	10,138	39,263	18,517	66,983	298	1,787
Sold on pre-harvest contract and stored on farm on 1 April 2014	Tonnes	78,623	148,395	29,299	116,806	10,539	3,322
Sold at spot/ free price and delivered by 1 April 2014	Tonnes	0	8,103	250	35,044	708	1,601
Sold at spot/ free price and stored on farm on 1 April 2014	Tonnes	346	26,275	0	24,612	0	0
(For milling or malting only) Downgraded and sold as feed by 1 April 2014	Tonnes	3,065	-	999	-	0	-
(For feed only) Used on own farm by 1 April 2014	Tonnes	-	3,149	-	425	-	320
Unsold (2014 harvested grain only) on 1 April 2014	Tonnes	21,334	58,092	6,844	44,453	335	596
2014 unharvested grain							
Unharvested grain sold under pre-harvest contract by 1 April 2014	Tonnes	692	3,944	441	39,857	9,369	521
Unharvested grain unsold on 1 April 2014	Tonnes	7,093	3,079	416	11,457	2,212	283

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Number of farmers in the survey who harvested this crop in 2014		43	81	25	96	12	13
Sales channels (2014 harvest): includes unharvested grain							
Sold on pre-harvest contract (total) by 1 April 2014	Tonnes	89,452	191,603	48,258	223,645	20,206	5,631
Sold at spot/ free price (total) by 1 April 2014	Tonnes	346	34,378	250	59,656	708	1,601
Delivery status of sold grain (2014 harvest): excludes unharvested grain							
Sold and delivered (total) by 1 April 2014	Tonnes	10,138	47,366	18,767	102,027	1,005	3,389
Sold and stored on farm (total) on 1 April 2014	Tonnes	78,969	174,670	29,299	141,417	10,539	3,322
Total sales (2014 harvest): includes unharvested grain							
Sold (of total crop) by 1 April 2014 (includes used on farm)	Tonnes	92,864	229,129	49,507	283,726	20,914	7,552
Unsold (of total crop) on 1 April 2014	Tonnes	28,427	61,171	7,260	55,909	2,547	879
Estimated % change in hectares, 2013 to 2014 harvest		3.2	-1.7	-12.1	-1.8	-3.8	21.6
Estimated % change in tonnes, 2013 to 2014 harvest		-6.7	-6.4	-10.3	-1.4	-0.2	17.1

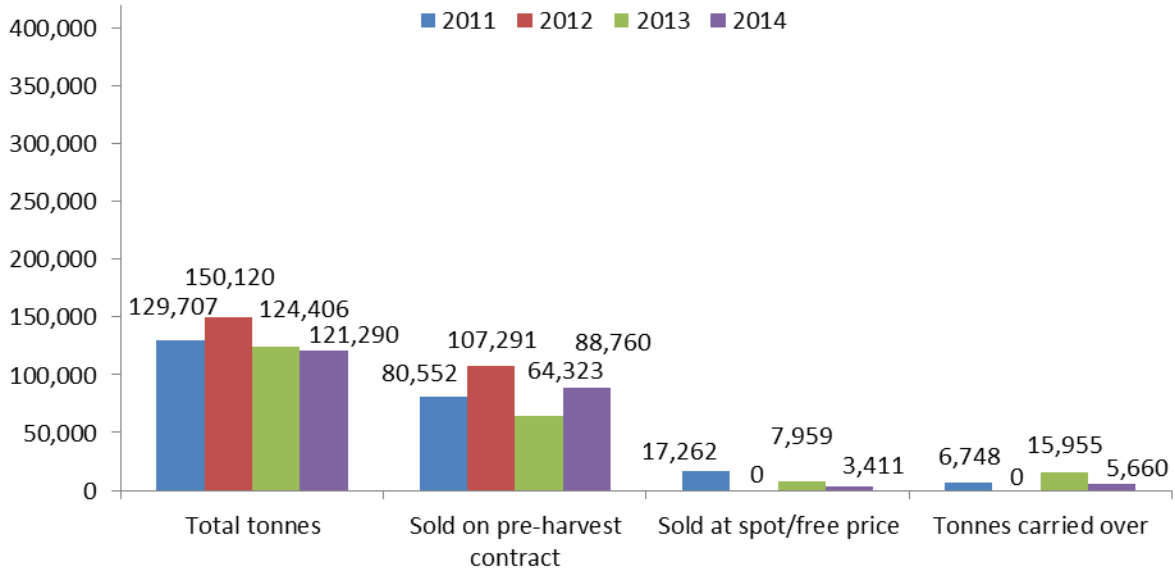
Plantings and planting intentions as at April 1, 2014

	Milling wheat (ha)	Feed wheat (ha)	Malting barley (ha)	Feed barley (ha)	Milling oats (ha)	Feed oats (ha)
Number of farmers in the survey who have planted or intend to plant this crop in the autumn or winter as at 1 April 2014	28	73	5	54	4	6
Estimated NZ total hectares, 2013 harvest	14,023	33,177	9,053	49,647	4,120	1,480
Estimated NZ total hectares, 2014 harvest	14,475	32,628	7,960	48,763	3,964	1,800
Estimated NZ total autumn/ winter 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/ winter 2012 plantings/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 2013 plantings/intentions (from the April 2013 AIMI Survey Report)	8,733	34,325	1,461	27,041	1,155	719
Estimated NZ total autumn/ winter 2014 plantings/intentions (hectares, for harvest in 2015) (this report)	7,078	32,607	1,148	23,380	554	926
Estimated change in autumn / winter plantings 2012 to 2013 (ha)	560	3189	-640	3556	-131	-821
Estimated change in autumn / winter plantings 2013 to 2014 (ha)	-1655	-1718	-313	-3661	-601	207
Estimated % change in autumn / winter plantings, 2013 to 2014 (%)	-19.0	-5.0	-21.5	-13.5	-52.0	28.8

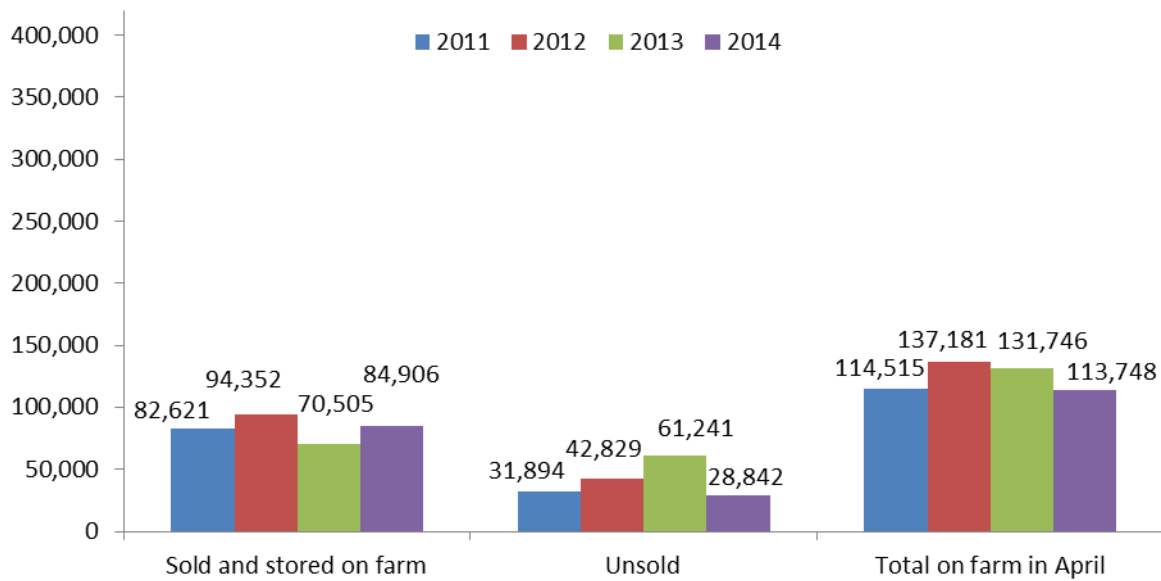
Summary results in April each year – graphs

For the three main crops, the following graphs present information from the AIMI Survey Reports for April 2011, 2012, 2013 and 2014 in graphical form. Note that for 2013, the estimated NZ total harvest tonnages differ from those presented in the first table above. The estimated harvest tonnages in the table above are a more accurate, matched comparison of 2013 and 2014 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 2013 and 2014. By comparison, the four April survey reports are based upon four 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 April 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.

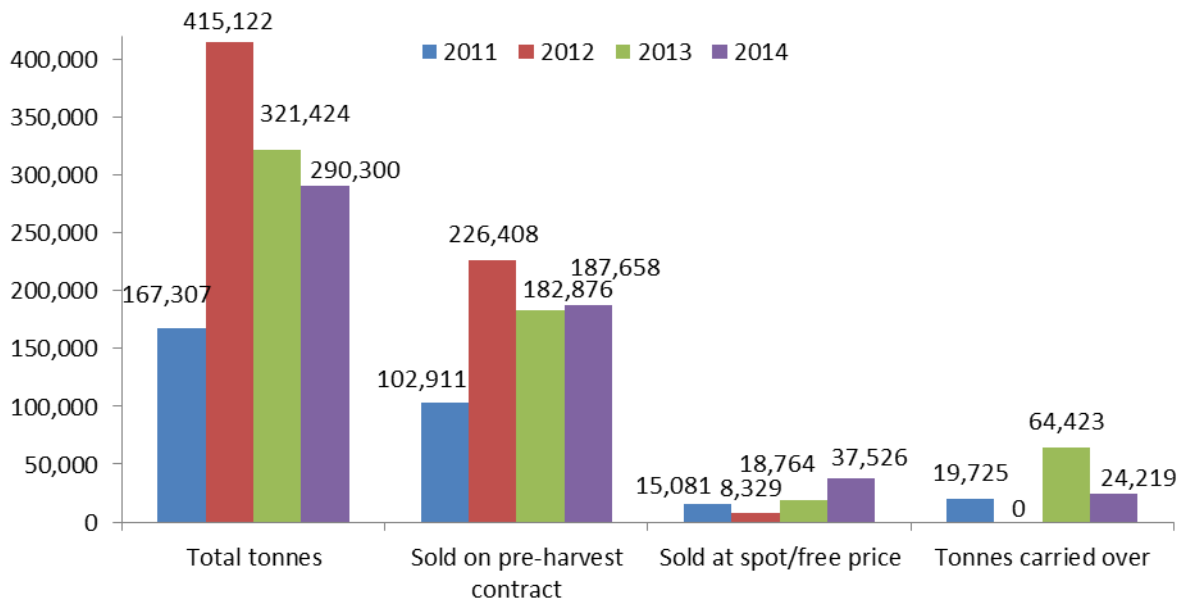
Harvest Tonnages and Delivered Sales (April): Milling Wheat (Tonnes)



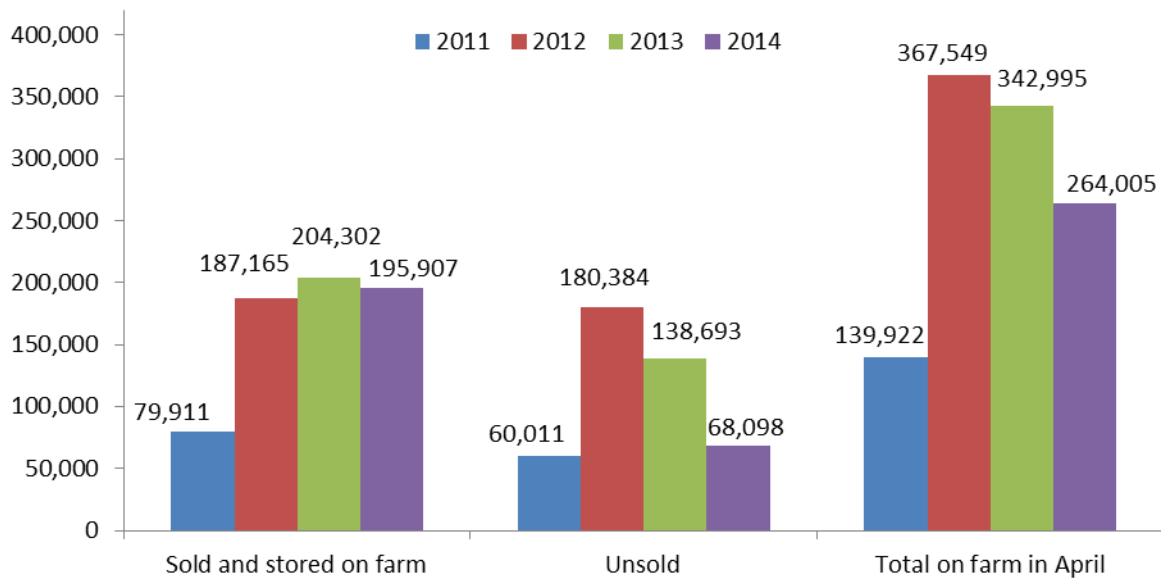
Stock on farms at April 1: Milling Wheat (Tonnes)



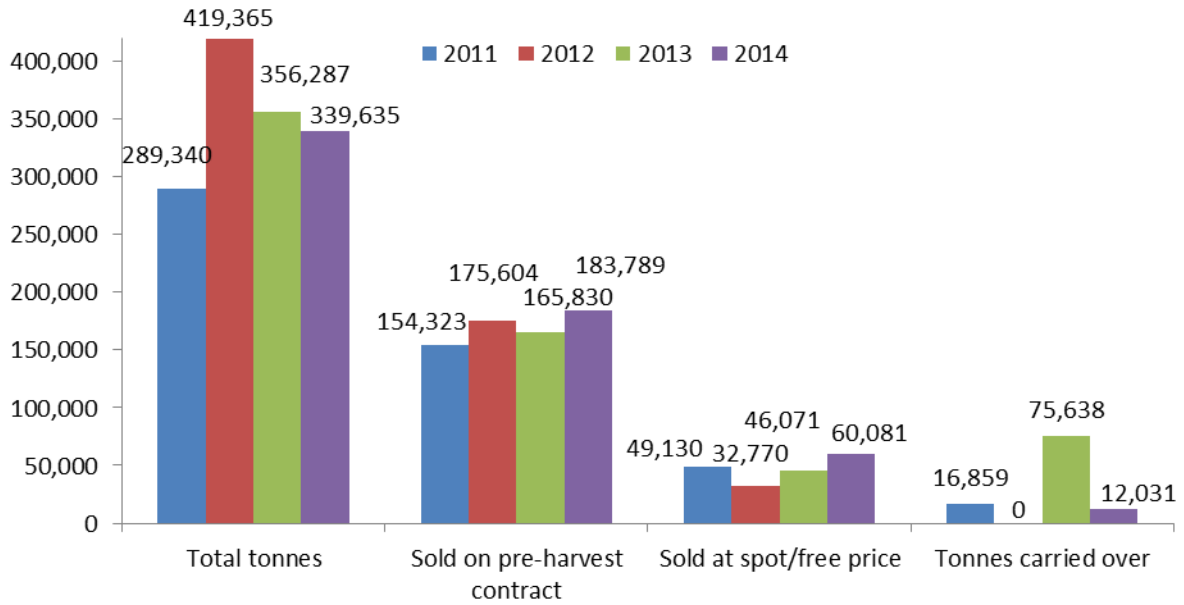
Harvest Tonnages and Sales Channels (April): Feed Wheat (Tonnes)



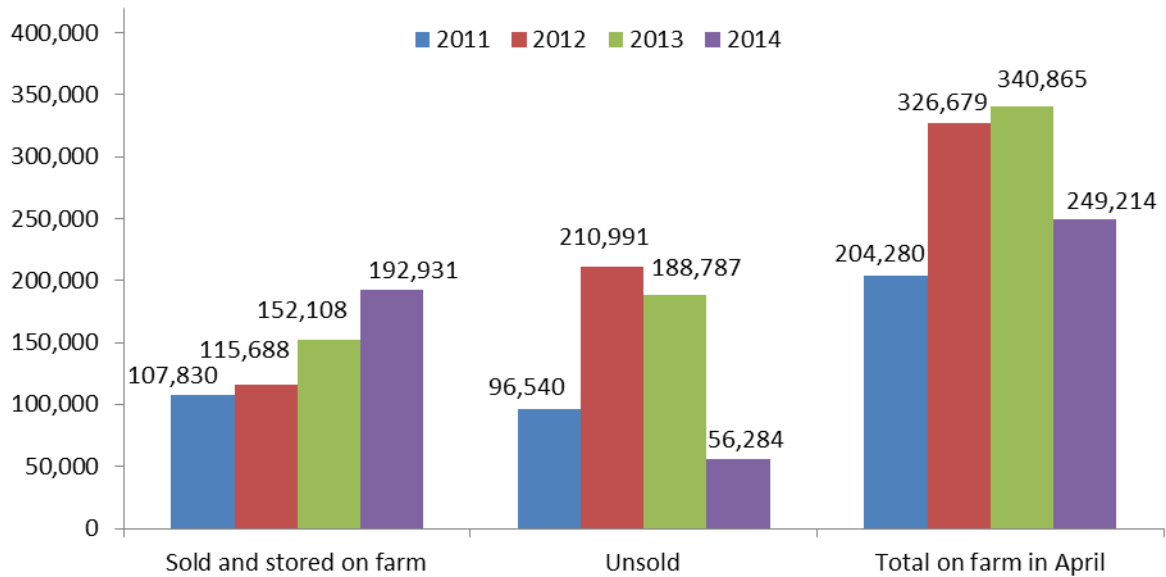
Stock on farms at April 1: Feed Wheat (Tonnes)



Harvest Tonnages and Sales Channels (April): Feed Barley (Tonnes)

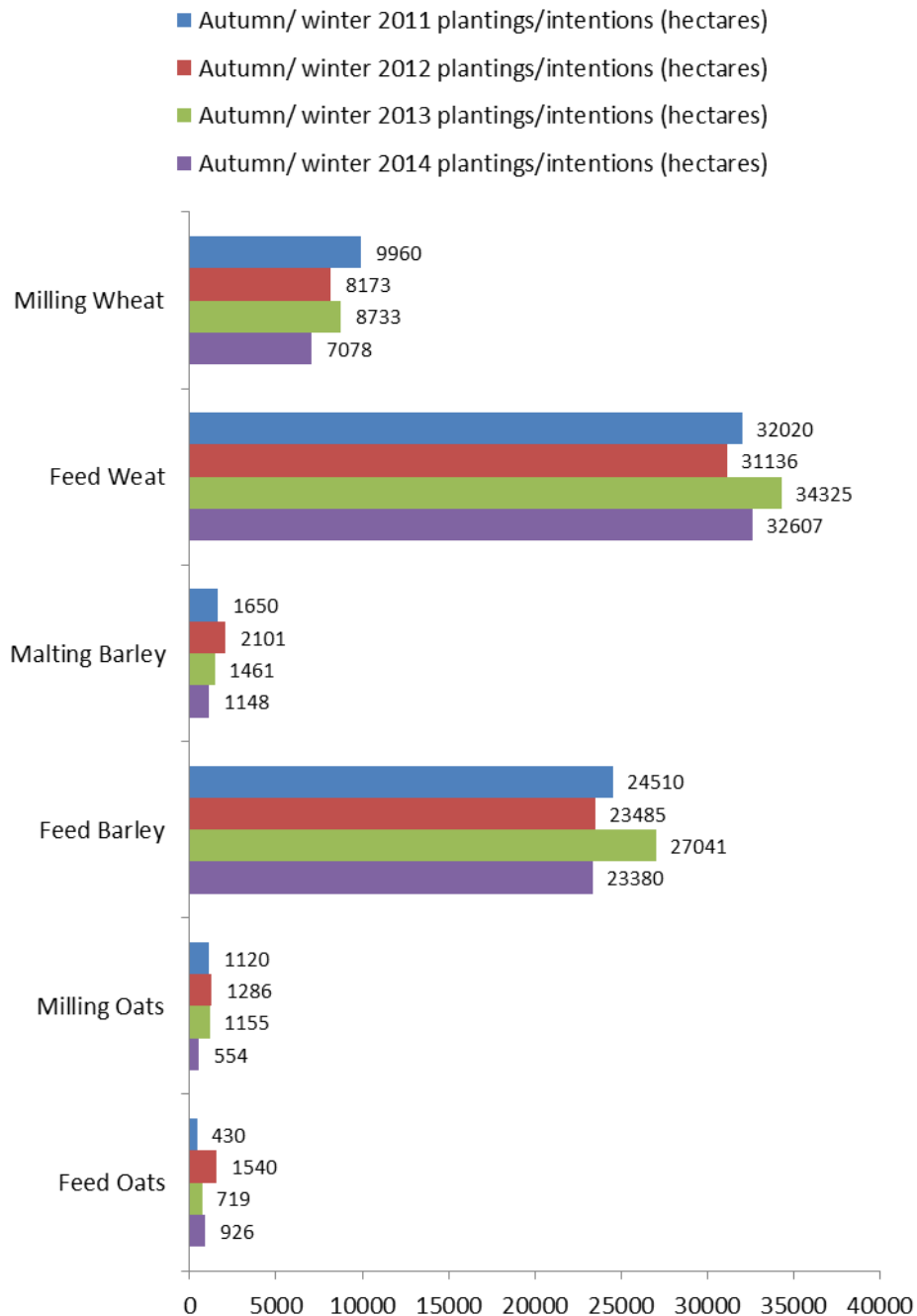


Stock on farms in April: Feed Barley (Tonnes)



Autumn/winter plantings/intentions as at 1st April, 2014

The graph below shows the estimated NZ total autumn/winter hectares sown or intended to be sown in autumn/winter 2014, along with the corresponding estimates from the three previous April 1 AIMI survey reports. This information is also presented in the second table above.



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

The graphs below present a comparison of yields (T/Ha) over the 2010, 2011, 2012, 2013, and 2014 harvests for the crops milling wheat, feed wheat, malting barley, feed barley, milling oats, and feed oats. These data are taken from the April 1 AIMI reports for 2012, 2013 and 2014 (and for the first two years, from the October 1, 2011 AIMI report).

