



SUMMARY - SURVEY OF CEREAL AREAS AND VOLUMES - OCTOBER 10, 2015

The objective of this AIMI survey of cereal growers was to determine, as at October 10, 2015:

- sales of the 2015 harvest of wheat, barley and oats since July 1, 2015
- levels of on-farm storage, both sold and unsold, of the 2015 harvest
- spring 2015 sowings and sowing intentions of wheat, barley and oats

Data from 123 survey farms who completed all of the last four cereal surveys (October 2014 and April, July and October 2015) were 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. These figures reflect the position at the 10th October 2015 and there will have been changes since this time. The maize survey is currently underway and details will be released later this month.

Key Points at 10 October 2015 (figures have been rounded to nearest 100):

On-farm storage, of both sold and unsold grain, is up markedly on this time last year, especially for feed barley. Total sowings of cereal crops are down on last year, especially for feed barley.

Milling wheat: The estimated tonnage of unsold grain is 10,500 tonnes, which is similar to the same time last year. The estimated tonnage of sold grain that is still stored on farm is 40,000 tonnes, which is slightly up on the tonnage at the same time last year. Overall, on-farm storage is up 11% on the same time last year. All milling wheat crops had been sown by October 10, and the area sown is estimated to be up 26% on last season.

Feed wheat: The estimated tonnage of unsold grain is 34,000 tonnes, which is up on the same time last year, but lower than the two preceding years. The estimated tonnage of sold grain that is still stored on farm is 101,900 tonnes, which is up on the tonnage at the same time last year, but lower than in the two preceding years (October 2012 and 2013). Overall, on-farm storage is up 37% on the same time last year. Feed wheat crops were 99% sown by October 10, and the area sown is estimated to be identical to last season.

Feed barley: The estimated tonnage of unsold grain is 59,000 tonnes, which is double the amount at the same time last year and the preceding year, but slightly lower than in October 2012. The estimated tonnage of sold grain that is still stored on farm is 121,600 tonnes, which is more than double the tonnage at the same time last year, and about 40% up on the two preceding years (October 2012 and 2013). Overall, on-farm storage is up 116% on the same time last year (over double), and is also higher than in October 2012 and 2013. Feed barley crops were 77% sown by October 10, and the area sown is estimated to be 16% down on last season.

Malting barley: The estimated tonnage of unsold grain is 8,800 tonnes, which is up on the same time in any of the last four years. The estimated tonnage of sold grain that is still stored on farm is 17,400 tonnes, which is higher than in October 2012 and 2014, but slightly lower than in October 2013. Overall, on-farm storage is similar to what it was in October 2013, but considerably higher than in October 2012 and 2014. Malting barley crops were 78% sown by October 10, and the area sown is estimated to be 4% down on last season.

Milling oats: The estimated tonnage of unsold grain is 400 tonnes, which is down on the same time in any of the last four years. The estimated tonnage of sold grain that is still stored on farm is 14,600 tonnes, which is up on the same time in any of the last four years. Overall, on-farm storage is up on the same time in any of the last four years. Milling oats crops were 88% sown by October 10, and the area sown is estimated to be 13% up on last season.

Feed oats: The estimated tonnage of unsold grain is 200 tonnes, which is similar to the same time last year, but down on the same time in any of the previous three years. The estimated tonnage of sold grain that is still stored on farm is 2,200 tonnes, which is roughly similar to the tonnages at the same time in any of the last three years. Overall, on-farm storage is slightly up on the same time in 2012 and 2014, but much lower than in 2011 and 2013. Feed oats crops were 70% sown by October 10, and the area sown is estimated to be 18% up on last season.

Overall: As a total over all six crops, estimated unsold tonnage of wheat, barley and oats (112,700 t in total) was up by 71% compared to the same time last year, while estimated tonnage sold but still stored on farm (297,600 t in total) was up by 61%. This meant that the total tonnage on farm on October 10, 2015 (410,300 t in total) was estimated to be up by 64% on the amount on October 10, 2014. The total on farm storage was made up of 180,500 tonnes of feed barley, 135,900 tonnes of feed wheat, 50,500 tonnes of milling wheat, 26,100 tonnes of malting barley, 15,000 tonnes of milling oats and 2,300 tonnes of feed oats.

The area sown plus intended to be sown in wheat, barley or oats, as at 10 October 2015, was estimated to be down 5,200 ha, or 4%, on the area harvested in 2015. This decrease was due to an 8,600 ha (16%) drop in sowings and intentions for feed barley, partly offset by increases in areas of milling wheat, milling oats and feed oats.

Estimated National Figures as at October each year – Cereals

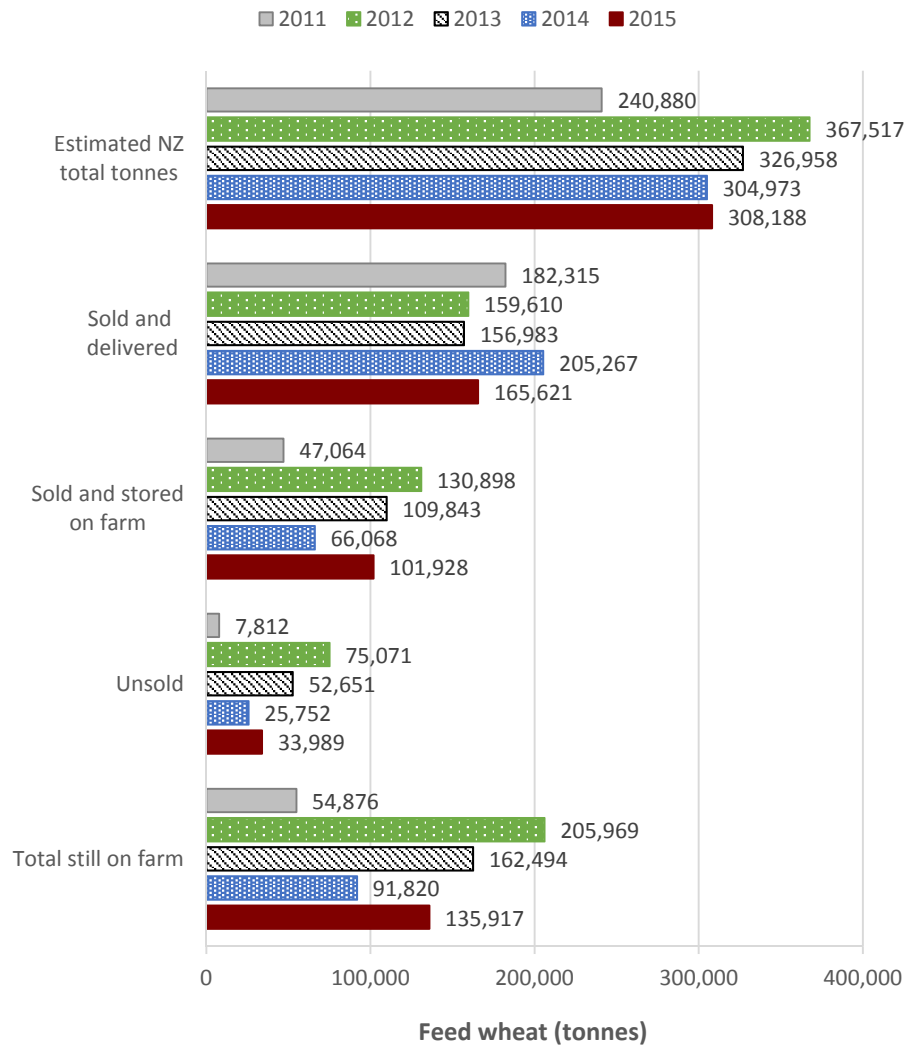


Figure 1. Harvest tonnages and sales of feed wheat by October each year.

(Crops used on own farm are only presented in 'estimated NZ total tonnes')

Data sourced from the annual October AIMI reports.

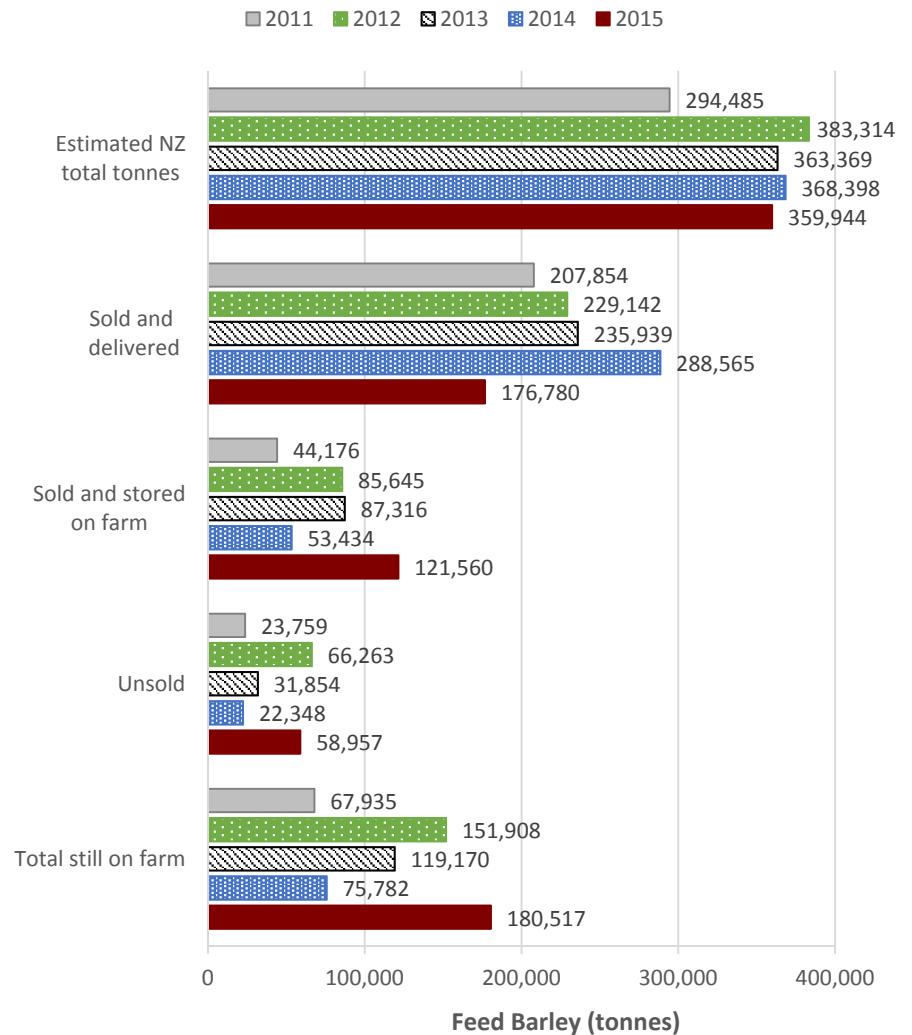


Figure 2. Harvest tonnages and sales of feed barley by October each year.

(Crops used on own farm are only presented in 'estimated NZ total tonnes')

Data sourced from the annual October AIMI reports.

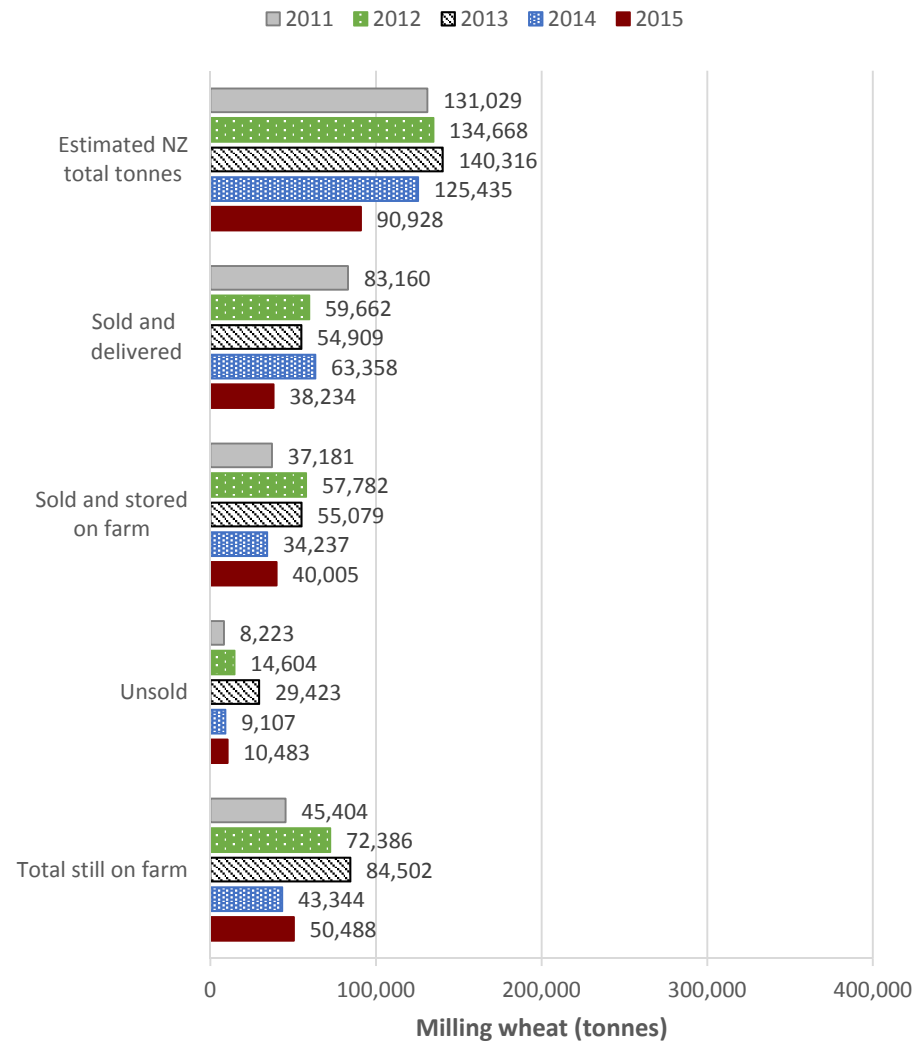


Figure 3. Harvest tonnages and sales of milling wheat by October each year.

(Crops downgraded to feed are only presented in 'estimated NZ total tonnes')

Data sourced from the annual October AIMI reports.

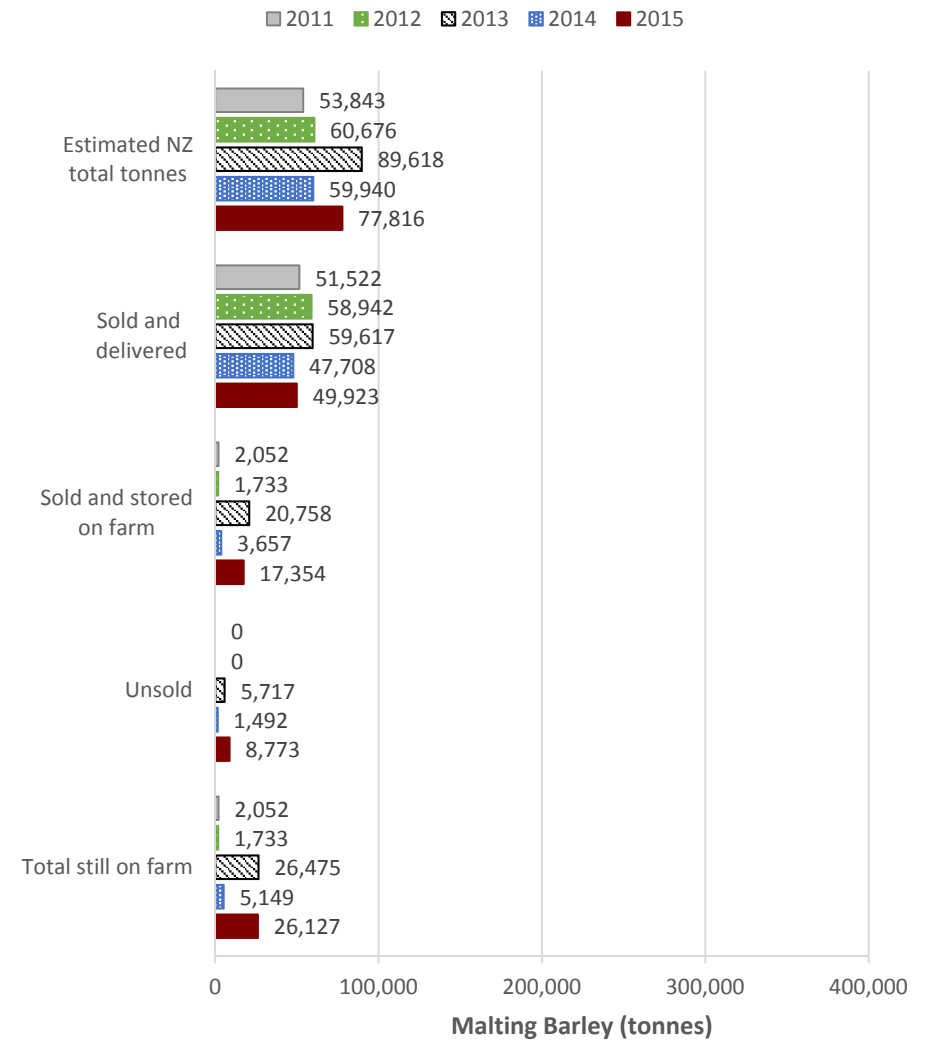


Figure 4. Harvest tonnages and sales of malting barley by October each year.

(Crops downgraded to feed are only presented in 'estimated NZ total tonnes')

Data sourced from the annual October AIMI reports.

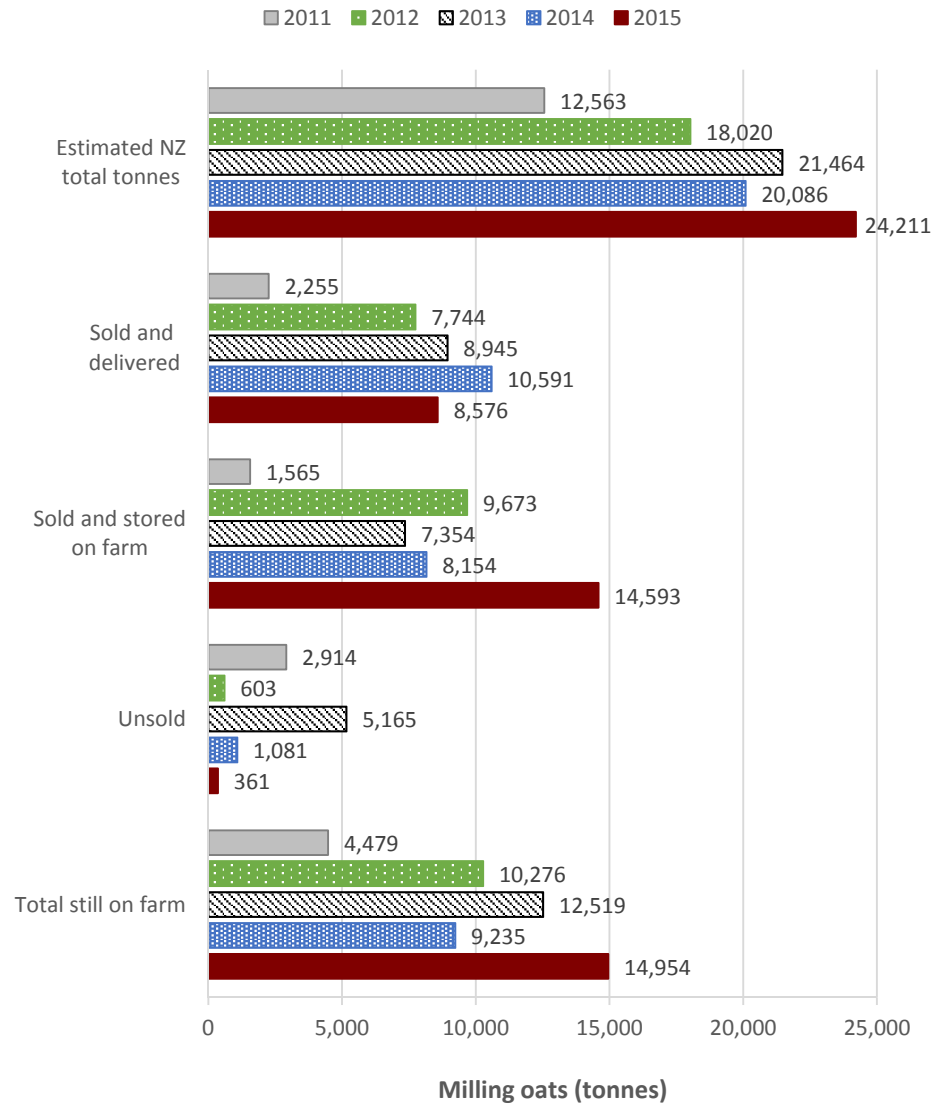


Figure 5. Harvest tonnages and sales of milling oats by October each year.

(Crops downgraded to feed are only presented in 'estimated NZ total tonnes')

Data sourced from the annual October AIMI reports.

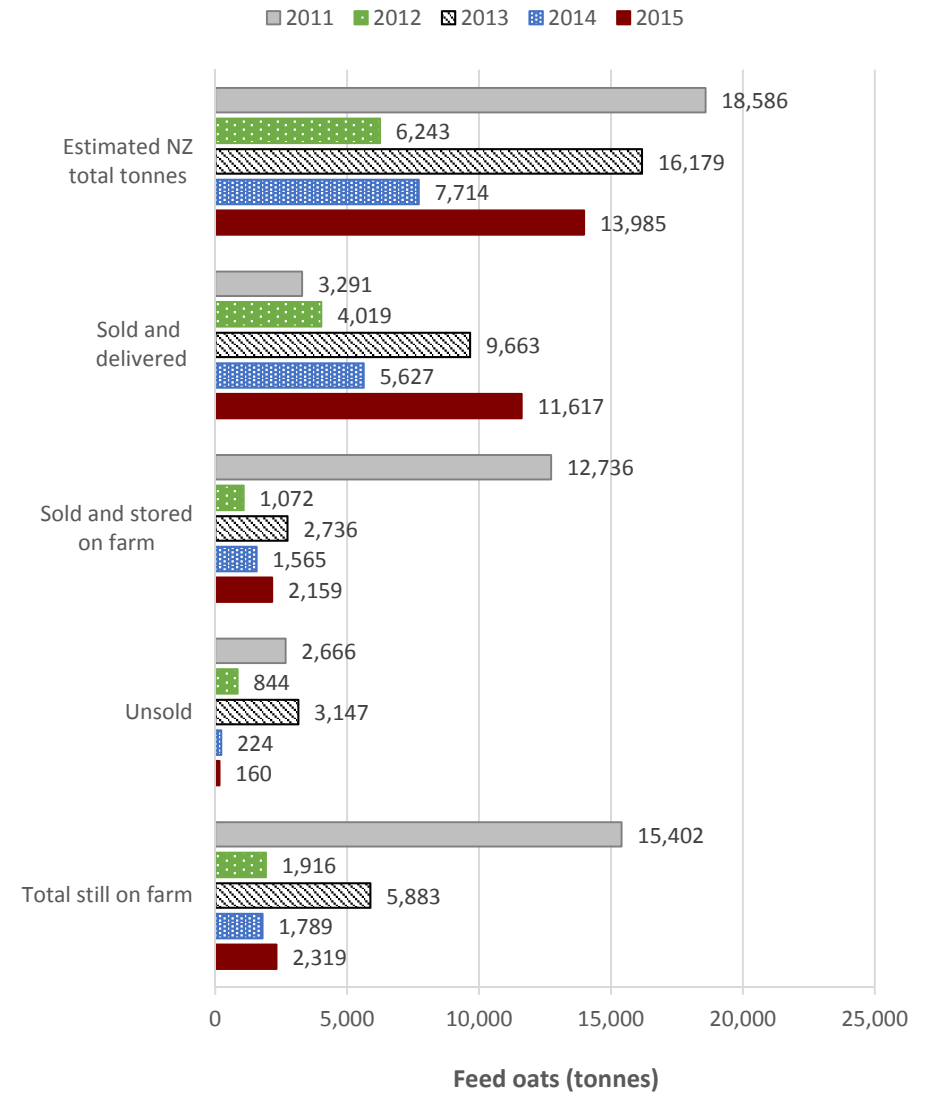


Figure 6. Harvest tonnages and sales of feed oats by October each year.

(Crops used on own farm are only presented in 'estimated NZ total tonnes')

Data sourced from the annual October AIMI reports.

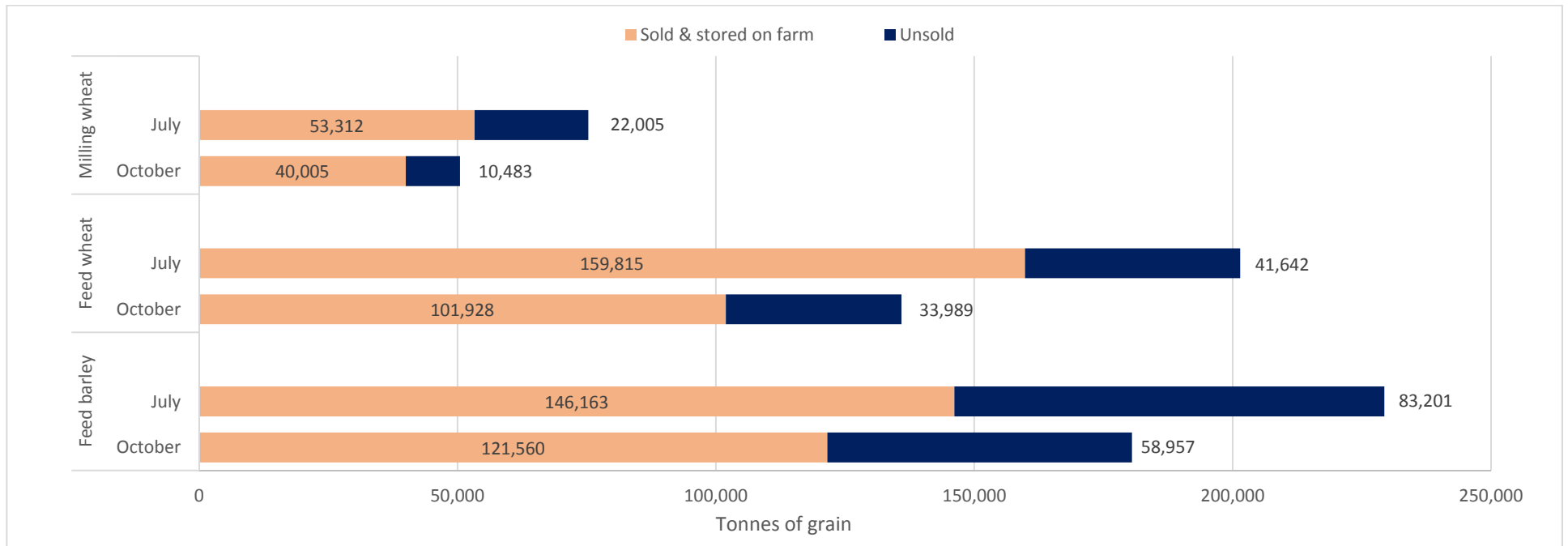


Figure 7. Changes in harvest sales and tonnages for milling wheat, feed wheat and feed barley between July 1 and October 10 2015.

All estimates are based upon scaling up from the current survey sample, which consists of only those growers who responded to all of the last four AIMI surveys; these estimates therefore provide more precise matched comparisons.

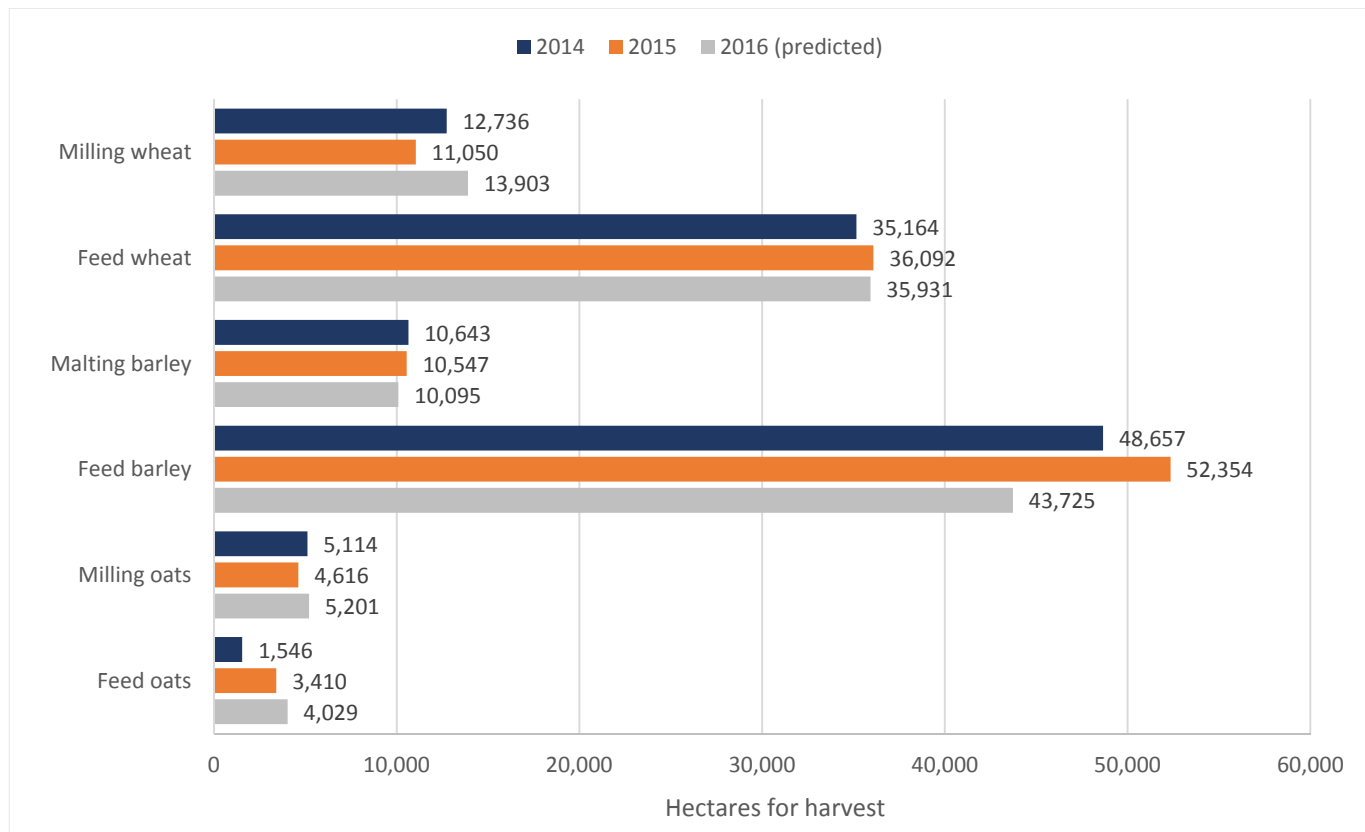


Figure 8. Estimated total hectares sown or intended to be sown in 2015 (for harvest in 2016) as compared to total hectares harvested in 2014 and 2015, based on data collected in October for both autumn and spring 2015 sowings. As in Figure 7, this is a more precise matched comparison based only on the current sample of growers.

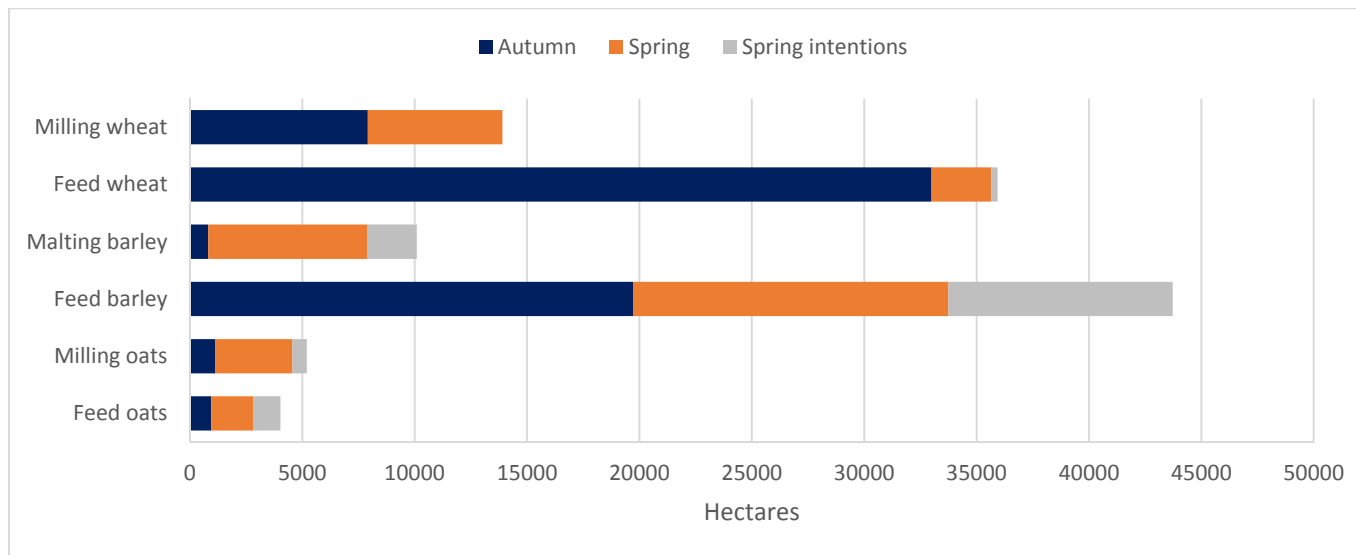


Figure 9. Estimated hectares sown in autumn and spring 2015, plus spring hectares yet to sow (spring intentions) for harvest in 2016, based on data collected on October 10, 2015.

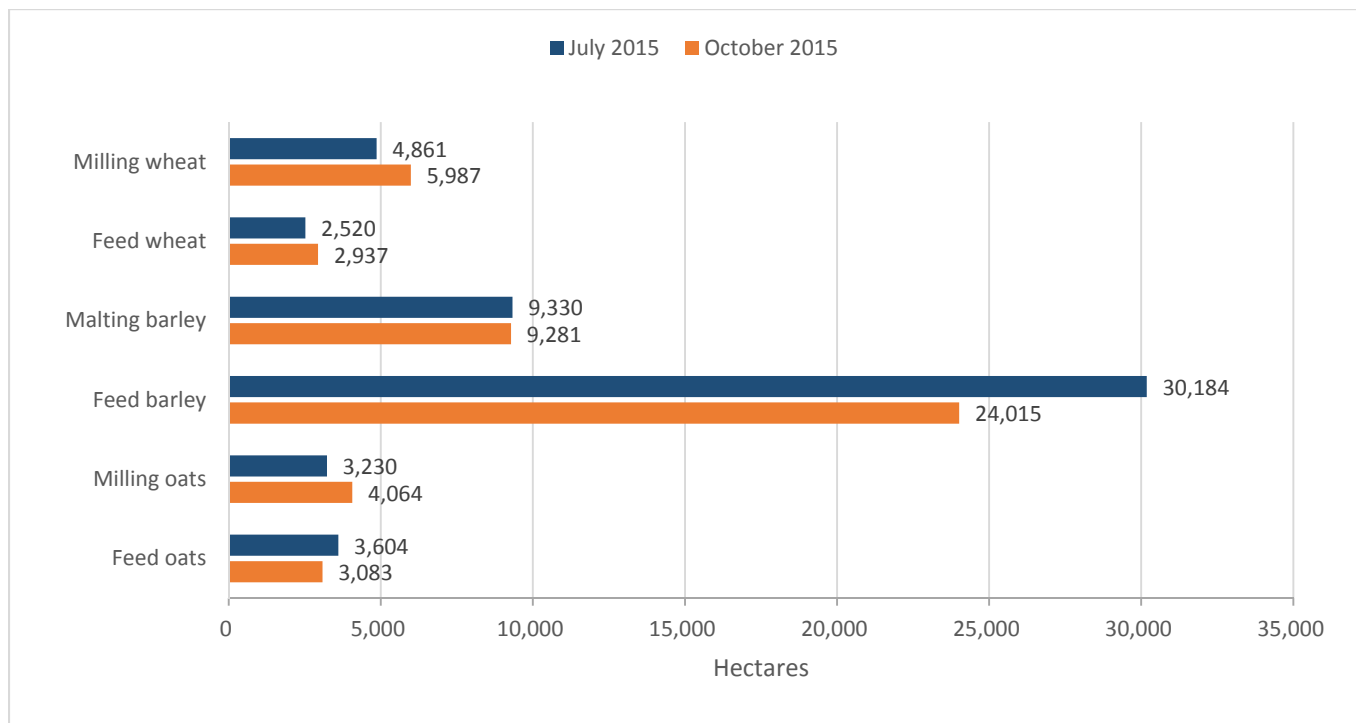


Figure 10. Comparison of spring sowing intentions as at July 1 2015 with actual spring sowings plus intentions as at October 10 2015. As in Figures 7 and 8, this is a matched comparison.

Table 1. Detailed estimated national figures for the 2015 harvest, plus sold and delivered tonnages, for six cereal crops as at October 10, 2015.

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Number of farmers in the survey who harvested this crop in 2015		39	80	25	101	10	20
2014 harvest							
Estimated NZ total hectares, 2014 harvest	Ha	12,736	35,164	10,643	48,657	5,114	1,546
Estimated NZ total tonnes, 2014 harvest	Tonnes	104,306	309,194	76,778	328,922	28,030	6,710
2015 harvest							
Estimated NZ total hectares, 2015 harvest	Ha	11,050	36,092	10,547	52,354	4,616	3,410
Estimated NZ total tonnes, 2015 harvest	Tonnes	90,928	308,188	77,816	359,944	24,211	13,985
Sold under pre-harvest contract and delivered by Oct 10 2015	Tonnes	35,390	127,273	47,933	124,396	6,042	11,457
Sold under pre-harvest contract and stored on farm on Oct 10 2015	Tonnes	31,400	87,064	17,354	101,659	14,484	2,057
Sold at spot/ free price and delivered by Oct 10 2015	Tonnes	2,845	38,348	1,990	52,384	2,534	160
Sold at spot/ free price and stored on farm on Oct 10 2015	Tonnes	8,606	14,864	0	19,901	109	102
(For milling or malting only) Downgraded and sold for feed by Oct 10 2015	Tonnes	2,205	-	1,765	-	681	-
(For feed only) Used on own farm by Oct 10 2015	Tonnes	-	6,650	-	2,648	-	48
Unsold stocks on hand (2015 harvest only) on Oct 10 2015	Tonnes	10,483	33,989	8,773	58,957	361	160
Sales channels (2015 harvest)							
Sold on pre-harvest contract (total) by Oct 10 2015	Tonnes	66,789	214,336	65,287	226,055	20,526	13,515
Sold at spot/ free price (total) by Oct 10 2015	Tonnes	11,450	53,212	1,990	72,285	2,643	262
On farm storage (2015 harvest)							
Sold and delivered (total) by Oct 10 2015	Tonnes	38,234	165,621	49,923	176,780	8,576	11,617
Sold and stored on farm (total) on Oct 10 2015	Tonnes	40,005	101,928	17,354	121,560	14,593	2,159
Total sales (2015 harvest)							
Sold (grand total) by Oct 10 2015 (includes downgraded and sold for feed, and used on farm)	Tonnes	80,445	274,199	69,043	300,988	23,850	13,824
Unsold stocks on hand (2015 harvest only) on Oct 10 2015	Tonnes	10,483	33,989	8,773	58,957	361	160
Comparison of hectares and tonnes between last two harvests							
Estimated % change in hectares, 2014 to 2015 harvest	%	-13.2	2.6	-0.9	7.6	-9.7	121
Estimated % change in tonnes, 2014 to 2015 harvest	%	-12.8	-0.3	1.4	9.4	-13.6	108
Comparison of yields (t/ha) between last two harvests							
NZ-wide estimated yield, 2014 harvest	T/ha	8.2	8.8	7.2	6.8	5.5	4.3
NZ-wide estimated yield, 2015 harvest	T/ha	8.2	8.5	7.4	6.9	5.2	4.1

Table 1 (continued).

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Comparison of on-farm storage between July 1 2015 and Oct 10 2015 (based upon matched data)							
Sold and stored on farm (total) on July 1 2015 (from 2015 harvest)	Tonnes	53,312	159,815	33,585	146,163	19,886	3,460
Sold and stored on farm (total) on Oct 10 2015 (from 2015 harvest)	Tonnes	40,005	101,928	17,354	121,560	14,593	2,159
Unsold stocks on hand (from 2015 harvest) on July 1 2015	Tonnes	22,005	41,642	9,201	83,201	375	160
Unsold stocks on hand (from 2015 harvest) on Oct 10 2015 (as above)	Tonnes	10,483	33,989	8,773	58,957	361	160
% decrease in total grain stored on-farm from July 2015 to Oct 2015	%	33	33	39	21	26	36
Comparison of on-farm storage between last October and this October (based upon matched data)							
Sold and stored on farm (total) on Oct 10 2014 (from 2014 harvest)	Tonnes	34,422	77,995	4,066	54,227	12,629	1,430
Sold and stored on farm (total) on Oct 10 2015 (from 2015 harvest)	Tonnes	40,005	101,928	17,354	121,560	14,593	2,159
Unsold stocks on hand (from 2014 harvest) on Oct 10 2014	Tonnes	11,194	21,542	1,658	29,477	1,771	204
Unsold stocks on hand (from 2015 harvest) on Oct 10 2015 (as above)	Tonnes	10,483	33,989	8,773	58,957	361	160
% increase in total grain stored on-farm from Oct 2014 to Oct 2015	%	11	37	356	116	4	42
Note: The matched comparisons in the last two sections were based upon scaling up data from the exact same survey farms for the last four AIMI surveys.							

In Table 1, the tonnages of the 2015 harvest of six grain crops still stored on farm have reduced by between 21% and 39% in the period between the AIMI surveys dated July 1, 2015 and October 10, 2015. When totalled over all six crops, the total tonnage of 2015 harvest grain still on farms has reduced by 28% during this period (July 1 to October 10, 2015).

When the on-farm storage on October 10, 2015 is compared to that at the same time last year (October 10, 2014), the total tonnage of grain on farms from the most recent harvest has increased by 64% (when summed over all six crops). This corresponds to a 61% increase in grain sold and stored on farm, and a 71% increase in unsold stocks on hand, as compared to a year ago. Feed barley is a major contributor to this overall increase, with feed barley still on farm over double what it was a year ago (a 116% increase, or a multiplication factor of 2.16-fold). Feed wheat and malting barley are secondary contributors to the increase.

Table 2. Sowings and sowing intentions for six cereal crops as at October 10, 2015.

	Units	Milling wheat (ha)	Feed wheat (ha)	Malting barley (ha)	Feed barley (ha)	Milling oats (ha)	Feed oats (ha)
Number of farmers in survey who have sown or intend to sow this crop as at Oct 10 2015		43	71	26	84	12	17
Estimated NZ total hectares, 2014 harvest	Ha	12,736	35,164	10,643	48,657	5,114	1,546
Estimated NZ total hectares, 2015 harvest	Ha	11,050	36,092	10,547	52,354	4,616	3,410
Estimated NZ total autumn / winter 2015 sowings (hectares; for harvest in 2016)	Ha	7,916	32,994	814	19,710	1,137	946
Estimated NZ total spring 2015 sowings already sown by Oct 10 2015 (hectares; for harvest in 2016)	Ha	5,987	2,665	7,062	14,041	3,421	1,858
Estimated NZ total spring 2015 sowings still to sow (intentions) as at Oct 10 2015 (hectares; for harvest in 2016)	Ha	0	272	2,219	9,975	643	1,224
Estimated NZ total spring 2015 sowings plus intentions as at Oct 10 2015 (hectares; for harvest in 2016)	Ha	5,987	2,937	9,281	24,015	4,064	3,083
Predicted NZ total hectares, 2016 harvest (Autumn /winter 2015 sowings and Spring 2015 sowings & intentions, all combined)	Ha	13,903	35,931	10,095	43,725	5,201	4,029
Comparison of sowings/ intentions over the 2013/14, 2014/15 and 2015/16 seasons (NZ totals) (based upon matched data)							
Estimated % change in NZ total sowings, 2014 to 2015 harvests	%	-13.2	2.6	-0.9	7.6	-9.7	121
Estimated % change in NZ total sowings, 2015 to 2016 (predicted) harvests	%	25.8	-0.4	-4.3	-16.5	12.7	18
Comparison of spring sowing intentions as at July 1 2015 with spring sowings plus intentions as at Oct 10 2015 (based upon matched data)							
Estimated NZ total spring 2015 sowing intentions as at July 1 2015 (hectares; for harvest in 2016)	Ha	4,861	2,520	9,330	30,184	3,230	3,604
Estimated NZ total spring 2015 sowings plus intentions as at Oct 10 2015 (hectares, for harvest in 2016) (as above)	Ha	5,987	2,937	9,281	24,015	4,064	3,083
Change in estimated NZ total spring 2015 sowings/ intentions between July 1 2015 and Oct 10 2015 (hectares; for harvest in 2016)	Ha	1,126	418	-49	-6,169	834	-521
Note: The matched comparisons in the last two sections were based upon scaling up data from the exact same survey farms for the last four AIMI surveys.							

In Table 2, the most striking feature is the change in spring sowing intentions for feed barley between the July 1, 2015 and the October 10, 2015 AIMI surveys. The drop is about 6,200 hectares of feed barley. When this is put together with already reduced intentions as at July 1, 2015, the result is a 16% drop in the predicted total number of hectares of feed barley due for harvest in 2016, as compared to the 2015 harvest.

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