SUMMARY - SURVEY OF CEREAL AREAS AND VOLUMES – APRIL 1, 2018

Introduction

The objective of this AIMI survey of growers was to determine, as at April 1, 2018:

- the size of the 2018 harvest of wheat, barley and oats
- the sales channels, storage status and unsold amount of the 2018 harvest
- the tonnages of carry-over stocks on farms from the 2017 harvest
- the sowing intentions for the autumn/winter of 2018

The data from 114 survey farms as at April 1, 2018 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 1st April 2018 and there will have been changes since this time.

Key Points at 1 April 2018 (figures have been rounded to nearest 100)**:**

- The 2017/18 season was regarded as poor by many growers in the survey (very wet at times, including flooding out of some crops, and too hot at other times). Average yields were down 12% (over all six crops) compared to last season. More hectares were harvested than last season (18% up), with a 3% increase in total tonnage compared to last season.
- The actual harvest was early and compressed into a shorter period than usual, so that the 2018 harvest of all six crops for all survey respondents was completely finished by 1 April. This was especially unusual for the two oats crops.
- Carry-over stocks of feed wheat and feed barley were lower than at the same time last year. Unsold stocks on hand of last year's feed wheat and feed barley crops were 0.7% and 0.3% of the 2017 harvest tonnages respectively.
- Milling wheat, feed wheat and feed barley have similar stocks of unsold grain compared to this time last year (down 3%, up 4% and down 10% respectively).
- Autumn/winter sowings of feed wheat are predicted to be down by 3,400 hectares on predicted sowings a year ago, with feed barley up by 1,100 ha, milling wheat down by 5,700 ha, malting barley down 1,400 ha, milling oats up 500 ha, and feed oats down 500 ha. However these predictions are based mostly on intentions as very little crop had been sown by 1 April 2018.

Milling wheat: Estimated total tonnage (82,500 t) was down 23% compared to last year's harvest (107,500 t). Of this total, 61% has been sold (50,300 t), although most of the sold grain is still stored on farm (71%). The amount of unsold grain is 32,200 tonnes (39%). Carryover of unsold grain from the 2017 harvest was 400 t, taking the estimate of unsold grain in the market to approximately 32,600 tonnes which is similar to both 2017 and 2016 (both 33,500 t), higher than 2015 (14,300 t) and 2014 (28,800 t), but lower than 2013 (61,200 t).

Feed wheat: Estimated total tonnage (300,700 t) was almost identical to last year's harvest (301,600 t). Of this total, 69% has been sold (206,800 t), with 68% of the sold grain still stored on farm. The

amount of unsold grain is 93,900 tonnes (31%). Unsold stock carried over from last season was 2,100 t, taking the estimate of total unsold grain in the market to 96,000 tonnes which was similar to last season (91,900 t in 2017), lower than 2016 (174,000 t), higher than 2015 (49,600 t) and 2014 (68,100 t), and lower than 2013 (138,700 t).

Feed barley: Estimated total tonnage (305,600 t) was up 28% compared to last year (238,000 t). Of this total tonnage, 67% has been sold (206,100 t), with 60% of the sold grain still stored on farm. About 33% (99,500 t) remains unsold. Carryover of unsold grain was 700 t, taking the estimate of total unsold grain in the market to approximately 100,200 tonnes, which is slightly down on last season (111,600 t), lower than in 2016 (174,000 t), higher than 2015 (75,400 t) and 2014 (56,300 t), and lower than 2013 (188,800 t).

For other cereals: Compared to last year, estimated total tonnages for malting barley (59,600 t) increased by 2%, milling oats (13,400 t) was down by 49%, and feed oats (3,200 t) was down by 58%. All (100%) of the three crops had been harvested by 1 April 2018, which is unusual for the two oats crops. For malting barley, 5% of the total harvest was unsold, while milling oats had 3% unsold and feed oats had 14% unsold as at 1 April, 2018. There were no unsold stocks carried over from last season for malting barley, an estimated 400 t of unsold carryover stocks for milling oats and an estimated 900 t for feed oats.

Sowing intentions: Only a few autumn/winter cereal crops had been sown by 1 April 2018. For feed wheat, 18% had been sown, while for both milling wheat and feed barley, about 5% had been sown. No malting barley or milling or feed oats had been sown. The total area sown or intending to be sown in autumn/winter wheat or barley, as at 1 April 2018, was down 12% overall (or, down by 9,300 hectares) on sowings plus intentions as at 1 April 2017.

Feed wheat area sown in the autumn/winter is predicted to decrease by 8% (down 3,400 hectares) from 2017 to 2018. Autumn/winter feed barley area sown is predicted to increase by 5% (up 1,100 hectares), and milling wheat area sown is predicted to decrease by 50% (down 5,700 hectares).

Autumn/winter malting barley area sown is predicted to decrease by 32% (down 1,400 hectares) from 2017 to 2018, which cancels out the increase from 2016 to 2017. Milling oats area sown is predicted to increase by 50% (up 500 hectares) from 2017 to 2018, while feed oats area sown is predicted to decrease by 40% (down 500 hectares).

Milling Wheat (Tonnes)

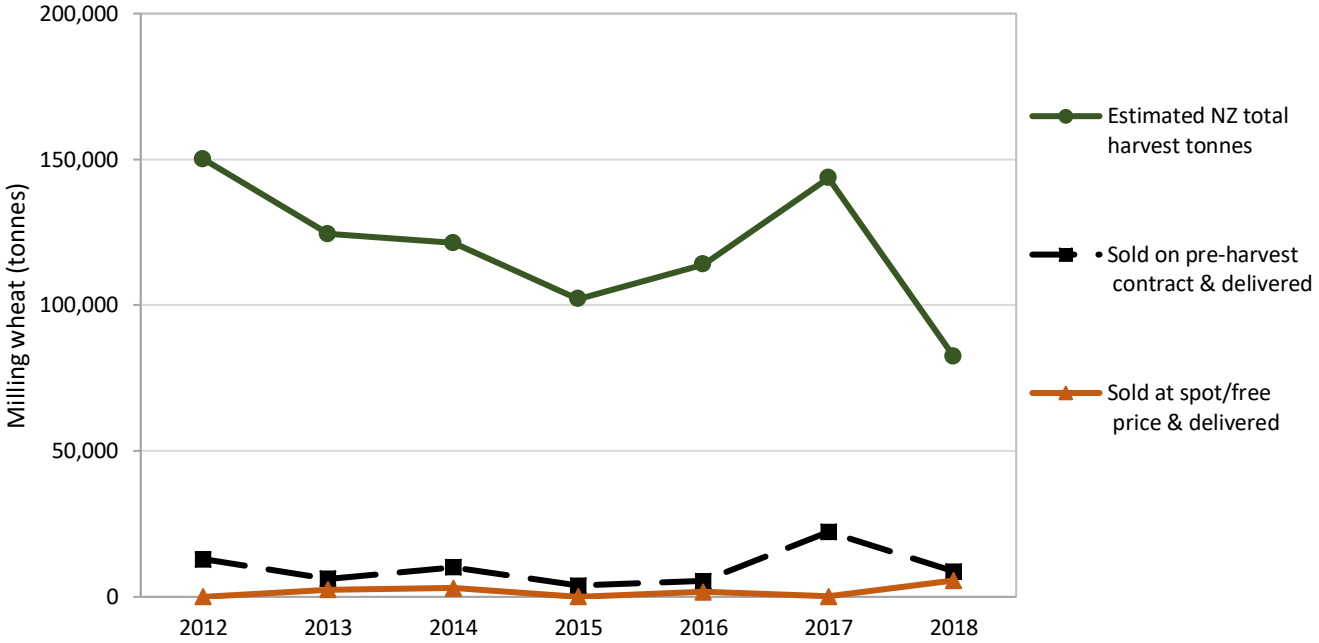

Figure 1a. NZ harvest tonnage and Sales channels for Milling Wheat (tonnes) as estimated on 1 April each year. (Note: "Total harvest tonnes" includes harvested and unharvested grain for that season's harvest. "Sold at spot/free price & delivered" includes grain sold for feed. Historical data are sourced from previous AIMI April Reports.)

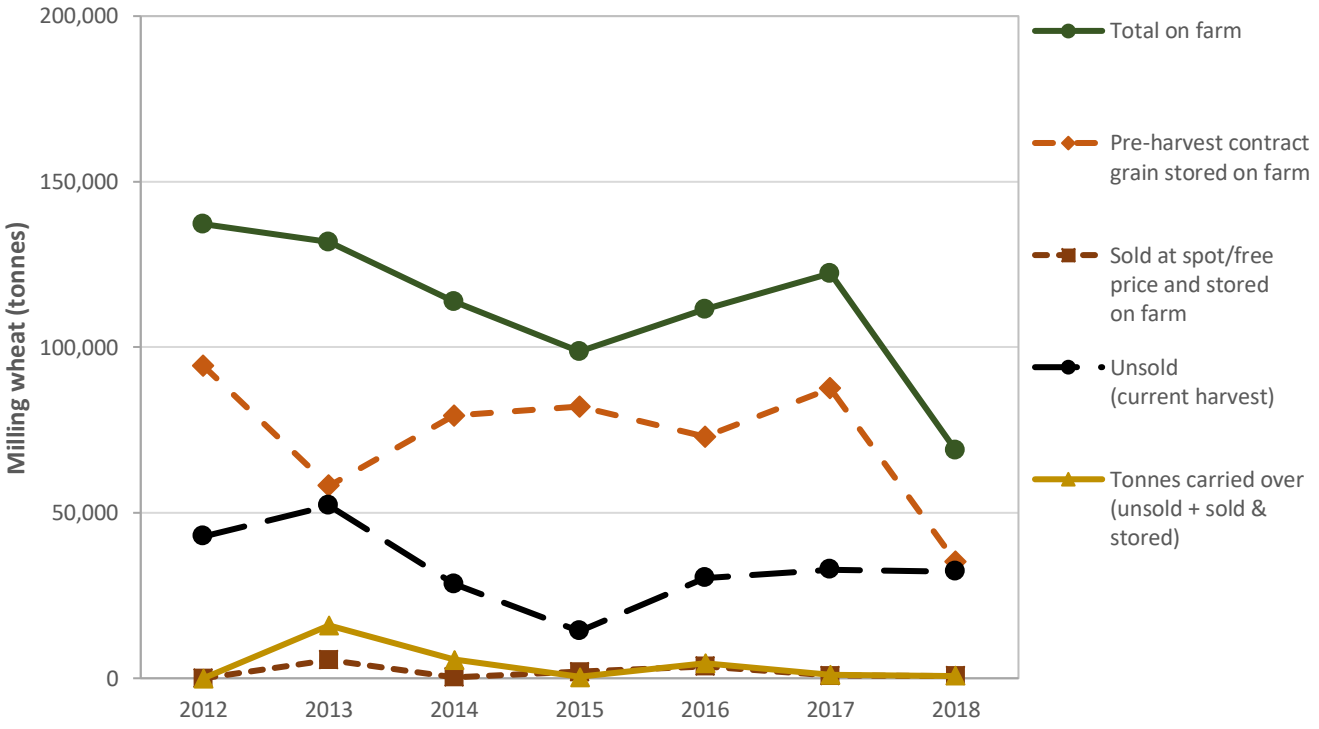

Figure 1b. NZ stock on farms for Milling Wheat (tonnes) as estimated on 1 April each year.
(Note: Unharvested grain is included. Historical data are sourced from previous AIMI April Reports. For the 2012 and 2013 harvests, the sales status of the unharvested grain was unknown, so it was assumed unsold. After this time the sales status of the unharvested grain was determined and has been apportioned between "Pre-harvest contract grain stored on farm" and "Unsold". "Tonnes carried over" is the sum of sold and unsold stock carried over (still on farm) from the previous season.)

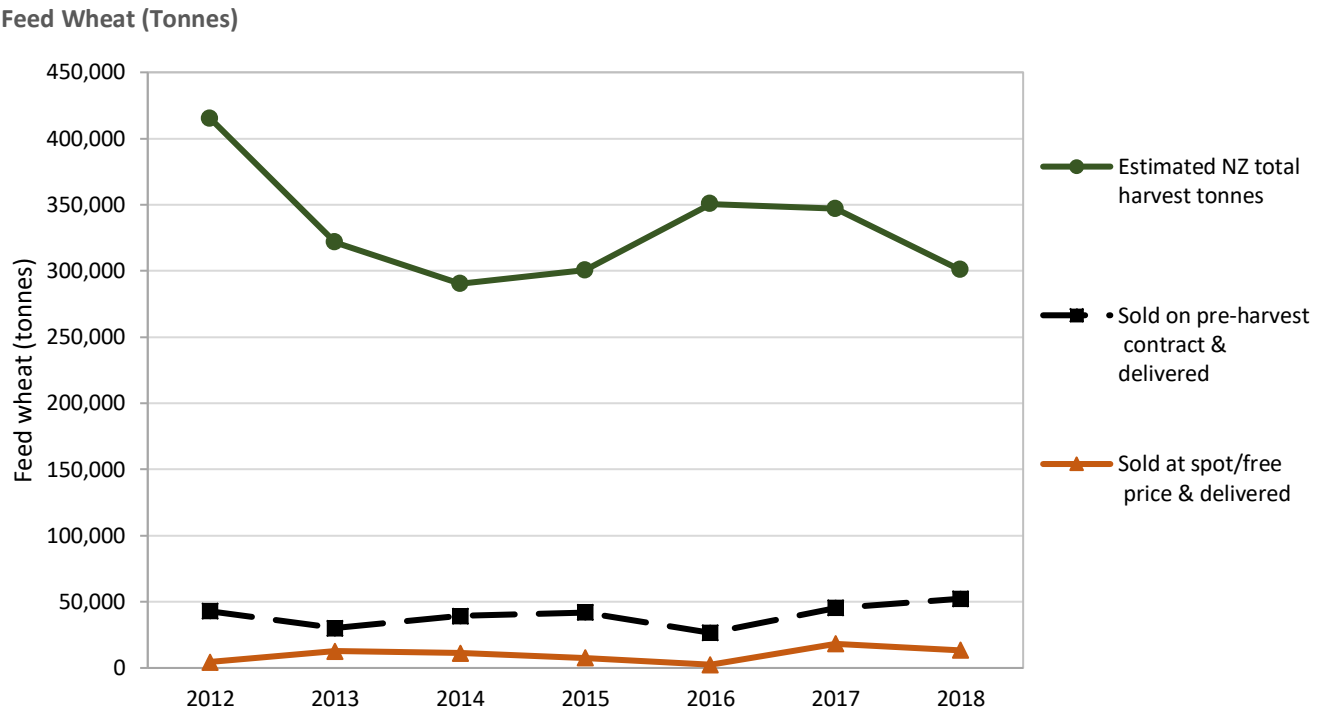

Figure 2a. NZ harvest tonnage and Sales channels for Feed Wheat (tonnes) as estimated on 1 April each year.
(Note: "Total harvest tonnes" includes harvested and unharvested grain for that season's harvest. "Sold at spot/free price & delivered" includes stock used on own farm. Historical data are sourced from previous AIMI April Reports.)

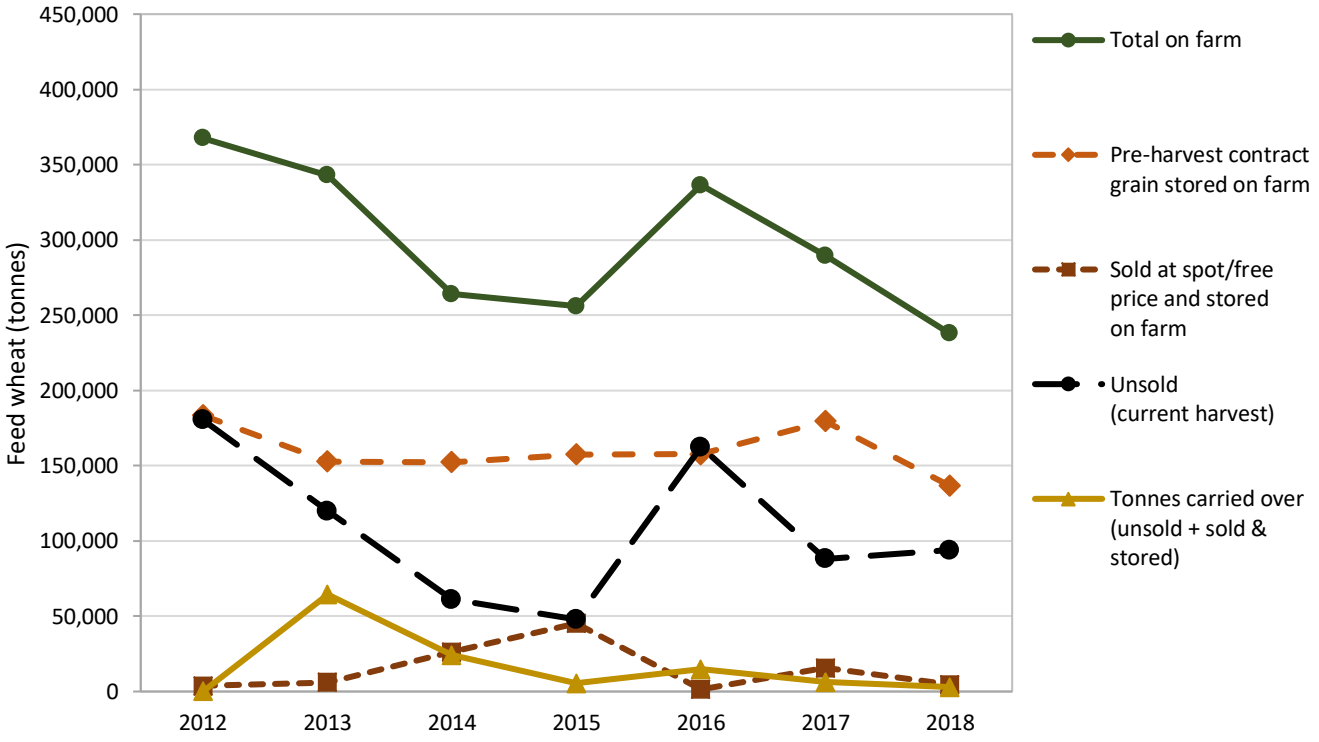

Figure 2b. NZ stock on farms for Feed Wheat (tonnes) as estimated on 1 April each year.
(Note: Unharvested grain is included. Historical data are sourced from previous AIMI April Reports. For the 2012 and 2013 harvests, the sales status of the unharvested grain was unknown, so it was assumed unsold. After this time the sales status of the unharvested grain was determined and has been apportioned between "Pre-harvest contract grain stored on farm" and "Unsold". "Tonnes carried over" is the sum of sold and unsold stock carried over (still on farm) from the previous season.)

Feed Barley (Tonnes)

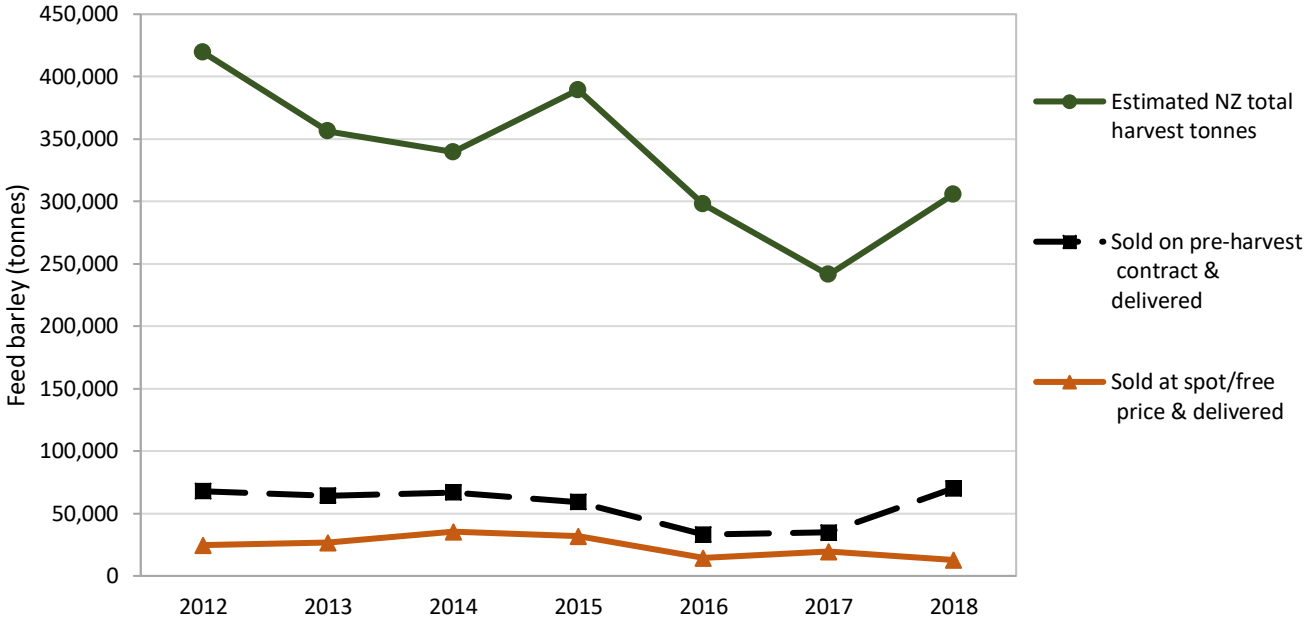

Figure 3a. NZ harvest tonnage and Sales channels for Feed Barley (tonnes) as estimated on 1 April each year. (Note: "Total harvest tonnes" includes harvested and unharvested grain for that season's harvest. "Sold at spot/free price & delivered" includes stock used on own farm. Historical data are sourced from previous AIMI April Reports.)

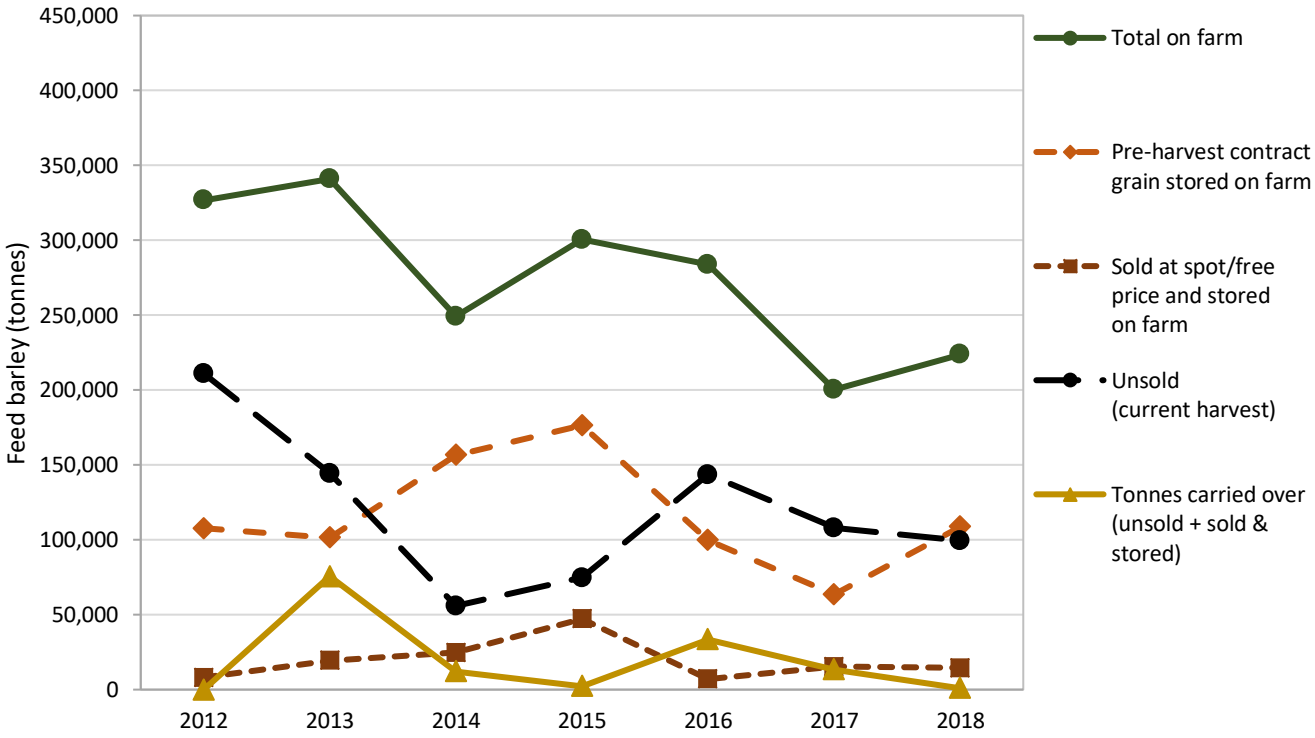

Figure 3b. NZ stock on farms for Feed Barley (tonnes) as estimated on 1 April each year.
(Note: Unharvested grain is included. Historical data are sourced from previous AIMI April Reports. For the 2012 and 2013 harvests, the sales status of the unharvested grain was unknown, so it was assumed unsold. After this time the sales status of the unharvested grain was determined and has been apportioned between "Pre-harvest contract grain stored on farm" and "Unsold". "Tonnes carried over" is the sum of sold and unsold stock carried over (still on farm) from the previous season.)

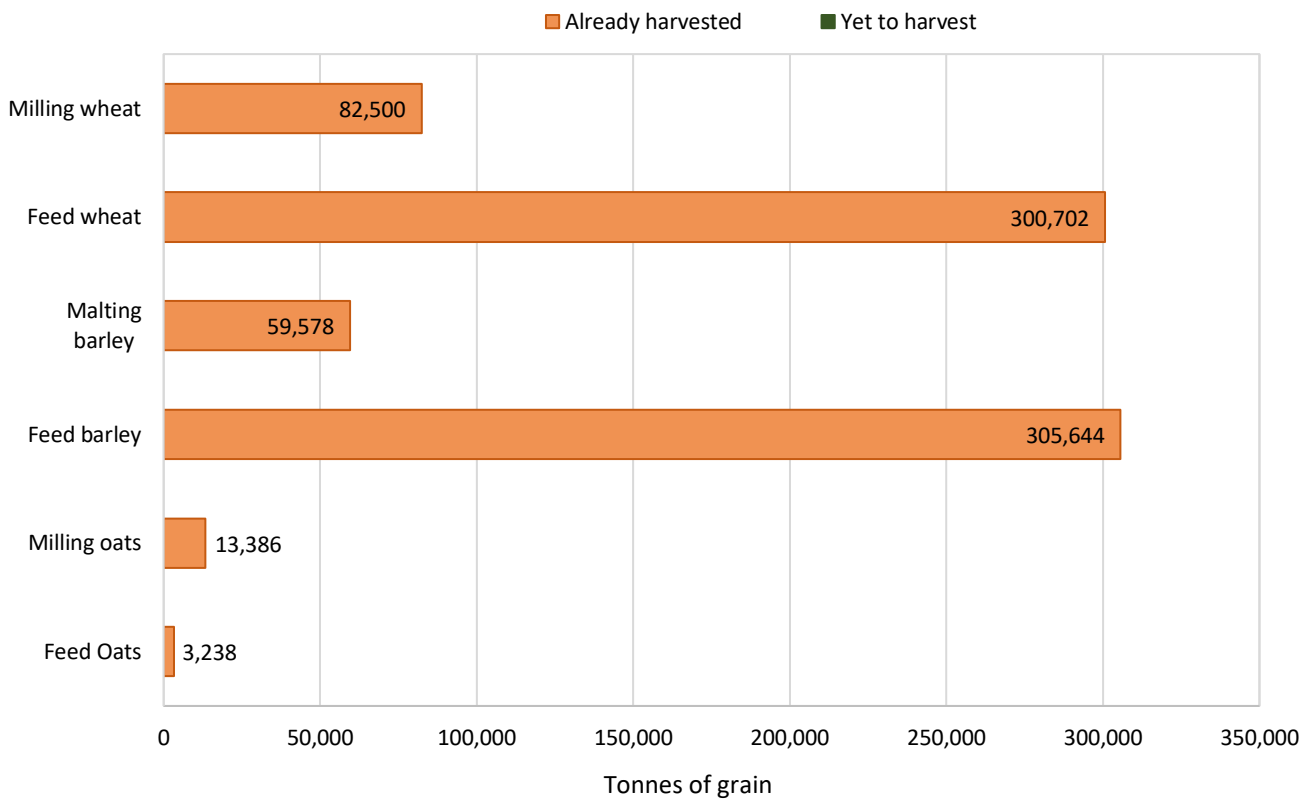

Figure 4. Estimated NZ tonnes harvested before 1 April 2018, and yet to harvest as at 1 April 2018.

Autumn/winter sowings and sowing intentions as at 1 April each year

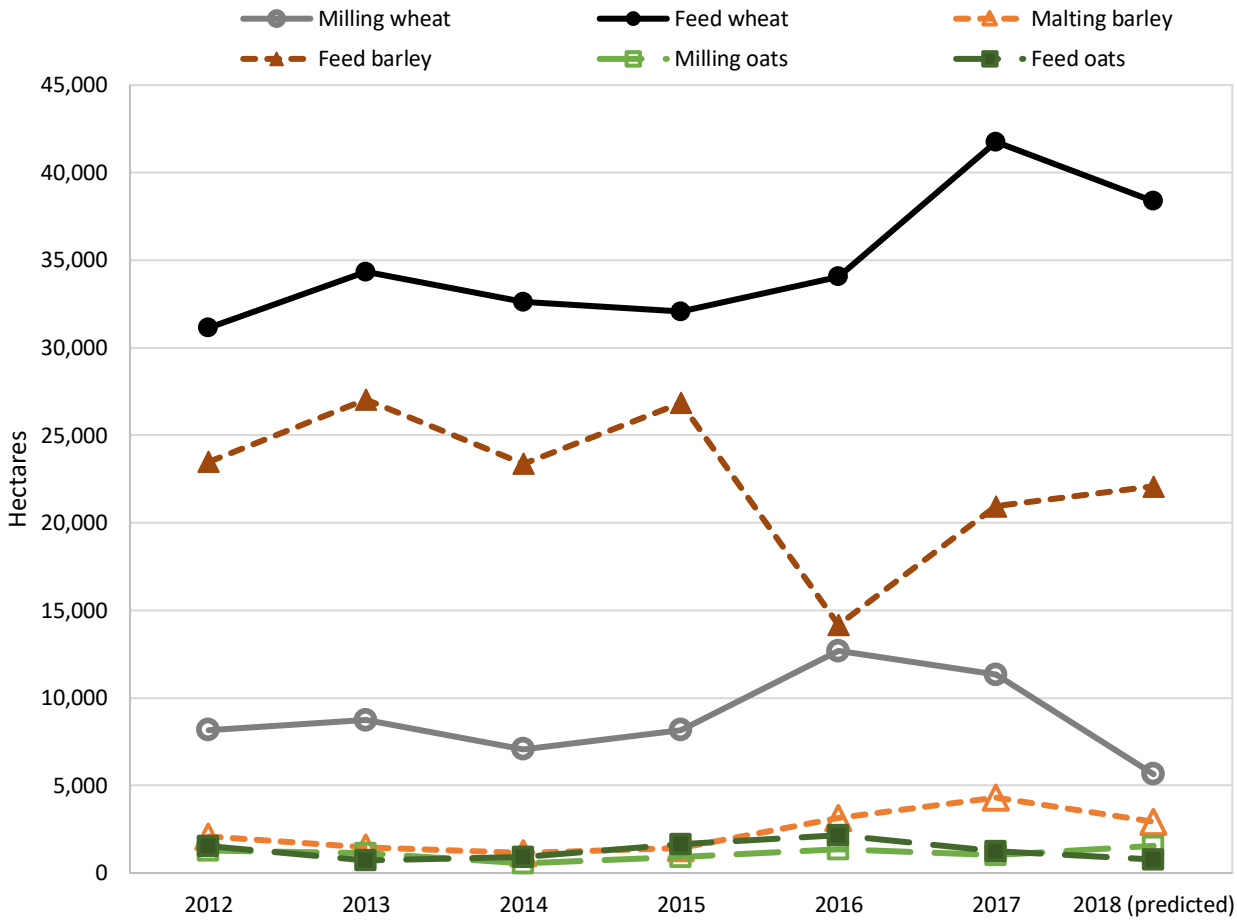

Figure 5. Estimated NZ total hectares sown or intended to be sown in autumn/winter 2018, along with the corresponding estimates from the six previous 1 April AIMI survey reports.
This information is also presented in Table 3 below.

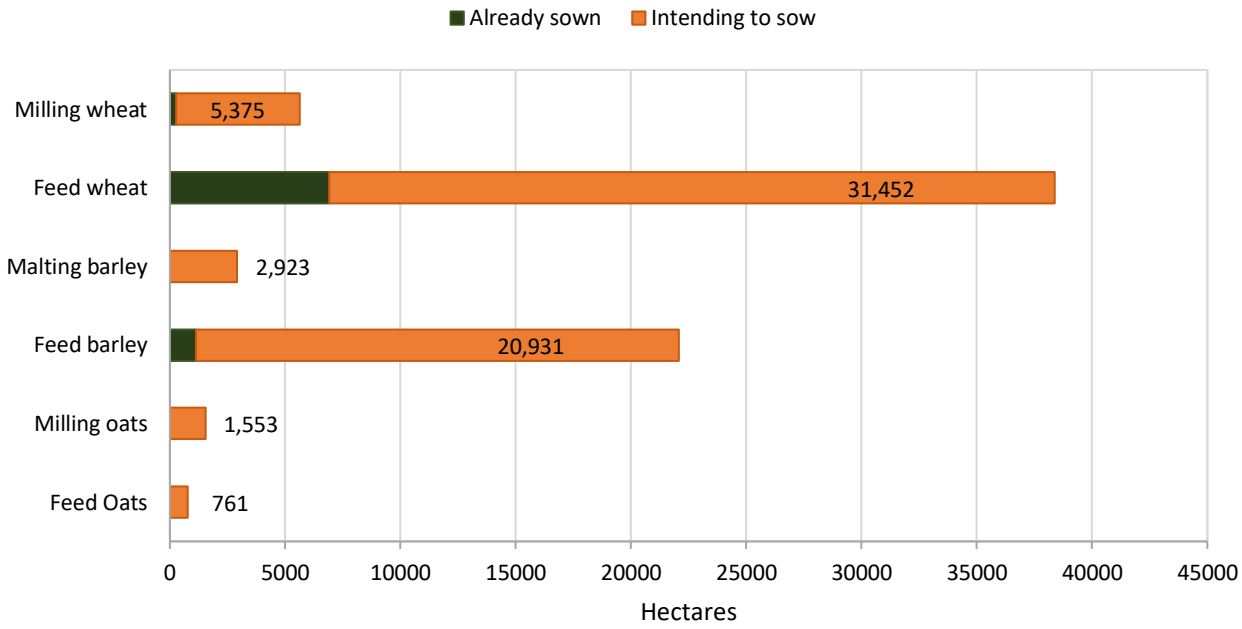

Figure 6. Estimated NZ Autumn/winter sowings and sowing intentions (hectares) as at 1 April 2018.
Note: Numbers at the end of the bars represent sowing intentions. These are estimated totals derived from the survey, and have an associated margin of error.

Comparison of yield (tonnes per ha) between harvests

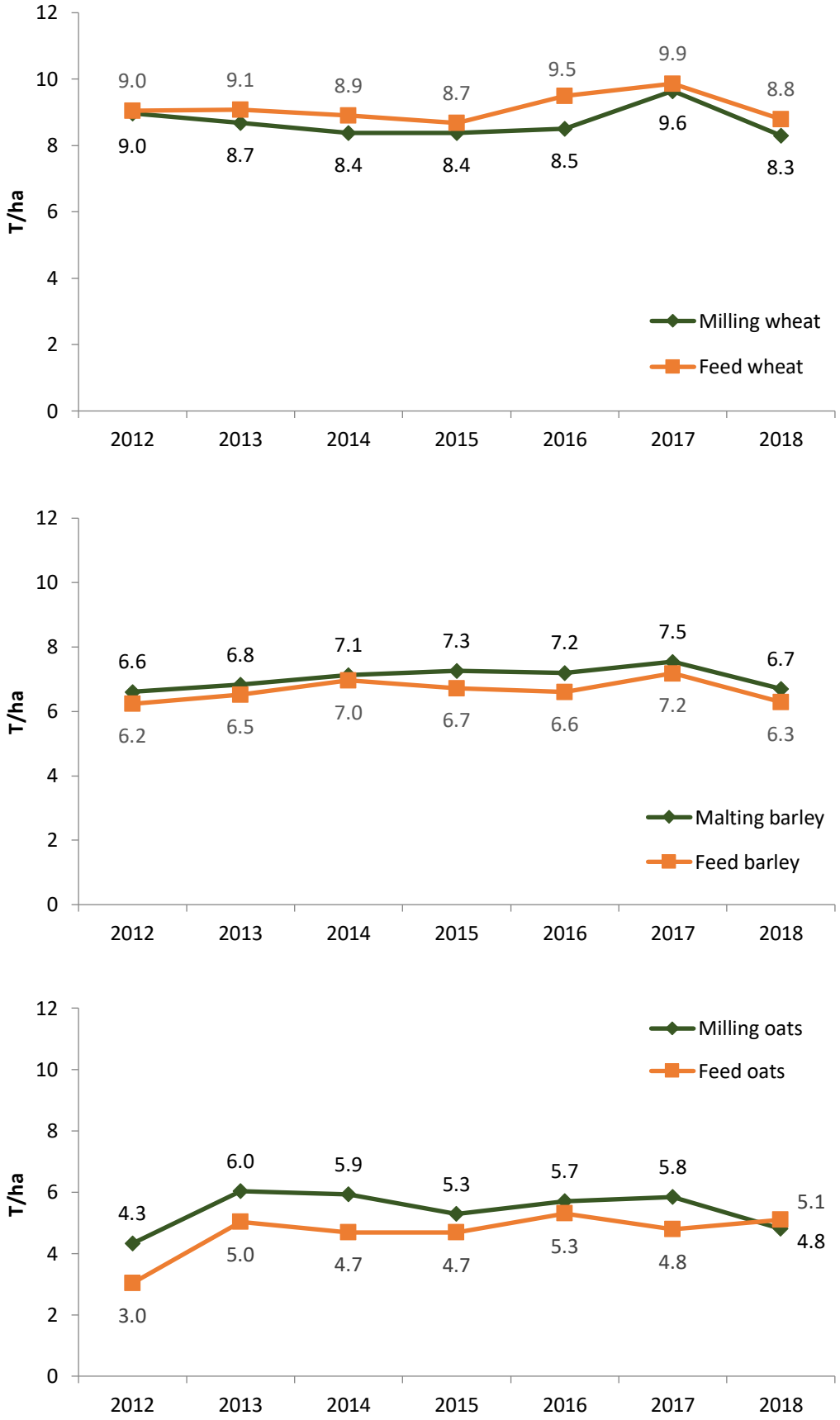

Figure 7. Comparison of yields (T/Ha) between the 2012 to 2018 harvests for the six cereal crops. Data are from the current survey and from previous April 1 AIMI reports for 2012 to 2017.
Note: Milling wheat includes biscuit and gristing varieties.

Table 1. Detailed estimated national figures for the 2018 harvest, plus sold and delivered tonnages, for six cereal crops as at April 1, 2018.

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Number of farmers in the survey who harvested or will harvest this crop in 2018		42	76	25	88	11	12
2017 harvest							
Estimated NZ total hectares, 2017 harvest	Ha	11,425	29,875	7,892	34,308	4,511	1,389
Estimated NZ total tonnes, 2017 harvest	Tonnes	107,480	301,620	58,545	237,955	26,081	7,619
2018 harvest							
Estimated NZ total hectares, 2018 harvest	Ha	9,946	34,212	8,954	48,777	2,805	635
Estimated NZ total tonnes, 2018 harvest	Tonnes	82,500	300,702	59,578	305,644	13,386	3,238
Estimated NZ total hectares already harvested by 1 April 2018	Ha	9,946	34,212	8,954	48,777	2,805	635
Estimated NZ total tonnes already harvested by 1 April 2018	Tonnes	82,500	300,702	59,578	305,644	13,386	3,238
Estimated NZ total hectares yet to harvest as at 1 April 2018	Ha	0	0	0	0	0	0
Estimated NZ total tonnes yet to harvest as at 1 April 2018	Tonnes	0	0	0	0	0	0
Percentage of estimated 2018 crop tonnage which had been harvested by 1 April 2018	%	100%	100%	100%	100%	100%	100%
2018 harvest so far							
Sold under pre-harvest contract and delivered by 1 April 2018	Tonnes	8,774	52,325	33,759	70,218	0	906
Pre-harvest contract grain stored on farm on 1 April 2018	Tonnes	35,165	136,579	21,771	108,641	12,948	1,641
Sold at spot/free price and delivered by 1 April 2018	Tonnes	0	13,118	463	11,969	0	167
Sold at spot/free price and stored on farm on 1 April 2018	Tonnes	745	4,472	0	14,471	0	0
(For milling or malting only) Sold for feed by 1 April 2018	Tonnes	5617	-	556	-	0	-
(For feed only) Used on own farm by 1 April 2018	Tonnes	-	293	-	797	-	74
Unsold stocks on hand (2018 harvest only) on 1 April 2018	Tonnes	32,199	93,914	3,029	99,548	438	449
2018 yet to harvest							
Unharvested grain sold under pre-harvest contract by 1 April 2018	Tonnes	0	0	0	0	0	0
Unharvested grain unsold on 1 April 2018	Tonnes	0	0	0	0	0	0
Sales channels (2018 harvest): includes unharvested grain (though nil this year)							
Sold under pre-harvest contract (total) by 1 April 2018 (includes sold, unharvested grain)	Tonnes	43,939	188,904	55,529	178,859	12,948	2,547
Sold at spot/free price (total) by 1 April 2018 (includes sold for feed and used on farm)	Tonnes	6,362	17,883	1,019	27,237	0	241
Delivery status of sold grain (2018 harvest): includes unharvested grain (though nil this year)							
Sold and delivered (total) by 1 April 2018 (includes sold for feed and used on farm)	Tonnes	14,391	65,736	34,778	82,984	0	1,147
Sold and stored on farm (total) on 1 April 2018 (includes sold, unharvested grain)	Tonnes	35,910	141,051	21,771	123,112	12,948	1,641
Total sales (2018 harvest): includes unharvested grain (though nil this year)							
Sold (of total crop) by 1 April 2018 (includes sold for feed, used on farm, and sold, unharvested grain)	Tonnes	50,301	206,787	56,549	206,096	12,948	2,789
Unsold (of total crop) on 1 April 2018 (includes unsold, unharvested grain)	Tonnes	32,199	93,914	3,029	99,548	438	449
Comparison of hectares and tonnes between last two harvests							
Estimated % change in hectares, 2017 to 2018 harvest (%)	%	-12.9	14.5	13.5	42.2	-37.8	-54.3
Estimated % change in tonnes, 2017 to 2018 harvest (%)	%	-23.2	-0.3	1.8	28.4	-48.7	-57.5
Estimated change in tonnes, 2017 to 2018 harvest (tonnes)	Tonnes	-24,980	-918	1,033	67,689	-12,695	-4,381
Comparison of yields (t/ha) between last two harvests							
NZ-wide estimated yield, 2017 harvest	T/ha	9.4	10.1	7.4	6.9	5.8	5.5
NZ-wide estimated yield, 2018 harvest	T/ha	8.3	8.8	6.7	6.3	4.8	5.1

Table 1 (continued).

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Comparison of on-farm storage (including unharvested grain) between last April and this April							
Sold but not delivered (total) on 1 April 2017 (from 2017 harvest) (April 2017 Report)	Tonnes	88,394	195,152	44,373	78,846	31,325	5,487
Sold but not delivered (total) on 1 April 2018 (from 2018 harvest) (from above)	Tonnes	35,910	141,051	21,771	123,112	12,948	1,641
Unsold (from 2017 harvest) on 1 April 2017 (April 2017 AIMI Report)	Tonnes	32,827	88,110	4,198	107,978	2,400	3,073
Unsold (from 2018 harvest) on 1 April 2018 (as above)	Tonnes	32,199	93,914	3,029	99,548	438	449
Change in sold but not delivered (including unharvested grain) as at 1 April (for most recent harvest) between 2017 and 2018	Tonnes	-52,484	-54,101	-22,602	44,266	-18,377	-3,846
Change in unsold as at 1 April (from most recent harvest) between 2017 and 2018	Tonnes	-628	5,804	-1,168	-8,429	-1,962	-2,624
Change in total grain on farm (both sold and unsold, and including unharvested grain) as at 1 April (for most recent harvest) between 2017 and 2018	Tonnes	-53,112	-48,297	-23,771	35,836	-20,339	-6,470
Note: The comparisons in the last seven rows do not include carryover stock from the previous season (as given in Table 2).							

In Table 1 (on the previous page), the estimated 2018 harvest tonnes of milling wheat was 23% *lower* than for the 2017 harvest (down 25,000 tonnes). For feed wheat, the estimated 2018 harvest tonnes was almost identical to 2017 (down 900 tonnes), and for feed barley, the estimated 2018 harvest tonnes was 28% *up* on 2017 (up 67,700 tonnes). Estimated 2018 harvest tonnes of malting barley was *up* by 2% (up 1,000 tonnes). Harvest tonnes of milling oats and feed oats were *down* by 49% and 58% respectively (down 12,700 and 4,400 tonnes respectively).

The last few rows of Table 1 (on this page) show the changes in on-farm storage between 1 April 2017 (of 2017 harvest grain) and 1 April 2018 (of 2018 harvest grain). Unharvested grain has been included in the estimates to take account of the differing percentages of grain harvested by 1 April between the two years. For milling wheat, feed wheat, malting barley, milling oats and feed oats there were decreases, some very large, in the tonnage of grain sold but not delivered by 1 April between the two seasons (drops of 52,500, 54,100, 22,600, 18,400 and 3,800 tonnes respectively). Feed barley was the only crop that showed a large increase in the tonnage of grain sold but not delivered by 1 April between the two seasons (an increase of 44,300 tonnes); this matches with the large increase in the feed barley harvest between the two seasons.

In terms of unsold tonnage, there were decreases in unsold tonnages as at 1 April between the two seasons for all crops except feed wheat, the largest decrease being for feed barley (a drop in unsold tonnage of 8,400 t). For feed wheat, there was an increase in unsold tonnage of 5,800 tonnes.

The nett effect is that there were sizeable *decreases* in the tonnages of grain from the most recent harvest stored on farms between 1 April 2017 and 1 April 2018 for milling wheat, feed wheat, malting barley, milling oats and feed oats (estimated decreases of 53,100, 48,300, 23,800, 20,300 and 6,500 tonnes respectively). Feed barley was the only crop that showed an increase in total on-farm storage between 1 April 2017 and 1 April 2018 (of 35,800 tonnes). These figures do not include the grain carried over from the previous harvest (Table 2); this carry-over grain needs to be added to give the total picture.

Table 2 below shows that for the wheat and barley crops, *unsold* carry-over stocks on hand on 1 April 2018 from the previous (2017) harvest were at a historically low level (all four crops had less than 0.7% of the 2017 crop unsold). For the oats crops, this unsold percentage was higher (1.4% for milling oats and 11.5% for feed oats). In terms of *sold* carry-over grain stored on farm from the 2017 harvest, the only crop with over 1,000 tonnes sold and stored was milling oats, with 4,500 tonnes.

In the last three rows, Table 2 also tracks the movement of unsold grain from the 2017 harvest between 10 October 2017 and 1 April 2018. For the wheat and barley crops, 94% to 100% of the grain that was unsold as at 10 October 2017, was sold between these two dates. For milling oats and feed oats, the corresponding percentages were much lower (77% and 24% respectively).

When the tonnage of unsold carry-over grain is added to the unsold tonnage from the current harvest, the estimated tonnage of unsold grain as at 1 April, 2018 is 96,000 t for feed wheat and 100,200 t for feed barley; when summed over these two major feed crops, the total amount of unsold grain is estimated to be 196,200 t, which is only slightly lower than the amount on 1 April 2017, of 203,500 tonnes.

Table 2. Carry-over stock on hand from the 2017 harvest, as at April 1, 2018.

	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
	(Tonnes)	(Tonnes)	(Tonnes)	(Tonnes)	(Tonnes)	(Tonnes)
Number of survey farmers who harvested this crop in 2017	49	74	23	81	10	22
Number of survey farmers with carry-over grain from 2017 crop on 1 April 2018	3	6	1	6	8	6
Estimated NZ total sold and stored on farm (2017 crop) on 1 April 2018	319	745	139	278	4,463	705
Estimated NZ total unsold stocks on hand (2017 crop) on 1 April 2018	399	2,066	0	676	371	873
Estimated NZ Total 2017 harvest still on farms on 1 April 2018 (tonnes)	719	2,811	139	954	4,834	1,578
Estimated NZ unsold stocks on hand of 2017 harvest on 1 April 2018 as a percentage of tonnes harvested in 2017 (%)	0.4%	0.7%	0.0%	0.3%	1.4%	11.5%
Comparative figures from last year (1 April 2017 AIMI survey)						
Estimated NZ total sold and stored on farm (2016 crop) on 1 April 2017	354	2,538	0	9,851	463	819
Estimated NZ total unsold stocks on hand (2016 crop) on 1 April 2017	708	3,790	0	3,604	98	1,097
Comparative figures from year before that (1 April 2016 AIMI survey)						
Estimated NZ total sold and stored on farm (2015 crop) on 1 April 2016	1,356	3,227	930	3,084	2,040	0
Estimated NZ total unsold stocks on hand (2015 crop) on 1 April 2016	3,220	11,578	2,496	30,457	0	35
Comparative figures from two years before that (1 April 2015 AIMI survey)						
Estimated NZ total sold and stored on farm (2014 crop) on 1 April 2015	399	3,747	227	1,532	0	0
Estimated NZ total unsold stocks on hand (2014 crop) on 1 April 2015	68	1,685	0	660	197	395
Comparative figures from three years before (1 April 2014 AIMI survey)						
Estimated NZ total sold and stored on farm (2013 crop) on 1 April 2014	5,245	17,293	0	11,656	298	0
Estimated NZ total unsold stocks on hand (2013 crop) on 1 April 2014	415	6,927	0	375	223	722
Comparative figures from four years before (1 April 2013 AIMI survey)						
Estimated NZ total sold and stored on farm (bumper 2012 crop) on 1 April 2013	6,838	45,514	2,236	31,266	852	0
Estimated NZ total unsold stocks on hand (bumper 2012 crop) on 1 April 2013	9,117	18,909	0	44,372	852	501
Change in unsold 2017 harvest grain between 10 Oct 2017 and 1 April 2018 (based upon matched data)						
Estimated NZ total unsold stocks on hand (2017 crop) on 10 October 2017	6,570	35,319	482	39,373	1,589	1,155
Estimated NZ total unsold stocks on hand (2017 crop) on 1 April 2018 (as above)	399	2,066	0	676	371	873
Reduction in estimated NZ total unsold stocks on hand (2017 crop) between 10 October 2017 and 1 April 2018 (tonnes)	6,170	33,253	482	38,696	1,218	282
As a percentage, reduction in estimated NZ total unsold stocks on hand (2017 crop) between 10 October 2017 and 1 April 2018 (%)	94%	94%	100%	98%	77%	24%
Note: The matched comparison in the last section was based upon scaling up data from the exact same survey farms for the last two AIMI surveys (Oct 2017 and April 2018).						

Table 3. Autumn/winter sowings and sowing intentions as at April 1, 2018, and comparisons with previous years' estimates.

	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 sown or intend to sow this crop in the autumn or winter, as at 1 April 2018	19	75	10	52	5	8
Estimated NZ total hectares, 2017 harvest (autumn/winter plus spring sown crops, combined)	11,425	29,875	7,892	34,308	4,511	1,389
Estimated NZ total hectares, 2018 harvest (autumn/winter plus spring sown crops, combined)	9,946	34,212	8,954	48,777	2,805	635
Estimated NZ total hectares already sown, as at 1 April 2018	265	6,919	0	1,145	0	0
Estimated NZ total hectares intending to sow in autumn or winter, as at 1 April 2018	5,375	31,452	2,923	20,931	1,553	761
Estimated percentage of autumn/ winter 2018 sowings already sown by 1 April 2018	4.7%	18.0%	0.0%	5.2%	0.0%	0.0%
Estimated NZ total autumn/ winter 2018 sowings and/or sowing intentions as at April 1 2018 (hectares, for harvest in 2019)	5,640	38,371	2,923	22,076	1,553	761
Comparative figures from the same time in seven previous years (1 April AIMI surveys)						
Estimated NZ total autumn/ winter 2017 sowings & intentions (from the April 2017 AIMI Survey Report)	11,330	41,751	4,306	20,949	1,036	1,262
Estimated NZ total autumn/ winter 2016 sowings & intentions (from the April 2016 AIMI Survey Report)	12,688	34,048	3,133	14,167	1,369	2,159
Estimated NZ total autumn/ winter 2015 sowings & intentions (from the April 2015 AIMI Survey Report)	8,171	32,070	1,434	26,849	909	1,658
Estimated NZ total autumn/ winter 2014 sowings & intentions (from the April 2014 AIMI Survey Report)	7,078	32,607	1,148	23,380	554	926
Estimated NZ total autumn/ winter 2013 sowings & intentions (from the April 2013 AIMI Survey Report)	8,733	34,325	1,461	27,041	1,155	719
Estimated NZ total autumn/ winter 2012 sowings & 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 2011 sowings & intentions (from the April 2011 AIMI Survey Report)	9,960	32,020	1,650	24,510	1,120	430
Estimated change in autumn/ winter sowings & intentions, 2016 to 2017 (hectares)	-1,358	7,703	1,173	6,782	-332	-897
Estimated change in autumn/ winter sowings & intentions, 2017 to 2018 (hectares)	-5,690	-3,380	-1,383	1,127	516	-501
Estimated % change in autumn/ winter sowings & intentions, 2017 to 2018 (%)	-50%	-8%	-32%	5%	50%	-40%

Table 3 above shows that most autumn/winter cereal crops had not been sown by 1 April 2018. For feed wheat, 18% had been sown, and for milling wheat and feed barley, 5% had been sown. No malting barley, milling oats or feed oats had been sown on the survey farms. Therefore the estimates in the table are primarily sowing *intentions*. For milling wheat, malting barley and feed oats, autumn/winter sowings plus sowing intentions for 2018, as at 1 April 2018, are *much lower* (down 50%, 32% and 40% respectively) than at the same time last year (2017), while feed wheat is down slightly (8%). Autumn/winter sowings plus sowing intentions for 2018 are *up* 5% for feed barley and up 50% for milling oats. When the autumn/winter sowings plus sowing intentions are summed over the four wheat and barley crops, the prediction is for a 12% decrease in autumn/winter sowings (a 9,300 hectare decrease in area sown). This predicted decrease in area sown in the autumn/winter of 2018 is unchanged when we add in the two oats crops, since the area autumn/winter sown in milling oats is predicted to go up by 500 hectares, while the feed oats area is predicted to go down by the same amount (500 hectares).