



*The objective of this AIMI survey of New Zealand (NZ) cereal growers was to determine, as at October 10, 2024:*

- *sales of the 2024 NZ harvest of wheat, barley and oats (milling/malting and feed crops) since July 1, 2024*
- *levels of on-farm storage, both sold and unsold, of the 2024 harvest*
- *spring 2024 sowings and sowing intentions of wheat, barley and oats (milling/malting and feed crops)*

## Survey details

Data from 113 NZ survey farms who completed each of the last four cereal surveys (October 2023 and April, July and October 2024) were scaled up to the national level using the most recent, 2023, final NZ Agricultural Production Statistics (APS). These data reflect the position at the 10th October 2024 and there may have been further changes. As with all surveys, there is a margin of error which needs to be considered in relation to this report. The maize survey is currently underway and details will be released in the near future.

## Key Points at 10 October 2024 (figures have been rounded to nearest 100):

- For the 2023/2024 season, cereal grain production (wheat, barley and oats) in NZ totaled an estimated 795,400 tonnes (up 2% on last year). Maize grain production was estimated at 250,700 tonnes. Total production of grain in NZ was therefore estimated to be 1,046,100 tonnes.
- Unsold stocks of cereal grain, summed over all six crops, are estimated to have reduced by 53% between 1 July 2024 and 10 October 2024.
- When compared to the same time last year, unsold stocks of cereal grain, summed over all six crops, are estimated to be 31% lower. As at 10 October 2024, unsold stocks of feed wheat were estimated to be 31,900 tonnes (up 5,000 tonnes on last year) and unsold stocks of feed barley were estimated to be 16,600 tonnes (down 32,100 tonnes on last year).
- On-farm storage of sold grain is up 6% (up 14,300 tonnes) on this time last year. Total on-farm storage, including both sold and unsold grain, summed over all six crops, is down 5% (down 16,800 tonnes) compared to the same time last year.
- The total area sown or intended to be sown in cereals is estimated to be 95,700 hectares, which is up 1% (up 1,300 ha) on last season. An estimated 79% of this total area had been sown, which is lower than the average over the previous ten seasons (86%).

As at 10 October 2024, the tonnages of unsold feed wheat and feed barley were estimated at 31,900 t and 16,600 t, respectively. In addition, there were an estimated 16,500 t of unsold milling wheat and 2,200 t of unsold malting barley. When totalled over all six cereal crops, the 2025 harvest hectares are predicted to be up 1% on the 2024 harvest hectares (up from an estimated 94,300 ha to 95,700 ha). The 2025 harvest hectares for feed wheat are predicted to be 1,500 hectares lower than the 2024 harvest hectares, while the 2025 harvest hectares for feed barley are predicted to be 4,900 hectares higher than the 2024 harvest hectares. For milling wheat and malting barley, the 2025 harvest hectares are predicted to be 200 and 1,300 hectares lower than the 2024 harvest hectares, respectively.

**Milling wheat:** Overall, on-farm storage was up 7% on the same time last year. The estimated tonnage of unsold grain was 16,500 t, which was down on the same time last year. The estimated tonnage of sold grain stored on farm was 43,200 t, which was up on the same time last year. All milling wheat crops had been sown by October 10, and the area sown is estimated to be down 1% on last season.

**Feed wheat:** Overall, on-farm storage was down 8% on the same time last year. The estimated tonnage of unsold grain was 31,900 t, which was up on the same time last year. The estimated tonnage of sold grain still stored on farm was 90,700 t, which was down on the tonnage at the same time last year. Most feed wheat crops (97%) had been sown by October 10, with the area sown (including yet to be sown) estimated to be down 5% on last season.

**Feed barley:** Overall, on-farm storage was down 37% on the same time last year. The estimated tonnage of unsold grain was 16,600 t, which was down on the same time last year. The estimated tonnage of sold grain still stored on farm was 46,000 t, which was down on the tonnage at the same time last year. An estimated 67% of feed barley crops had been sown by October 10, with the area sown (including yet to be sown) estimated to be up 15% on last season.

**Malting barley:** Overall, on-farm storage was up 126% on the same time last year (more than double). The estimated tonnage of unsold grain was 2,200 t, which was down on the same time last year, while the estimated tonnage of sold grain still stored on farm was 49,300 t, which was much higher than the tonnage at the same time last year (18,400 t). An estimated 67% of malting barley crops were sown by October 10, and the area sown (including yet to be sown) was estimated to be down 8% on last season.

**Milling oats:** Overall, on-farm storage was down 13% compared to the same time last year. The estimated tonnage of unsold grain was 400 t, which was slightly up on the same time last year. The estimated tonnage of sold grain that was still stored on farm was 7,900 t, which was down on the same time last year. Milling oat crops were 6% sown by October 10, with the area sown (including yet to be sown) estimated to be 14% down on to last season.

**Feed oats:** Overall, on-farm storage was down 22% on the same time last year. The estimated tonnage of unsold grain was 1,300 t, which was up on the same time last year. The estimated tonnage of sold grain still stored on farm was 2,100 t, which was lower than at the same time last year. Feed oat crops were 82% sown by October 10, and the area sown (including yet to be sown) was estimated to be 16% down on last season.

**Overall:** As a total over all six crops, the estimated unsold tonnage of wheat, barley and oats (68,800 t in total) was 31% lower than at the same time last year, and the estimated tonnage sold but still stored on farm (239,200 t in total) was 6% higher than at the same time last year. This meant that the total tonnage on farm on October 10, 2024 (308,000 t in total) was estimated to be 5% lower than the amount on October 10, 2023. The total on-farm storage was made up of 122,500 t of feed wheat, 62,700 t of feed barley, 59,700 t of milling wheat, 51,500 t of malting barley, 8,200 t of milling oats and 3,400 t of feed oats.

The total area sown plus intended to be sown in wheat, barley or oats, as at 10 October 2024, was estimated to be up 1,300 ha, or up 1%, on the area harvested in 2024. There were increases in sowings of feed barley and decreases in sowings of the other five crops.

As a comparison over the last two years, the total area sown plus intended to be sown in wheat, barley or oats, as at 10 October 2024, was estimated to be 1% up on the area harvested in 2023. Milling wheat area was unchanged, feed wheat area was down 8%, feed barley area was down 1%, malting barley area was up 37%, milling oats area was predicted to be down 23% and feed oats area was up 14% over the two-year period.

The percentage of hectares that has been “forward sold”, as at 10 October 2024, was estimated to be 60% for milling wheat, 80% for malting barley and 90% for milling oats (as compared to matched estimates of 60%, 92% and 95%, respectively, for forward sales at the same time last year). For the feed crops, the percentages that have been forward sold were 36% of feed wheat, 38% of feed barley and 32% of feed oats hectares (as compared to 52%, 33% and 59%, respectively, for forward sales at the same time last year).

**Table 1. Estimated NZ national figures for the 2024 harvest, plus sold and delivered tonnages, for six cereal crops as at October 10, 2024.**

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Total (all crops)
<b>Number of farmers in the survey who harvested this crop in 2024</b>		<b>37</b>	<b>77</b>	<b>32</b>	<b>73</b>	<b>9</b>	<b>12</b>	<b>113</b>
<b>2023 harvest</b>								
Estimated NZ total hectares, 2023 harvest	ha	11,806	28,694	11,114	38,986	2,823	1,412	94,835
Estimated NZ total tonnes, 2023 harvest	tonnes	109,608	281,992	79,932	277,968	22,267	7,992	779,759
<b>2024 harvest</b>								
Estimated NZ total hectares, 2024 harvest	ha	12,013	27,882	16,449	33,567	2,511	1,909	94,331
Estimated NZ total tonnes, 2024 harvest	tonnes	107,946	294,238	111,507	250,626	19,325	11,723	795,364
Sold under pre-harvest contract and delivered by 10 October, 2024	tonnes	42,049	115,686	54,011	89,477	10,863	7,390	319,477
Pre-harvest contract grain stored on farm on 10 October, 2024	tonnes	32,032	52,986	44,720	20,481	7,886	1,790	159,895
Sold at spot/free price and delivered by 10 October, 2024	tonnes	3,212	53,014	3,814	91,706	89	478	152,314
Sold at spot/free price and stored on farm on 10 October, 2024	tonnes	11,195	37,671	4,572	25,561	0	310	79,309
(For milling or malting only) Sold for feed by 10 October, 2024	tonnes	2,988	-	2,166	-	133	-	5,287
(For feed only) Used on own farm by 10 October, 2024	tonnes	-	3,022	-	6,776	-	478	10,276
Unsold stocks on hand (2024 harvest only) on 10 October, 2024	tonnes	16,470	31,858	2,224	16,625	354	1,276	68,806
<b>Sales channels (2024 harvest)</b>								
Sold on pre-harvest contract (total) by 10 October, 2024	tonnes	74,081	168,672	98,731	109,959	18,749	9,180	479,372
Sold at spot/free price (total) by 10 October, 2024	tonnes	14,407	90,686	8,386	117,267	89	789	231,623
<b>On farm storage (2024 harvest)</b>								
Sold and delivered (total) by 10 October, 2024	tonnes	45,262	168,701	57,826	181,183	10,952	7,868	471,791
Sold and stored on farm (total) on 10 October, 2024	tonnes	43,227	90,658	49,291	46,042	7,886	2,100	239,204
<b>Total sales (2024 harvest)</b>								
Sold (grand total) by 10 October, 2024 (includes sold for feed & used on farm)	tonnes	91,476	262,380	109,283	234,001	18,971	10,447	726,557
Unsold stocks on hand (2024 harvest only) on 10 October, 2024	tonnes	16,470	31,858	2,224	16,625	354	1,276	68,806
<b>Comparison of hectares and tonnes between last two harvests</b>								
Estimated % change in hectares, 2023 to 2024 harvest	%	2%	-3%	48%	-14%	-11%	35%	-1%
Estimated % change in tonnes, 2023 to 2024 harvest	%	-2%	4%	40%	-10%	-13%	47%	2%
<b>Comparison of yields (t/ha) between last two harvests</b>								
NZ-wide estimated yield, 2023 harvest	t/ha	9.3	9.8	7.2	7.1	7.9	5.7	8.2
NZ-wide estimated yield, 2024 harvest	t/ha	9.0	10.6	6.8	7.5	7.7	6.1	8.4

Table 1 (continued).	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Total (all crops)
<b>Comparison of on-farm storage between 1 July, 2024 and 10 October, 2024 (based upon matched data)</b>								
Sold and stored on farm (total) on 1 July, 2024 (2024 harvest)	tonnes	50,475	145,090	78,897	72,362	15,993	6,530	369,348
Sold and stored on farm (total) on 10 October, 2024 (2024 harvest)	tonnes	43,227	90,658	49,291	46,042	7,886	2,100	239,204
Unsold stocks on hand (from 2024 harvest) on 1 July, 2024	tonnes	23,029	58,407	5,798	57,279	1,418	1,311	147,242
Unsold stocks on hand (from 2024 harvest) on 10 October, 2024 (as above)	tonnes	16,470	31,858	2,224	16,625	354	1,276	68,806
% decrease in total grain stored on-farm from July 2024 to Oct 2024	%	19%	40%	39%	52%	53%	57%	40%
<b>Recalculated 10 October, 2023 survey breakdown to enable more precise, matched comparisons between 10 October, 2023 and 10 October, 2024</b>								
Sold under pre-harvest contract and delivered by 10 October, 2023	tonnes	45,660	104,090	54,064	115,728	12,795	2,658	334,995
Pre-harvest contract grain stored on farm on 10 October, 2023	tonnes	31,185	62,690	17,779	38,241	9,206	4,032	163,132
Sold at spot/free price and delivered by 10 October, 2023	tonnes	3,386	42,391	767	56,508	0	859	103,912
Sold at spot/free price and stored on farm on 10 October, 2023	tonnes	5,225	43,311	661	12,546	0	0	61,742
(For milling or malting only) Sold for feed by 10 October, 2023	tonnes	4,720	-	2,348	-	0	-	7,068
(For feed only) Used on own farm by 10 October, 2023	tonnes	-	2,635	-	6,191	-	159	8,986
Unsold stocks on hand (2023 harvest only) on 10 October, 2023	tonnes	19,433	26,874	4,313	48,754	266	284	99,924
<b>Comparison of on-farm storage between last October and this October (based upon matched data)</b>								
Sold and stored on farm (total) on 10 October, 2023 (2023 harvest)	tonnes	36,410	106,001	18,440	50,786	9,206	4,032	224,875
Sold and stored on farm (total) on 10 October, 2024 (2024 harvest)	tonnes	43,227	90,658	49,291	46,042	7,886	2,100	239,204
Unsold stocks on hand (from 2023 harvest) on 10 October, 2023	tonnes	19,433	26,874	4,313	48,754	266	284	99,924
Unsold stocks on hand (from 2024 harvest) on 10 October, 2024 (as above)	tonnes	16,470	31,858	2,224	16,625	354	1,276	68,806
% change in total grain stored on-farm from Oct 2023 to Oct 2024	%	7%	-8%	126%	-37%	-13%	-22%	-5%
Change in total grain (in TONNES) stored on-farm from Oct 2023 to Oct 2024	tonnes	3,854	-10,360	28,762	-36,874	-1,232	-939	-16,788

**Note:** The matched comparisons in the last three sections were based upon scaling up data from the exact same survey farms for the last four AIMI surveys (not accounting for any carry-over from previous years).

Statistics NZ is gratefully acknowledged for supplying final 2023 NZ Agricultural Production Statistics data on total hectares and tonnes for wheat, barley and oats.

**Table 2. NZ sowings and sowing intentions for six cereal crops as at October 10, 2024.**

	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Total (all crops)
<b>Number of farmers in survey who have sown or intend to sow this crop as at 10 October, 2024</b>	<b>40</b>	<b>70</b>	<b>31</b>	<b>81</b>	<b>7</b>	<b>9</b>	<b>111</b>
Estimated NZ total hectares, 2023 harvest	11,806	28,694	11,114	38,986	2,823	1,412	94,835
Estimated NZ total hectares, 2024 harvest	12,013	27,882	16,449	33,567	2,511	1,909	94,331
<b>Sowings and intentions for the current season's crop (2024/25)</b>							
Estimated NZ total autumn/winter 2024 sowings (hectares; for harvest in 2025)	8,389	24,461	2,101	9,439	123	615	45,127
Estimated NZ total spring 2024 sowings already sown by 10 October, 2024 (hectares; for harvest in 2025)	3,462	1,221	8,132	16,518	0	709	30,042
Estimated NZ total spring 2024 sowings still to sow (intentions) as at 10 October, 2024 (hectares; for harvest in 2025)	0	709	4,959	12,514	2,037	290	20,509
Estimated NZ total spring 2024 sowings plus intentions as at 10 October, 2024 (hectares; for harvest in 2025)	3,462	1,930	13,091	29,032	2,037	998	50,551
Predicted NZ total hectares, 2025 harvest (Autumn/winter 2024 sowings and Spring 2024 sowings & intentions, all combined)	11,850	26,391	15,192	38,471	2,160	1,613	95,678
% of predicted NZ hectares which had already been sown by 10 October, 2024	100%	97%	67%	67%	6%	82%	79%
Average over previous 10 years of % of predicted NZ hectares which had been sown by 10 October	99%	99%	76%	75%	71%	77%	86%
<b>"Forward sales" of 2024/25 crop</b>							
Predicted NZ total hectares that are "forward sold" (2025 harvest) as at 10 October, 2024	7,073	9,606	12,218	14,434	1,952	509	45,792
Estimated percentage of NZ total hectares that are "forward sold" (2025 harvest) as at 10 October, 2024	60%	36%	80%	38%	90%	32%	48%
<b>Comparison of sowings/intentions between the 2022/23, 2023/24 and 2024/25 seasons (NZ totals) (based upon matched data)</b>							
Estimated % change in NZ total sowings, 2023 to 2024 harvests	2%	-3%	48%	-14%	-11%	35%	-1%
Estimated % change in NZ total sowings, 2024 to 2025 (predicted) harvests	-1%	-5%	-8%	15%	-14%	-16%	1%
Estimated % change in NZ total sowings, 2023 to 2025 (predicted) harvests (TOTAL over TWO seasons)	0%	-8%	37%	-1%	-23%	14%	1%
Estimated change in NZ total sowings, 2024 to 2025 (predicted) harvests (in HECTARES)	-163	-1,491	-1,257	4,904	-351	-296	1,347
<b>Comparison of spring sowing intentions as at 1 July, 2024 with spring sowings plus intentions as at 10 October, 2024 (based upon matched data)</b>							
Estimated NZ total spring 2024 sowing intentions as at 1 July, 2024 (hectares; for harvest in 2025)	4,833	1,230	9,570	21,198	1,370	790	38,990
Estimated NZ total spring 2024 sowings plus intentions as at 10 October, 2024 (hectares, for harvest in 2025) (as above)	3,462	1,930	13,091	29,032	2,037	998	50,551
Change in estimated NZ total spring 2024 sowings/intentions between 1 July, 2024 and 10 October, 2024 (hectares; for harvest in 2025)	-1,371	701	3,521	7,834	667	208	11,561

**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 2024 harvest of six grain crops still stored on farm reduced by between 19% and 57% in the period between the AIMI surveys dated July 1, 2024 and October 10, 2024. When tonnages were totalled over all six crops, the reduction was 40%.

When the on-farm storage on October 10, 2024 was compared to that at the same time last year (October 10, 2023), the total tonnage of grain on farms from the most recent harvest was higher than last year for the milling wheat and malting barley crops, and, conversely, lower than last year for feed wheat, feed barley and both oats crops. When summed over all six crops, the total on-farm storage was 5% lower than at this time last year. This corresponded to a 6% increase in the tonnage of grain sold and stored on farm, and a 31% decrease in unsold stocks on hand, as compared to a year ago.

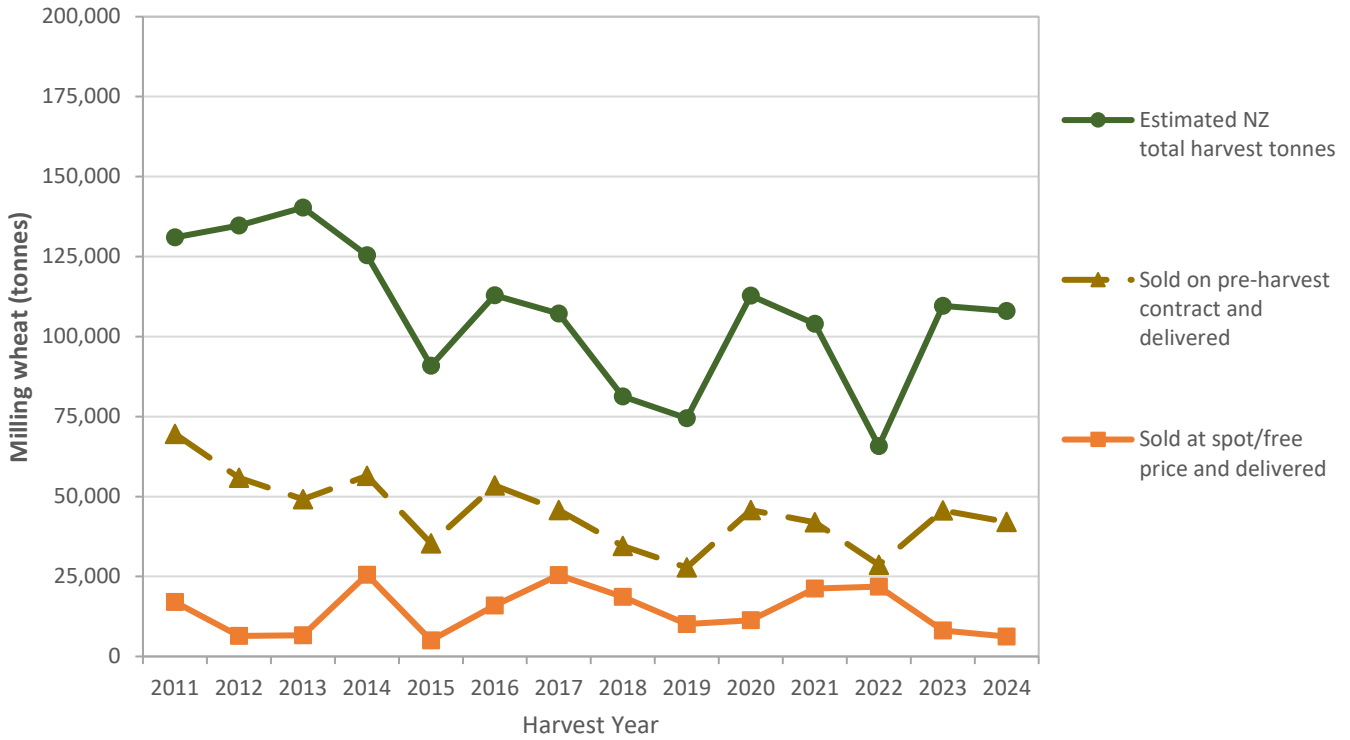
The number out of the 113 survey growers who have sown or intend to sow each crop this season can be compared with the number who harvested last season (2023/2024) by comparing the top rows in Tables 1 and 2. For milling wheat, grower numbers increased from 37 to 40 between last season and this season, and feed wheat numbers decreased from 77 to 70. Note that for both wheat crops, almost all sowing had been completed by October 10, so these numbers are unlikely to change. For malting barley, milling oats and feed oats, grower numbers were similar between the last two seasons, while for feed barley, grower numbers increased from 73 to 81. However, for the two barley crops, sowing was only 67% complete, and for milling oats, sowing was only 6% complete, so final grower numbers may be different. Sowing was 82% complete for feed oats.

In Table 2, sowings plus sowing intentions for feed wheat (for harvest in 2025) were 5% down on the area harvested in 2024 and down 8% on the area harvested in 2023. For feed barley, sowings plus sowing intentions (for harvest in 2025) were an estimated 15% up on the area harvested in 2024, following a 14% decrease between the 2023 and 2024 harvests. As a result, feed barley sowings were down 1% on two years ago. For milling wheat, sowings (for harvest in 2025) were an estimated 1% down on the area harvested in 2024, and very similar to the area harvested in 2023. Malting barley sowings and intentions were down 8% on last year, following a 48% increase the previous season. As a result, malting barley sowings were up 37% on two years ago. Milling oats sowings and intentions were down 14% on last year, and down 23% on two years ago. Feed oats sowings and intentions were down 16% on last year, following a 35% increase the previous year, and as a result, feed oats sowings were predicted to be up 14% on two years ago.

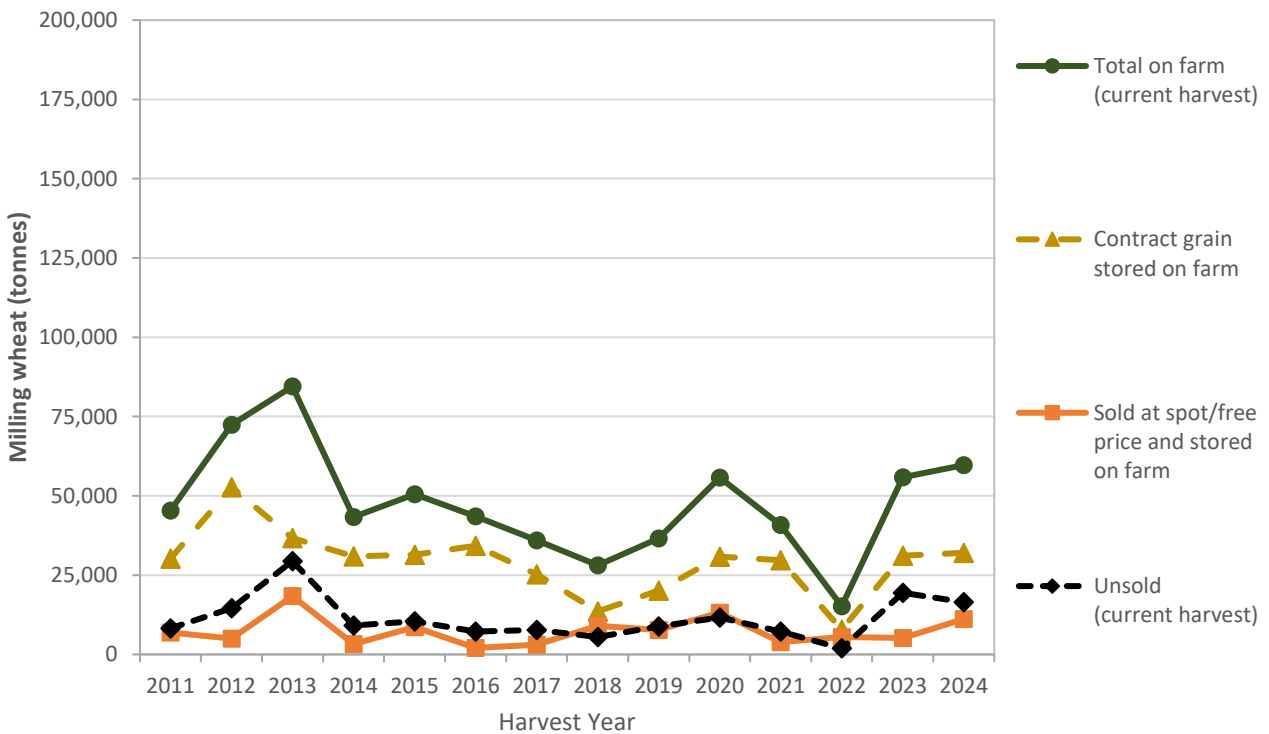
Summing the sowings and intended sowings for the six cereal crops for the current season (for harvest in 2025) (95,700 ha), an increase of 1,300 ha was estimated when compared with the estimated area harvested in 2024 (94,300 ha).

At the bottom of Table 2 is the estimated change between the spring sowing intentions on July 1, 2024 and the actual sowings plus updated intentions on October 10, 2024. In total, there was an estimated increase of 11,600 ha in the spring hectares sown plus intended to be sown between the two survey dates. This was dominated by a large increase in hectares for feed barley (up 7,800 ha) and a moderate increase in hectares for malting barley (up 3,500 ha).

### Milling wheat (tonnes)



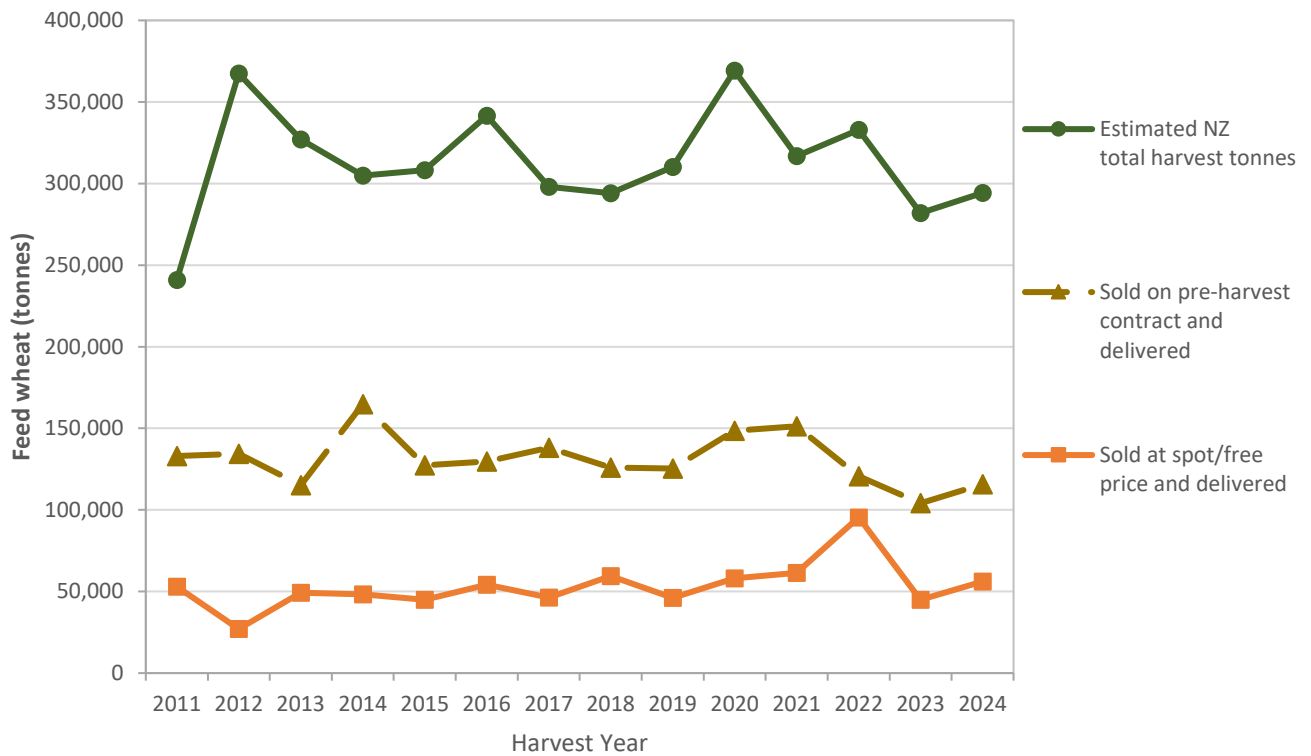
**Figure 1a. NZ harvest tonnage and sales channels for milling wheat as estimated in October each year.** (Note: Both “sold and delivered” categories relate to the crop harvested that year, excluding carryover stock. “Sold at spot/free price and delivered” includes grain sold for feed. Historical data for 2011 to 2022 are from October AIMI Reports for 2022 and earlier, while data for 2023 and 2024 are matched data from the current report.)



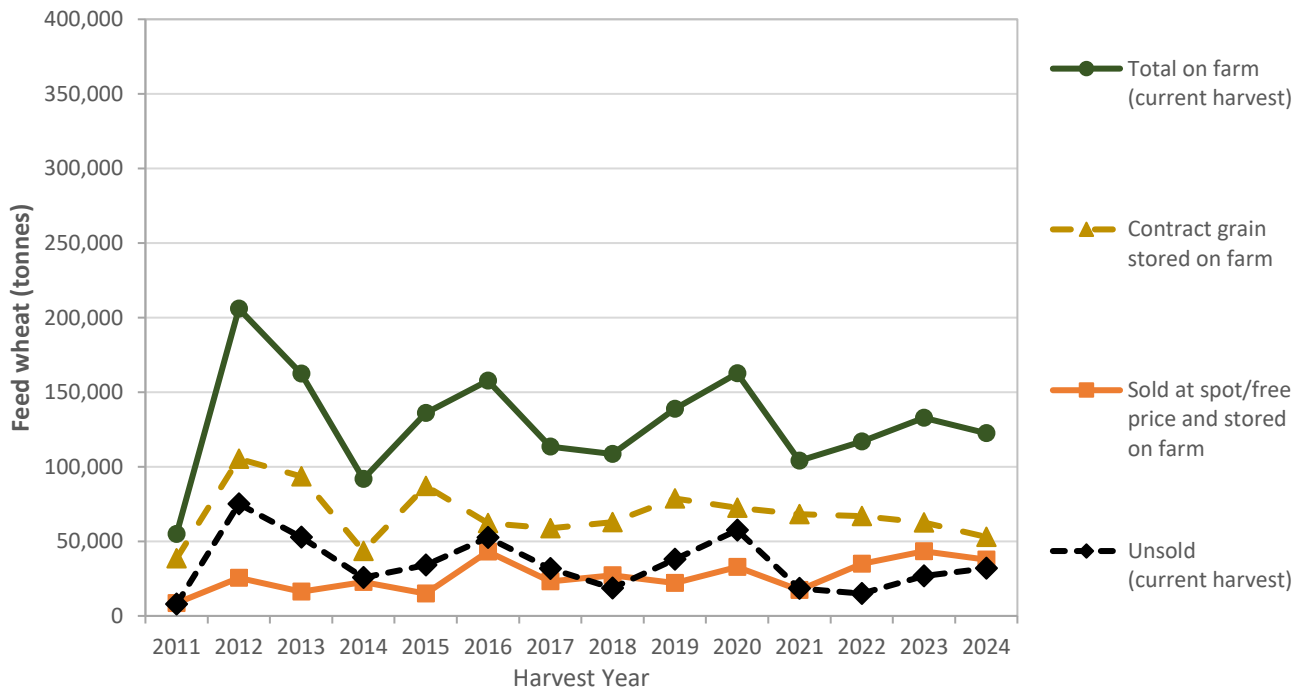
**Figure 1b. NZ stocks on farm for milling wheat as estimated in October each year.** (Note: Historical data for 2011 to 2022 are from October AIMI Reports for 2022 and earlier, while data for 2023 and 2024 are matched data from the current report.)



## Feed wheat (tonnes)

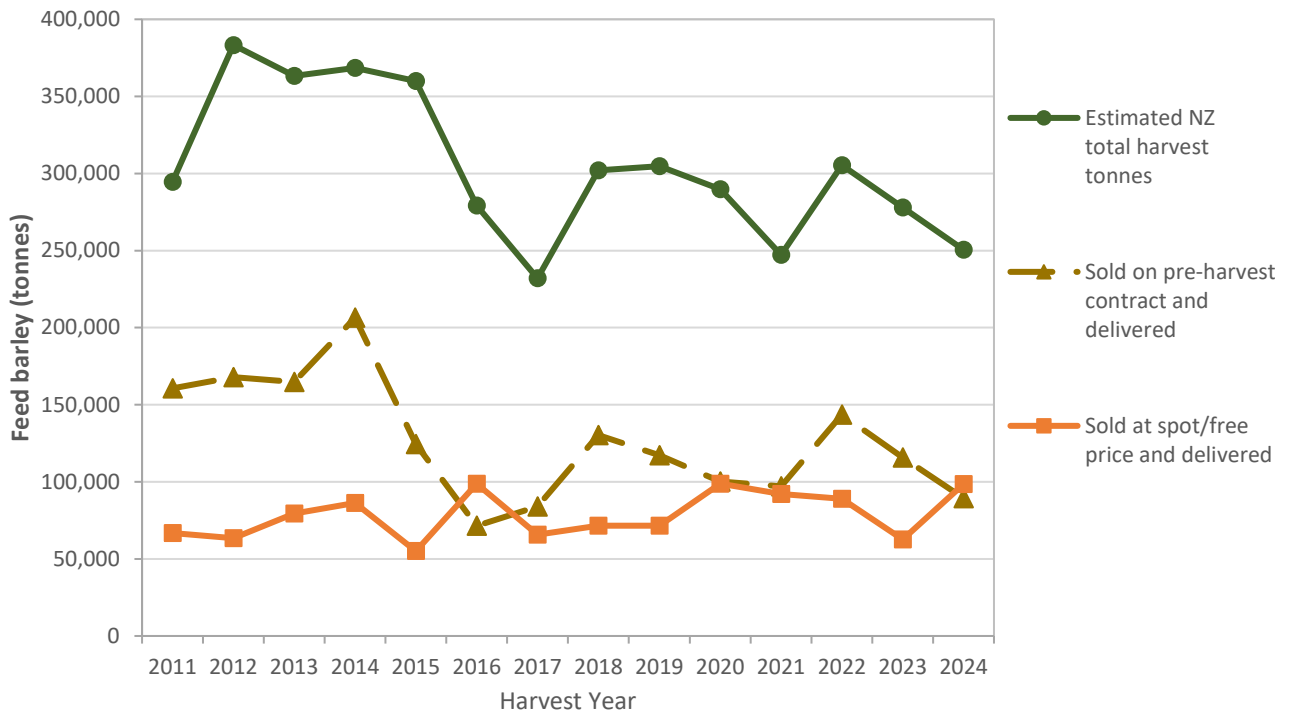


**Figure 2a. NZ harvest tonnage and sales channels for feed wheat as estimated in October each year.** (Note: Both “sold and delivered” categories relate to the crop harvested that year, excluding carryover stock. “Sold at spot/free price and delivered” includes grain used on own farm. Historical data for 2011 to 2022 are from October AIMI Reports for 2022 and earlier, while data for 2023 and 2024 are matched data from the current report.)

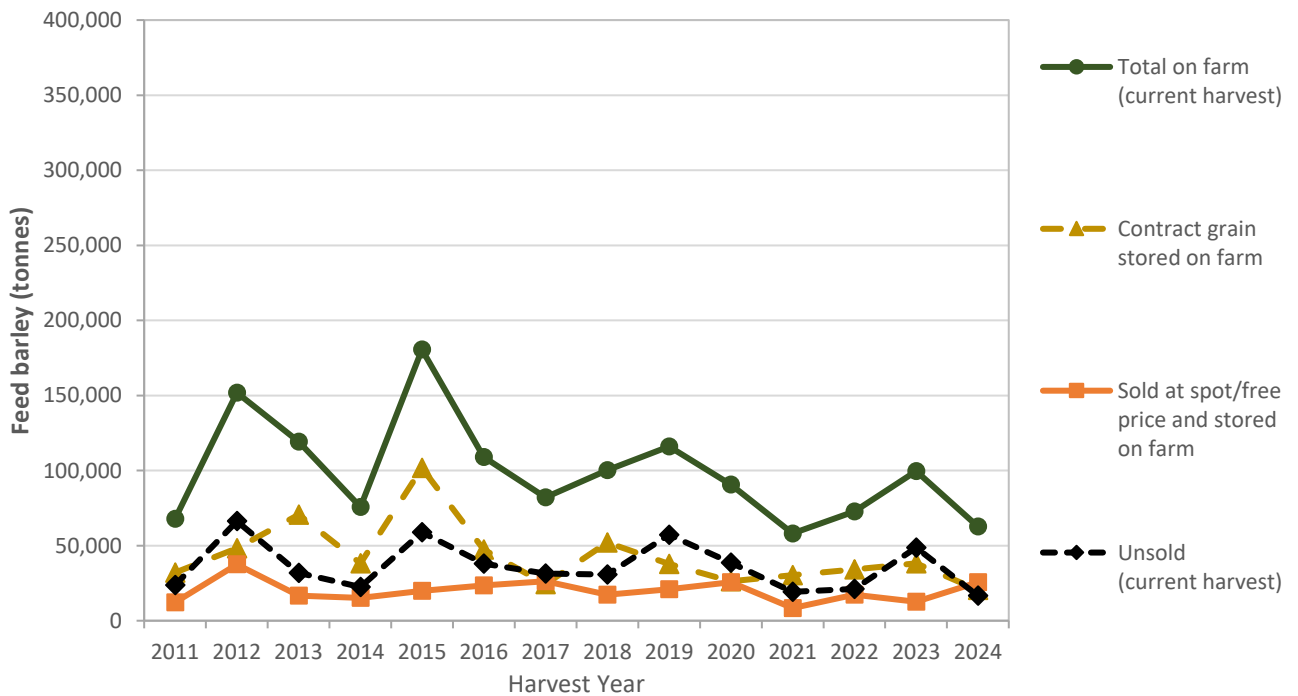


**Figure 2b. NZ stocks on farm for feed wheat as estimated in October each year.** (Note: Historical data for 2011 to 2022 are from October AIMI Reports for 2022 and earlier, while data for 2023 and 2024 are matched data from the current report.)

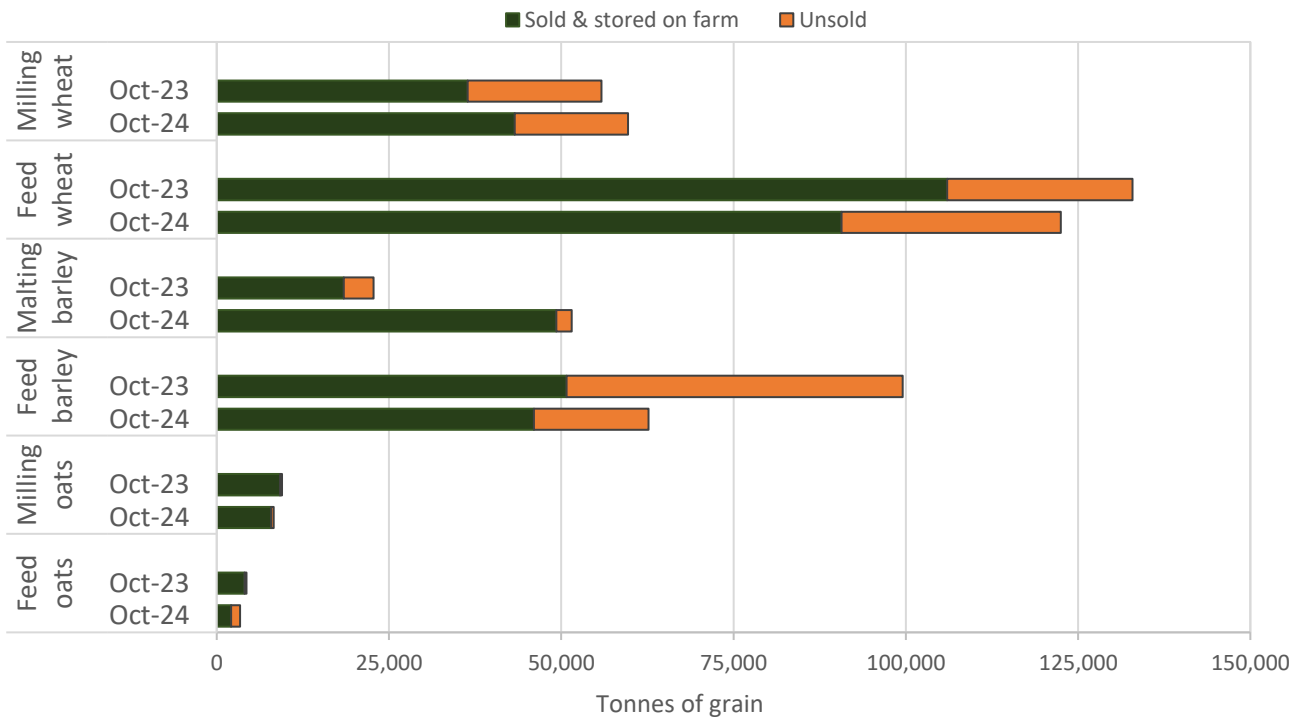
### Feed barley (tonnes)



**Figure 3a. NZ harvest tonnage and sales channels for feed barley as estimated in October each year.** (Note: Both “sold and delivered” categories relate to the crop harvested that year, excluding carryover stock. “Sold at spot/free price and delivered” includes grain used on own farm. Historical data for 2011 to 2022 are from October AIMI Reports for 2022 and earlier, while data for 2023 and 2024 are matched data from the current report.)

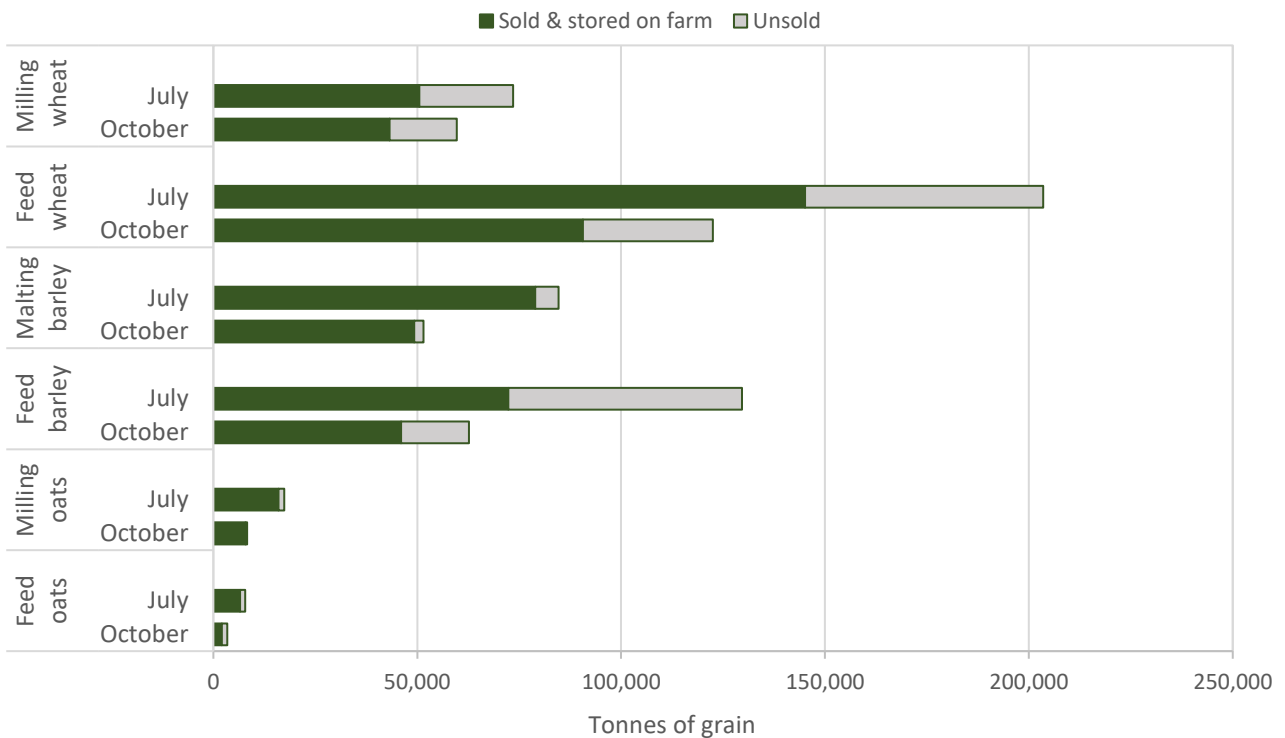


**Figure 3b. NZ stocks on farm for feed barley as estimated in October each year.** (Note: Historical data for 2011 to 2022 are from October AIMI Reports for 2022 and earlier, while data for 2023 and 2024 are matched data from the current report.)



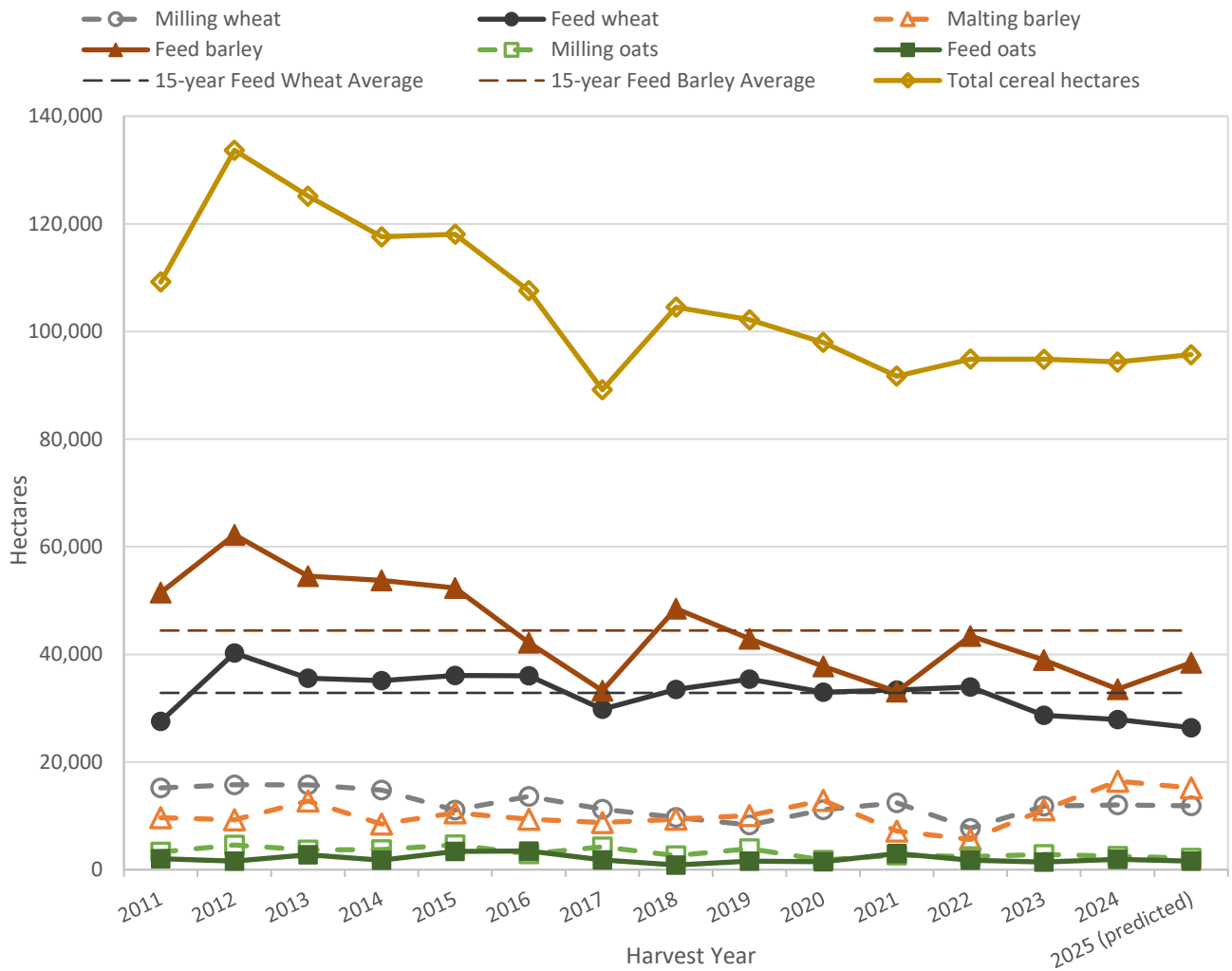
**Figure 4. Changes in NZ stocks on farm for wheat, barley and oats between October 10, 2023 and October 10, 2024. These data are also reported in Table 1 and Figures 1b, 2b and 3b.**

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



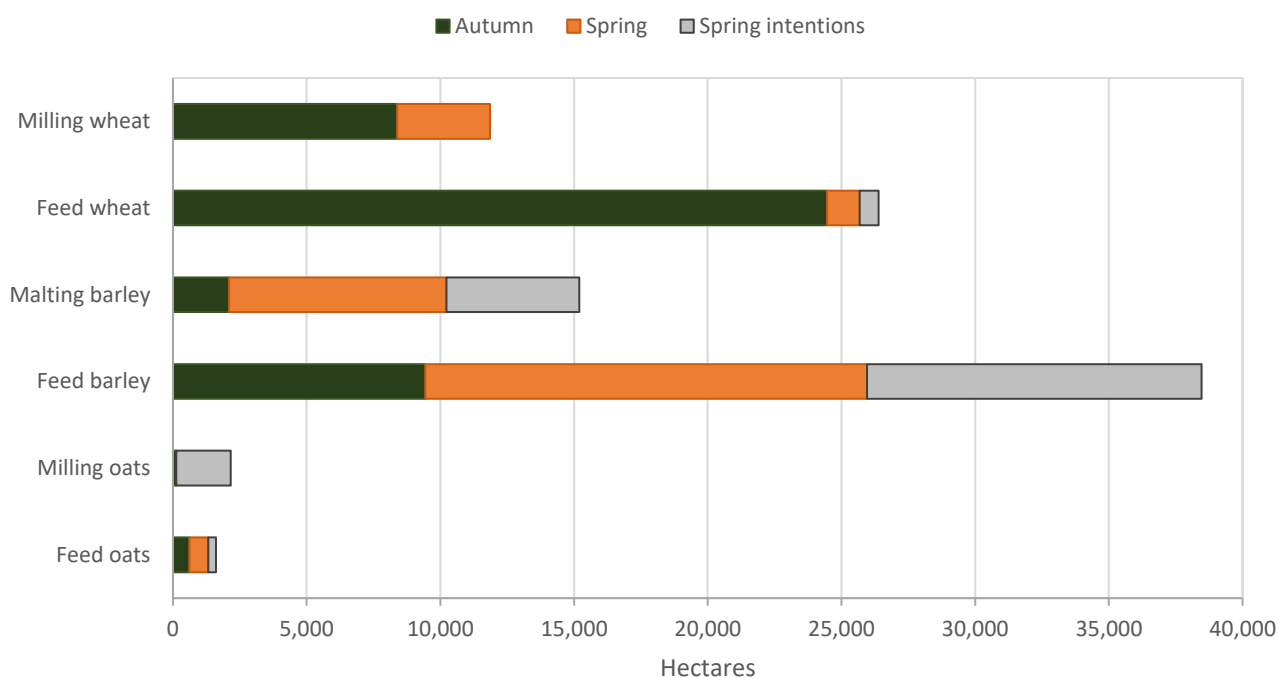
**Figure 5. Changes in NZ stocks on farm for wheat, barley and oats between July 1 and October 10, 2024. These data are also reported in Table 1. As in Figure 4, this is a matched comparison.**

**NZ harvest hectares for 2011 to 2024 and predicted hectares for 2025 as estimated in October each year**

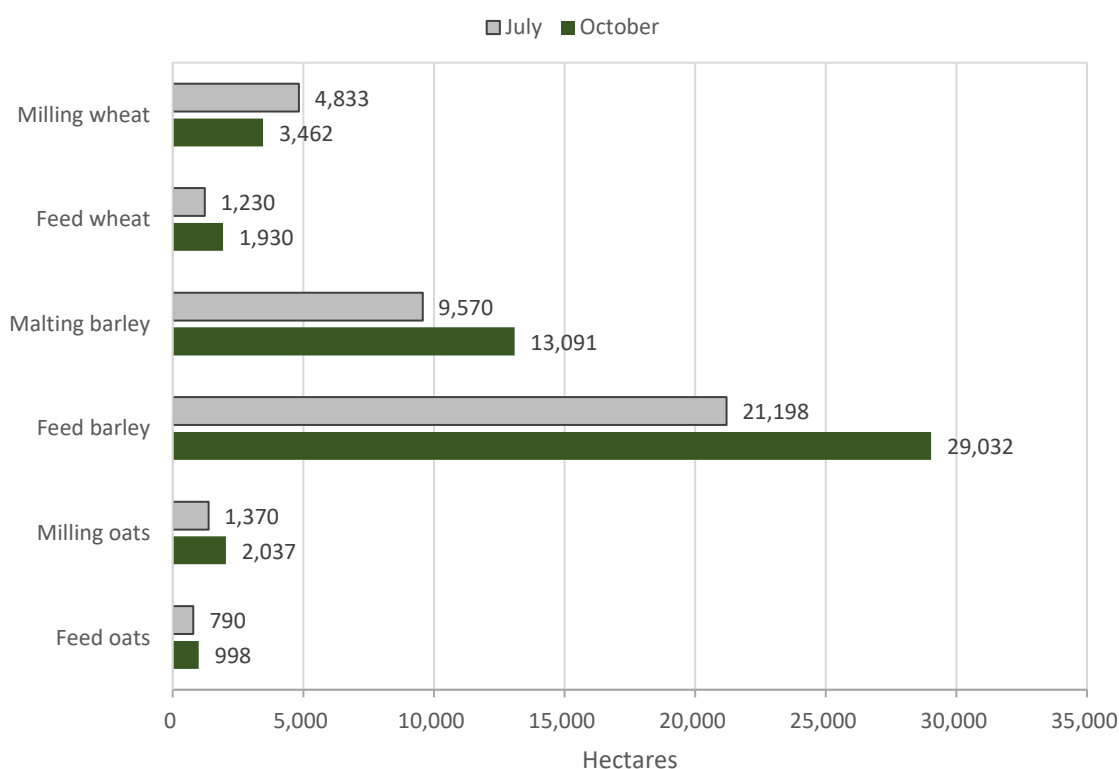


**Figure 6. NZ harvest hectares for six cereal crops (and the total over the six crops) as estimated in October each year from 2011 to 2024, and predicted harvest hectares for 2025. For feed wheat and feed barley, “long-term” means (15-year averages) are included as dashed horizontal lines.**

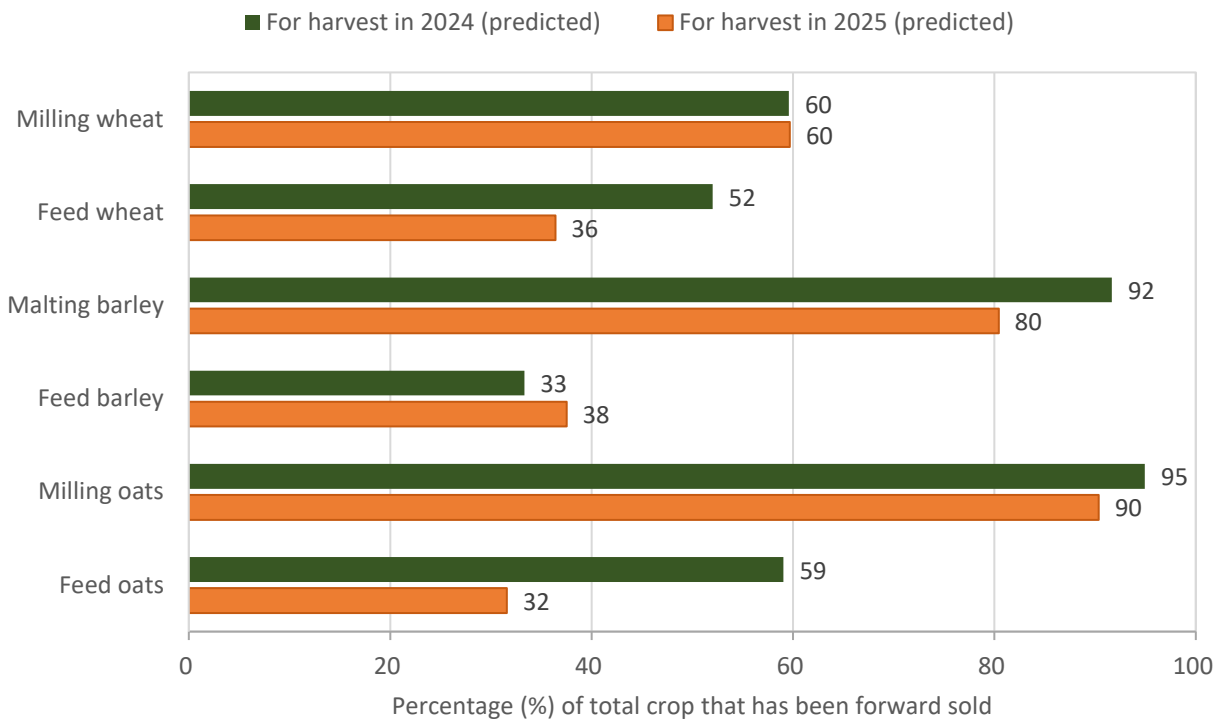
(Note: All figures represent final harvest hectares except for 2025 which is made up of hectares already sown and hectares intended to be sown for harvest in 2025. Refer to Fig. 7 for hectares already sown by October 10, 2024. Figures for 2023, 2024 and 2025 (predicted) are from the current report and are a matched comparison (scaled up from a common set of growers), while other figures are from previous October AIMI reports for 2011 – 2022.)



**Figure 7. Estimated NZ hectares sown in autumn and spring 2024, plus NZ spring hectares yet to sow (spring intentions) for harvest in 2025, based on data collected on October 10, 2024. These data are also reported in Table 2.**



**Figure 8. Comparison of NZ spring sowing intentions as at July 1 2024 with actual NZ spring sowings plus intentions as at October 10, 2024. These data are also reported in Table 2. As in Figures 4 and 5, this is a matched comparison.**



**Figure 9. Comparison of percentage of total NZ crop sown (autumn and spring sowings plus spring intentions) that had been forward sold as at October 10, 2023 and 2024 for predicted 2024 and predicted 2025 harvests, respectively. As in Figures 4, 5 and 8, this is a matched comparison.**

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**AIMI receives funding from Ministry for Primary Industries, FAR, Arable Food Industry Council, NZ Flour Millers Association, NZ Feed Manufacturers Association, Federated Farmers and United Wheat Growers.**

Report group\* 113

\* Must have completed October 2023, April 2024, July 2024 and current survey.

## Regional breakdown

Region	Eastern NI	Sth West NI	Northern SI	Mid Canterbury	Sth Canty & Nth Otago	Sth Otago & Sthland	Total
No. of participants	6	5	27	38	13	24	113

Hectares harvested in 2024 and harvest intentions for 2025 (from 113 SCALED responses)												
Region	Milling Wheat		Feed Wheat		Malting Barley		Feed Barley		Milling Oats		Feed Oats	
	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025
ENI	366	277	1,351	1,678	2,696	3,804	1,941	3,672	-	-	702	228
SWNI	-	21	347	299	892	380	-	-	-	-	-	-
NSI	2,953	3,041	4,078	3,160	1,627	1,540	6,851	7,270	-	-	263	123
MC	6,334	6,348	6,977	6,647	10,284	8,634	6,982	8,452	-	-	210	340
SCNO	2,299	1,949	5,561	5,927	950	834	6,552	6,595	-	-	97	61
SOS	62	214	9,568	8,680	-	-	11,240	12,483	2,511	2,160	637	861
<b>Total</b>	<b>12,013</b>	<b>11,850</b>	<b>27,882</b>	<b>26,391</b>	<b>16,449</b>	<b>15,192</b>	<b>33,567</b>	<b>38,471</b>	<b>2,511</b>	<b>2,160</b>	<b>1,909</b>	<b>1,613</b>

Unsold grain (tonnes) as at 10 October 2024 (from 113 SCALED responses)						
Region	Milling Wheat	Feed Wheat	Malting Barley	Feed Barley	Milling Oats	Feed Oats
Eastern NI	-	-	-	-	-	257
Sth West NI	-	-	-	-	-	-
Northern SI	4,771	4,787	-	2,689	-	89
Mid Canterbury	10,578	9,261	2,224	11,539	-	665
Sth Cant & Nth Otago	1,121	13,785	-	1,773	-	266
Sth Otago & Sthland	-	4,025	-	623	354	-
<b>Crop total</b>	<b>16,470</b>	<b>31,858</b>	<b>2,224</b>	<b>16,625</b>	<b>354</b>	<b>1,276</b>

## Totals over 113 survey responses

In Table A.1, the yields per hectare on the survey farms were higher for the 2024 harvest than for the 2023 harvest for feed wheat, feed barley and feed oats, and lower for milling wheat, malting barley and milling oats.

<b>Table A.1 Data totalled over all survey respondents</b>							
	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
<b>Number of farmers in the survey who harvested this crop in 2024</b>		37	77	32	73	9	12
<b>2023 harvest</b>							
Total hectares on survey farms, 2023 harvest	ha	2,132	5,181	1,053	3,695	322	161
Total tonnes on survey farms, 2023 harvest	tonnes	19,553	50,303	8,340	29,003	2,513	902
<b>2024 harvest</b>							
Total hectares on survey farms, 2024 harvest	ha	2,169	5,034	1,559	3,181	286	217
Total tonnes on survey farms, 2024 harvest	tonnes	19,256	52,488	11,635	26,150	2,181	1,323
Sold under pre-harvest contract and delivered by 10 October, 2024	tonnes	7,501	20,637	5,636	9,336	1,226	834
Pre-harvest contract grain stored on farm on 10 October, 2024	tonnes	5,714	9,452	4,666	2,137	890	202
Sold at spot/free price and delivered by 10 October, 2024	tonnes	573	9,457	398	9,569	10	54
Sold at spot/free price and stored on farm on 10 October, 2024	tonnes	1,997	6,720	477	2,667	0	35
(For milling or malting only) Sold for feed by 10 October, 2024	tonnes	533	-	226	-	15	-
(For feed only) Used on own farm by 10 October, 2024	tonnes	-	539	-	707	-	54
Unsold stocks on hand (2024 harvest only) on 10 October, 2024	tonnes	2,938	5,683	232	1,735	40	144
<b>Comparison of yield (tonnes per ha) on survey farms between harvests</b>							
Survey farms, 2023 harvest	t/ha	9.2	9.7	7.9	7.8	7.8	5.6
Survey farms, 2024 harvest	t/ha	8.9	10.4	7.5	8.2	7.6	6.1
<b>Data for these SAME survey farms for comparisons of on-farm storage between 1 July, 2024 and 10 October, 2024</b>							
Sold and stored on farm (total) on 1 July, 2024 (2024 harvest)	tonnes	9,004	25,882	8,232	7,550	1,805	737
Sold and stored on farm (total) on 10 October, 2024 (2024 harvest)	tonnes	7,711	16,172	5,143	4,804	890	237
Unsold stocks on hand (from 2024 harvest) on 1 July, 2024	tonnes	4,108	10,419	605	5,976	160	148
Unsold stocks on hand (from 2024 harvest) on 10 October, 2024	tonnes	2,938	5,683	232	1,735	40	144



Table A.1 continued	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
<b>Data for these SAME survey farms from 10 October, 2023 survey, to enable more precise, matched comparisons between 10 October, 2023 and 10 October, 2024</b>							
Sold under pre-harvest contract and delivered by 10 October, 2023	tonnes	8,145	18,568	5,641	12,075	1,444	300
Pre-harvest contract grain stored on farm on 10 October, 2023	tonnes	5,563	11,183	1,855	3,990	1,039	455
Sold at spot/free price and delivered by 10 October, 2023	tonnes	604	7,562	80	5,896	0	97
Sold at spot/free price and stored on farm on 10 October, 2023	tonnes	932	7,726	69	1,309	0	0
(For milling or malting only) Sold for feed by 10 October, 2023	tonnes	842	-	245	-	0	-
(For feed only) Used on own farm by 10 October, 2023	tonnes	-	470	-	646	-	18
Unsold stocks on hand (2023 harvest only) on 10 October, 2023	tonnes	3,467	4,794	450	5,087	30	32
<b>Data for these SAME survey farms for comparisons of on-farm storage between 10 October, 2023 and 10 October, 2024</b>							
Sold and stored on farm (total) on 10 October, 2023 (2023 harvest)	tonnes	6,495	18,909	1,924	5,299	1,039	455
Sold and stored on farm (total) on 10 October, 2024 (2024 harvest)	tonnes	7,711	16,172	5,143	4,804	890	237
Unsold stocks on hand (from 2023 harvest) on 10 October, 2023	tonnes	3,467	4,794	450	5,087	30	32
Unsold stocks on hand (from 2024 harvest) on 10 October, 2024	tonnes	2,938	5,683	232	1,735	40	144

In Table A.2 below, the data in Table A.1 are expressed as percentages.

<b>Table A.2 Fate of 2024 crop, in percentages (by tonnes)</b>		<b>Milling wheat</b>	<b>Feed wheat</b>	<b>Malting barley</b>	<b>Feed barley</b>	<b>Milling oats</b>	<b>Feed oats</b>
<b>Number of farmers in the survey who harvested this crop in 2024</b>		<b>37</b>	<b>77</b>	<b>32</b>	<b>73</b>	<b>9</b>	<b>12</b>
<b>2024 harvest</b>							
% Sold under pre-harvest contract and delivered by 10 October, 2024		39.0	39.3	48.4	35.7	56.2	63.0
% Pre-harvest contract grain stored on farm on 10 October, 2024		29.7	18.0	40.1	8.2	40.8	15.3
% Sold at spot/free price and delivered by 10 October, 2024		3.0	18.0	3.4	36.6	0.5	4.1
% Sold at spot/free price and stored on farm on 10 October, 2024		10.4	12.8	4.1	10.2	0.0	2.6
<b>(For milling or malting only) % Sold for feed by 10 October, 2024</b>		2.8	-	1.9	-	0.7	-
<b>(For feed only) % Used on own farm by 10 October, 2024</b>		-	1.0	-	2.7	-	4.1
% Unsold stocks on hand (2024 harvest only) on 10 October, 2024		15.3	10.8	2.0	6.6	1.8	10.9
<b>Sales channels (2024 harvest)</b>							
% Sold on pre-harvest contract (total) by 10 October, 2024		68.6	57.3	88.5	43.9	97.0	78.3
% Sold at spot/free price (total) by 10 October, 2024		13.3	30.8	7.5	46.8	0.5	6.7
<b>On-farm storage (2024 harvest)</b>							
% Sold and delivered (total) by 10 October, 2024		41.9	57.3	51.9	72.3	56.7	67.1
% Sold and stored on farm (total) on 10 October, 2024		40.0	30.8	44.2	18.4	40.8	17.9
<b>Total sales (2024 harvest)</b>							
% Sold (of total crop) by 10 October, 2024 (includes sold for feed and used on farm)		84.7	89.2	98.0	93.4	98.2	89.1
% Unsold (of total crop) on 10 October, 2024		15.3	10.8	2.0	6.6	1.8	10.9

In Table A.3, autumn/winter sowings, spring sowings, and spring sowing intentions are given as sums over the 113 survey farms.

<b>Table A.3 Autumn/winter sowings and spring sowings and intentions (data totalled over all survey respondents)</b>						
	<b>Milling wheat</b>	<b>Feed wheat</b>	<b>Malting barley</b>	<b>Feed barley</b>	<b>Milling oats</b>	<b>Feed oats</b>
Number of farmers in survey who have sown or intend to sow this crop as at 10 October, 2024	40	70	31	81	7	9
Number of survey farmers who have sown in Autumn/winter 2024	32	63	8	30	1	3
Number of survey farmers who have already sown in Spring 2024, as at 10 October, 2024	17	7	23	47	0	4
Number of survey farmers who still intend to sow in Spring 2024, as at 10 October, 2024	0	7	10	27	6	2
Total hectares on survey farms, 2023 harvest	2,132	5,181	1,053	3,695	322	161
Total hectares on survey farms, 2024 harvest	2,169	5,034	1,559	3,181	286	217
<b>Sowings and intentions for the current season's crop (2024/25)</b>						
Autumn/winter sowings on survey farms (hectares; for harvest in 2025)	1,515	4,416	199	895	14	70
Spring sowings already sown on survey farms by 10 October, 2024 (hectares; for harvest in 2025)	625	221	771	1,566	0	81
Spring sowings still to sow on survey farms (intentions) as at 10 October, 2024 (hectares; for harvest in 2025)	0	128	470	1,186	232	33
Total spring 2024 sowings plus intentions on survey farms as at 10 October, 2024 (hectares; for harvest in 2025)	625	349	1,241	2,752	232	114
Total predicted hectares on survey farms for 2025 harvest, as at 10 October, 2024	2,140	4,765	1,440	3,646	246	184
<b>"Forward sales" of 2024/25 crop</b>						
Total hectares on survey farms that are "forward sold", as at 10 October, 2024	1,277	1,734	1,158	1,368	222	58
Percentage of hectares on survey farms that are "forward sold", as at 10 October, 2024	60%	36%	80%	38%	90%	32%
<b>Comparison of sowings/intentions over the 2022/23, 2023/24 and 2024/25 seasons (on survey farms)</b>						
Estimated % change in total sowings on survey farms, 2023 to 2024 harvests	2%	-3%	48%	-14%	-11%	35%
Estimated % change in total sowings on survey farms, 2024 to 2025 (predicted) harvests	-1%	-5%	-8%	15%	-14%	-16%
Estimated % change in total sowings on survey farms, 2023 to 2025 (predicted) harvests (TOTAL over TWO seasons)	0%	-8%	37%	-1%	-23%	14%
<b>Comparison of spring sowing intentions as at July 1, 2024 with spring sowings plus intentions as at 10 October, 2024 (on survey farms)</b>						
Estimated spring 2024 sowing intentions on survey farms as at 1 July, 2024 (hectares; for harvest in 2025)	873	222	907	2,009	156	90
Estimated spring 2024 sowings plus intentions on survey farms as at 10 October, 2024 (hectares; for harvest in 2025) (as above)	625	349	1,241	2,752	232	114
Change in spring 2024 sowings/intentions on survey farms between 1 July, 2024 and 10 October, 2024 (hectares; for harvest in 2025)	-248	127	334	743	76	24

For scaling up to NZ-wide totals, the most recent figures are the Final 2023 Agricultural Production Statistics (APS) figures, as in Table A.4. On average, the yields on the survey farms were slightly lower than the APS yields for wheat, higher for barley, and identical for oats.

From the scale-up factors, we can see what percentage of the area of each 2023 harvest crop was on the survey farms. For wheat, it was  $100/5.539 = 18.1\%$ . For barley, it was  $100/10.551 = 9.5\%$ . For oats, it was  $100/8.781 = 11.4\%$ . That is, the percentages were highest for wheat (with between one fifth and one sixth of hectares sampled in the survey), lower for oats (with about one ninth of hectares sampled), and lowest for barley (with about one eleventh of hectares sampled).

<b>Table A.4 Scaling up from survey totals to NZ-wide totals using Final 2023 Agricultural Production Statistics (APS) data</b>				
		<b>Total wheat</b>	<b>Total barley</b>	<b>Total oats</b>
<b>Total hectares on survey farms, 2023 harvest</b>		7,312	4,748	482
<b>Total tonnes on survey farms, 2023 harvest</b>		69,856	37,343	3,415
<b>Final APS statistics for 2023 harvest, total hectares</b>		40,500	50,100	4,235
<b>Final APS statistics for 2023 harvest, total tonnes</b>		391,600	357,900	30,259
<b>Multiplier for scaling up from survey farms to APS statistics</b>				
<b>Hectares</b>		5.539	10.551	8.781
<b>Tonnes</b>		5.606	9.584	8.861
<b>Comparison of yields between survey and APS statistics</b>				
<b>Survey farms, 2023 harvest (t/ha)</b>		9.6	7.9	7.1
<b>APS statistics, 2023 harvest (t/ha)</b>		9.7	7.1	7.1

**Matched vs unmatched data:**

\* *Matched data* – The same growers are used to compare two seasons of data. Matched data are scaled up from totals over the survey farms to totals for NZ using the same scaling factors (given in Table A.4). Data in the tables consist of matched data except when a previous AIMI survey is referenced.

\* *Unmatched data* – Data comes from annual AIMI reports and doesn't compare the same set of growers or use the same scale-up factors. The graphs present unmatched data, except when stated otherwise in the caption (as in Figures 1-4, where the last two years are matched, Figure 6, where the last three years are matched, and Figures 5, 8 and 9 which are matched comparisons between two time points).

AIMI receives funding from Ministry for Primary Industries, FAR, Arable Food Industry Council, NZ Flour Millers Association, NZ Feed Manufacturers Association, Federated Farmers and United Wheat Growers.

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