NEW ZEALAND SURVEY OF CEREAL AREAS AND VOLUMES: JULY 1, 2025

The objective of this AIMI survey of cereal growers in New Zealand (NZ) was to determine, as at July 1, 2025:

- *the final size of the 2025 NZ harvest of wheat, barley and oats (divided into milling/malting and feed crops)*
- *sales channels and level of on-farm storage, both sold and unsold, of the 2025 harvest of these six crops*
- *autumn/winter sowings of wheat, barley and oats (both milling/malting and feed), and sowing intentions for the spring of 2025*

Survey details

The data from 110 NZ survey farms as at July 1, 2025 were scaled up to the national level using the most recent, 2024, final NZ Agricultural Production Statistics (APS). 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 on July 1, 2025 and there will have been changes since this time. Note, unsold and sold grain carried over from the 2024 harvest were not estimated in this survey.

Key Points at July 1, 2025 *(figures have been rounded to the nearest 100):*

- Difficult harvest conditions delayed progress in South and Mid Canterbury. Frequent rainfall across Canterbury and parts of Southland affected autumn drilling, drowning some newly established crops while others have had to postpone drilling until the spring.
- 2025 harvest data showed that total tonnages from all six crops combined were down 2% compared to last season (19,300 tonnes), from a similar harvest area (0.5% increase, 500 hectares). The resulting average yield is 8.5 t/ha across all crops compared to 8.7 t/ha last season (3% change).
- Unsold stocks of grain, totalled over all six cereal crops, are up by 20,700 tonnes compared to last season. There are more unsold tonnes of feed barley (up 30,700 t) and malting barley (up 9,600 t), and lower stocks of unsold milling wheat (down 15,900 t) and feed wheat (down 3,300 t).
- When totalled over all six cereal crops, the 2026 harvest hectares are predicted to be 7% down on the 2025 harvest hectares (from 97,500 hectares to 90,500 hectares). Note that only 54% of crops had been established by July 1, 2025, the remainder are intentions to be sown in the spring.

Final tonnages over all six crops, were down by 2% this season compared to last season. Feed and milling wheat yields were down an estimated 9%, feed barley yields were up 14% while malting barley was down 14%, milling oats yields were up 5% and feed oats yields down 32% compared to last season. Final estimated overall average yield (8.5 t/ha) was down by 3% this season compared to last season.

The tonnages of unsold feed grain were estimated at 70,400 t of feed wheat and 90,900 t of feed barley, as at 1 July 2025; in addition, there was an estimated 11,000 t of unsold milling wheat and 15,300 t of unsold malting barley. The predicted 2026 harvest hectares, when totalled over all six cereal crops, are estimated to be down 7% on the 2025 harvest hectares (from 97,500 hectares to 90,500 hectares).

Milling wheat: Estimated final total tonnage (111,000 t) was down 9% compared to last year's harvest. Of this total, 90% has been sold (100,000 t), although a large amount of the sold grain is still stored on farm (67%). The amount of unsold grain is 11,000 tonnes (10%), which is considerably lower than at the same time last year, 1 July 2024 (26,900 t).

Feed wheat: Estimated final total tonnage (312,900 t) was also down 9% compared to last year's harvest. Of this total, 78% has been sold (242,500 t), with 59% of the sold grain still stored on farm. The amount of unsold grain is 70,400 tonnes (22%), which is lower than at the same time last year, 1 July 2024 (73,800 t).

Feed barley: Estimated final total tonnage (292,600 t) was up 14% compared to last year. Of this total tonnage, 69% has been sold (201,700 t), with 37% of the sold grain still stored on farm. The amount of unsold grain is 90,900 tonnes (31%), which is higher than at the same time last year, 1 July 2024 (60,200 t).

For other cereals: Compared to last year, estimated final total tonnage for malting barley (85,200 t) was down by 14%, milling oats (16,100 t) was up by 15%, and feed oats (6,400 t) was down by 32%. Malting barley had 18% of the total harvest unsold (15,300 t) while milling oats and feed oats had 7% (1,100 t) and 5% (300 t) unsold, respectively, as at 1 July, 2025. Of the sold grain, 62% of malting barley was still on farm, as compared to 77% of milling oats and 51% of feed oats.

Sowings and sowing intentions: Establishing autumn crops in Canterbury and some parts of Southland had been challenging due to wet weather. There were many reports of delayed drilling and drowned crops, which will have to be re-drilled in the spring.

The predicted 2026 harvest hectares, when totalled over all six cereal crops, are estimated to be down 7% on the 2025 harvest hectares (from 97,500 hectares to 90,500 hectares). Sowings and intentions for milling wheat are down 22% (2,700 ha) on last season, with 55% sown by July 1, 2025, while feed wheat are up 10% (3,200 ha) on last season, with 91% already sown). Sowings and intentions for malting barley are down 53% (6,600 hectares, 23% sown), no change for feed barley, milling oats is down 20% (600 ha, 30% sown) and feed oats is down 26% (400 ha, 3% sown). Some growers were undecided about hectares for spring sowing, so predicted harvest hectares are expected to change.

Milling wheat (tonnes)

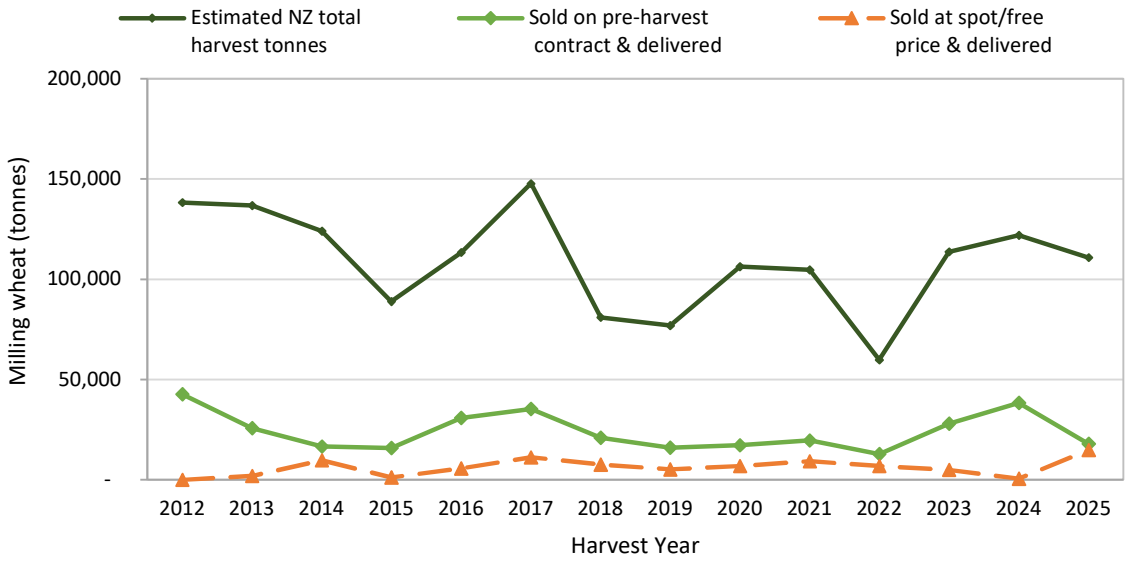

Figure 1a. NZ harvest tonnage and sales channels for milling wheat (tonnes) as estimated on July 1 each year.

Note: Historical data are from July AIMI Reports for 2012 to 2023, while 2024 and 2025 data are matched data from the current report. All categories relate to that season's harvest, excluding carryover stock. "Sold at spot/free price and delivered" includes grain sold for feed. In 2012 "Sold at spot/free price and delivered" was zero since the question was simply "sold and delivered", with responses reported as "Sold on pre-harvest contract and delivered"; also, there was no question on "grain sold for feed".

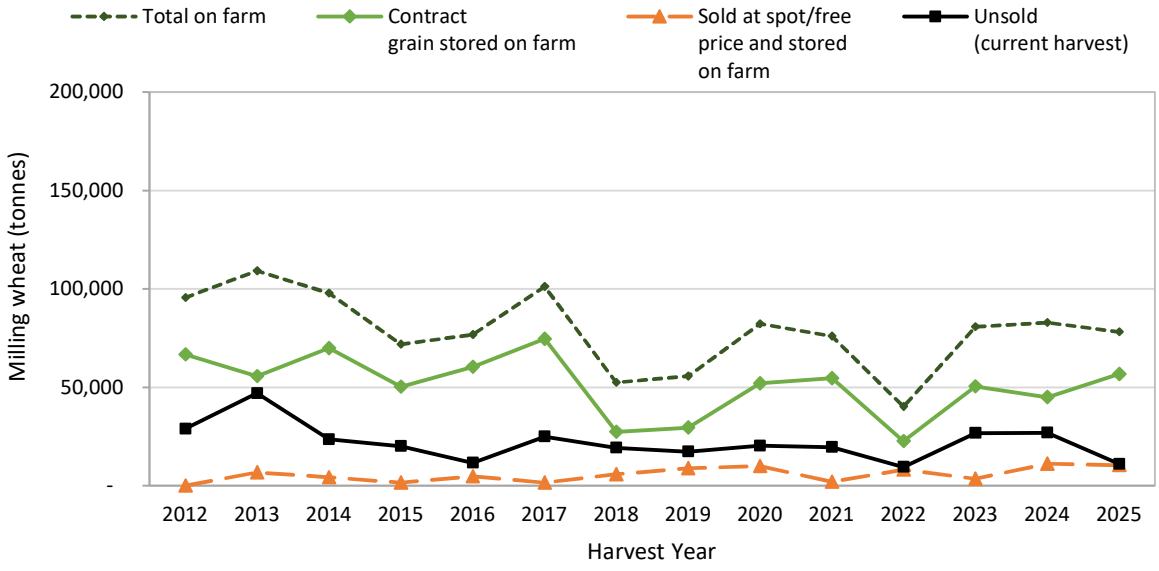

Figure 1b. NZ stocks on farm for milling wheat (tonnes) as estimated on July 1 each year.

Note: Historical data are from July AIMI Reports for 2012 to 2023, while 2024 and 2025 data are matched data from the current report. Carryover stock from the previous season is excluded. In 2012 "Sold at spot/free price and stored on farm" was zero since the question was simply "sold and stored on farm", with responses reported as "Contract grain stored on farm".

Feed wheat (tonnes)

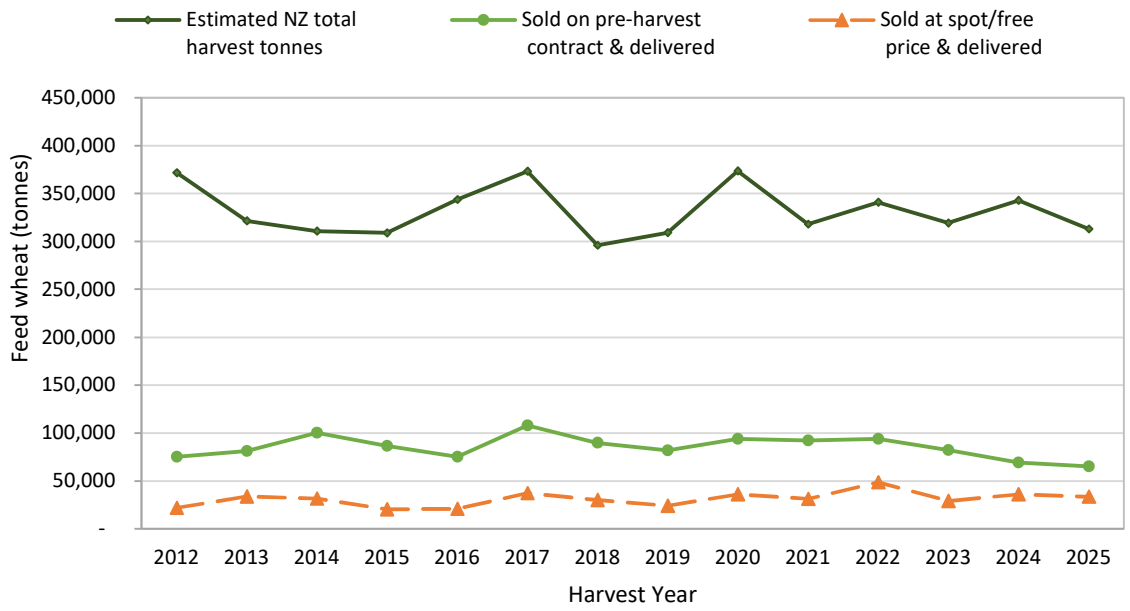

Figure 2a. NZ harvest tonnage and sales channels for feed wheat (tonnes) as estimated on July 1 each year.

Note: Historical data are from July AIMI Reports for 2012 to 2023, while 2024 and 2025 data are matched data from the current report. All categories relate to that season's harvest, excluding carryover stock. "Sold at spot/free price and delivered" includes grain used on own farm.

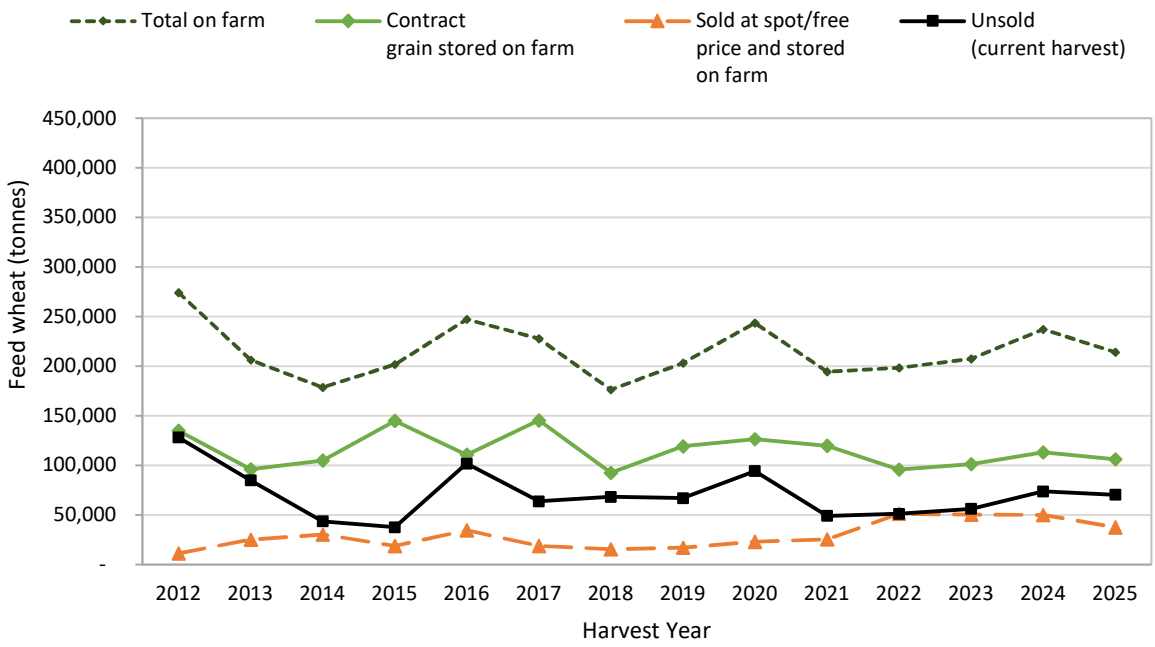

Figure 2b. NZ stocks on farm for feed wheat (tonnes) as estimated on July 1 each year.

Note: Carryover stock from the previous season is excluded. Historical data are from July AIMI Reports for 2012 to 2023, while 2024 and 2025 data are matched data from the current report.

Feed barley (tonnes)

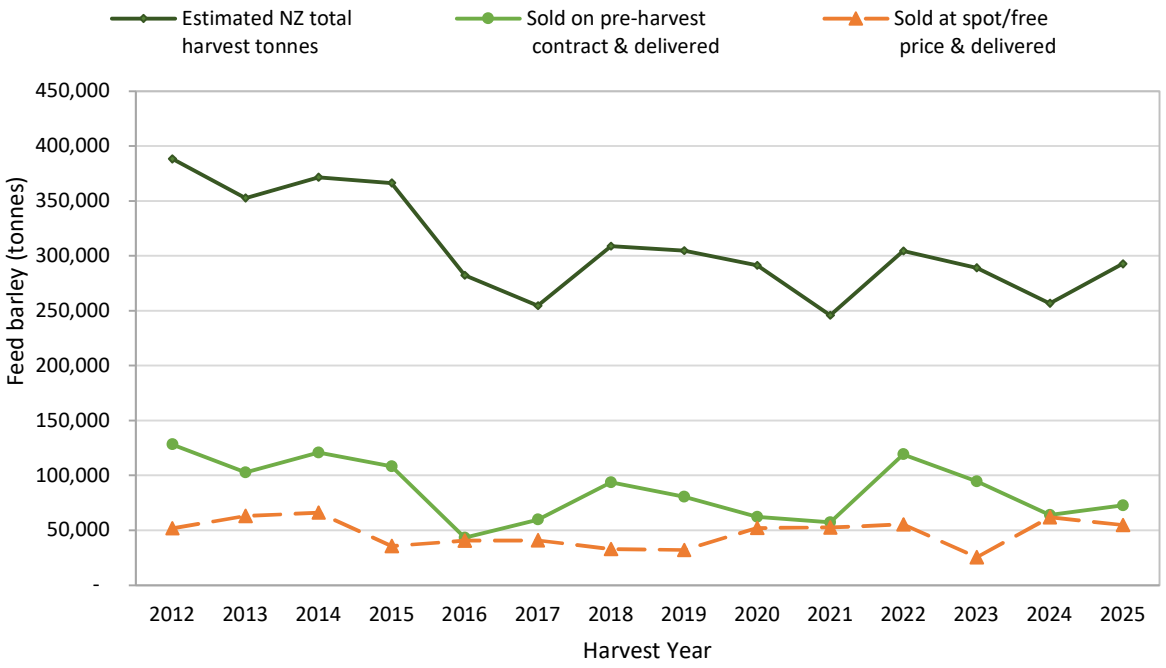

Figure 3a. NZ harvest tonnage and sales channels for feed barley (tonnes) as estimated on July 1 each year.

Note: Historical data are from July AIMI Reports for 2012 to 2023, while 2024 and 2025 data are matched data from the current report. All categories relate to that season's harvest, excluding carryover stock. "Sold at spot/free price and delivered" includes grain used on own farm.

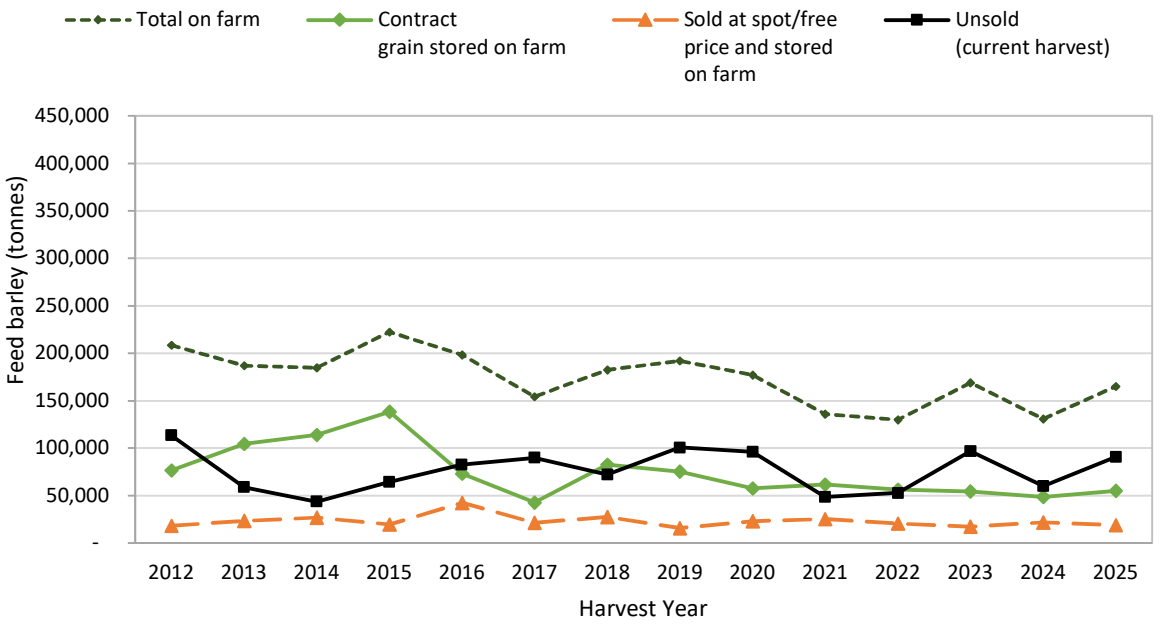

Figure 3b. NZ stocks on farm for feed barley (tonnes) as estimated on July 1 each year.

Note: Reports for 2012 to 2023, while 2024 and 2025 data are matched data from the current report. Carryover stock from the previous season is excluded. Historical data are from July AIMI.

Comparison of estimated NZ-wide yield (tonnes per hectare) between harvests

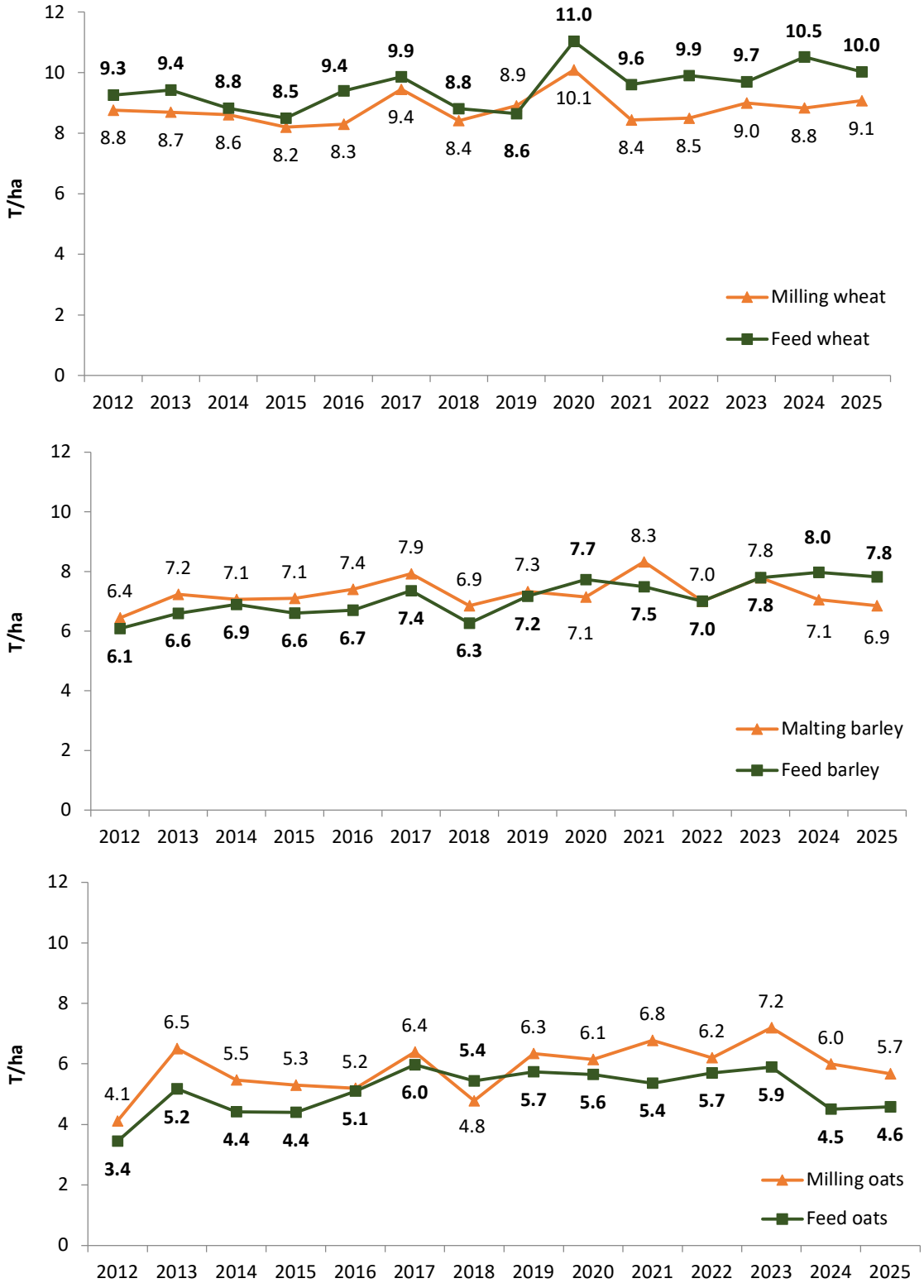

Figure 4. Comparison of NZ-wide yield (tonnes per ha) as estimated on July 1 each year, from 2012 to 2025 for six cereal crops.

Note: Historical data are from July AIMI Reports for 2012 to 2023, while 2024 and 2025 data are matched data from the current report. Milling wheat contains biscuit and gristing varieties.

Autumn/winter sowings and spring sowing intentions (combined) as at July 1, 2025 compared to hectares harvested in previous years

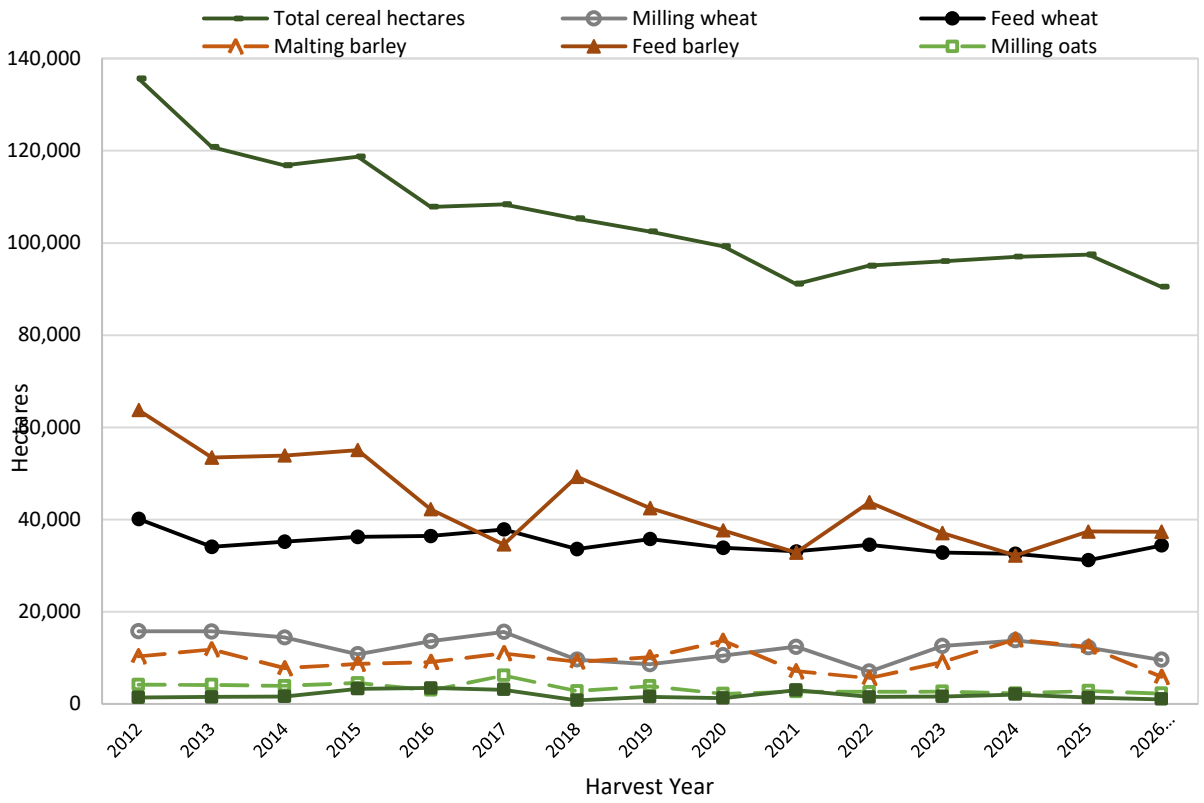

Figure 5. NZ harvest hectares for six cereal crops (and the total over the six crops) as estimated on July 1 each year, from 2012 to 2025 and predicted harvest hectares for 2026.
Note: Historical data are from July AIMI Reports for 2012 to 2023, while 2024, 2025 and 2026 (predicted) data are matched data from the current report. All figures represent final harvest hectares except for 2026 which is made up of hectares already sown and hectares intended to be sown for harvest in 2026. Refer to Fig. 6 for hectares already sown.

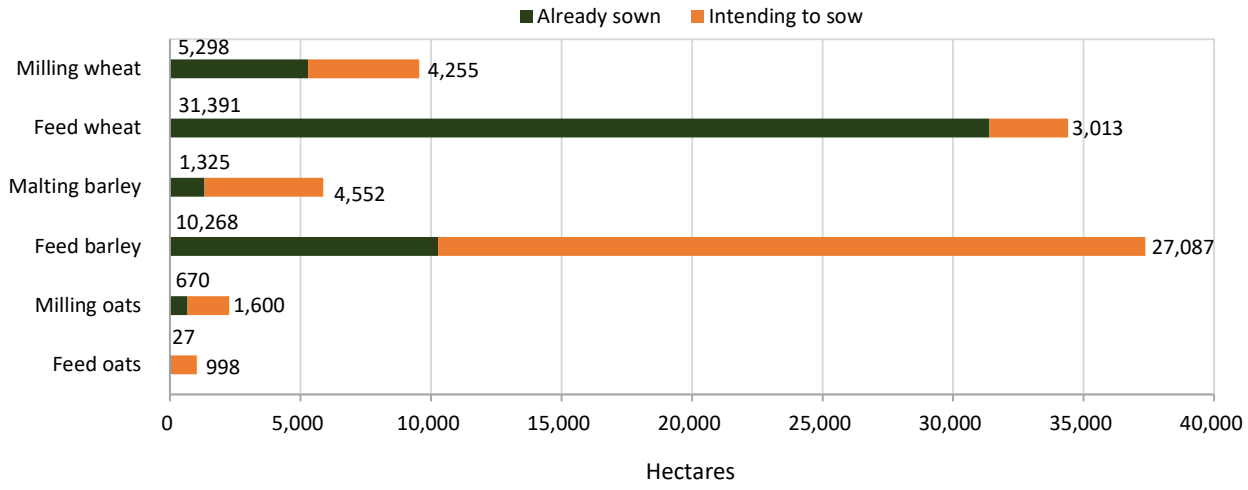

Figure 6. NZ autumn/winter 2025 sowings and spring 2025 sowing intentions (hectares) for harvest in 2026, for six cereal crops as estimated on July 1, 2025.
Note: Numbers at the end of each bar are sowing intentions.

Table 1. Detailed estimated national figures for the 2025 harvest, plus sold and delivered tonnages, for six cereal crops as at July 1, 2025.

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Total (all crops)
Number of farmers in the survey who harvested this crop in 2025		**37**	**71**	**26**	**79**	**7**	**11**	**108**
2024 harvest								
Estimated NZ total hectares, 2024 harvest	**ha**	13,812	32,588	13,995	32,205	2,332	2,068	97,000
Estimated NZ total tonnes, 2024 harvest	**tonnes**	121,957	342,643	98,741	256,759	13,976	9,324	843,400
2025 harvest								-
Estimated NZ total hectares, 2025 harvest (final figures)	**ha**	12,228	31,206	12,434	37,401	2,837	1,387	97,492
Estimated NZ total tonnes, 2025 harvest (final figures)	**tonnes**	110,959	312,870	85,184	292,603	16,108	6,350	824,073
Sold under pre-harvest contract and delivered by July 1, 2025	**tonnes**	18,038	65,114	14,983	72,579	3,485	1,339	175,538
Pre-harvest contract grain stored on farm on July 1, 2025	**tonnes**	56,700	106,107	43,210	55,227	11,519	3,106	275,869
Sold at spot/free price and delivered by July 1, 2025	**tonnes**	0	32,064	0	51,983	0	1,070	85,117
Sold at spot/free price and stored on farm on July 1, 2025	**tonnes**	10,434	37,568	341	18,957	0	0	67,300
(For milling or malting only) Sold for feed by July 1, 2025	**tonnes**	14,810	-	11,350	-	0	-	26,159
(For feed only) Used on own farm (2025 harvest only) by July 1, 2025	**tonnes**	-	1,621		2,937	-	518	5,075
Unsold stocks on hand (2025 harvest only) on July 1, 2025	**tonnes**	10,977	70,396	15,300	90,920	1,104	317	189,015
Sales channels (2025 harvest)								
"Sold" under pre-harvest contract (total) by July 1, 2025	**tonnes**	74,738	171,221	58,193	127,806	15,004	4,445	451,406
Sold at spot/free price (total) by July 1, 2025 (includes sold for feed and used on farm)	**tonnes**	25,244	71,253	11,691	73,877	0	1,587	183,652
Delivery status of sold grain (2025 harvest)								
Sold and delivered (total) by July 1, 2025 (includes sold for feed and used on farm)	**tonnes**	32,848	98,799	26,332	127,498	3,485	2,926	291,889
"Sold" and stored on farm (total) on July 1, 2025	**tonnes**	67,134	143,675	43,551	74,184	11,519	3,106	343,169
Total sales (2025 harvest)								
Sold (grand total) by July 1, 2025 (includes sold for feed and used on farm)	**tonnes**	99,982	242,474	69,883	201,683	15,004	6,032	635,058
Unsold stocks on hand (2025 harvest only) on July 1, 2025	**tonnes**	10,977	70,396	15,300	90,920	1,104	317	89,015
Comparison of hectares and tonnages between last two harvests								
Estimated % change in hectares, 2024 to 2025 harvest	**%**	-11	-4	-11	16	22	-33	0.5
Estimated % change in tonnes, 2024 to 2025 harvest	**%**	-9	-9	-14	14	15	-32	-2.3
Comparison of yields (t/ha) between last two harvests								
NZ-wide estimated yield, 2024 harvest	**t/ha**	8.8	10.5	7.1	8.0	6.0	4.5	8.7
NZ-wide estimated yield, 2025 harvest	**t/ha**	9.1	10.0	6.9	7.8	5.7	4.6	8.5

Table 1 continued.

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Total (all crops)
Recalculated July 1, 2024 survey breakdown to enable more precise comparisons between July 1, 2024 and July 1, 2025 (based upon matched data)								
Sold under pre-harvest contract and delivered by July 1, 2024	**tonnes**	38,399	69,394	22,069	63,870	1,146	2,547	197,425
Pre-harvest contract grain stored on farm on July 1, 2024	**tonnes**	44,889	113,245	64,327	48,782	11,622	4,845	287,710
Sold at spot/free price and delivered by July 1, 2024	**tonnes**	662	32,598	284	57,584	0	718	91,845
Sold at spot/free price and stored on farm on July 1, 2024	**tonnes**	11,143	50,095	4,187	21,894	0	242	87,561
(For milling or malting only) Sold for feed by July 1, 2024	**tonnes**	0	-	2,141	-	104	-	2,245
(For feed only) Used on own farm by July 1, 2024	**tonnes**	-	3,572	-	4,396	-	311	8,279
Unsold stocks on hand (2024 harvest only) on July 1, 2024	**tonnes**	26,864	73,739	5,732	60,233	1,104	663	168,335
Comparison of unsold grain between last July and this July (based upon matched data)								
Unsold (2024 harvest only) as at July 1, 2024 (as above)	**tonnes**	26,864	73,739	5,732	60,233	1,104	663	168,335
Unsold (2025 harvest only) on July 1, 2025 (as above)	**tonnes**	10,977	70,396	15,300	90,920	1,104	317	189,015
Change in tonnes of unsold grain, July 1, 2024 to July 1, 2025	**tonnes**	-15,887	-3,343	9,569	30,687	0	-345	20,680

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 2024 NZ Agricultural Production Statistics data on total hectares and tonnes for wheat, barley and oats.

In Table 2 below, feed wheat sowings/intentions, as at July 1, 2025, show a 10% increase as compared to the last harvest (2025). Feed barley sowings/intentions show no change in estimated hectares compared to the last harvest, and milling wheat sowings/intentions decreased by 22% as compared to the last harvest. Over the last two seasons, milling wheat sowings/intentions have decreased 31%.

Malting barley sowings/intentions show a large decrease (53%, or 6,600 hectares) as compared to the last harvest (2025). However, only 23%, or 1,300 hectares, of the malting barley sowings/intentions have been sown by July 1, 2025.

As a total over all six cereal crops, sowings/intentions are 7% *down* on the last harvest (2025, 7,000 tonnes). By 1 July 2025, only 54% of crops had actually been sown in autumn/winter, compared to 62% of crops at 1 July 2024.

Table 2. Sowings and sowing intentions (ha) for six cereal crops as at July 1, 2025.

		Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Total (all crops)
Number of farmers in the survey who have sown this crop in the autumn or winter or intend to sow in the spring, as at July 1, 2025		**28**	**75**	**18**	**76**	**6**	**5**	**106**
Estimated NZ total hectares, 2024 harvest	ha	13,812	32,588	13,995	32,205	2,332	2,068	97,000
Estimated NZ total hectares, 2025 harvest	ha	12,228	31,206	12,434	37,401	2,837	1,387	97,492
Estimated NZ total autumn/winter 2025 sowings as at July 1, 2025 (hectares, for harvest in 2026)	ha	5,298	31,391	1,325	10,268	670	27	48,979
Estimated NZ total spring 2025 sowing intentions as at July 1, 2025 (hectares, for harvest in 2026)	ha	4,255	3,013	4,552	27,087	1,600	998	41,504
Predicted NZ total hectares, 2026 harvest (autumn/winter sowings 2025 and spring 2025 sowing intentions combined)	ha	9,554	34,404	5,876	37,354	2,270	1,025	90,483
Comparison of hectares between 2024, 2025 and 2026 (predicted) harvests								
Estimated % change in NZ total harvest hectares, 2024 to 2025 harvest	%	-11	-4	-11	16	22	-33	0.5
Estimated % change in NZ total harvest hectares, 2025 to 2026 harvest (predicted)	%	-22	10	-53	0	-20	-26	-7.2
Estimated % change in NZ total harvest hectares over two seasons, 2024 to 2026 harvest (predicted)	%	-31	6	-58	16	-3	-50	-6.7
% Predicted NZ total hectares, for 2026 harvest, already sown by July 1, 2025.	%	55	91	23	27	30	3	54
% Predicted NZ total hectares, for 2025 harvest, already sown by July 1, 2024.	%	64	95	14	30	8	43	62

Note: The matched comparison in the last three rows was based upon scaling up data from the exact same survey farms for both survey dates.

AIMI
Arable Industry Marketing Initiative

FOR AIMI COMMITTEE ONLY: APPENDIX & REGIONAL DATA

NEW ZEALAND SURVEY OF CEREAL AREAS AND VOLUMES: JULY 1, 2025

Cereal Survey Panel:		
Count of completed:	114	
Out of:	130	
Report group*	**110**	(*Must have completed July and October 2024, and July 2025 Surveys)

Comments

- Price a huge concern, although it's lifting it is not enough to cover the rise in input costs. Some looking at other options, grazing, growing barley instead of wheat.
- Many are undecided about sowing spring feed crops – unsure of how many hectares to grow or waiting to see what other options are available.
- Weather has affected/delayed drilling in Canterbury and parts of Southland. Many established crops drowned and will require re-drilling in spring. Some areas of Southland have had good autumn conditions.

Regional Summary

Table A.1. Average regional yields (t/ha) of harvested grain (from 110 responses), scaled up to NZ estimates.

Region	Milling Wheat	Feed Wheat	Malting Barley	Feed Barley	Milling Oats	Feed Oats	Total Growers Surveyed
ENI	9.0	8.0	6.6	6.5	-	3.9	**6**
SWNI	-	9.3	6.5	-	-	-	**5**
NSI	8.9	10.1	7.7	7.6	-	3.3	**27**
MC	8.9	11.7	6.7	8.9	-	5.8	**35**
SCNO	9.8	9.7	9.0	8.2	-	1.8	**14**
SOS	-	9.4	-	7.4	5.7	4.7	**23**
NZ Average	**9.1**	**10.0**	**6.9**	**7.8**	**5.7**	**4.6**	**110**

ENI = Eastern North Island, SWNI = South West North Island, NSI = Northern South Island, MC = Mid Canterbury, SCNO = South Canterbury North Otago, SOS = South Otago and Southland.

Table A.2 Tonnes of unsold grain (from 110 responses), scaled up to NZ estimates.

Region	Milling Wheat	Feed Wheat	Malting Barley	Feed Barley	Milling Oats	Feed Oats	Total Unsold
ENI	-	4,910	-	13,301	-	-	18,211
SWNI	-	-	-	-	-	-	-
NSI	743	5,227	284	12,401	-	-	18,655
MC	6,318	27,371	12,174	32,154	-	317	78,334
SCNO	3,917	16,309	2,842	22,974	-	-	46,042
SOS	-	16,579	-	10,090	1,104	-	27,773
NZ Total	**10,977**	**70,396**	**15,300**	**90,920**	**1,104**	**317**	**189,015**

Regional Summary continued

Table A.3 Comparison of hectares harvested in 2025 with hectares already sown and intended to be sown (predicted) for harvest in 2026, scaled up to NZ estimates (from 110 responses).

	Milling Wheat		Feed Wheat		Malting Barley		Feed Barley		Milling Oats		Feed Oats	
Region	2025 Harvest	2026 Harvest	2025 Harvest	2026 Harvest	2025 Harvest	2026 Harvest	2025 Harvest	2026 Harvest	2025 Harvest	2026 Harvest	2025 Harvest	2026 Harvest
ENI	378	199	1,916	1,564	2,597	1,264	4,474	1,245	-	-	223	536
SWNI	-	-	378	371	305	282	-	-	-	-	-	-
NSI	3,339	2,138	2,098	3,972	948	146	7,314	9,360	-	-	63	-
MC	6,482	5,679	8,036	9,070	7,951	3,406	8,522	10,287	-	-	520	399
SCNO	2,028	1,538	7,523	7,225	632	778	6,225	6,915	-	-	161	-
SOS	-	-	11,254	12,202	-	-	10,867	9,547	2,837	2,270	420	89
NZ Total	**12,228**	**9,554**	**31,206**	**34,404**	**12,434**	**5,876**	**37,401**	**37,354**	**2,837**	**2,270**	**1,387**	**1,025**

Totals over 110 survey responses (Unscaled data)

Table A.4 Data totalled over all survey respondents

	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Number of farmers in the survey who harvested this crop in 2025		37	71	26	79	7	11
2024 harvest							
Total hectares on survey farms, 2024 harvest	ha	2,084	4,916	1,439	3,311	261	231
Total tonnes on survey farms, 2024 harvest	tonnes	18,059	50,738	10,423	27,102	2,025	1,351
2025 harvest							
Total hectares on survey farms, 2025 harvest (final figures)	ha	1,845	4,708	1,278	3,846	318	155
Total tonnes on survey farms, 2025 harvest (final figures)	tonnes	16,431	46,329	8,992	30,886	2,334	920
Sold under pre-harvest contract and delivered by July 1, 2025	tonnes	2,671	9,642	1,582	7,661	505	194
Pre-harvest contract grain stored on farm on July 1, 2025	tonnes	8,396	15,712	4,561	5,830	1,669	450
Sold at spot/free price and delivered by July 1, 2025	tonnes	0	4,748	0	5,487	0	155
Sold at spot/free price and stored on farm on July 1, 2025	tonnes	1,545	5,563	36	2,001	0	0
(For milling or malting only) Sold for feed by July 1, 2025	tonnes	2,193	-	1,198	-	0	-
(For feed only) Used on own farm (2025 harvest only) by July 1, 2025	tonnes	-	240	-	310	-	75
Unsold stocks on hand (2025 harvest only) on July 1, 2025	tonnes	1,626	10,424	1,615	9,597	160	46
Comparison of yield (tonnes per ha) on survey farms between harvests							
Survey farms, 2024 harvest	t/ha	8.7	10.3	7.2	8.2	7.8	5.8
Survey farms, 2025 harvest	t/ha	8.9	9.8	7.0	8.0	7.4	5.9
Data for these SAME survey farms from July 1, 2024 survey, to enable more precise, matched comparisons between July 1, 2024 and July 1, 2025							
Sold under pre-harvest contract and delivered by July 1, 2024	tonnes	5,686	10,276	2,330	6,742	166	369
Pre-harvest contract grain stored on farm on July 1, 2024	tonnes	6,647	16,769	6,790	5,149	1,684	702
Sold at spot/free price and delivered by July 1, 2024	tonnes	98	4,827	30	6,078	0	104
Sold at spot/free price and stored on farm on July 1, 2024	tonnes	1,650	7,418	442	2,311	0	35
(For milling or malting only) Sold for feed by July 1, 2024	tonnes	0	-	226	-	15	-
(For feed only) Used on own farm by July 1, 2024	tonnes	-	529	-	464	-	45
Unsold stocks on hand (2024 harvest only) on July 1, 2024	tonnes	3,978	10,919	605	6,358	160	96
Data for these SAME survey farms for matched comparisons of unsold grain between July 1, 2024 and July 1, 2025							
Unsold stocks on hand (from 2024 harvest) on July 1, 2024	tonnes	3,978	10,919	605	6,358	160	96
Unsold stocks on hand (from 2025 harvest) on July 1, 2025	tonnes	1,626	10,424	1,615	9,597	160	46

In Table A.5, the data in Table A.4 are expressed as percentages.

Table A.5 Fate of 2025 crop, in percentages (by tonnes)

	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Number of farmers in the survey who harvested this crop in 2025	37	71	26	79	7	11
2025 harvest						
% Sold under pre-harvest contract and delivered by July 1, 2025	16.3	20.8	17.6	24.8	21.6	21.1
% Pre-harvest contract grain stored on farm on July 1, 2025	51.1	33.9	50.7	18.9	71.5	48.9
% Sold at spot/free price and delivered by July 1, 2025	0.0	10.2	0.0	17.8	0.0	16.8
% Sold at spot/free price and stored on farm on July 1, 2025	9.4	12.0	0.4	6.5	0.0	0.0
(For milling or malting only) % Sold for feed by July 1, 2025	13.3	-	13.3	-	0.0	-
(For feed only) % Used on own farm by July 1, 2025	-	0.5	-	1.0	-	8.2
% Unsold stocks on hand (2025 harvest only) on July 1, 2025	9.9	22.5	18.0	31.1	6.9	5.0
Sales channels (2025 harvest)						
% "Sold" under pre-harvest contract (total) by July 1, 2025	67.4	54.7	68.3	43.7	93.1	70.0
% Sold at spot/free price (total) by July 1, 2025 (includes sold for feed and used on farm)	22.8	22.8	13.7	25.2	0.0	25.0
Delivery status of sold grain (2025 harvest)						
% Sold and delivered (total) by July 1, 2025 (includes sold for feed and used on farm)	29.6	31.6	30.9	43.6	21.6	46.1
% "Sold" and stored on farm (total) on July 1, 2025	60.5	45.9	51.1	25.4	71.5	48.9
Total sales (2025 harvest)						
% Sold (of total crop) by July 1, 2025 (includes sold for feed and used on farm)	90.1	77.5	82.0	68.9	93.1	95.0
% Unsold (of total crop) on July 1, 2025	9.9	22.5	18.0	31.1	6.9	5.0

In Table A.6, autumn/winter sowings and spring sowing intentions are given as sums over the 110 survey farms.

Table A.6 Autumn/winter sowings and spring sowing intentions (data totalled over all survey respondents)

	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Number of farmers in the survey who have sown this crop in the autumn or winter or intend to sow in the spring, as at July 1, 2025	**28**	**75**	**18**	**76**	**6**	**5**
Number of farmers in the survey who sowed in autumn/winter 2025	**24**	**65**	**5**	**31**	**2**	**1**
Number of farmers in the survey who intend to sow in spring 2025, as at July 1, 2025	**13**	**20**	**17**	**65**	**5**	**4**
Total hectares on survey farms, 2024 harvest	2,084	4,916	1,439	3,311	261	231
Total hectares on survey farms, 2025 harvest	1,845	4,708	1,278	3,846	318	155
Autumn/winter 2025 sowings on survey farms as at July 1, 2025 (hectares; for harvest in 2026)	799	4,736	136	1,056	75	3
Spring 2025 sowing intentions on survey farms as at July 1, 2025 (hectares; for harvest in 2026)	642	455	468	2,785	179	112
Total predicted hectares for 2026 harvest, as at July 1, 2025	1,441	5,190	604	3,841	254	115

For scaling up to NZ-wide totals, the most recent figures are the Final 2024 Agricultural Production Statistics (APS) figures, as in Table A.7. On average, the yields (t/ha) on the survey farms were similar to the APS yields for wheat and barley, and higher on the survey farms for oats.

From the scale-up factors, we can see what percentage of the area of each 2024 harvest crop was on the survey farms. For wheat, it was 15.1%. For barley, it was = 10.3%. For oats, it was 11.2%. That is, the percentage was highest for wheat, lowest for barley, and intermediate for oats.

Table A.7 Scaling up from survey totals to NZ-wide totals using Final 2025 Agricultural Production Statistics (APS) data	Total wheat	Total barley	Total oats
Total hectares on survey farms, 2024 harvest	7,000	4,750	492
Total tonnes on survey farms, 2024 harvest	68,797	37,525	3,376
Final APS statistics for 2024 harvest, total hectares	46,400	46,200	4,400
Final APS statistics for 2024 harvest, total tonnes	464,600	355,500	23,300
Multiplier for scaling up from survey farms to APS statistics			
Hectares	6.628	9.726	8.936
Tonnes	6.753	9.474	6.902
Comparison of yields between survey and APS statistics			
Survey farms, 2024 harvest (t/ha)	9.8	7.9	6.9
APS statistics, 2024 harvest (t/ha)	10.0	7.7	5.3

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.7). Data in the tables consist of matched data except when a previous AIMI survey is referenced.*
** Unmatched data – Data come from annual AIMI reports and don'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, and Figure 5, where the last three years are matched).*

Report prepared by Cropright Ltd.
Statistics NZ is gratefully acknowledged for supplying Final 2024 NZ Agricultural Production Statistics data on total hectares and tonnes for wheat, barley and oats.

AIMI receives funding from FAR, Arable Food Industry Council, NZ Flour Millers Association, NZ Feed Manufacturers Association and Federated Farmers.

ISSN 2744-5739