NEW ZEALAND SURVEY OF CEREAL AREAS AND VOLUMES: OCT 10, 2025

The objective of this AIMI survey of New Zealand (NZ) cereal growers was to determine, as at October 10, 2025:

- *sales of the 2025 NZ harvest of wheat, barley and oats (milling/malting and feed crops) since July 1, 2025*
- *levels of on-farm storage, both sold and unsold, of the 2025 harvest*
- *spring 2025 sowings and sowing intentions of wheat, barley and oats (milling/malting and feed crops)*

Survey details

Data from 102 NZ survey farms who completed each of the last three cereal surveys (October 2024 and July and October 2025) were scaled up to the national level using the most recent, 2024, final NZ Agricultural Production Statistics (APS). The data reflects the position at the 10th October 2025 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 2025 (figures have been rounded to nearest 100):

- For the 2024/2025 season, cereal grain production (wheat, barley and oats) in NZ totaled an estimated 822,600 tonnes (down 2% on last year), from 97,400 hectares (similar as last year).
- Unsold stocks of cereal grain, summed over all six crops, are estimated to have reduced by 38% between 1 July 2025 and 10 October 2025.
- Unsold stocks of cereal grain, summed over all six crops, are estimated to be 65% higher (50,500 tonnes) as at 10 October 2025 when compared to the same time last year. This is mainly due to greater stocks of unsold feed barley (49,700 tonnes, up 34,800 tonnes) and malting barley (25,600 tonnes, up 23,200 tonnes). As at 10 October 2025, unsold stocks of feed wheat were estimated to be 45,000 tonnes. Unsold stocks of milling wheat were estimated to be 7,000 tonnes (down 12,700 tonnes on last year).
- On-farm storage of sold grain is down 22% (down 54,500 tonnes) on this time last year. Total on- farm storage, including both sold and unsold grain, summed over all six crops, is similar compared to the same time last year at 326,200 tonnes.
- The total area sown or intended to be sown in cereals for harvest in 2026 is estimated to be 84,400 hectares, which is down 4% (3,200 ha) on the area harvested in 2025. An estimated 90% of this total area had been sown, which is higher than the average over the previous ten seasons (85%).

ISSN 2744-5739

As at 10 October 2025, the tonnages of unsold feed wheat and feed barley were estimated at 45,000 tonnes (t) and 49,700 t, respectively. In addition, there were an estimated 7,000 t of unsold milling wheat and 25,600 t of unsold malting barley. Totaled over all six crops, the estimated unsold tonnage of wheat, barley and oats (128,300 t in total) was 65% higher than at the same time last year. However, the estimated tonnage sold but still stored on farm (197,900 t in total) was 22% lower than at the same time last year. This meant that the total tonnage on farm on October 10, 2025 (325,200 t in total) was estimated to be 1% lower than the amount on October 10, 2024.

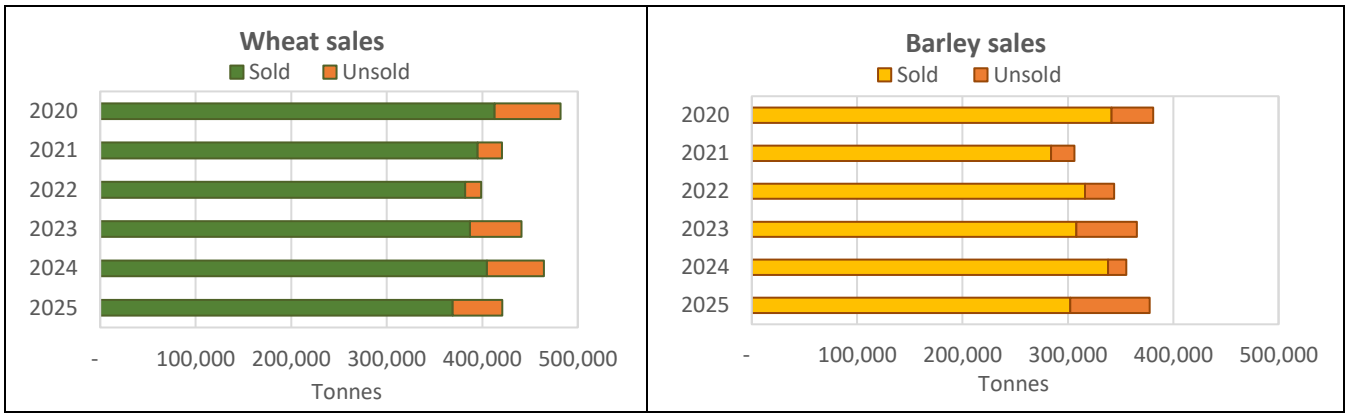

Figure A. NZ harvest tonnage and sales status for wheat and barley (combined malting/milling and feed) as estimated in October each year, over the last six years.

Growers reported a wet winter in Canterbury resulted in some crops being redrilled due to flooding. Cold spring temperatures have slowed growth, and strong winds have been a factor across most of the country, drying out crops and delaying spray applications in recent months. When totalled over all six cereal crops, the 2026 harvest hectares are predicted to be down 4% on the 2025 harvest hectares (down from an estimated 87,600 ha to 84,400 ha). The 2026 harvest hectares for feed wheat are predicted to be 4,100 hectares higher than the 2025 harvest hectares, while the 2026 harvest hectares for feed barley are predicted to be 4,800 hectares higher than the 2025 harvest hectares. For milling wheat and malting barley, the 2026 harvest hectares are predicted to be 2,200 and 9,000 hectares lower than the 2025 harvest hectares, respectively.

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 2025, was estimated to be 3% down on the area harvested in 2024. Milling wheat area was down 32%, feed wheat area was up 10%, feed barley area was up 31%, malting barley area was down 78%, milling oats area was predicted to be down 20% and feed oats area was down 3% over the two-year period.

The percentage of hectares that has been “forward sold”, as at 10 October 2025, was estimated to be 43% for milling wheat, 23% for malting barley and 83% for milling oats (as compared to matched estimates of 59%, 78% and 97%, respectively, for forward sales at the same time last year). For the feed crops, the percentages that have been forward sold were 42% of feed wheat, 36% of feed barley and 37% of feed oats hectares (as compared to 37%, 36% and 42%, respectively, for forward sales at the same time last year).

Milling wheat: Overall, on-farm storage was down 23% on the same time last year. The estimated tonnage of unsold grain was 7,000 t, which was down 12,800 t on the same time last year. The estimated tonnage of sold grain stored on farm was 44,600 t, which was down on the same time last year. An estimated 99% of milling wheat crops had been sown by October 10, and the area sown is estimated to be down 21% on last season.

Feed wheat: Overall, on-farm storage was down 23% on the same time last year. The estimated tonnage of unsold grain was 45,000 t, which was up on the same time last year. The estimated tonnage of sold grain still stored on farm was 70,800 t, which was down on the tonnage at the same time last year. Most feed wheat crops (99%) had been sown by October 10, with the area sown (including yet to be sown) estimated to be up 15% on last season.

Feed barley: Overall, on-farm storage was up 66% on the same time last year. The estimated tonnage of unsold grain was 49,700 t, which is more than double the same time last year. The estimated tonnage of sold grain still stored on farm was 53,300 t, which was slightly up on the tonnage at the same time last year. An estimated 82% of feed barley crops had been sown by October 10, with the area sown (including yet to be sown) estimated to be up 14% on last season.

Malting barley: Overall, on-farm storage was similar to the same time last year. The estimated tonnage of unsold grain was 25,600 t, which is significantly up on the same time last year (2,400 t), while the estimated tonnage of sold grain still stored on farm was 17,600 t, which is less than half the tonnage at the same time last year (41,000 t). The increase in unsold malting barley due to the cancellation of contracts. An estimated 84% of malting barley crops were sown by October 10, and the area sown (including yet to be sown) was estimated to be down 76% on last season.

Milling oats: Overall, on-farm storage was up 36% 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 8,300 t, which was up on the same time last year. Milling oat crops were 100% sown by October 10, with the area sown (including yet to be sown) estimated to be 29% down on to last season.

Feed oats: Overall, on-farm storage was up 2100 t on the same time last year. The estimated tonnage of unsold grain was 500 t, which was down on the same time last year. The estimated tonnage of sold grain still stored on farm was 3,300 t, which was much higher than at the same time last year. Feed oat crops were 90% sown by October 10, and the area sown (including yet to be sown) was estimated to be 30% down on last season.

Table 1. Estimated NZ national figures for the 2025 harvest, plus sold and delivered tonnages, for six cereal crops as at October 10, 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		**34**	**64**	**24**	**74**	**5**	**10**	**101**
2024 harvest								
Estimated NZ total hectares, 2024 harvest	ha	13,718	32,682	13,867	32,333	2,414	1,986	97,000
Estimated NZ total tonnes, 2024 harvest	tonnes	121,894	342,706	96,950	258,550	14,786	8,514	843,400
2025 harvest								
Estimated NZ total hectares, 2025 harvest	ha	11,796	31,357	12,752	37,101	2,745	1,666	97,418
Estimated NZ total tonnes, 2025 harvest	tonnes	106,438	314,557	86,268	291,495	16,004	7,879	822,641
Sold under pre-harvest contract and delivered by 10 October, 2025	tonnes	31,389	114,821	26,578	95,839	7,316	1,781	277,724
Pre-harvest contract grain stored on farm on 10 October, 2025	tonnes	34,075	43,633	17,272	33,838	8,278	3,274	140,372
Sold at spot/free price and delivered by 10 October, 2025	tonnes	2,388	80,215	436	86,819	0	1,586	171,444
Sold at spot/free price and stored on farm on 10 October, 2025	tonnes	10,573	27,122	374	19,495	0	0	57,563
(For milling or malting only) Sold for feed by 10 October, 2025	tonnes	21,033	-	15,974	-	0	-	37,007
(For feed only) Used on own farm by 10 October, 2025	tonnes	-	3,738	-	5,775	-	767	10,280
Unsold stocks on hand (2025 harvest only) on 10 October, 2025	tonnes	6,980	45,028	25,633	49,729	409	471	128,251
Sales channels (2025 harvest)								
Sold on pre-harvest contract (total) by 10 October, 2025	tonnes	65,465	158,454	43,851	129,677	15,595	5,055	418,096
Sold at spot/free price (total) by 10 October, 2025	tonnes	12,960	107,337	810	106,313	0	1,586	229,007
On farm storage (2025 harvest)								
Sold and delivered (total) by 10 October, 2025	tonnes	33,777	195,036	27,015	182,657	7,316	3,367	449,168
Sold and stored on farm (total) on 10 October, 2025	tonnes	44,648	70,755	17,646	53,333	8,278	3,274	197,935
Total sales (2025 harvest)								
Sold (grand total) by 10 October, 2025 (includes sold for feed & used on farm)	tonnes	99,458	269,529	60,635	241,766	15,595	7,409	694,390
Unsold stocks on hand (2025 harvest only) on 10 October, 2025	tonnes	6,980	45,028	25,633	49,729	409	471	128,251
Comparison of hectares and tonnes between last two harvests								
Estimated % change in hectares, 2024 to 2025 harvest	%	-14	-4	-8	15	14	-16	0
Estimated % change in tonnes, 2024 to 2025 harvest	%	-13	-8	-11	13	8	-7	-2
Comparison of yields (t/ha) between last two harvests								
NZ-wide estimated yield, 2024 harvest	t/ha	8.9	10.5	7.0	8.0	6.1	4.3	8.7
NZ-wide estimated yield, 2025 harvest	t/ha	9.0	10.0	6.8	7.9	5.8	4.7	8.4

Table 1 (continued).	Units	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Total (all crops)
Comparison of on-farm storage between 1 July, 2025 and 10 October, 2025 (based upon matched data)								
Sold and stored on farm (total) on 1 July, 2025 (2025 harvest)	tonnes	62,346	138,965	38,709	72,584	10,427	3,837	326,869
Sold and stored on farm (total) on 10 October, 2025 (2025 harvest)	tonnes	44,648	70,755	17,646	53,333	8,278	3,274	197,935
Unsold stocks on hand (from 2025 harvest) on 1 July, 2025	tonnes	12,128	75,537	17,812	92,406	1,637	471	199,992
Unsold stocks on hand (from 2025 harvest) on 10 October, 2025 (as above)	tonnes	6,980	45,028	25,633	49,729	409	471	128,251
% decrease in total grain stored on-farm from July 2025 to Oct 2025	%	31	46	23	38	28	13	38
Recalculated 10 October, 2024 survey breakdown to enable more precise, matched comparisons between 10 October, 2024 and 10 October, 2025								
Sold under pre-harvest contract and delivered by 10 October, 2024	tonnes	48,714	121,877	47,107	86,704	8,135	5,812	318,349
Pre-harvest contract grain stored on farm on 10 October, 2024	tonnes	34,336	56,496	35,999	20,118	6,293	532	153,775
Sold at spot/free price and delivered by 10 October, 2024	tonnes	1,925	66,815	4,134	101,842	102	553	175,371
Sold at spot/free price and stored on farm on 10 October, 2024	tonnes	13,184	53,087	4,954	27,087	0	358	98,670
(For milling or malting only) Sold for feed by 10 October, 2024	tonnes	3,977	-	2,347	-	153	-	6,478
(For feed only) Used on own farm by 10 October, 2024	tonnes	-	4,544	-	7,956	-	553	13,052
Unsold stocks on hand (2024 harvest only) on 10 October, 2024	tonnes	19,757	39,888	2,410	14,842	102	706	77,705
Comparison of on-farm storage between last October and this October (based upon matched data)								
Sold and stored on farm (total) on 10 October, 2024 (2024 harvest)	tonnes	47,520	109,583	40,953	47,205	6,293	890	252,445
Sold and stored on farm (total) on 10 October, 2025 (2025 harvest)	tonnes	44,648	70,755	17,646	53,333	8,278	3,274	197,935
Unsold stocks on hand (from 2024 harvest) on 10 October, 2024	tonnes	19,757	39,888	2,410	14,842	102	706	77,705
Unsold stocks on hand (from 2025 harvest) on 10 October, 2025 (as above)	tonnes	6,980	45,028	25,633	49,729	409	471	128,251
% change in total grain stored on-farm from Oct 2024 to Oct 2025	%	-23	-23	0	66	36	135	-1
Change in total grain (in TONNES) stored on-farm from Oct 2024 to Oct 2025	tonnes	-15,650	-33,687	-83	41,015	2,292	2,149	-3,964

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.

Table 2. NZ sowings and sowing intentions for six cereal crops as at October 10, 2025.

	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats	Total (all crops)
Number of farmers in survey who have sown or intend to sow this crop as at 10 October, 2025	**31**	**68**	**12**	**75**	**5**	**7**	**100**
Estimated NZ total hectares, 2024 harvest	12,246	29,175	12,786	29,813	1,687	1,388	87,096
Estimated NZ total hectares, 2025 harvest	10,531	27,992	11,758	34,210	1,919	1,164	87,574
Sowings and intentions for the current season's crop (2025/26)							
Estimated NZ total autumn/winter 2025 sowings (hectares; for harvest in 2026)	4,949	28,369	1,133	8,662	201	0	43,314
Estimated NZ total spring 2025 sowings already sown by 10 October, 2025 (hectares; for harvest in 2026)	3,334	3,492	1,228	23,302	393	815	32,564
Estimated NZ total spring 2025 sowings still to sow (intentions) as at 10 October, 2025 (hectares; for harvest in 2026)	77	232	439	7,017	760	0	8,526
Estimated NZ total spring 2025 sowings plus intentions as at 10 October, 2025 (hectares; for harvest in 2026)	3,412	3,723	1,667	30,319	1,154	815	41,089
Predicted NZ total hectares, 2026 harvest (Autumn/winter 2025 sowings and Spring 2025 sowings & intentions, all combined)	8,361	32,092	2,799	38,981	1,355	815	84,403
% of predicted NZ hectares which had already been sown by 10 October, 2025	99	99	84	82	44	100	90
Average over previous 10 years of % of predicted NZ hectares which had been sown by 10 October	99	98	75	75	65	80	85
"Forward sales" of 2025/26 crop							
Predicted NZ total hectares that are "forward sold" (2026 harvest) as at 10 October, 2025	3,615	13,491	649	14,219	1,127	301	33,402
Estimated percentage of NZ total hectares that are "forward sold" (2026 harvest) as at 10 October, 2025	43	42	23	36	83	37	40
Comparison of sowings/intentions between the 2023/24, 2024/25 and 2025/26seasons (NZ totals) (based upon matched data)							
Estimated % change in NZ total sowings, 2024 to 2025 harvests	-14	-4	-8	15	14	-16	1
Estimated % change in NZ total sowings, 2025 to 2026 (predicted) harvests	-21	15	-76	14	-29	-30	-4
Estimated % change in NZ total sowings, 2024 to 2026 (predicted) harvests (TOTAL over TWO seasons)	-32	10	-78	31	-20	-41	-3
Estimated change in NZ total sowings, 2025 to 2026 (predicted) harvests (in HECTARES)	-2,170	4,100	-8,959	4,771	-564	-350	-3,171
Comparison of spring sowing intentions as at 1 July, 2025 with spring sowings plus intentions as at 10 October, 2025 (based upon matched data)							
Estimated NZ total spring 2025 sowing intentions as at 1 July, 2025 (hectares; for harvest in 2026)	3,492	2,780	3,879	24,975	1,136	976	37,238
Estimated NZ total spring 2025 sowings plus intentions as at 10 October, 2025 (hectares, for harvest in 2026) (as above)	3,412	3,723	1,667	30,319	1,154	815	41,089
Change in estimated NZ total spring 2025 sowings/intentions between 1 July, 2025 and 10 October, 2025 (hectares; for harvest in 2026)	-80	944	-2,212	5,344	17	-162	3,851

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 2025 harvest of six grain crops still stored on farm reduced by between 13% and 46% in the period between the AIMI surveys dated July 1, 2025 and October 10, 2025. When tonnages were totalled over all six crops, the reduction was 38%.

When the on-farm storage on October 10, 2025 was compared to that at the same time last year (October 10, 2024), the total tonnage of grain on farms from the most recent harvest was higher than last year for feed barley and oat crops, similar for malting barley, and lower than last year for the wheat crops. When summed over all six crops, the total on-farm storage was 1% lower than at this time last year. This corresponded to a 54,500 t decrease in grain sold and stored on farm, and a 50,500 t increase in unsold stocks on hand, as compared to a year ago.

The number out of the 102 survey growers who have sown or intend to sow each crop this season can be compared with the number who harvested last season (2024/2025) by comparing the top rows in Tables 1 and 2. For milling wheat, grower numbers decreased from 34 to 31 between last season and this season, and feed wheat numbers increased from 64 to 68. 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, numbers have reduced by half, from 24 to 12 this season. For feed barley and milling oats, grower numbers were similar between the last two seasons, while for feed oats, grower numbers decreased from 10 to 7. However, for the two barley crops, sowing was only just over 80% complete, and for milling oats, sowing was only 44% complete, so final grower numbers may be different. Sowing was 100% complete for feed oats.

In Table 2, sowings plus sowing intentions for feed wheat (for harvest in 2026) were 4% down on the area harvested in 2025 and down 3% on the area harvested in 2024. For feed barley, sowings plus sowing intentions (for harvest in 2026) were an estimated 14% up on the area harvested in 2025, following a 15% increase between the 2024 and 2025 harvests. As a result, feed barley sowings were up 31% on two years ago. For milling wheat, sowings (for harvest in 2026) were an estimated 21% down on the area harvested in 2025, and 32% down on two years ago. Malting barley sowings and intentions were down 76% on last year, and 78% down on two years ago. Milling oats sowings and intentions were down 29% on last year, following a 14% increase the previous year, and as a result, feed oats sowings were predicted to be down 20% on two years ago. Feed oats sowings and intentions were down 30% on last year, and 41% down on two years ago.

Summing the sowings and intended sowings for the six cereal crops for the current season (for harvest in 2026) (84,400 ha), a decrease of 3,200 ha was estimated when compared with the estimated area harvested in 2025 (87,600 ha).

At the bottom of Table 2 is the estimated change between the spring sowing intentions on July 1, 2025 and the actual sowings plus updated intentions on October 10, 2025. In total, there was an estimated increase of 3,900 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 5,300 ha) and a decrease in hectares for malting barley (down 2,200 ha).

Milling wheat (tonnes)

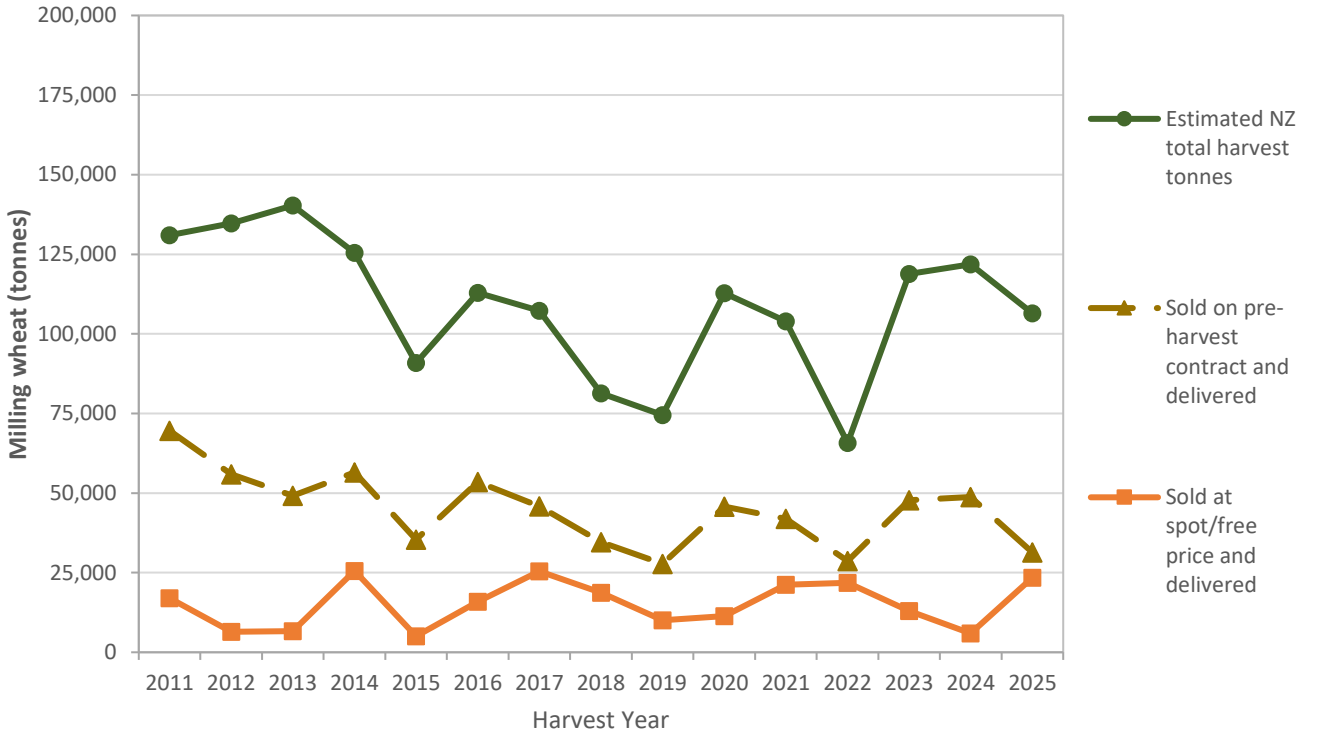

Figure 1a. NZ harvest tonnage and sales channels for milling wheat as estimated in October each year. (Note: Both "sold and delivered" categories relate to the crop harvested that year, excluding carryover stock. "Sold at spot/free price and delivered" includes grain sold for feed. Historical data for 2011 to 2023 are from October AIMI Reports for 2023 and earlier, while data for 2024 and 2025 are matched data from the current report.)

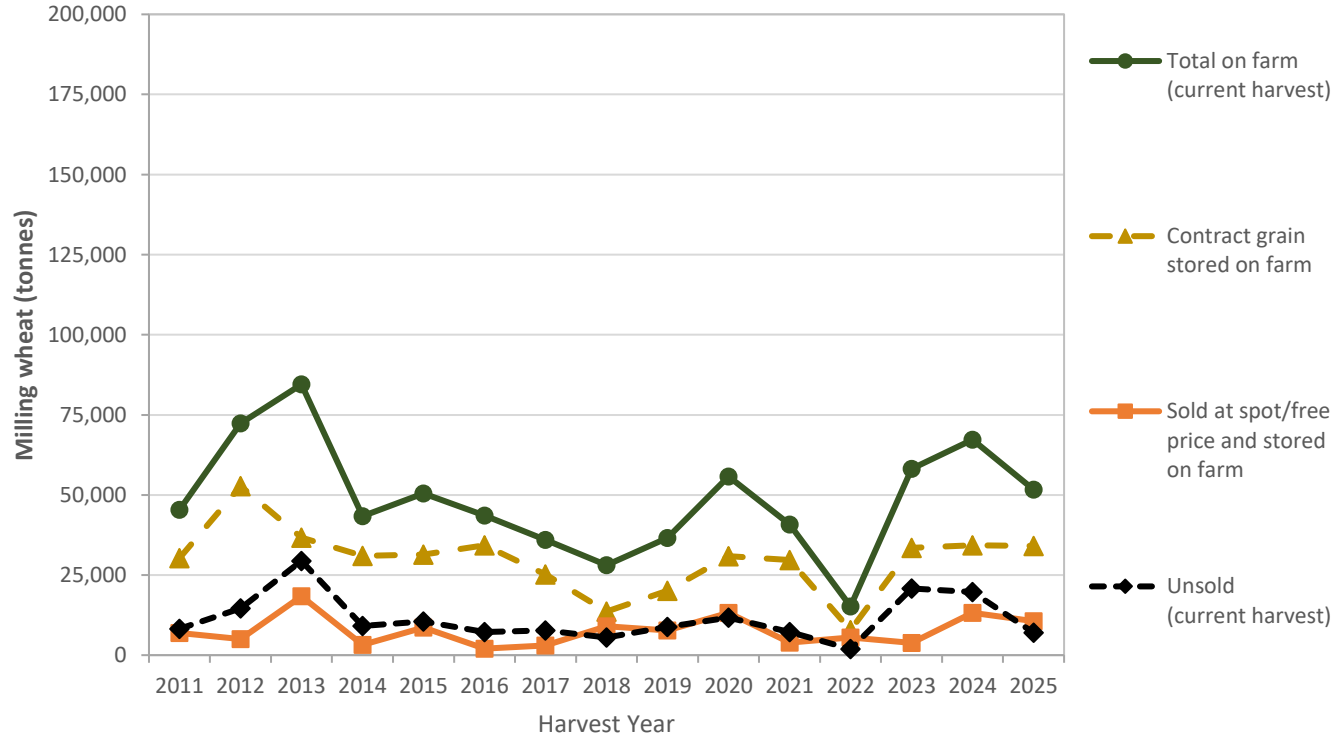

Figure 1b. NZ stocks on farm for milling wheat as estimated in October each year.
(Note: Historical data for 2011 to 2023 are from October AIMI Reports for 2023 and earlier, while data for 2024 and 2025 are matched data from the current report.)

Feed wheat (tonnes)

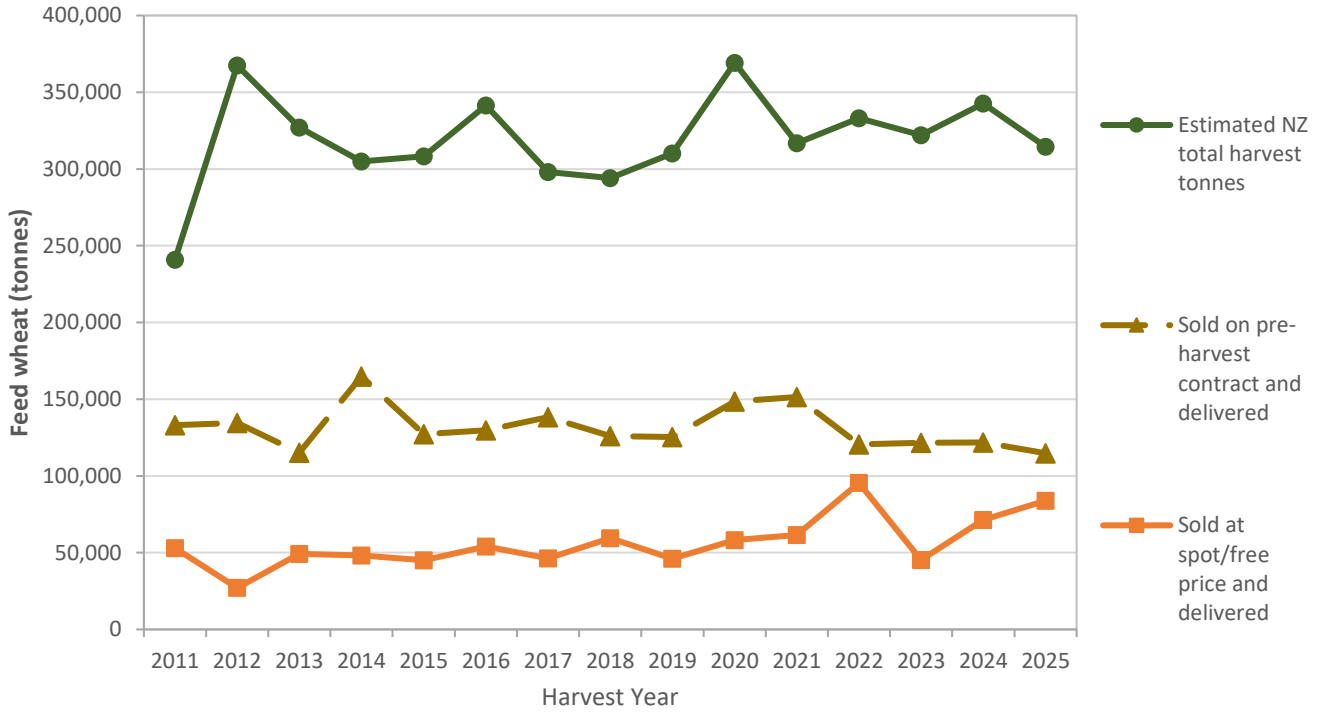

Figure 2a. NZ harvest tonnage and sales channels for feed wheat as estimated in October each year. (Note: Both "sold and delivered" categories relate to the crop harvested that year, excluding carryover stock. "Sold at spot/free price and delivered" includes grain used on own farm. Historical data for 2011 to 2023 are from October AIMI Reports for 2023 and earlier, while data for 2024 and 2025 are matched data from the current report.)

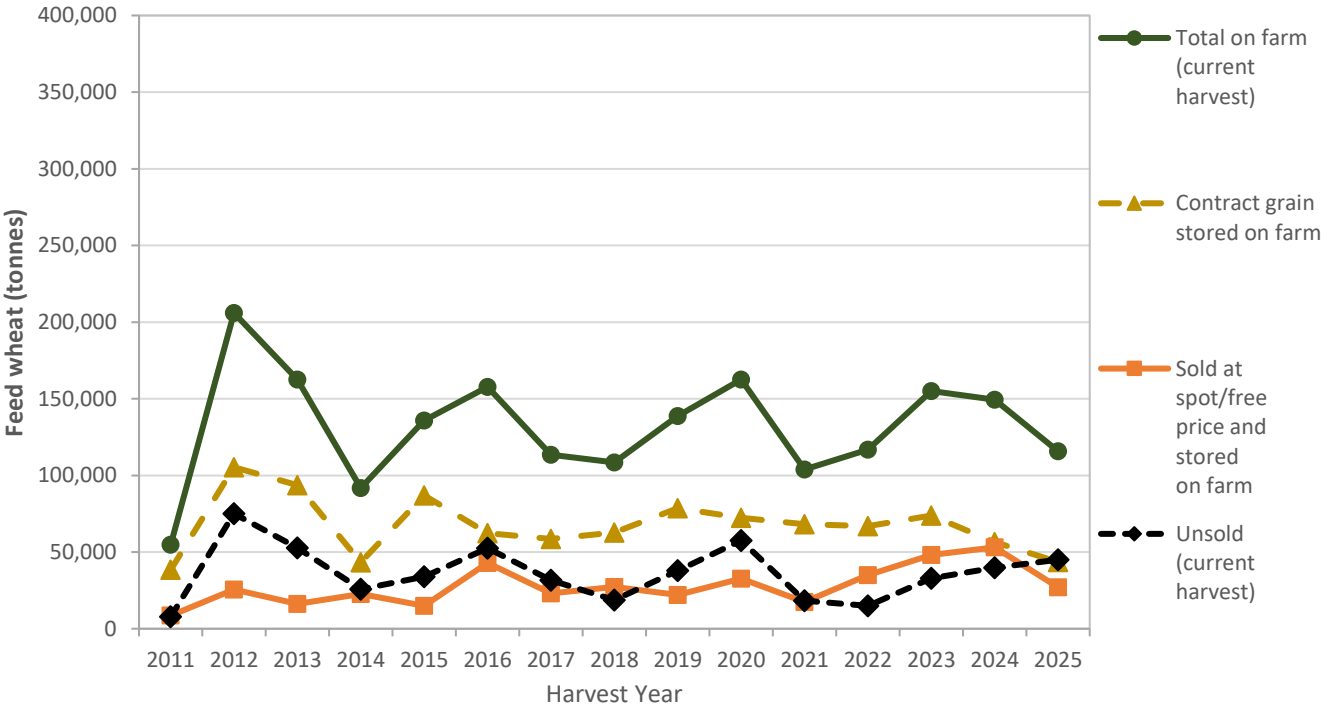

Figure 2b. NZ stocks on farm for feed wheat as estimated in October each year.
(Note: Historical data for 2011 to 2023 are from October AIMI Reports for 2023 and earlier, while data for 2024 and 2025 are matched data from the current report.)

Feed barley (tonnes)

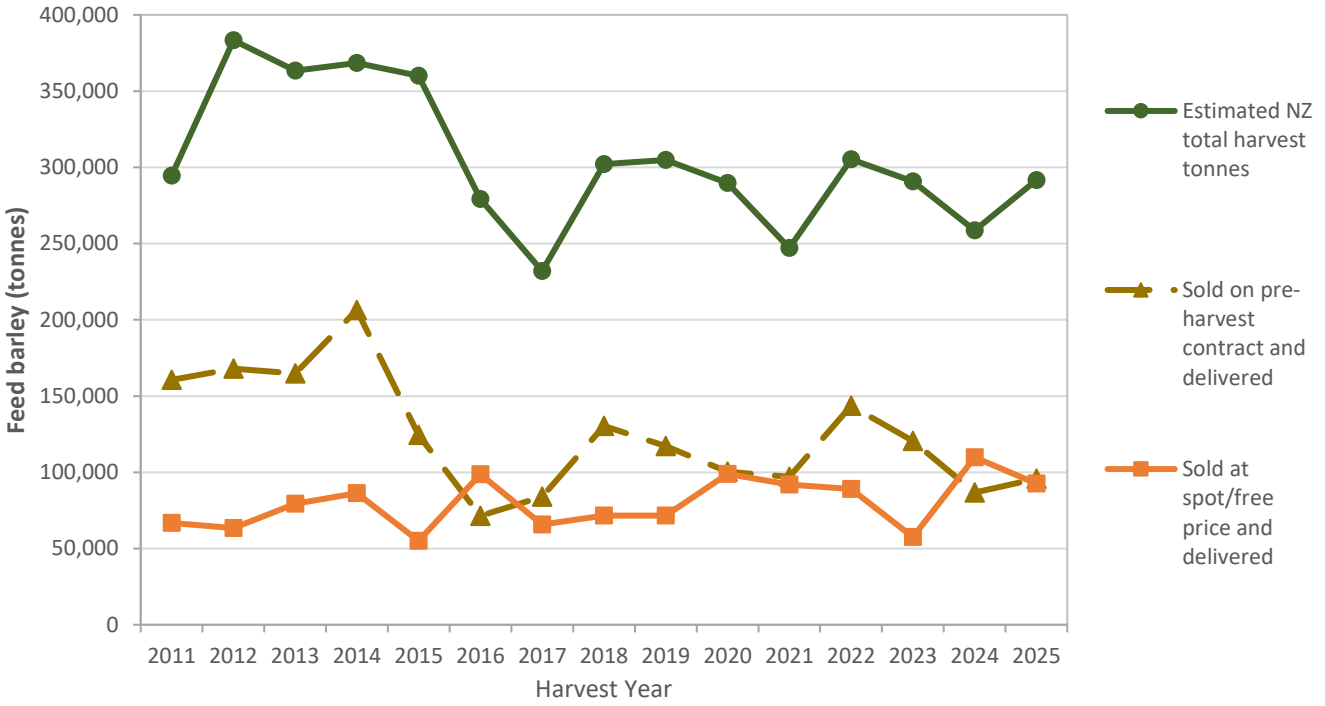

Figure 3a. NZ harvest tonnage and sales channels for feed barley as estimated in October each year. (Note: Both "sold and delivered" categories relate to the crop harvested that year, excluding carryover stock. "Sold at spot/free price and delivered" includes grain used on own farm. Historical data for 2011 to 2023 are from October AIMI Reports for 2023 and earlier, while data for 2024 and 2025 are matched data from the current report.)

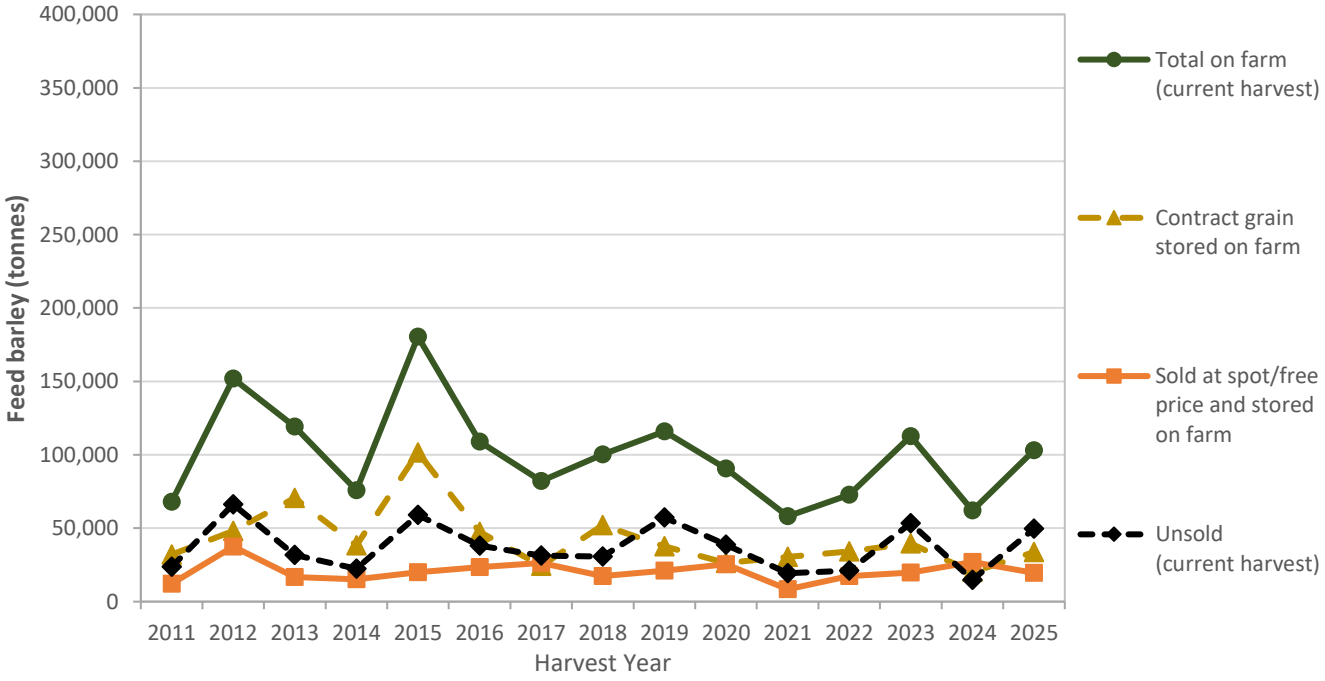

Figure 3b. NZ stocks on farm for feed barley as estimated in October each year.
(Note: Historical data for 2011 to 2023 are from October AIMI Reports for 2023 and earlier, while data for 2024 and 2025 are matched data from the current report.)

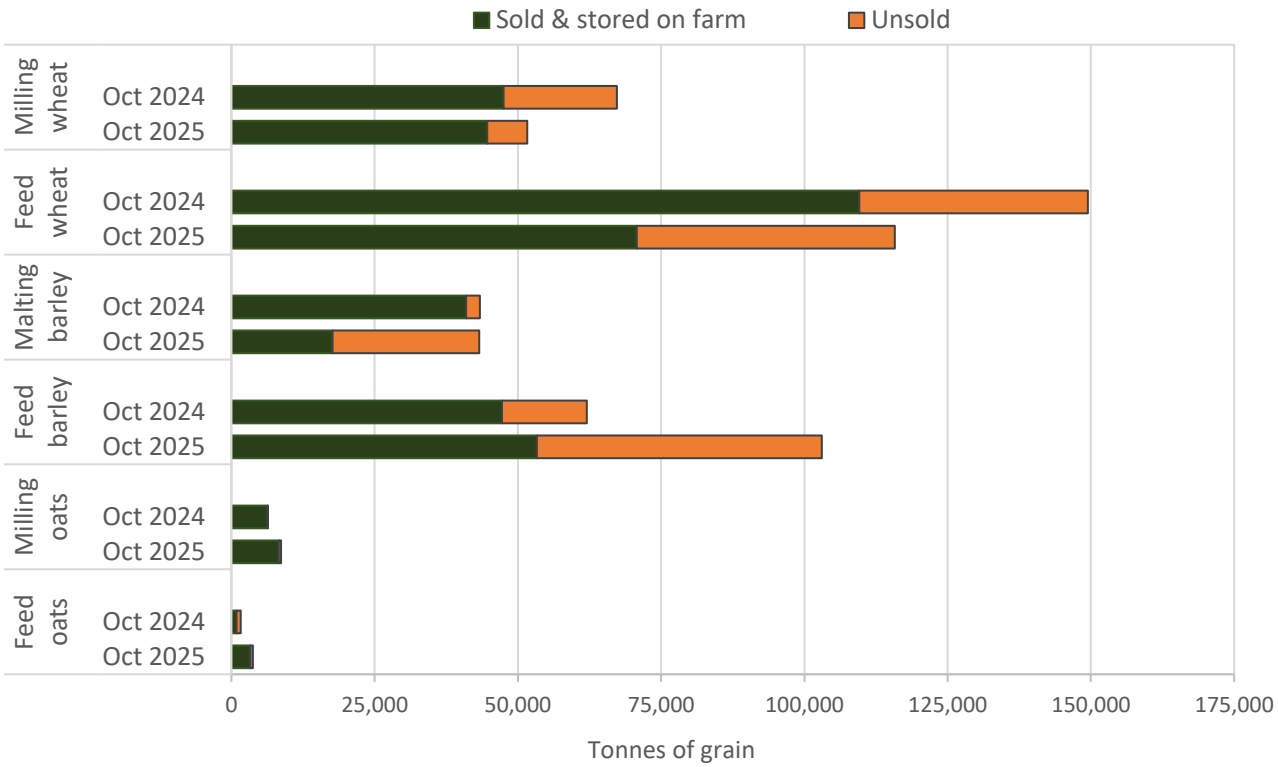

Figure 4. Changes in NZ stocks on farm for wheat, barley and oats between October 10, 2024 and October 10, 2025. These data are also reported in Table 1 and Figures 1b, 2b and 3b.
All estimates are based upon scaling up from the current survey sample, which consists of only those growers who responded to each of the last three AIMI surveys; these estimates therefore provide more precise, matched comparisons.

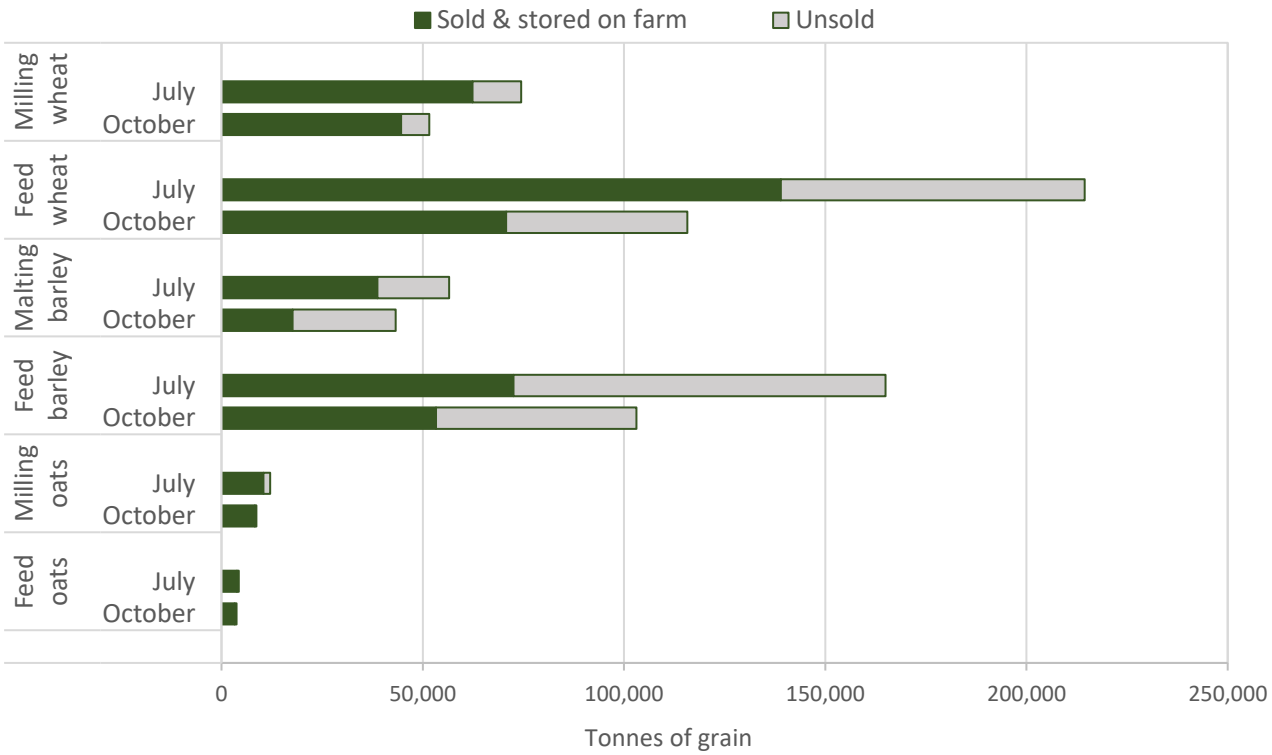

Figure 5. Changes in NZ stocks on farm for wheat, barley and oats between July 1 and October 10, 2025. These data are also reported in Table 1. As in Figure 4, this is a matched comparison.

NZ harvest hectares for 2011 to 2025 and predicted hectares for 2026 as estimated in October each year

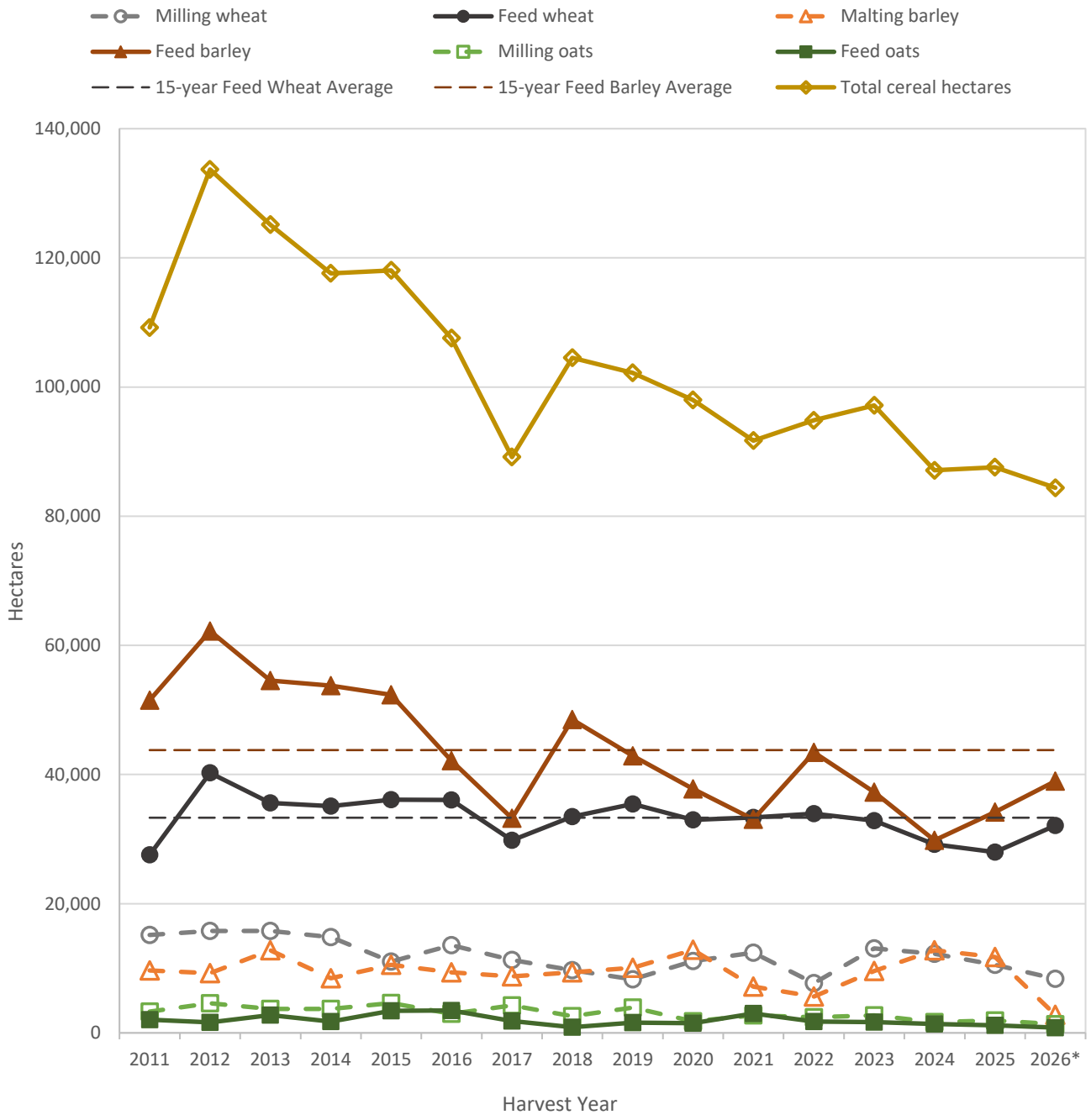

Figure 6. NZ harvest hectares for six cereal crops (and the total over the six crops) as estimated in October each year from 2011 to 2025, and predicted (*) harvest hectares for 2026. For feed wheat and feed barley, "long-term" means (15-year averages) are included as dashed horizontal lines.
(Note: All figures represent final harvest hectares except for 2026 which is made up of hectares already sown and hectares intended to be sown for harvest in 2026. Refer to Fig. 7 for hectares already sown by October 10, 2025. Figures for 2024, 2025 and 2026 (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 – 2023.)

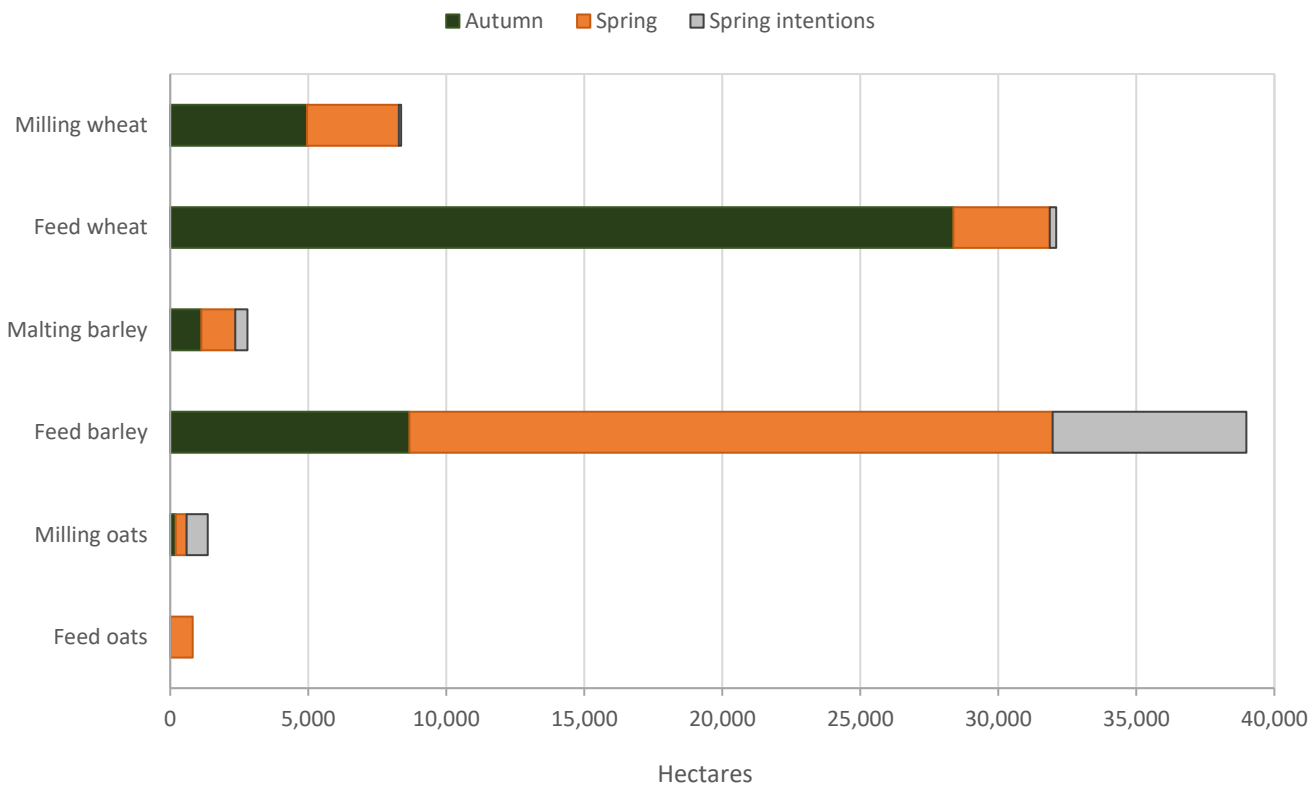

Figure 7. Estimated NZ hectares sown in autumn and spring 2025, plus NZ spring hectares yet to sow (spring intentions) for harvest in 2026, based on data collected on October 10, 2025. These data are also reported in Table 2.

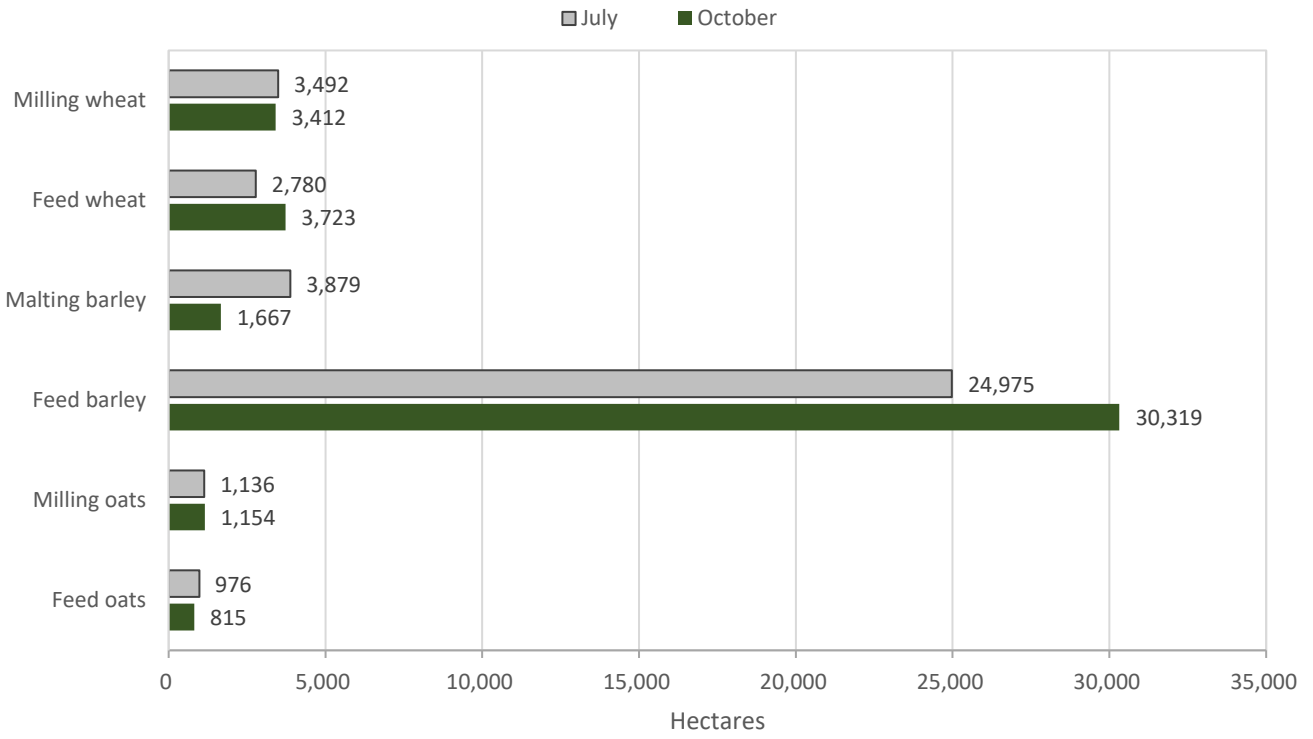

Figure 8. Comparison of NZ spring sowing intentions as at July 1 2025 with actual NZ spring sowings plus intentions as at October 10, 2025. These data are also reported in Table 2.

As in Figures 4 and 5, this is a matched comparison.

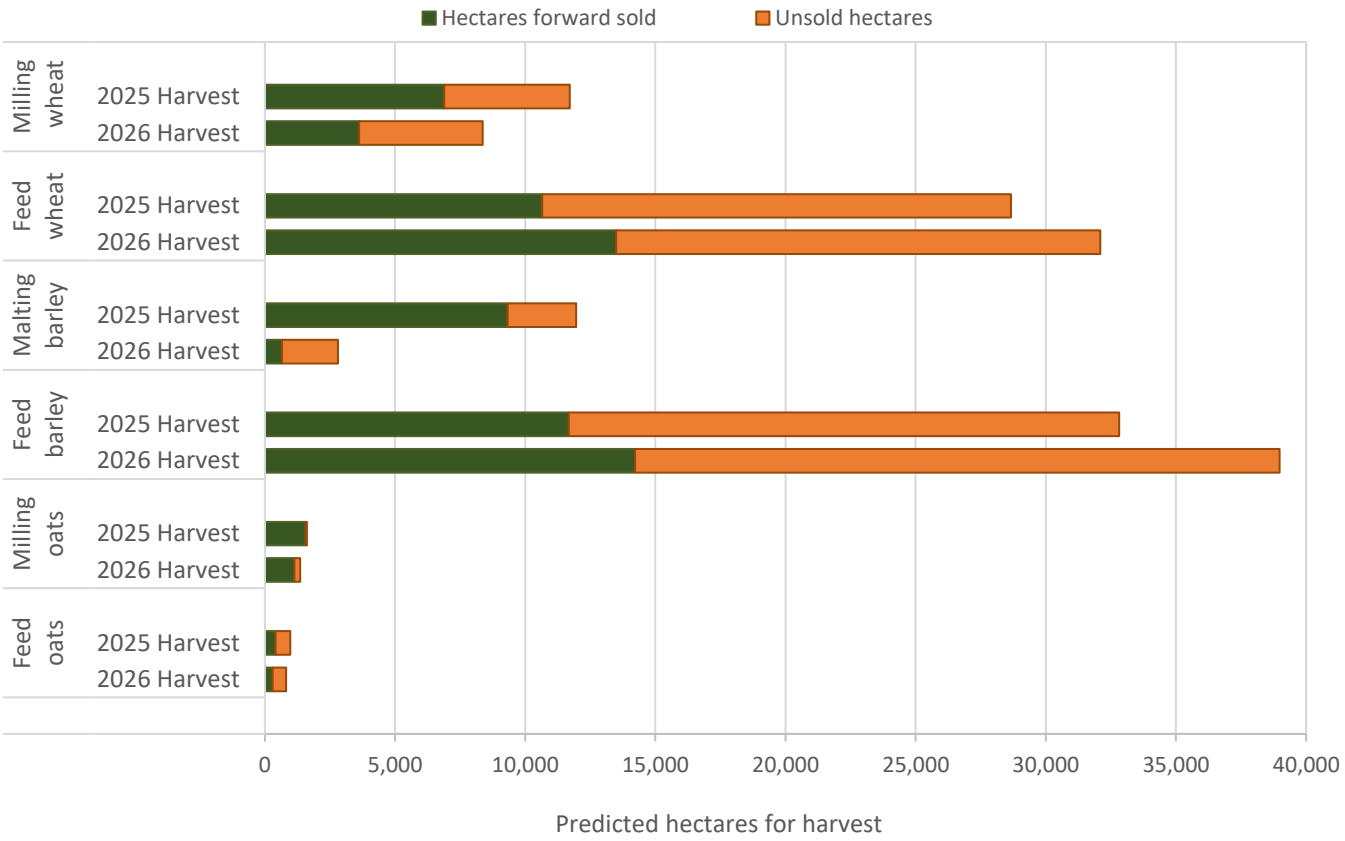

Figure 9. Comparison of hectares of total NZ crop sown (autumn and spring sowings plus spring intentions) that had been forward sold as at October 10, 2024 and 2025 for predicted 2025 and predicted 2026 harvests, respectively. As in Figures 4, 5 and 8, this is a matched comparison.

AIMI
Arable Industry Marketing Initiative

APPENDIX

NEW ZEALAND SURVEY OF CEREAL
AREAS AND VOLUMES: OCTOBER 10, 2025

Cereal Survey Panel:	
Completed:	106
Out of:	131
Report group*	**102**

Survey comments:
Sales – poor demand, poor prices, not enough profit
Cancelled contracts for malting barley – reduced demand for year ahead
Cold spring, windy across NZ, hard to spray, drying out. Wet winter in Canterbury, drowned crops

(*Must have completed October 2024, July & October 2025 Surveys)

Regional breakdown

Region	Eastern Nth Island	Sth West Nth Island	Northern Sth Island	Mid Canterbury	Sth Canty & Nth Otago	Sth Otago & Sthland	Total
No. of participants	6	5	26	32	14	19	102

Hectares harvested in 2025 and harvest intentions for 2026 (from 102 SCALED responses)

	Milling Wheat		Feed Wheat		Malting Barley		Feed Barley		Milling Oats		Feed Oats	
Region	**2024**	**2025**	**2024**	**2025**	**2024**	**2025**	**2024**	**2025**	**2024**	**2025**	**2024**	**2025**
ENI	411	216	2,086	2,129	2,822	,163	4,862	3,996	-	-	313	225
SWNI	-	-	415	379	459	106	-	-	-	-	-	-
NSI	3,304	2,726	2,284	3,891	1,031	159	7,949	9,663	-	-	88	75
MC	5,873	4,561	7,551	10,105	7,753	1,271	7,549	10,752	-	-	728	428
SCNO	2,208	1,862	8,190	7,859	687	338	6,765	9,217	-	-	225	263
SOS	-	-	10,831	11,588	-	-	9,976	8,647	2,745	1,939	313	175
Total	**11,796**	**9,366**	**31,357**	**35,950**	**12,752**	**3,036**	**37,101**	**42,275**	**2,745**	**1,939**	**1,666**	**1,166**

Yield (tonnes/hectare) from survey farms as at 10 October 2025 (from 102 responses)

Region	Milling Wheat	Feed Wheat	Malting Barley	Feed Barley	Milling Oats	Feed Oats
ENI	9.2	8.2	6.7	6.6	-	4.2
SWNI	-	9.3	6.6	-	-	-
NSI	9.2	10.3	7.8	7.7	-	3.5
MC	8.6	11.6	6.5	9.1	-	6.1
SCNO	10.0	9.8	9.1	8.2	-	2.0
SOS	-	9.4	-	7.4	5.8	4.4
Average	9.0	10.0	6.8	7.9	5.8	4.7

Unsold tonnes (from 102 SCALED responses)

Region	Milling Wheat	Feed Wheat	Malting Barley	Feed Barley	Milling Oats	Feed Oats
ENI	-	1,694	-	8,434	-	-
SWNI	-	-	-	-	-	-
NSI	1,679	3,178	-	4,736	-	-
MC	4,816	21,615	23,556	14,541	-	471
SCNO	485	6,939	2,077	19,723	-	-
SOS	-	11,602	-	2,295	409	-
Total	**6,980**	**45,028**	**25,633**	**49,729**	**409**	**471**

Totals over 102 survey responses

In Table A.1, the yields per hectare on the survey farms were slightly higher for the 2025 harvest than for the 2024 harvest for milling wheat and feed oats and marginally lower for the remaining crops.

Table A.1 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		34	64	24	74	5	10
2024 harvest							
Total hectares on survey farms, 2024 harvest	ha	1,901	4,529	1,312	3,059	193	159
Total tonnes on survey farms, 2024 harvest	tonnes	16,337	45,932	9,335	24,894	1,445	832
2025 harvest							
Total hectares on survey farms, 2025 harvest	ha	1,635	4,345	1,206	3,510	220	133
Total tonnes on survey farms, 2025 harvest	tonnes	14,266	42,159	8,306	28,066	1,564	770
Sold under pre-harvest contract and delivered by 10 October, 2025	tonnes	4,207	15,389	2,559	9,228	715	174
Pre-harvest contract grain stored on farm on 10 October, 2025	tonnes	4,567	5,848	1,663	3,258	809	320
Sold at spot/free price and delivered by 10 October, 2025	tonnes	320	10,751	42	8,359	0	155
Sold at spot/free price and stored on farm on 10 October, 2025	tonnes	1,417	3,635	36	1,877	0	0
(For milling or malting only) Sold for feed by 10 October, 2025	tonnes	2,819	-	1,538	-	0	-
(For feed only) Used on own farm by 10 October, 2025	tonnes	-	501	-	556	-	75
Unsold stocks on hand (2025 harvest only) on 10 October, 2025	tonnes	936	6,035	2,468	4,788	40	46
Comparison of yield (tonnes per ha) on survey farms between harvests							
Survey farms, 2024 harvest	t/ha	8.6	10.1	7.1	8.1	7.5	5.2
Survey farms, 2025 harvest	t/ha	8.7	9.7	6.9	8.0	7.1	5.8
Data for these SAME survey farms for comparisons of on-farm storage between 1 July, 2025 and 10 October, 2025							
Sold and stored on farm (total) on 1 July, 2025 (2025 harvest)	tonnes	8,356	18,625	3,727	6,989	1,019	375
Sold and stored on farm (total) on 10 October, 2025 (2025 harvest)	tonnes	5,984	9,483	1,699	5,135	809	320
Unsold stocks on hand (from 2025 harvest) on 1 July, 2025	tonnes	1,626	10,124	1,715	8,897	160	46
Unsold stocks on hand (from 2025 harvest) on 10 October, 2025	tonnes	936	6,035	2,468	4,788	40	46

Table A.1 continued

	Units						
Data for these SAME survey farms from 10 October, 2024 survey, to enable more precise, matched comparisons between 10 October, 2024 and 10 October, 2025							
Sold under pre-harvest contract and delivered by 10 October, 2024	tonnes	6,529	16,335	4,536	8,348	795	568
Pre-harvest contract grain stored on farm on 10 October, 2024	tonnes	4,602	7,572	3,466	1,937	615	52
Sold at spot/free price and delivered by 10 October, 2024	tonnes	258	8,955	398	9,806	10	54
Sold at spot/free price and stored on farm on 10 October, 2024	tonnes	1,767	7,115	477	2,608	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	-	609	-	766	-	54
Unsold stocks on hand (2024 harvest only) on 10 October, 2024	tonnes	2,648	5,346	232	1,429	10	69
Data for these SAME survey farms for comparisons of on-farm storage between 10 October, 2024 and 10 October, 2025							
Sold and stored on farm (total) on 10 October, 2024 (2024 harvest)	tonnes	6,369	14,687	3,943	4,545	615	87
Sold and stored on farm (total) on 10 October, 2025 (2025 harvest)	tonnes	5,984	9,483	1,699	5,135	809	320
Unsold stocks on hand (from 2024 harvest) on 10 October, 2024	tonnes	2,648	5,346	232	1,429	10	69
Unsold stocks on hand (from 2025 harvest) on 10 October, 2025	tonnes	936	6,035	2,468	4,788	40	46

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

Table A.2 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		34	64	24	74	5	10
2025 harvest							
% Sold under pre-harvest contract and delivered by 10 October, 2025	%	29.5	36.5	30.8	32.9	45.7	22.6
% Pre-harvest contract grain stored on farm on 10 October, 2025	%	32.0	13.9	20.0	11.6	51.7	41.6
% Sold at spot/free price and delivered by 10 October, 2025	%	2.2	25.5	0.5	29.8	0.0	20.1
% Sold at spot/free price and stored on farm on 10 October, 2025	%	9.9	8.6	0.4	6.7	0.0	0.0
(For milling or malting only) % Sold for feed by 10 October, 2025	%	19.8	-	18.5	-	0.0	-
(For feed only) % Used on own farm by 10 October, 2025	%	-	1.2	-	2.0	-	9.7
% Unsold stocks on hand (2025 harvest only) on 10 October, 2025	%	6.6	14.3	29.7	17.1	2.6	6.0
Sales channels (2025 harvest)							
% Sold on pre-harvest contract (total) by 10 October, 2025	%	61.5	50.4	50.8	44.5	97.4	64.2
% Sold at spot/free price (total) by 10 October, 2025	%	12.2	34.1	0.9	36.5	0.0	20.1
On-farm storage (2025 harvest)							
% Sold and delivered (total) by 10 October, 2025	%	31.7	62.0	31.3	62.7	45.7	42.7
% Sold and stored on farm (total) on 10 October, 2025	%	41.9	22.5	20.5	18.3	51.7	41.6
Total sales (2025 harvest)							
% Sold (of total crop) by 10 October, 2025 (includes sold for feed and used on farm)	%	93.4	85.7	70.3	82.9	97.4	94.0
% Unsold (of total crop) on 10 October, 2025	%	6.6	14.3	29.7	17.1	2.6	6.0

In Table A.3, autumn/winter sowings, spring sowings, and spring sowing intentions are given as sums over the 102 survey farms.

Table A.3 Autumn/winter sowings and spring sowings and intentions (data totalled over all survey respondents)						
	Milling wheat	Feed wheat	Malting barley	Feed barley	Milling oats	Feed oats
Number of farmers in survey who have sown or intend to sow this crop as at 10 October, 2025	31	68	12	75	5	7
Number of survey farmers who have sown in Autumn/winter 2025	**25**	**58**	**4**	**27**	**1**	**0**
Number of survey farmers who have already sown in Spring 2025, as at 10 October, 2025	**15**	**15**	**7**	**54**	**1**	**7**
Number of survey farmers who still intend to sow in Spring 2025, as at 10 October, 2025	**1**	**2**	**2**	**21**	**3**	**0**
Total hectares on survey farms, 2024 harvest	1,901	4,529	1,312	3,059	193	159
Total hectares on survey farms, 2025 harvest	1,635	4,345	1,206	3,510	220	133
Sowings and intentions for the current season's crop (2025/26)						
Autumn/winter sowings on survey farms (hectares; for harvest in 2026)	768	4,404	116	889	23	0
Spring sowings already sown on survey farms by 10 October, 2025 (hectares; for harvest in 2026)	518	542	126	2,391	45	93
Spring sowings still to sow on survey farms (intentions) as at 10 October, 2025 (hectares; for harvest in 2026)	12	36	45	720	87	0
Total spring 2025 sowings plus intentions on survey farms as at 10 October, 2025 (hectares; for harvest in 2026)	530	578	171	3,111	132	93
Total predicted hectares on survey farms for 2026 harvest, as at 10 October, 2025	1,298	4,982	287	4,000	155	93
"Forward sales" of 2025/26 crop						
Total hectares on survey farms that are "forward sold", as at 10 October, 2025	561	2,094	67	1,459	129	34
Percentage of hectares on survey farms that are "forward sold", as at 10 October, 2025	43	42	23	36	83	37
Comparison of sowings/intentions over the 2023/24, 2024/25 and 2025/26 seasons (on survey farms)						
Estimated % change in total sowings on survey farms, 2024 to 2025 harvests	-14	-4	-8	15	14	-16
Estimated % change in total sowings on survey farms, 2025 to 2026 (predicted) harvests	-21	15	-76	14	-29	-30
Estimated % change in total sowings on survey farms, 2024 to 2026 (predicted) harvests (TOTAL over TWO seasons)	-32	10	-78	31	-20	-41
Comparison of spring sowing intentions as at July 1, 2025 with spring sowings plus intentions as at 10 October, 2025 (on survey farms)						
Estimated spring 2025 sowing intentions on survey farms as at 1 July, 2025 (hectares; for harvest in 2026)	542	432	398	2,563	130	112
Estimated spring 2025 sowings plus intentions on survey farms as at 10 October, 2025 (hectares; for harvest in 2026) (as above)	530	578	171	3,111	132	93
Change in spring 2025 sowings/intentions on survey farms between 1 July, 2025 and 10 October, 2025 (hectares; for harvest in 2026)	-2	34	-57	21	2	-17

For scaling up to NZ-wide totals, the most recent figures are the Final 2024 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 2024 harvest crop was on the survey farms. For wheat, it was 100/ 7.216 = 13.9%. For barley, it was 100/ 10.570 = 9.5%. For oats, it was 100/ 12.507 = 8.0%. That is, the percentages were highest for wheat, lower for barley and lowest for oats.

Table A.4 Scaling up from survey totals to NZ-wide totals using Final 2024 Agricultural Production Statistics (APS) data

	Total wheat	Total barley	Total oats
Total hectares on survey farms, 2024 harvest	6,430	4,371	352
Total tonnes on survey farms, 2024 harvest	62,269	34,228	2,277
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	7.216	10.570	12.507
Tonnes	7.461	10.386	10.233
Comparison of yields between survey and APS statistics			
Survey farms, 2024 harvest (t/ha)	9.7	7.8	6.5
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.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.

Report prepared by Cropright Ltd.