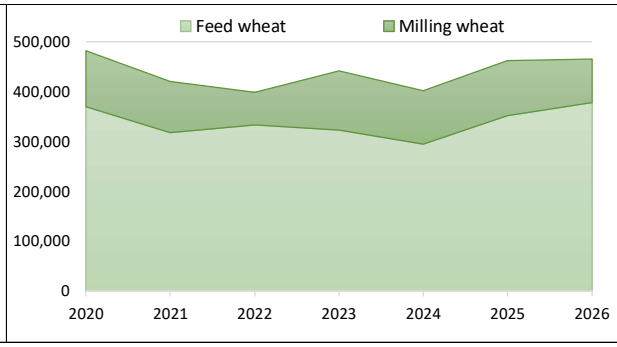
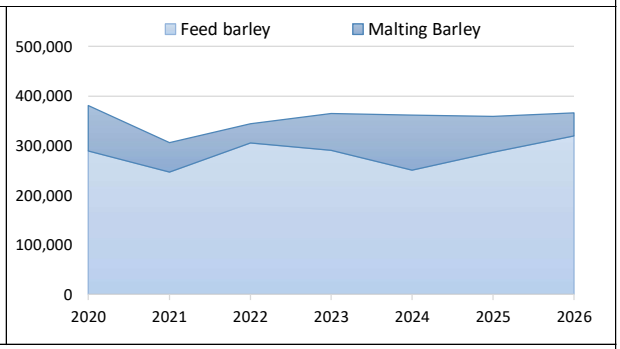
NEW ZEALAND SURVEY OF CEREAL AREAS AND VOLUMES: **REPORT OCTOBER 10, 2026**

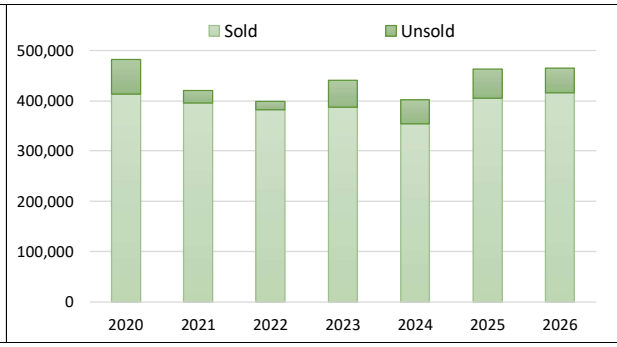
AIMI Arable Industry Marketing Initiative

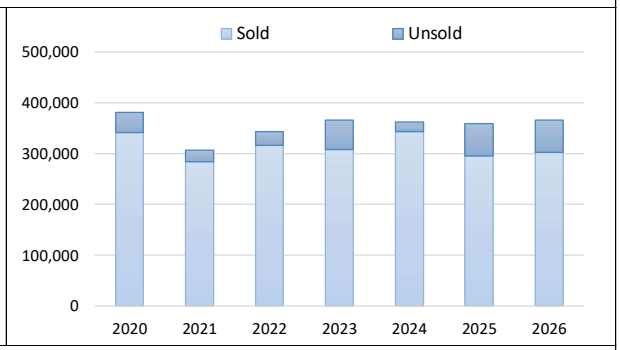
SURVEY SUMMARY - October 10th (▲▼Increase/decrease over previous year)

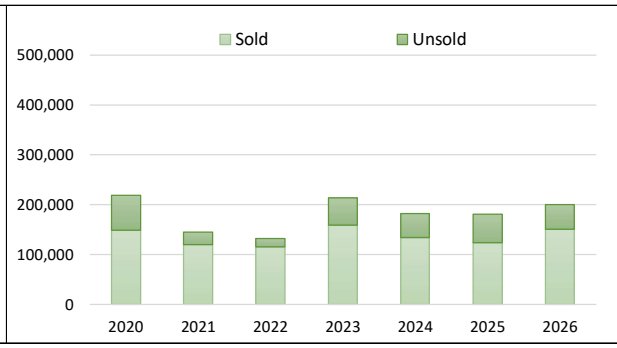
	WHEAT (feed & milling)	BARLEY (feed & malting)
PRODUCTION (tonnes)	▬ 0%	▲ 2%
SALES (tonnes sold)	▲ 3%	▲ 2%
ON-FARM (tonnes)	▲ 10%	▼ 17%
SOWING (hectares)	▼ 12%	▼ 10%

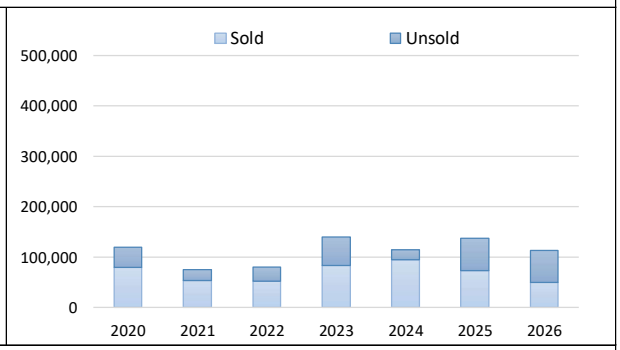


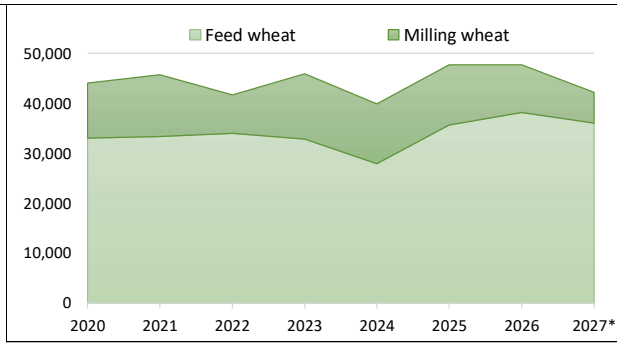


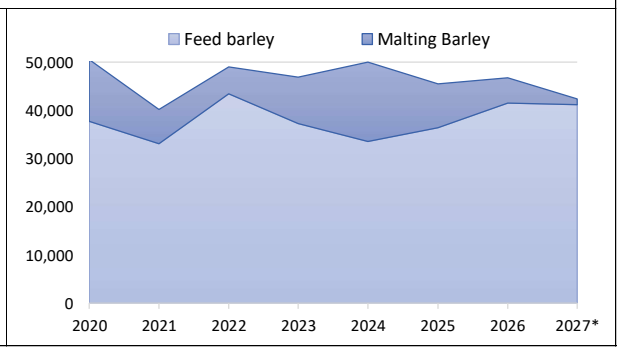












Survey details

*Data from **104 NZ survey farms** that completed each of the last three cereal surveys (October 2025 and July and October 2026) was scaled up to the national level using the most recent, 2025, final NZ Agricultural Production Statistics (APS). This data reflects the position at the 10th October 2026 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.*
*Graph data on page 1 are from previous October AIMI Reports except from the two most recent years, which are matched data (same group of growers) from the current survey. * = Sowing data represent final harvest hectares except for the final year (*) which is based on sowings and sowing predictions. The last three years data are matched from the same set of growers.*

Key Points as at 10 October 2026: (figures have been rounded to nearest 100):

- For the 2025/2026 season, **cereal grain production** (wheat, barley and oats) in NZ totalled an estimated 850,000 tonnes (up 2,200 t on last season), from a near identical harvest area of 98,000 hectares.
- **Unsold stocks** of cereal grain, summed over all six crops (112,000 t), are estimated to be 8% lower than October last year. The largest movement is feed wheat (down 15,800 t), although this is partially offset by increases in milling wheat (up 6,700 t) and feed barley (up 2,800 t).
- **Unsold stocks** of cereal grain, summed over all six crops, are estimated to have reduced by 43% between 1 **July** 2026 and 10 **October** 2026.
- **On-farm storage** of **sold grain** is similar to this time last year (up 3,000 t). **Total on-farm storage**, including both sold and unsold grain, summed over all six crops at 322,100 tonnes, is down 2% compared to the same time last year.
- The **total area** sown or intended to be **sown in cereals**, for harvest in 2027, is estimated to be down 10% on the area harvested this year (from 98,000 to 88,300 hectares). An estimated 84% of the 2027 crop had been sown, which is slightly lower than the ten-season average (86%), mainly due to wet conditions delaying spring sowings of oats and feed barley in Southland.
- **Forward sales** of hectares sown, or intended to be sown, in 2026 are estimated to be 35% of the area for harvest in 2027, the same as the previous October.

A wet September was followed by an improving October. The impact was greatest in the south, with reports of flooded autumn crops and delays to spring sowings. Conditions have been more favourable from Mid Canterbury north, where crops have established well. However, conditions are getting drier further north, and some growers are watching for El Niño.

CROP SUMMARY AT October 10th

Milling wheat: The 2026 harvest is estimated at 87,200 t. Compared to last season, unsold grain rose 6,700 t to 13,000 t, while sold grain stored on farm fell 14,300 t to 33,000 t. Together, total on-farm storage was 14% lower.

Sowing is complete, and the area for harvest in 2027 is estimated at 6,100 ha, down 36%.

Feed wheat: Production reached an estimated 377,800 t. Compared to last season, unsold grain (35,400 t) was lower by 15,800 t, but sold grain stored on farm (118,200 t) was higher by 42,200 t, lifting total on-farm storage by 21%.

With 98% of crops sown by October 10, the 2027 area is estimated at 36,000 ha (down 5%).

Feed barley: An estimated 320,200 t was harvested. Unsold grain was 50,500 t (up 2,800 t) and sold grain stored on farm was down 7,100 t (48,400 t), leaving total on-farm storage 4% lower than the same time last year.

Only 72% of crops had been sown by October 10. The 2027 area is estimated at 41,200 ha, which is similar to last season (down 1%).

Malting barley: Production fell by 37% on last season to an estimated 46,100. Unsold grain (13,000 t) was 2,700 t lower, while sold grain on farm dropped sharply to 1,800 t (down 16,600 t), resulting in total on-farm storage 57% lower than last year.

All crops are sown, but the 2027 area is estimated at just 1,200 ha, a 78% reduction.

Milling oats: The harvest is estimated at 14,400 t. Compared to last season, less than 100 t remains unsold (down 200 t), and sold grain stored on farm rose 1,600 t to 7,800 t, a 21% increase in total on-farm storage.

Only half the crop had been sown by October 10, and the 2027 area is estimated at 2,300 ha (down 10%).

Feed oats: An estimated 4,400 t was harvested, all of it sold. Compared to last season, sold grain on farm fell 2,800 t to 900 t, cutting total on-farm storage by 79%.

With 68% sown, the 2027 area is estimated at 1,500 ha, up 66%, the only crop expected to increase.

Milling wheat (tonnes)

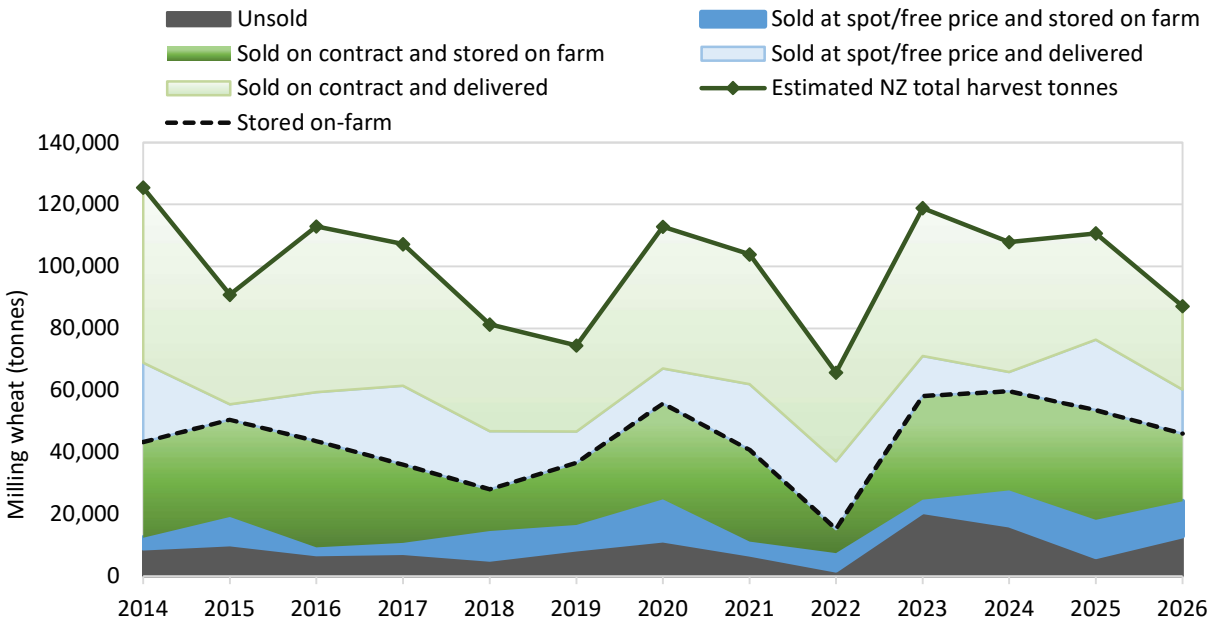


Figure 1. NZ harvest tonnage and sales channels for milling wheat as estimated in October each year.
(Note: excludes carryover stock. "Sold at spot/free price and delivered" includes grain sold for feed. Historical data for 2014 to 2024 are from October AIMI Reports for 2024 and earlier, while data for 2025 and 2026 are matched data from the current report.)

Feed wheat (tonnes)

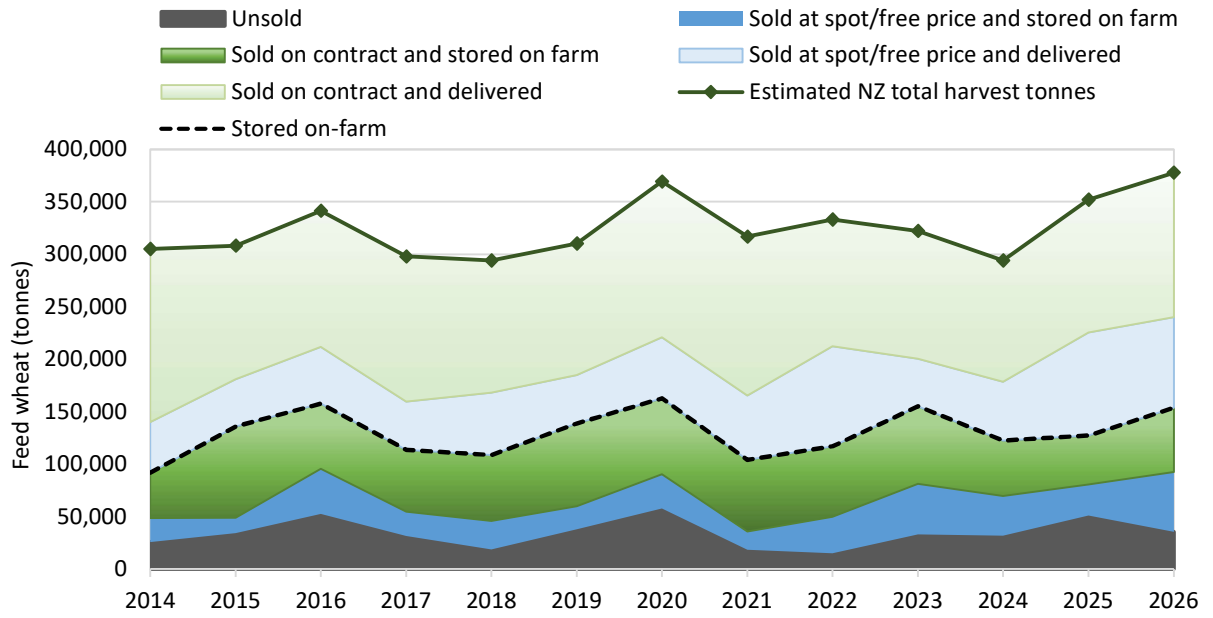


Figure 2. NZ harvest tonnage and sales channels for feed wheat as estimated in October each year.

(Note: excludes carryover stock. "Sold at spot/free price and delivered" includes grain used on own farm. Historical data for 2014 to 2024 are from October AIMI Reports for 2024 and earlier, while data for 2025 and 2026 are matched data from the current report.)

Feed barley (tonnes)

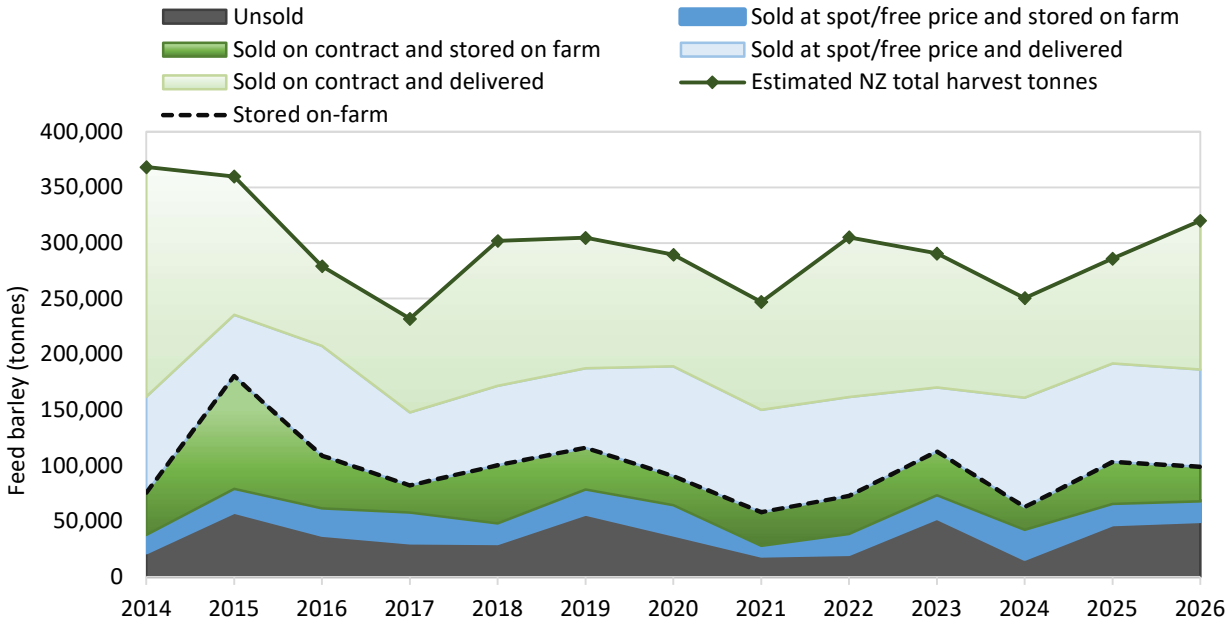


Figure 3. NZ harvest tonnage and sales channels for feed barley as estimated in October each year.
(Note: excludes carryover stock. "Sold at spot/free price and delivered" includes grain used on own farm. Historical data for 2014 to 2024 are from October AIMI Reports for 2024 and earlier, while data for 2025 and 2026 are matched data from the current report.)

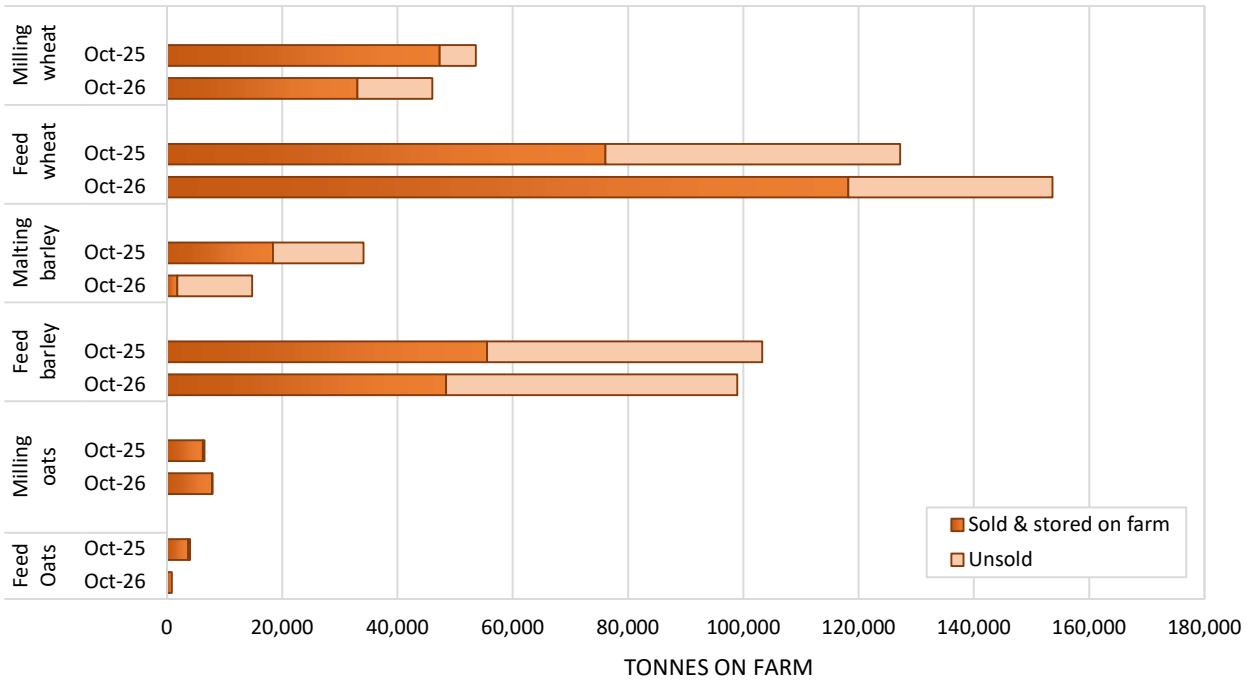


Figure 4. Changes in NZ stocks on farm for wheat, barley and oats between October 10, 2025 and October 10, 2026.
(Note: Data also reported in Table 1 and Figures 1 to 3. All estimates are based upon scaling up from the current survey sample, which consists of only those growers who responded to each of the last three AIMI surveys; these estimates therefore provide more precise, matched comparisons.)

Sowing (Hectares)

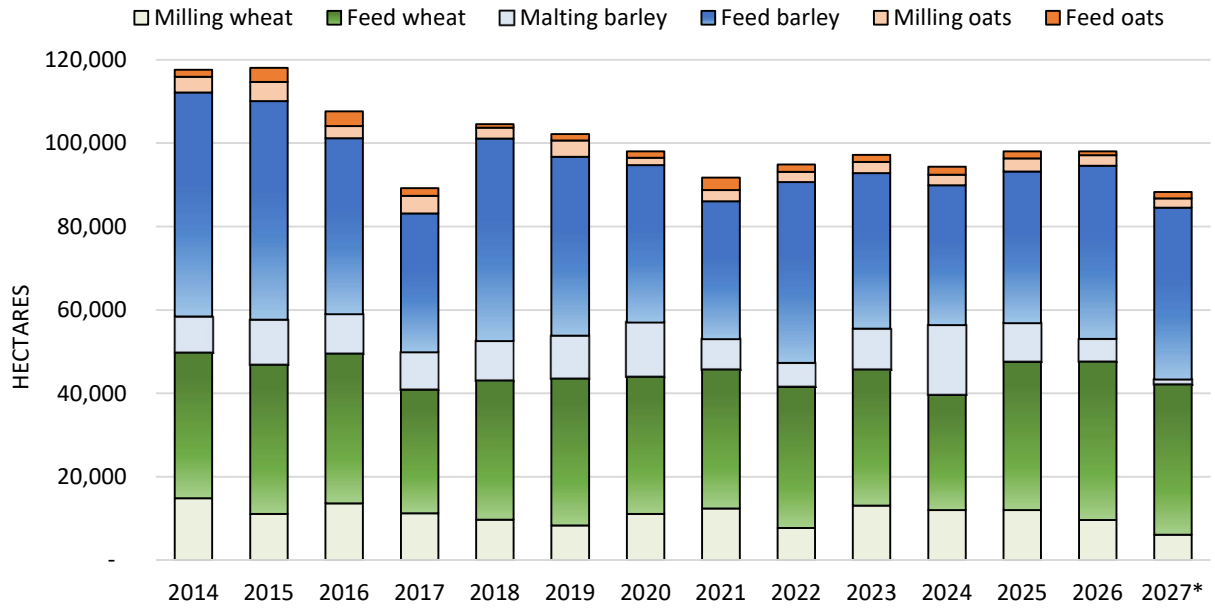


Figure 5. NZ harvest hectares for six cereal crops as estimated in October each year from 2014 to 2026, and predicted harvest hectares for 2027(*).

(Note: All figures represent final harvest hectares except for 2027 which is made up of hectares already sown and hectares intended to be sown for harvest in 2027. Refer to Fig. 7 for hectares already sown by October 10, 2026. Figures for 2025, 2026 and 2027 (predicted) are from the current report and are a matched comparison, while other figures are from previous October AIMI reports for 2014 – 2024.)

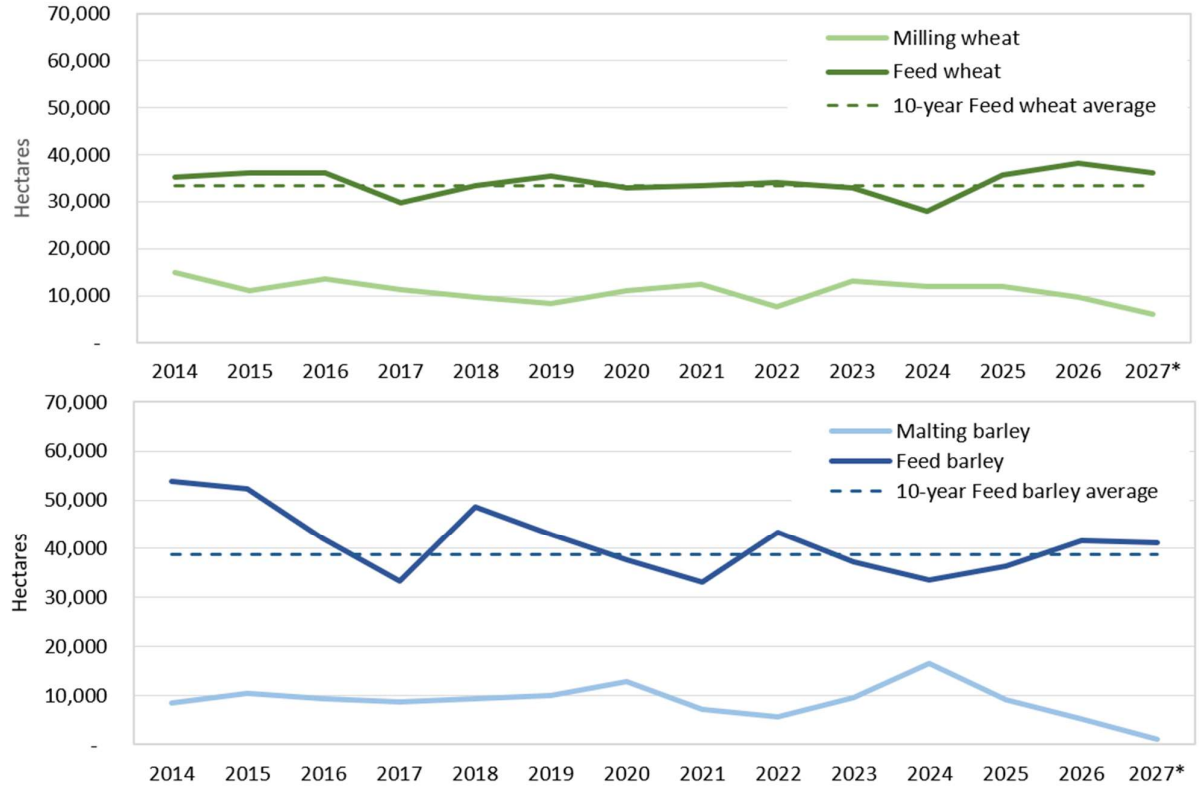


Figure 6. NZ harvest hectares for wheat and barley crops, and the 10-year average, as estimated in October each year from 2014 to 2026, and predicted harvest hectares for 2027(*). (*See note above.)*

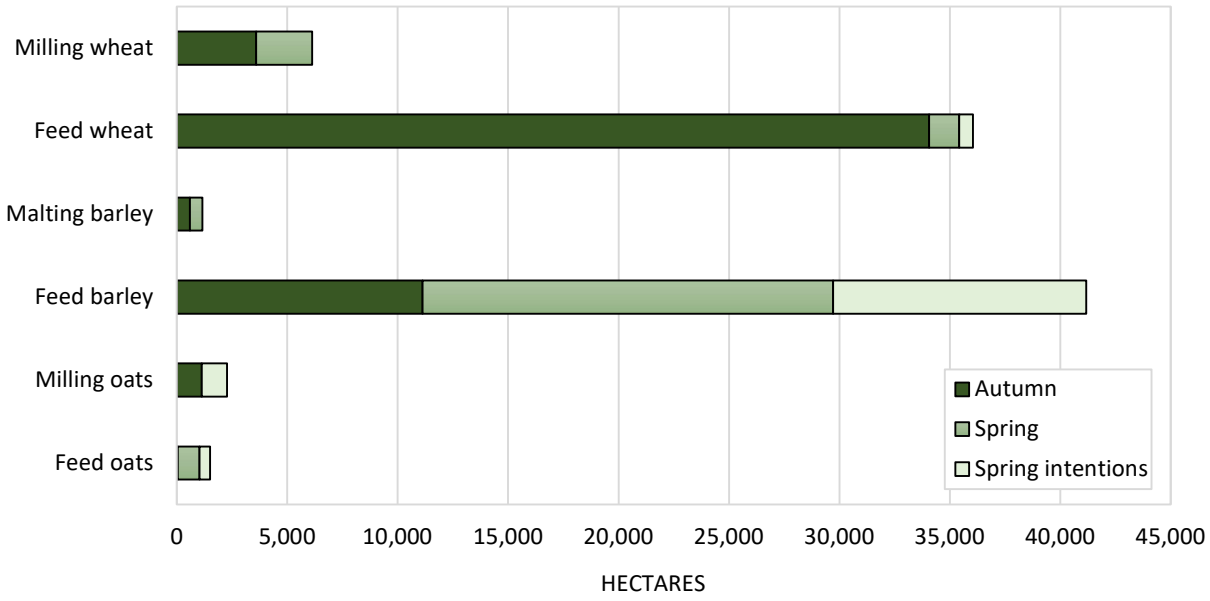


Figure 7. Estimated NZ hectares sown in autumn and spring 2026, plus NZ spring hectares yet to sow (spring intentions) for harvest in 2027, based on data collected on October 10, 2026.
(Note: Data also reported in Table 2.)

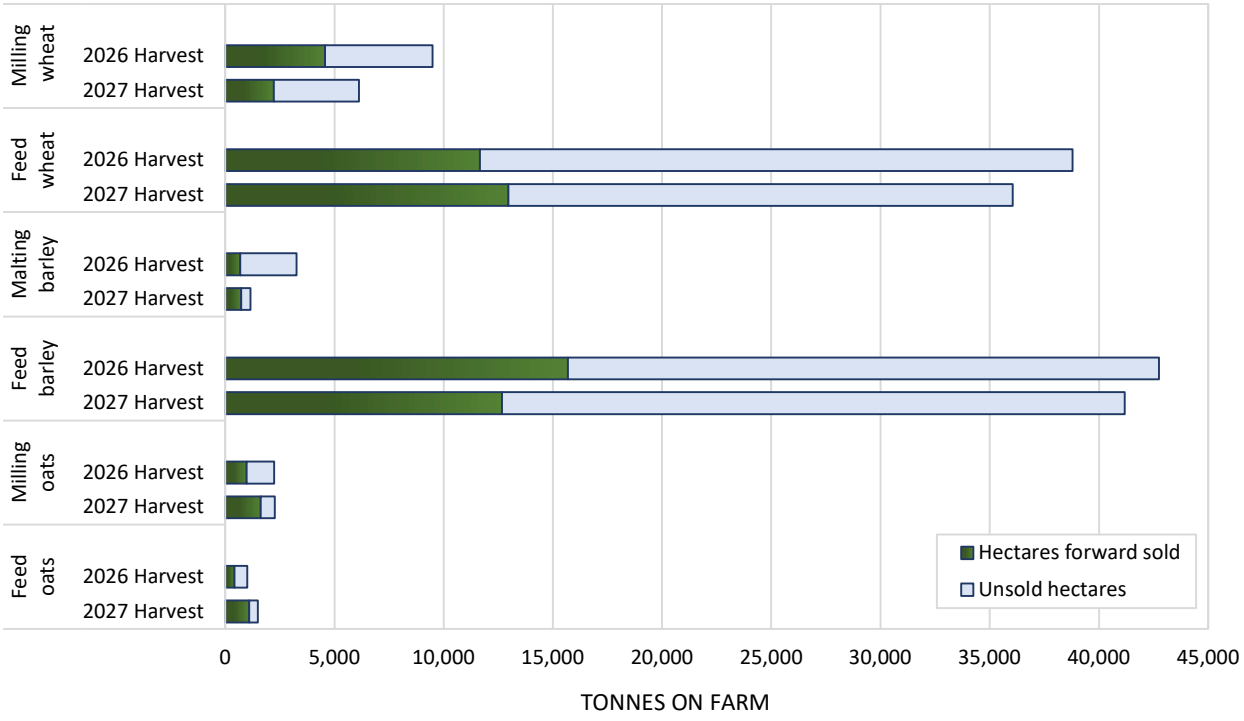


Figure 8. Comparison of hectares of total NZ crop sown (autumn and spring sowings plus spring intentions) that had been forward sold as at October 10, 2025 and 2026 for predicted 2026 and predicted 2027 harvests, respectively. *(Note: this is a matched comparison.)*

Table 1. Estimated NZ national figures for the 2026 harvest, plus sold and delivered tonnages, for six cereal crops as at October 10, 2026.

	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 2026		**24**	**70**	**11**	**76**	**7**	**6**	**102**
2025 harvest								
Estimated NZ total hectares, 2025 harvest	ha	12,030	35,670	9,101	36,399	3,113	1,687	98,000
Estimated NZ total tonnes, 2025 harvest	tonnes	110,743	351,957	72,979	286,021	17,721	8,379	847,800
2026 harvest								
Estimated NZ total hectares, 2026 harvest	ha	9,629	38,128	5,263	41,557	2,527	902	98,006
Estimated NZ total tonnes, 2026 harvest	tonnes	87,188	377,754	46,130	320,161	14,355	4,364	849,952
Sold under pre-harvest contract and delivered by 10 October, 2026	tonnes	26,967	137,762	24,088	133,735	6,489	2,475	331,516
Pre-harvest contract grain stored on farm on 10 October, 2026	tonnes	21,868	61,062	1,252	30,964	7,809	856	123,811
Sold at spot/free price and delivered by 10 October, 2026	tonnes	10,348	78,196	7,013	80,734	0	856	177,147
Sold at spot/free price and stored on farm on 10 October, 2026	tonnes	11,152	57,148	501	17,433	0	0	86,234
(For milling or malting only) Sold for feed by 10 October, 2026	tonnes	3,868	-	250	-	0	-	4,118
(For feed only) Used on own farm by 10 October, 2026	tonnes	-	8,167	-	6,758	-	178	15,103
Unsold stocks on hand (2026 harvest only) on 10 October, 2026	tonnes	12,985	35,418	13,025	50,536	57	0	112,022
Sales channels (2026 harvest)								
Sold on pre-harvest contract (total) by 10 October, 2026	tonnes	48,835	198,825	25,340	164,699	14,298	3,330	455,327
Sold at spot/free price (total) by 10 October, 2026	tonnes	21,500	135,344	7,514	98,167	0	856	263,381
On farm storage (2026 harvest)								
Sold and delivered (total) by 10 October, 2026	tonnes	37,315	215,958	31,101	214,469	6,489	3,330	508,663
Sold and stored on farm (total) on 10 October, 2026	tonnes	33,020	118,211	1,753	48,397	7,809	856	210,046
Total sales (2026 harvest)								
Sold (grand total) by 10 October, 2026 (includes sold for feed & used on farm)	tonnes	74,202	342,336	33,105	269,624	14,298	4,364	737,930
Unsold stocks on hand (2026 harvest only) on 10 October, 2026	tonnes	12,985	35,418	13,025	50,536	57	0	112,022
Comparison of hectares and tonnes between last two harvests								
Estimated % change in hectares, 2025 to 2026 harvest	%	-20	7	-42	14	-19	-47	0.0
Estimated % change in tonnes, 2025 to 2026 harvest	%	-21	7	-37	12	-19	-48	0.3
Comparison of yields (t/ha) between last two harvests								
NZ-wide estimated yield, 2025 harvest	t/ha	9.2	9.9	8.0	7.9	5.7	5.0	8.7
NZ-wide estimated yield, 2026 harvest	t/ha	9.1	9.9	8.8	7.7	5.7	4.8	8.7

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, 2026 and 10 October, 2026 (based upon matched data)								
Sold and stored on farm (total) on 1 July, 2026 (2026 harvest)	tonnes	49,069	169,725	2,274	84,767	12,194	1,227	319,256
Sold and stored on farm (total) on 10 October, 2026 (2026 harvest)	tonnes	33,020	118,211	1,753	48,397	7,809	856	210,046
Unsold stocks on hand (from 2026 harvest) on 1 July, 2026	tonnes	17,908	67,484	22,793	87,517	57	0	195,759
Unsold stocks on hand (from 2026 harvest) on 10 October, 2026 (as above)	tonnes	12,985	35,418	13,025	50,536	57	0	112,022
% decrease in total grain stored on-farm from July 2026 to Oct 2026	%	31	35	41	43	36	30	37
Recalculated 10 October, 2025 survey breakdown to enable more precise, matched comparisons between 10 October, 2025 and 10 October, 2026								
Sold under pre-harvest contract and delivered by 10 October, 2025	tonnes	34,384	126,604	15,049	94,195	11,232	2,845	284,309
Pre-harvest contract grain stored on farm on 10 October, 2025	tonnes	35,431	46,616	18,014	37,692	6,204	3,673	147,630
Sold at spot/free price and delivered by 10 October, 2025	tonnes	1,256	91,014	421	82,988	0	1,105	176,784
Sold at spot/free price and stored on farm on 10 October, 2025	tonnes	11,863	29,428	361	17,804	0	0	59,456
(For milling or malting only) Sold for feed by 10 October, 2025	tonnes	21,508	-	23,425	-	0	-	44,933
(For feed only) Used on own farm by 10 October, 2025	tonnes	-	7,125	-	5,571	-	428	13,123
Unsold stocks on hand (2025 harvest only) on 10 October, 2025	tonnes	6,300	51,171	15,710	47,771	285	328	121,565
Comparison of on-farm storage between last October and this October (based upon matched data)								
Sold and stored on farm (total) on 10 October, 2025 (2025 harvest)	tonnes	47,294	76,044	18,375	55,496	6,204	3,673	207,086
Sold and stored on farm (total) on 10 October, 2026 (2026 harvest)	tonnes	33,020	118,211	1,753	48,397	7,809	856	210,046
Unsold stocks on hand (from 2025 harvest) on 10 October, 2025	tonnes	6,300	51,171	15,710	47,771	285	328	121,565
Unsold stocks on hand (from 2026 harvest) on 10 October, 2026 (as above)	tonnes	12,985	35,418	13,025	50,536	57	0	112,022
% change in total grain stored on-farm from Oct 2025 to Oct 2026	%	-14	21	-57	-4	21	-79	-2
Change in total grain (in TONNES) stored on-farm from Oct 2025 to Oct 2026	tonnes	-7,589	26,414	-19,307	-4,333	1,376	-3,145	-6,584

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

Statistics NZ is gratefully acknowledged for supplying final 2025 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, 2026.

	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, 2026	**21**	**67**	**6**	**82**	**6**	**7**	**97**
Estimated NZ total hectares, 2025 harvest	12,030	35,670	9,101	36,399	3,113	1,687	98,000
Estimated NZ total hectares, 2026 harvest	9,629	38,128	5,263	41,557	2,527	902	98,006
Sowings and intentions for the current season's crop (2026/27)							
Estimated NZ total autumn/winter 2026 sowings (hectares; for harvest in 2027)	3,589	34,063	597	11,130	1,126	46	50,552
Estimated NZ total spring 2026 sowings already sown by 10 October, 2026 (hectares; for harvest in 2027)	2,530	1,360	563	18,590	0	976	24,018
Estimated NZ total spring 2026 sowings still to sow (intentions) as at 10 October, 2026 (hectares; for harvest in 2027)	0	627	0	11,449	1,145	476	13,697
Predicted NZ total hectares, 2027 harvest (Autumn/winter 2026 sowings and Spring 2026 sowings & intentions, all combined)	6,119	36,050	1,160	41,169	2,271	1,498	88,266
% of predicted NZ hectares which had already been sown by 10 October, 2026	100	98	100	72	50	68	84
Average over previous 10 years of % of predicted NZ hectares which had been sown by 10 October	99	98	75	75	61	83	86
"Forward sales" of 2026/27 crop							
Predicted NZ total hectares that are "forward sold" (2027 harvest) as at 10 October, 2026	2,233	12,966	727	12,664	1,621	1,095	31,305
Estimated percentage of NZ total hectares that are "forward sold" (2027 harvest) as at 10 October, 2026	36	36	63	31	71	73	35
Predicted NZ total hectares that are "forward sold" (2026 harvest) as at 10 October, 2025 (Recalculated to enable matched comparison)	4,564	11,664	688	15,684	974	421	33,996
Estimated percentage of NZ total hectares that are "forward sold" (2026 harvest) as at 10 October, 2025 (Recalculated to enable matched comparison)	48	30	21	37	43	42	35
Average over previous 10 years of % of predicted NZ hectares which had been "forward sold" by 10 October	55	45	72	37	81	47	47
Comparison of sowings/intentions between the 2025/26 and 2026/27 seasons (NZ totals) (based upon matched data)							
Estimated % change in NZ total sowings, 2025 to 2026 harvests	-20	7	-42	14	-19	-47	0
Estimated % change in NZ total sowings, 2026 to 2027 (predicted) harvests	-36	-5	-78	-1	-10	66	-10
Estimated % change in NZ total sowings, 2025 to 2027 (predicted) harvests (TOTAL over TWO seasons)	-49	1	-87	13	-27	-11	-10
Estimated change in NZ total sowings, 2026 to 2027 (predicted) harvests (in HECTARES)	-3,510	-2,078	-4,104	-387	-256	596	-9,739

Note: *The matched comparisons in the last two sections were based upon scaling up data from the exact same survey farms for the last three AIMI surveys.*

APPENDIX

NEW ZEALAND SURVEY OF CEREAL AREAS AND VOLUMES: OCTOBER 10, 2026

Survey panel details:

121 Growers: 107 completed current survey, **104 in report group** (*Must have completed October 2025, July & October 2026 surveys).

Survey comments:

- A very wet September was followed by an improving October. The impact was greatest in the south and lightest in Mid Canterbury. Some growers are watching for El Niño.
- Costs (fuel, fertiliser, drying) are outpacing grain prices. Grain is moving slowly and feed sales are flat. Several growers are leaving cereals or cutting back. Forward sales by area are common in the south and Northern South Island.

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	5	5	27	29	16	22	**104**

Hectares harvested in 2026 and harvest intentions for 2027 (from 104 SCALED responses)

	Milling Wheat		Feed Wheat		Malting Barley		Feed Barley		Milling Oats		Feed Oats	
Region	**2026**	**2027**	**2026**	**2027**	**2026**	**2027**	**2026**	**2027**	**2026**	**2027**	**2026**	**2027**
ENI	-	-	2,490	1,889	826	103	3,304	4,037	-	-	165	687
SWNI	-	-	415	420	119	-	-	-	-	-	-	-
NSI	2,612	2,073	5,123	4,723	320	258	11,670	9,104	-	-	46	92
MC	4,543	2,902	8,823	8,414	3,998	798	9,329	11,687	-	-	215	244
SCNO	2,474	1,145	9,310	9,243	-	-	8,509	6,877	-	-	137	-
SOS	-	-	11,967	11,361	-	-	8,744	9,464	2,527	2,271	339	476
Total	9,629	6,119	38,128	36,050	5,263	1,160	41,557	41,169	2,527	2,271	902	1,498

Yield (tonnes/hectare) from survey farms as at 10 October 2026 (from 104 SCALED responses)

Region	Milling Wheat	Feed Wheat	Malting Barley	Feed Barley	Milling Oats	Feed Oats
ENI	-	6.9	6.3	7.3	-	5.2
SWNI	-	8.2	5.3	-	-	-
NSI	8.6	8.8	7.7	7.6	-	3.9
MC	9.7	11.0	9.5	7.7	-	4.9
SCNO	8.4	9.7	-	7.4	-	3.6
SOS	-	10.5	-	8.2	5.7	5.3
Average	**9.1**	**9.9**	**8.8**	**7.7**	**5.7**	**4.8**

Unsold tonnes (from 104 SCALED responses)

Region	Milling Wheat	Feed Wheat	Malting Barley	Feed Barley	Milling Oats	Feed Oats
ENI	-	-	-	2,004	-	-
SWNI	-	-	-	-	-	-
NSI	-	3,190	-	7,164	-	-
MC	10,641	12,638	13,025	22,834	-	-
SCNO	2,344	9,670	-	15,770	-	-
SOS	-	9,921	-	2,765	57	-
Total	**12,985**	**35,418**	**13,025**	**50,536**	**57**	**-**

For scaling up to NZ-wide totals, the most recent figures are the Final 2025 Agricultural Production Statistics (APS) figures, as in Table A.4. On average, the yields on the survey farms were similar for wheat, and higher for barley and oats.

From the scale-up factors, we can see what percentage of the area of each 2025 harvest crop was on the survey farms. For wheat, it was 100/ 8.357 = 12.0%. For barley, it was 100/ 10.326 = 9.7%. For oats, it was 100/ 9.157 = 10.9%. That is, the percentages were highest for wheat, then oats, and lowest for barley.

Table A.4 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, 2025 harvest	5,708	4,406	524
Total tonnes on survey farms, 2025 harvest	55,267	35,832	3,660
Final APS statistics for 2025 harvest, total hectares	47,700	45,500	4,800
Final APS statistics for 2025 harvest, total tonnes	462,700	359,000	26,100
Multiplier for scaling up from survey farms to APS statistics			
Hectares	8.357	10.326	9.157
Tonnes	8.372	10.019	7.131
Comparison of yields between survey and APS statistics			
Survey farms, 2025 harvest (t/ha)	9.7	8.1	7.0
APS statistics, 2025 harvest (t/ha)	9.7	7.9	5.4

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 historical data, except where stated otherwise: in Figures 1–4 and 8 the last two years are matched, in Figures 5 and 6 the last three years are matched, and Figure 7 presents only the current survey year's data.

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