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AUSTRALIAN CROP REPORT



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The next issue of the *Australian Crop Report* is scheduled to be released on Tuesday, 18 February 2003.

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- 2003-04 winter crop area estimates
- 2002-03 summer crop production updates

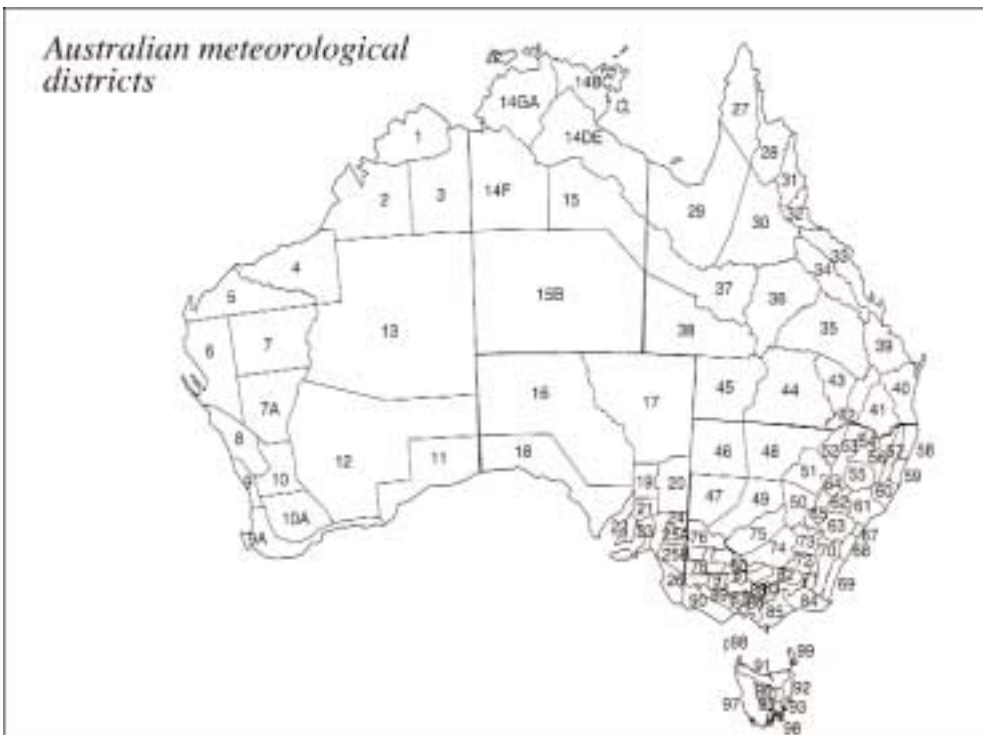
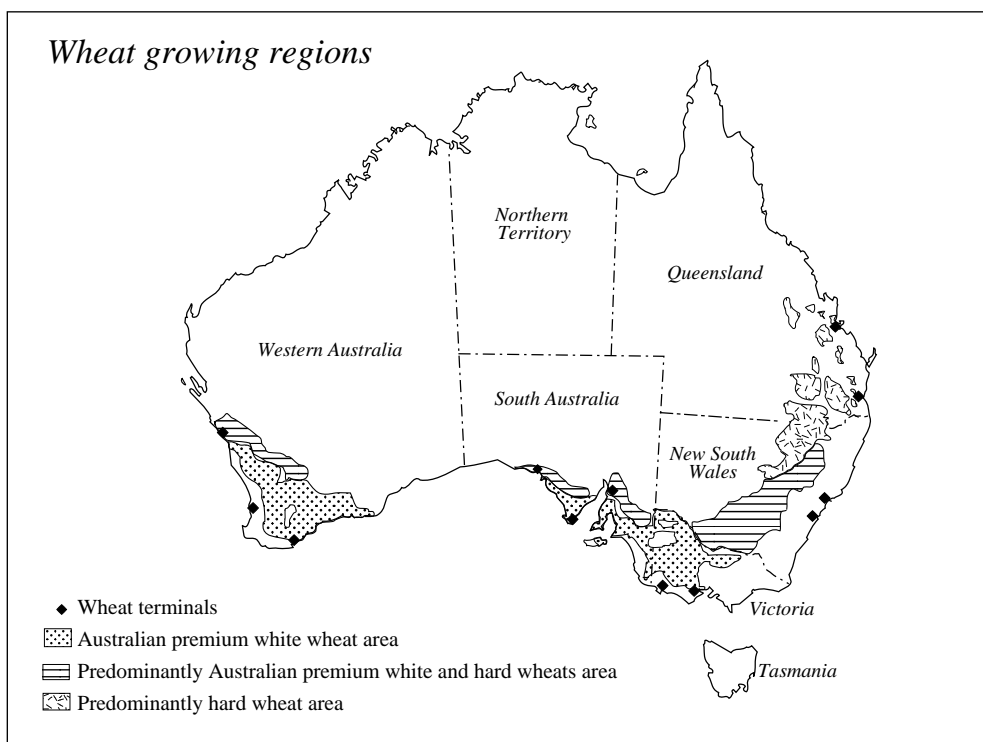
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Overview

- *Widespread dry conditions throughout the Australian grain belt have severely reduced winter grains production in 2002-03, with production forecast to decline to 16.2 million tonnes, 21 million tonnes below last season and the lowest harvest since 1994-95 when 14.7 million tonnes were harvested*
- *Falls in production are forecast to be greatest in New South Wales, with winter grains production to decline from 9.9 million tonnes in 2001-02 to 2.8 million tonnes in 2002-03, and Western Australia, with production declining from 11.3 million tonnes to under 6.7 million tonnes.*
- *Of the major winter grains, wheat production is forecast to decline by 14.0 million tonnes to around 10.0 million tonnes, barley down 4.2 million tonnes to under 3.3 million tonnes, and canola down 1.0 million tonnes to 0.6 million tonnes. The total winter pulse production forecast of 1.3 million tonnes is only around half of last season's harvest.*
- *The area planted to summer crops is forecast to decline by 41 per cent to 0.94 million hectares principally because shortages of irrigation water are likely to result in decreased plantings of cotton and rice in 2002-03.*

Seasonal conditions

Winter crops

The current 2002 winter crop growing season has in many regions been one of the worst on record. Listed in table A is the rainfall received in the April–October period of 2002 in the major crop growing areas in Australia. Any rainfall recorded prior to April is generally too early for the planting of crops, although such rains can be useful for crops later in the season if they have contributed to a buildup of subsoil moisture. Rainfall beyond October adds little to the yield potential of winter crops and can reduce yields and damage the quality depending on the amount of rain received.

Rainfall received in 2002 is also presented as a percentage of the average rainfall received in the April–October period over the 90 years 1913–2002 (table A). Rainfall received in 2002 has also been ranked from 1 to 90 with, for instance, the year with the lowest rainfall recorded over the 90 year period

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being ranked as 1. The 2002 season for the Upper North region in South Australia, for example, has been the driest in 90 years and has therefore been ranked as 1 in the table.

Below average rainfall by itself does not necessarily mean that a below average yielding crop will be harvested. Fortuitous rains at key times during the season can boost yields, while apparently good rainfall can mask the situation that most of the rain was recorded in one period. Nevertheless, the rankings indicate that rainfall received in 2002 in around 75 per cent of the mainland crop growing regions ranks in the bottom 10 per cent of observations for that region.

A *April–October rainfall in major grain growing areas*

Meteorological district	2002 rain	% of ave a	Rank b	Meteorological district	2002 rain	% of ave a	Rank b
	mm	%				mm	%
Queensland				Victoria (cont.)			
Central Highlands (35)	110	48	7	South Wimmera (79)	240	69	13
Moreton South Coast (40)	249	59	11	Western Plains (89)	346	78	12
East Darling Downs (41)	170	53	7	Lower North (80)	133	45	3
West Darling Downs (42)	154	63	12	Upper North (81)	166	50	5
Maranoa (43)	122	53	10	Lower North East (82)	359	70	16
New South Wales				Upper North East (83)	476	64	12
North West Plains (W) (52)	87	36	2	North Central (88)	372	68	13
North West Plains (E) (53)	118	43	4	Western Australia			
North West Slopes (N) (54)	127	41	3	North Coast (8)	164	66	5
North West Slopes (S) (55)	117	36	2	Central Coast (9)	428	65	3
Northern Tablelands (N) (56)	161	44	3	Northern Central (10)	567	62	5
Central West Plains (S) (50)	141	55	5	South Coast (9A)	232	73	7
Central West Plains (N) (51)	88	36	3	South Central (10A)	225	68	5
Central West Slopes (N) (64)	139	40	3	South East (12)	106	53	1
Central West Slopes (S) (65)	174	52	6	South Australia			
Central Tablelands (N) (62)	139	41	3	Upper South East (25B)	186	63	6
Central Tablelands (S) (63)	188	42	2	Murray Mallee (25A)	118	55	6
Riverina (W) (74)	164	53	6	Murray River (24)	179	67	11
Riverina (E) (75)	110	47	5	East Central (23)	278	63	5
South West Slopes (S) (72)	343	66	13	West Central (22)	273	84	23
South West Slopes (N) (73)	278	70	17	Lower North (21)	170	55	7
Southern Tablelands (70)	197	53	3	Upper North (19)	101	43	1
Victoria				Western (18)	130	54	3
North Mallee (76)	112	54	8	Tasmania			
South Mallee (77)	127	55	9	Northern (91)	692	103	51
North Wimmera (78)	162	59	8	Midlands (93)	417	108	60

a Average for period 1913–2002. **b** Rainfall ranked for the period 1913–2002, with lowest rainfall year ranked as 1.

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The states with the most serious rainfall deficiency in 2002 were New South Wales followed by Victoria. In most regions, crop development was also hindered by low subsoil moisture, particularly in the northern crop areas.

Summer crops

Rainfall in the major dryland summer cropping regions has been well below average during October and November in the leadup to the sowing of summer crops which usually occurs from October to December depending on the arrival of the rain.

A consequence of the poor rainfall during 2002 over the main catchment areas in the Murray Darling Basin is that irrigation water availabilities in the major storages leading into the main summer irrigation period are very low. As a result, there will be substantial cuts in the areas sown to the major summer irrigated crops of cotton and rice in 2002-03.

The rainfall outlook for the remainder of the summer cropping season is not overly promising across much of the grain belt ([click here for map](#)). The mid-November Bureau of Meteorology forecasts on the likelihood of rainfall over the three months from December to February point to there being a less than 50 per cent probability of there being median rainfall in this period over the main summer cropping areas in Australia.

Winter crop production

Australian winter crop production is forecast to be 16.2 million tonnes, down 21.0 million tonnes from last season's record crop and the lowest harvest since 1994-95 when 14.7 million tonnes were harvested. The greatest fall in production is forecast in New South Wales, with production forecast to fall from 9.9 million tonnes in 2001-02 to 2.8 million tonnes, again the lowest production since 1994-95 when less than 1.5 million tonnes were harvested. Lack of rain in northern regions early in the season prevented many crops from being sown, while elsewhere an increasing number of crops that had been sown have been abandoned owing to the lack of followup rains and low subsoil moisture.

Wheat production is forecast to decline to 10.0 million tonnes, down 14.0 million tonnes from last season. Of the other major winter crops, canola production is forecast to fall from 1.6 million tonnes to 0.6 million tonnes. Barley production is forecast to decline by 56 per cent from last season to

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***B** Australian winter crop production ^a*

	New South Wales	Victoria	Queensland	Western Australia	South Australia	Australia
	Mt	Mt	Mt	Mt	Mt	Mt
1993-94	7.51	4.37	0.83	9.85	4.84	27.83
1994-95	1.47	1.80	0.31	7.91	2.98	14.71
1995-96	6.74	4.35	0.74	10.22	5.16	27.82
1996-97	11.27	4.55	2.59	11.32	5.36	35.89
1997-98	8.29	3.21	1.63	12.06	5.22	31.15
1998-99	9.52	3.56	2.57	12.12	6.24	34.76
1999-2000	11.07	4.86	2.22	13.30	4.63	36.99
2000-01 p	10.62	5.72	1.21	8.97	7.23	34.63
2001-02 p	9.92	5.36	1.05	11.29	8.96	37.24
2002-03 f	2.81	1.62	0.65	6.65	4.02	16.24
<i>% change</i>	-72	-70	-38	-41	-55	-56

^a State areas include wheat, barley, oats, canola, lupins, field peas, chickpeas, faba beans and lentils. Australian totals also include triticale, linseed, safflower and vetch. **p** ABARE preliminary estimate. **f** ABARE forecast.

3.3 million tonnes, although last season's barley production was a record harvest of 7.5 million tonnes, reflecting an excellent South Australian harvest.

Winter pulse production is forecast to decline from 2.4 million tonnes in 2001-02 to 1.3 million tonnes in 2002-03. Reduced lupin production in Western Australia is the major contributor to the overall decline in winter pulse production in 2002-03.

Summer crop production

Summer crop area in 2002-03 is forecast to decrease by 41 per cent to 0.94 million hectares, with production forecast to decrease by 59 per cent to under 2.0 million tonnes. Reduced availability of irrigation water for cotton and rice production is the major contributory factor for the forecast decline in summer crop production in 2002-03, with the area sown to cotton forecast to decline by 44 per cent to 224 000 hectares and rice by nearly 70 per cent to 46 000 hectares.

Planting rains for the major dryland summer crops of sorghum and sunflowers through to the end of November have been very disappointing. It is still possible to sow these crops during December. However, available information indicates that rainfall in the major summer cropping areas of northern New South Wales and Queensland during December will be below average. The

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C *Australian summer crop plantings and production* ^a

	New South Wales		Queensland		Australia	
	'000 ha	Mt	'000 ha	Mt	'000 ha	Mt
1993-94	516	1.84	598	1.51	1 172	3.09
1994-95	527	2.25	727	1.31	1 317	3.63
1995-96	576	2.30	802	1.58	1 466	3.98
1996-97	655	2.78	689	1.49	1 429	4.37
1997-98	625	2.61	631	1.14	1 341	3.84
1998-99	889	3.25	680	1.67	1 709	5.07
1999-2000	728	2.88	737	2.03	1 550	5.01
2000-01	872	3.64	811	1.81	1 767	5.55
2001-02 p	806	3.08	704	1.63	1 586	4.82
2002-03 f	397	1.08	468	0.80	938	1.97
<i>% change</i>	<i>-51</i>	<i>-65</i>	<i>-34</i>	<i>-51</i>	<i>-41</i>	<i>-59</i>

^a State production includes sorghum, rice, cottonseed, maize and sunflowers. Australian production also includes soybeans, peanuts, mung beans and navy beans. **p** ABARE preliminary estimate. **f** ABARE forecast.

area sown to the major dryland summer crop, sorghum, in 2002-03 is forecast to decline by 38 per cent to 0.48 million hectares.

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New South Wales

- Winter grains production in New South Wales in 2002-03 is forecast to fall to 2.8 million tonnes, down 72 per cent from last season, and the lowest production since 1994-95.
- **Wheat** production is forecast to be around 2.1 million tonnes, some 72 per cent below the estimated 7.45 million tonnes harvested in 2001-02 and smallest crop since 1994-95. Harvesting in northern New South Wales has been completed, with the quality of the grain affected by the very dry conditions during crop development. Indications are that the harvested wheat is of high protein but with around half exhibiting high screenings.
- **Barley** production in New South Wales is forecast to be around 0.34 million tonnes this season, 70 per cent lower than in 2001-02. With the crop characterised by high protein levels and high screenings, most of the harvest has been graded as feed barley.
- **Canola** production in New South Wales is forecast to fall from an estimated 550 000 tonnes in 2001-02 to 90 000 tonnes this season.
- Only around a quarter of the **sorghum** area that normally is planted had been sown by mid-November. On the basis of below average rainfall continuing into December, the area planted to sorghum is forecast to reach 140 000 hectares – 48 per cent less than the area planted in 2001-02.

New South Wales winter crop estimates, 2002-03

	Area	Yield f	Production f	Production change from 2001-02
	'000 ha	t/ha	kt	%
Wheat	2 950	0.71	2 100	-72
Barley	400	0.85	340	-70
Canola	400	0.23	90	-84

f ABARE forecast.

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New South Wales summer crop estimates, 2002-03

	Area	Yield f	Production f	<i>Area change from 2001-02</i>
	'000 ha	t/ha	kt	%
Sorghum	140	2.00	280	-48
Sunflowers	20	0.90	18	-43
Cottonseed	155	1.50	232	-46
Rice	46	9.45	380	-69

f ABARE forecast.

- Reduced water availability in the southern irrigation areas is expected to result in the area planted to **rice** falling to around 46 000 hectares — a 69 per cent decline on the area sown in 2001-02. Total rice production is forecast at 380 000 tonnes, well down from the 1.3 million tonnes produced in 2001-02.
- The area sown to irrigated **cotton** is estimated to be nearly halved from last season due to low water supplies and reduced allocations to irrigators at the time of planting. Some growers have opted to use reduced water allocations on alternative enterprises such as maize. Lack of rain around planting time in most regions is forecast to reduce the area sown to dryland cotton to less than 15 per cent of the area planted last season. Cottonseed production is forecast to decline by 68 per cent from last season to 232 000 tonnes.

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Victoria

- All cropping areas in Victoria with the exception of the more south western crop areas have suffered from drought conditions this season. The 2002-03 winter grains season is shaping up to be the worst season in terms of lost production since 1982-83. Although some rain fell across most regions in the second half of November, this had little beneficial effect and may possibly reduce the quality of some crops.
- Total Victorian grain production in 2002-03 is now forecast to be 1.62 million tonnes, down 3.74 million tonnes, or 70 per cent, from the previous season.
- **Wheat** production in Victoria is forecast to be down by 68 per cent to around 900 000 tonnes in 2002-03, reflecting poor seasonal conditions after last year's excellent yields. The dry conditions are expected to result in higher protein levels this year.
- Similarly, the **barley** harvest is forecast to be 74 per cent lower at around 390 000 tonnes in 2002-03.
- The poor conditions have also ensured that Victorian **canola** yields will be well below average. The crop is forecast to come in at around 101 000 tonnes in 2002-03, with lower oil content than in previous years. **Pulse** crop production is forecast to have fallen by 84 per cent from last season to 68 000 tonnes.

Victorian winter crop estimates, 2002-03

	Area	Yield f	Production f	Production change from 2001-02
	'000 ha	t/ha	kt	%
Wheat	1 450	0.62	900	-68
Barley	680	0.57	390	-74
Canola	250	0.40	101	-73

f ABARE forecast.

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Queensland

- For the third successive year there has been a poor winter crop growing season in Queensland. Winter crop production is forecast at 650 000 tonnes, 38 per cent lower than last season.
- **Wheat** production is estimated to have declined by 46 per cent to around 450 000 tonnes in 2002-03 as a result of the very dry conditions this season. High daily temperatures meant that winter crops ripened earlier than usual. Reflecting the dry seasonal conditions there is a large percentage of high protein wheat being delivered and, in some cases, with relatively high screenings.
- Production of **barley** is estimated to have decreased by 45 per cent to 80 000 tonnes largely reflecting reduced plantings but also below average yields. Relatively high screenings and high protein levels have resulted in most of the barley crop being graded as feed quality.
- There was very little rain in October and November in the summer cropping areas in Queensland and, given the dry winter, subsoil moisture levels are very low in nearly all summer cropping areas. Some early **grain sorghum** crops were planted around the Miles district through to Goondiwindi, but without significant rainfall in December and January the planting of summer crops is likely to be substantially reduced in 2002-03. Overall, the area planted to sorghum is forecast fall by 32 per cent to 340 000 hectares.
- The area sown to irrigated **cotton** in 2002-03 is estimated to have declined by 35 per cent from last season due to low water availabilities at the time

Queensland winter crop estimates, 2002-03

	Area	Yield f	Production f	Production change from 2001-02
	'000 ha	t/ha	kt	%
Wheat	465	0.97	450	-46
Barley	80	1.00	80	-45

f ABARE forecast.

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Queensland summer crop estimates, 2002-03

	Area	Yield f	Production f	Area change from 2001-02
	'000 ha	t/ha	kt	%
Sorghum	340	1.68	570	-32
Sunflowers	25	0.96	24	-16
Cottonseed	69	1.52	105	-59

p ABARE preliminary forecast.

of planting and the low chance of there being any increase in allocations during the growing season. Lack of rainfall in recent months is estimated to have resulted in a 75 per cent reduction in dryland cotton plantings this season. **Cottonseed** production is forecast to decline by 59 per cent in 2002-03 to 105 000 tonnes.

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Western Australia

- Western Australian winter grains production is forecast to decline by 41 per cent from last season to around 6.65 million tonnes, the lowest production year since 1989-90.
- **Wheat** production in Western Australia is estimated to fall by 43 per cent to 4.3 million tonnes in 2002-03, largely reflecting the poor seasonal conditions across much of the central and eastern grain belt. Crops, that were just reaching the grain filling stage, in the southern and central grain growing areas were adversely affected by frosts in early October. The wheat harvest has been characterised by high protein grain and screenings that have varied from average to high.
- Western Australian **barley** production is forecast to decline by 42 per cent to 1.2 million tonnes in 2002-03 reflecting the relatively poor yields this season. High screenings have been evident in early deliveries and, as a result, a large proportion of the barley has been graded as feed quality.
- **Canola** production is forecast to fall by around 36 per cent to 270 000 tonnes in 2002-03. Postharvest testing indicates that the oil content of the canola crop has been good, reflecting the better crop conditions in the main lower east and coastal producing regions.
- The very dry conditions have severely affected the **lupin** crop, with production forecast to fall sharply to around 550 000 tonnes in 2002-03, 350 000 tonnes less than in the previous year.

Western Australia winter crop estimates, 2002-03

	Area	Yield f	Production f	Production change from 2001-02
	'000 ha	t/ha	kt	%
Wheat	4 150	1.04	4 300	-43
Barley	950	1.23	1 170	-42
Canola	400	0.68	270	-36
Lupins	800	0.69	550	-39

f ABARE forecast.

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South Australia

- Dry conditions continued in most grain growing regions of South Australia through October and most of November, adversely affecting the yield potential of winter grain crops. Total winter crop production in South Australia is forecast at 4.0 million tonnes, down 55 per cent from last season.
- Rain fell over most of the grain belt during the last week of November. These rains will have no beneficial effect on crop yields and have the potential to cause further deterioration in crop quality if there are further rains in the near term.
- The harvest is well under way. Yields have been quite variable, with better regions being the eastern Eyre Peninsula, Kangaroo Island and in the south east regions. The worst hit regions have been the Murray Mallee, the Upper North and the western Eyre Peninsula.
- As a result of the drought conditions, warmer spring temperatures and strong winds during spring, **wheat** production is forecast to be down by 58 per cent, at around 2.2 million tonnes in 2002-03. However, due to the dry conditions, protein levels are expected to be higher than last year.
- **Barley** production is also forecast to be down sharply, by 53 per cent, to under 1.3 million tonnes in 2002-03. Grain protein levels are high due to dry conditions.

South Australia winter crop estimates, 2002-03

	Area	Yield f	Production f	Production change from 2001-02
	'000 ha	t/ha	kt	%
Wheat	2 010	1.09	2 200	-58
Barley	970	1.29	1 250	-53
Canola	140	1.14	160	-39

f ABARE forecast.

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- Canola production is forecast to be around 160 000 tonnes, down 39 per cent from last year. Oil content of seed is also well down from last season.
- Of the pulses, **lentil** production is forecast to be around 66 000 tonnes, down 49 per cent from last season, and **field pea** production is forecast to be down 47 per cent to 110 000 tonnes in 2002-03.

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Crop production in Australia At 27 November 2002

	Area planted			Yield			Production			
	Five year average a	2001-02 current	2002-03 previous	Five year average a	2001-02 current	2002-03 previous	Five year average a	2001-02 current	2002-03 previous	2002-03 current
	'000 ha	'000 ha	'000 ha	t/ha	t/ha	t/ha	kt	kt	kt	kt
Wheat	11 505	12 526	10 821	1.92	1.91	1.24	22 112	23 960	10 130	9 980
Barley	3 228	3 389	3 202	1.92	2.20	1.43	6 203	7 459	3 360	3 258
Oats b	836	678	728	1.77	1.80	1.25	1 467	1 222	912	735
Triticale	348	272	265	1.96	1.96	2.01	676	532	532	341
Sorghum b	615	773	803	2.79	2.30	2.30	1 724	1 777	1 849	855
Maize	69	93	91	5.10	5.60	5.25	354	521	478	244
Canola	1 166	1 164	955	1.32	1.38	1.04	1 500	1 605	720	621
Sunflower	118	65	73	1.11	0.97	1.11	133	63	81	42
Cottonseed c	474	404	256	2.12	2.39	2.53	997	968	648	337
- lint				1.50	1.69	1.57	705	684	401	238
Rice d	156	151	120	8.93	8.53	8.33	1 394	1 291	1 000	380
Lupins e	1 320	1 103	951	1.13	1.00	0.70	1 510	1 104	670	654
Field peas e	341	272	320	1.08	1.53	1.03	365	416	330	174
Chickpeas e	255	195	210	0.84	1.32	1.03	210	258	216	195
Faba beans e	142	180	149	1.44	1.94	1.20	201	350	179	114
Lentils e	67	158	165	1.22	1.68	1.18	76	266	195	85

a Based on data from ABS, *Principal Agricultural Commodities*, cat. no. 7111.0; ABS, *Agricultural Commodities, Australia*, cat. no. 7121.0; and ABARE estimates. b Area harvested for grain. c Cottonseed area is estimated harvested area. d Source: Rice Growers Cooperative Limited. e Source: Pulse Australia for 2001-02 and 2002-03; ABARE for previous years. Note: Previous estimates are from the previous issue of the *Australian Crop Report*. The crop year refers to crops planted during the twelve months to 31 March. Winter crops are generally both sown and harvested within the nominated twelve month period. Slight discrepancies may appear between table 1 and tables 2 and 3 as a result of the inclusion of the Australian Capital Territory and Northern Territory in the Australian totals. Area and production estimates are from the sources detailed in footnotes to tables 2 and 3. Coverage is for all farms with an estimated value of agricultural operations of more than \$5000.

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2 State production – principal crops At 27 November 2002

	New South Wales		Victoria		Queensland		Western Australia		South Australia		Tasmania	
	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt
Wheat												
2002-03 – current ABARE estimate	2 950	2 100	1 450	900	465	450	4 150	4 300	2 010	2 200	6	30
2002-03 – previous ABARE estimate	2 500	1 700	1 300	1 000	465	550	4 000	4 450	2 100	2 400	6	20
2001-02 – latest ABARE estimate	3 720	7 450	1 360	2 800	730	840	4 590	7 600	2 120	5 250	6	20
Five year average to 2000-01 ^a	3 274	7 465	1 049	2 188	1 023	1 643	4 435	7 717	1 719	3 084	4	16
Barley												
2002-03 – current ABARE estimate	400	340	680	390	80	80	950	1 170	970	1 250	12	28
2002-03 – previous ABARE estimate	400	300	730	350	80	80	950	1 100	1 030	1 500	12	26
2001-02 – latest ABARE estimate	535	1 135	732	1 500	90	145	1 000	2 000	1 020	2 650	12	29
Five year average to 2000-01 ^a	631	1 295	610	1 155	140	266	847	1 513	989	1 945	12	29
Oats ^b												
2001-02 – latest ABARE estimate	260	450	122	275	12	7	180	300	97	176	7	14
Lupins ^c												
2002-03 – current ABARE estimate	50	30	30	11	0	0	800	550	66	63	0	0
2002-03 – previous ABARE estimate	55	55	30	20	0	0	800	440	66	70	0	0
2001-02 – latest ABARE estimate	63	63	26	36	0	0	950	900	63	106	0	0
Five year average to 2000-01 ^a	91	136	37	42	0	0	1 114	1 234	76	97	0	0
Canola												
2002-03 – current ABARE estimate	400	90	250	101	0	0	400	270	140	160	0	0
2002-03 – previous ABARE estimate	250	150	200	140	0	0	320	270	145	160	0	0
2001-02 – latest ABARE estimate	393	550	240	370	1	0	370	425	160	260	0	0
Five year average to 2000-01 ^a	378	603	195	265	1	1	472	473	119	158	0	0
Sorghum												
2002-03 – current ABARE estimate	140	280	0	0	340	570	3	5	0	0	0	0
2002-03 – previous ABARE estimate	280	784	0	0	520	1 060	3	5	0	0	0	0
2001-02 – latest ABARE estimate	270	670	0	0	500	1 150	3	5	0	0	0	0
Five year average to 2000-01 ^a	189	659	2	4	422	1 058	2	3	0	0	0	1
Cottonseed ^d												
2002-03 – current ABARE estimate	155	232	0	0	69	105	0	0	0	0	0	0
2002-03 – previous ABARE estimate	179	411	0	0	77	237	0	0	0	0	0	0
2001-02 – latest ABARE estimate	288	721	0	0	115	259	0	0	0	0	0	0
Five year average to 2000-01 ^a	319	683	0	0	155	314	0	0	0	0	0	0

^a Based on data from ABS, *Principal Agricultural Commodities*, cat. no. 7111.0; ABS, *Agricultural Commodities, Australia*, cat. no. 7121.0; and ABARE estimates. ^b Area harvested for grain; current season estimates, by state, are no longer produced because of difficulties in obtaining consistent data at the state level. ^c Includes albus lupins. ^d Cottonseed area is estimated harvested area. ^e ABARE estimate. ^f ABARE forecast. ^g Zero area or production estimates may appear as a result of rounding to the nearest whole number, if production or area estimates are less than 500 tonnes or 500 hectares. ^h Cottonseed

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3 State production – other major crops At 27 November 2002

	New South Wales		Victoria		Queensland		Western Australia		South Australia		Tasmania	
	Area	Prod.	Area	Prod.	Area	Prod.	Area	Prod.	Area	Prod.	Area	Prod.
	'000 ha	kt	'000 ha	kt	'000 ha	kt	'000 ha	kt	'000 ha	kt	'000 ha	kt
Field peas												
2002-03 – current estimate a	18	12	110	22	0	0	70	30	120	110	0	0
2002-03 – previous estimate a	20	20	110	80	0	0	70	60	120	170	0	0
2001-02 – latest ABARE estimate	26	33	102	130	0	0	40	45	104	208	0	0
Five year average to 2000-01 b	19	24	147	136	1	0	45	39	129	181	1	1
Maize												
2002-03 – current estimate	22	145	1	5	28	85	2	9	0	0	0	0
2002-03 – previous estimate	38	296	1	7	50	165	2	10	0	0	0	0
2001-02 – latest ABARE estimate	40	330	1	7	50	175	2	9	0	0	0	0
Five year average to 2000-01 b	26	195	1	6	42	148	1	5	0	0	0	0
Chickpeas												
2002-03 – current estimate a	80	70	9	4	110	115	5	3	3	3	0	0
2002-03 – previous estimate a	80	70	12	14	110	125	5	4	3	3	0	0
2001-02 – latest ABARE estimate	116	162	16	24	46	61	16	11	1	1	0	0
Five year average to 2000-01 b	63	53	84	65	45	40	53	42	9	11	0	0
Sunflowerseed												
2002-03 – current estimate	20	18	0	0	25	24	0	0	0	0	0	0
2002-03 – previous estimate	33	37	0	0	40	40	0	0	0	0	0	0
2001-02 – latest ABARE estimate	35	35	0	0	30	30	0	0	0	0	0	0
Five year average to 2000-01 b	38	47	2	3	77	82	0	0	1	1	0	0
Faba beans												
2002-03 – current estimate a	17	17	50	14	0	0	7	2	83	81	0	0
2002-03 – previous estimate a	17	17	50	35	0	0	7	7	75	120	0	0
2001-02 – latest ABARE estimate	37	70	55	95	0	0	13	10	75	175	0	0
Five year average to 2000-01 b	24	28	48	64	2	1	21	18	48	90	0	0
 Lentils												
2002-03 – current estimate a	2	1	90	17	0	0	3	2	70	66	0	0
2002-03 – previous estimate a	17	17	50	35	0	0	7	7	75	120	0	0
2001-02 – latest ABARE estimate	3	3	90	130	0	0	5	3	60	130	0	0
Five year average to 2000-01 b	1	1	52	54	0	0	2	1	12	20	0	0

a Source: Pulse Australia for 2001-02 and 2002-03; ABARE for previous years. **b** Based on data from ABS, *Principal Agricultural Commodities*, cat. no. 7112.0; ABS, *Agricultural Commodities, Australia*, cat. no. 7121.0 and ABARE estimates. **s** ABARE estimates. **f** ABARE forecast.

Note: Zero area or production estimates may appear as a result of rounding to the nearest whole number, if production or area estimates are less than 500 tonnes or 500 hectares.

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4 Rainfall comparisons for principal Australian cropping districts

	July			August			September			October		
	Normal a	2001	2002	Normal a	2001	2002	Normal a	2001	2002	Normal a	2001	2002 p
	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm
Queensland												
Central Highlands (35)	27	2	2	21	2	38	22	11	1	42	39	5
Maranoa (43)	34	7	7	25	7	41	26	15	3	46	42	15
West Darling Downs (42)	35	10	4	25	10	59	27	15	7	48	51	26
East Darling Downs (41)	42	14	2	31	15	50	37	20	10	62	73	29
Moreton South Coast (40)	56	9	2	37	10	91	44	24	10	76	60	40
New South Wales												
North West Plains (W) (52)	37	6	2	27	8	18	29	16	23	42	49	12
North West Plains (E) (53)	43	10	4	33	11	24	34	18	28	48	51	19
North West Slopes (N) (54)	47	17	3	38	18	29	40	23	28	61	56	31
North West Slopes (S) (55)	54	22	5	46	27	16	51	30	38	75	61	11
Northern Tablelands (N) (56)	48	30	4	43	34	35	44	28	34	61	62	35
Central West Plains (S) (50)	36	22	7	36	24	10	33	35	45	44	42	4
Central West Plains (N) (51)	35	9	1	30	12	6	30	19	34	41	47	6
Central West Slopes (N) (64)	47	20	4	42	23	7	42	20	40	54	72	9
Central West Slopes (S) (65)	49	38	15	48	38	11	43	43	46	56	60	2
Central Tablelands (N) (62)	49	26	8	48	33	10	46	32	34	58	79	3
Central Tablelands (S) (63)	65	54	23	66	65	20	60	48	36	75	69	4
Riverina (W) (75)	31	29	8	31	31	14	30	34	25	37	49	5
Riverina (E) (74)	43	36	16	45	38	17	41	37	33	47	65	5
South West Slopes (N) (73)	56	54	29	55	56	28	49	53	60	59	67	4
South West Slopes (S) (72)	88	93	64	90	106	51	75	62	82	83	122	17
Southern Tablelands (GM)(70)	50	77	24	51	89	25	51	49	43	64	57	13
Victoria												
North Mallee (76)	30	38	15	30	39	16	31	45	17	33	39	10
South Mallee (77)	35	47	15	36	52	19	36	47	21	37	41	12
North Wimmera (78)	44	56	25	45	59	23	43	60	28	41	46	15
South Wimmera (79)	59	83	48	59	89	35	53	81	43	50	73	33
Lower North (80)	42	41	15	44	42	16	42	34	21	44	53	8
Upper North (81)	53	55	22	54	58	25	50	45	31	51	72	16
Lower North East (82)	90	119	62	90	123	49	76	83	88	80	154	26
Upper North East (83)	128	132	63	132	135	46	106	92	95	109	161	47
North Central (88)	79	88	40	83	93	41	73	54	51	71	104	39
Central Western (89)	63	107	62	70	114	42	65	65	56	63	101	46
Western Australia												
North Coast (8)	72	29	48	52	32	38	28	43	23	18	33	15
Central Coast (9)	168	85	111	126	93	79	76	93	56	50	32	42
Northern Central (10)	59	30	35	45	33	30	26	33	19	19	17	14
South Coast (9A)	159	98	109	126	106	94	88	95	69	65	41	59
South Central (10A)	68	67	48	55	71	39	38	41	27	29	22	24
South East (12)	26	14	9	23	15	10	14	16	6	14	35	4
South Australia												
Upper South East (25B)	50	66	38	52	71	29	47	78	34	41	49	21
Murray Mallee (25A)	31	31	17	33	36	15	32	58	19	32	48	9
Murray River (24)	35	38	25	36	38	16	34	60	22	32	45	9
East Central (23)	79	84	63	75	89	33	64	105	47	53	71	24
West Central (22)	60	65	63	54	71	40	44	73	41	36	52	32
Lower North (21)	53	57	39	53	60	23	49	94	26	42	61	13
Upper North (19)	37	20	18	36	23	11	34	71	14	31	57	3
Western (18)	46	32	27	42	33	17	33	57	12	27	27	10
Tasmania												
Northern (91)	126	204	151	115	204	116	95	118	170	91	146	110
Midlands (93)	47	90	44	48	85	47	45	48	81	54	98	62

a The definition of normal rainfall reflects a simple arithmetic average of rainfall over the period 1913 to 2001. p Preliminary.

Note: Numbers in parentheses indicate meteorological districts (see map on page iv).

Source: Bureau of Meteorology monthly district rainfall reports (various issues).

AUSTRALIAN CROP REPORT

5 Supply and disposal of Australian wheat, oilseeds and pulses ^a

	1997-98	1998-99	1999-00	2000-01	2001-02 ^s	2002-03 ^f
	kt	kt	kt	kt	kt	kt
Wheat						
Production	19 224	21 464	24 758	22 190	23 960	9 980
Domestic use	5 079	5 006	5 596	3 907	5 726	6 258
– human and industrial	2 174	2 117	2 181	2 206	2 229	2 253
– feed ^b	2 385	2 341	2 830	2 900	3 000	3 500
– seed	519	548	585	564	496	506
Exports	15 679	16 391	17 784	16 085	16 405	8 500
Change in stocks	-1 534	68	1 379	2 198	1 829	-4 778
Canola						
Production	856	1 690	2 426	1 905	1 605	621
Domestic use	322	355	370	415	395	307
– crushers	315	345	362	409	390	300
– seed	6	10	8	6	5	7
Exports	555	1 355	2 033	1 392	1 332	313
Pulses – major crops						
Production						
Lupins	1 561	1 696	1 968	800	1 104	654
Field peas	316	298	357	401	416	174
Chickpeas	199	188	230	146	258	195
Apparent domestic use ^b						
Lupins	600	643	584	399	391	420
Field peas	132	31	68	39	75	67
Chickpeas	34	28	46	44	46	48
Exports						
Lupins	961	1 053	1 384	401	713	234
Field peas	184	267	289	362	432	107
Chickpeas	200	120	243	176	283	166

^a Wheat and legume export figures are for winter crop years defined as follows: October–September for wheat; November–October for canola, peas and lupins. Production may not equal the sum of apparent domestic use and exports in any one year due to reductions or increases in stock levels. ^b Calculated as a residual: production less exports less other domestic uses less change in stocks. ^s ABARE estimate. ^f ABARE forecast.

Note: The export data refer to market year export periods, so are not comparable with financial year export figures published elsewhere. *Sources:* Australian Bureau of Statistics; ABARE.

AUSTRALIAN CROP REPORT

6 Supply and disposal of Australian coarse grains ^a

	1997-98	1998-99	1999-00	2000-01	2001-02 ^s	2002-03 ^f
	kt	kt	kt	kt	kt	kt
Barley						
Production	6 482	5 987	5 032	6 819	7 459	3 258
Domestic use	2 090	2 158	2 011	2 310	2 201	2 011
– as malt and other human use	148	151	154	158	161	165
– feed	1 800	1 890	1 700	2 000	1 900	1 700
– seed	143	117	157	153	140	147
Export	3 463	4 765	3 325	4 567	4 821	1 550
– feed barley	2 025	2 607	1 524	2 050	2 336	467
– malting barley	982	1 635	1 234	1 604	1 842	516
– malt (grain equivalent)	457	525	569	597	644	567
Oats						
Production	1 634	1 798	1 118	1 131	1 222	735
Domestic use	1 481	1 538	983	1 045	1 057	686
– human	113	116	119	122	125	128
– feed	1 324	1 394	830	891	898	524
– seed	44	28	33	33	34	34
Export	154	248	135	86	165	83
Triticale ^b						
Production	633	708	764	601	532	341
Domestic use	639	713	764	601	532	341
– feed	620	695	750	587	519	329
– seed	19	18	14	14	13	12
Sorghum						
Production	1 081	1 891	2 116	2 107	1 825	855
Domestic use	897	1 399	1 452	1 536	1 414	773
– feed	894	1 396	1 448	1 532	1 411	769
– seed	3	3	4	4	2	4
Export	184	493	665	501	411	82
Maize						
Production	271	338	406	355	521	244
Domestic use	252	302	353	306	480	211
– human, industrial	96	94	96	99	101	104
– feed	155	207	256	205	378	106
– seed	1	1	1	1	1	1
Export	19	36	53	45	50	35
Total coarse grains						
Production	10 101	10 722	9 436	11 013	11 559	5 433
Domestic use	5 715	6 470	5 932	6 176	6 071	4 418
– human, industrial	357	361	369	378	387	396
– feed	5 149	5 942	5 353	5 594	5 493	3 823
– seed	209	167	210	204	190	199
Export	3 820	5 542	4 178	5 199	5 448	1 750

^a Market years are November–October for barley, oats and triticale, and March–February for sorghum and maize. This means that the 2001-02 barley crop harvested in November 2001 to January 2002 is marketed from November 2001 to October 2002. The 2001-02 sorghum crop harvested in March to May 2002 is marketed from March 2002 to February 2003. The sum of domestic use and exports may differ from production as a result of changes in grain stock levels. ^b Excludes small quantities of triticale for export. ^s ABARE estimate. ^f ABARE forecast.

Sources: Australian Bureau of Statistics; ABARE.

AUSTRALIAN CROP REPORT

7 Australian grain prices ^a

	2001			2002			
	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec ^s
	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t
Wheat							
Domestic							
Feed – Sydney	180	204	207	223	221	279	325
Export							
Australian standard white b	303	305	316	302	274	340	375
International							
US no.2 hard red winter, fob Gulf b	258	258	259	250	239	301	330
Barley							
Domestic							
2 row feed – Sydney	186	200	193	213	205	258	329
Export c							
Feed (bulk)	225	212	214	221	na	na	na
Malting (bulk)	287	278	286	274	na	na	na
International							
Feed – US no. 2 fob Portland b	217	218	221	216	200	222	244
Sorghum							
Domestic							
Feed – Sydney	172	186	182	187	195	256	332
Export c	184	183	225	185	182	247	231
International							
US del. Gulf b	183	185	184	189	173	205	208
Oats							
Domestic							
Feed – Sydney	151	179	170	205	211	272	345
Export c	284	288	345	231	337	245	299
International							
US heavy white, del. Portland b	214	229	284	316	303	299	302
Maize							
Domestic							
Feed – Sydney	185	205	220	236	239	292	364
International							
US no.2 fob Gulf b	167	178	172	176	164	197	197
Oilseeds							
Domestic							
Canola – del. Melbourne	381	433	414	389	388	501	560
Sunflower – del. Melbourne	311	344	366	360	380	404	420
Soybeans – US cif Rotterdam b	362	404	368	379	390	414	434
Pulses							
Domestic							
Lupins – del. Perth	209	240	237	219	215	235	268
Field peas – del. Melbourne	257	288	291	327	327	340	352
Chickpeas – del. Melbourne	524	565	535	508	520	521	514
Export c							
Chickpeas	604	637	615	622	615	708	616
Field peas	300	367	404	336	345	395	369

^a Prices refer to bulk sales of grain delivered to Sydney region. Export prices for coarse grains are the average unit fob value of Australian exports recorded by the Australian Bureau of Statistics. Prices quoted only for months in which sizable export volumes were recorded. International prices are obtained from the Unicom Newswire service in US\$ and converted to A\$ using monthly average of daily exchange rates. ^b Average of daily offer prices made in US\$, converted to A\$ using monthly average of daily exchange rates. ^c Export unit values do not reflect current market prices but the average price received for grain exported over the quarter. Generally, there can be a long lag time between when prices were negotiated by exporters and the physical export of product. ^s ABARE estimate. **na** Not available.

Note: Prices used in these calculations exclude the GST.