



**Australian Government**  
**Australian Bureau of Agricultural  
and Resource Economics**

**17 FEBRUARY 2004**

# **AUSTRALIAN CROP REPORT**

**NO. 129**



abare

---

© Commonwealth of Australia 2004

This work is copyright. The *Copyright Act 1968* permits fair dealing for study, research, news reporting, criticism or review. Selected passages, tables or diagrams may be reproduced for such purposes provided acknowledgment of the source is included. Major extracts or the entire document may not be reproduced by any process without the written permission of the Executive Director, ABARE.

ISSN 1325-8931

Australian Bureau of Agricultural and Resource Economics  
GPO Box 1563 Canberra 2601

Telephone +61 2 6272 2000 Facsimile +61 2 6272 2001  
Internet [www.abareconomics.com](http://www.abareconomics.com)

ABARE is a professionally independent government economic research agency.

This report was prepared by John Hogan, David Barrett, Peter Berry, Leanne Lawrance, Peter Connell and Will Mollard from the Agriculture and Trade Economics Branch.

For further information, contact John Hogan on +61 2 6272 2056. For subscription details for the *Australian Crop Report*, contact the Publications Sales at [sales@abare.gov.au](mailto:sales@abare.gov.au) or ph +61 2 6272 2010. For general media enquiries, contact Kierra-Jade Sanders on +61 2 6272 2303.

The next issue of the *Australian Crop Report* is scheduled to be released on Tuesday, 8 June 2004

IN THE NEXT ISSUE ...

- 2004-05 winter crop area forecasts
- 2003-04 summer crop production updates

ABARE project 1076

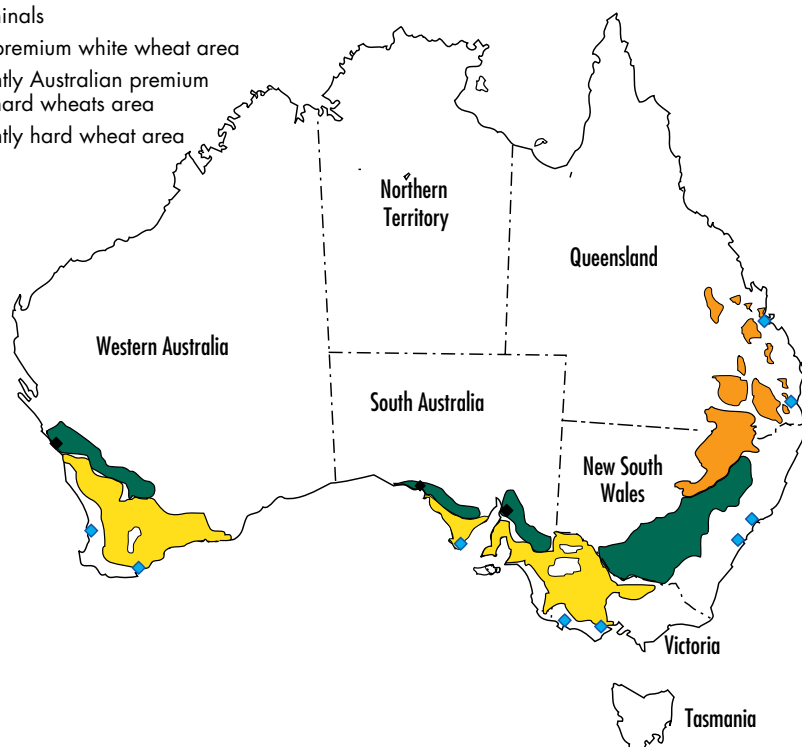
---

# contents

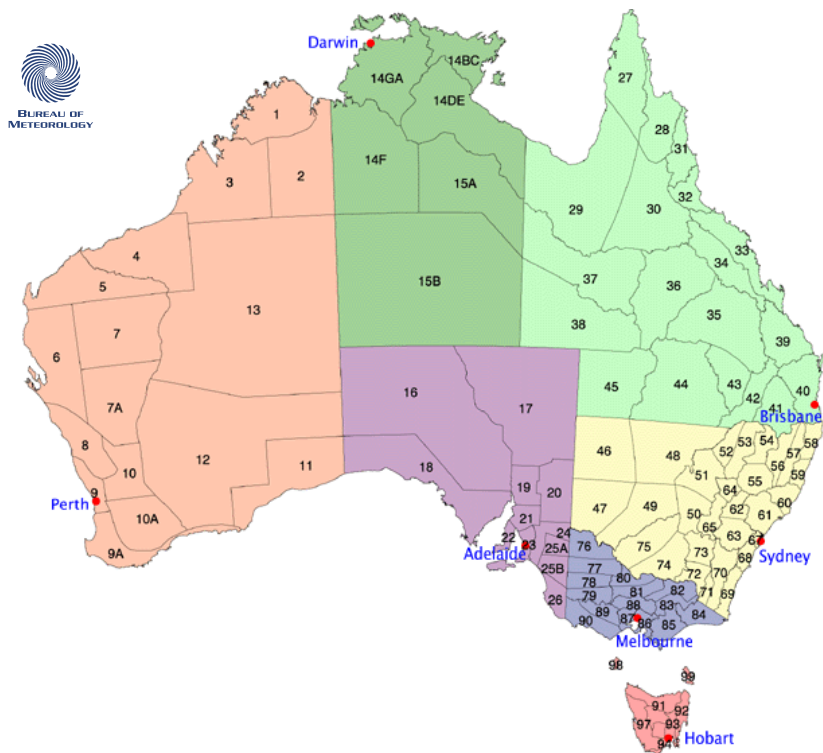
overview	1
Seasonal conditions	1
Summer crops	3
Winter crops	4
crop conditions and production estimates, by state	
New South Wales	6
Victoria	8
Queensland	9
Western Australia	10
South Australia	11
maps	
Wheat growing regions	iv
Australian meteorological districts	iv
1 Simulated median sorghum yield, by shire	2
tables	
A Australian summer crop plantings and production	3
B Australian winter crop production	4
1 Crop production in Australia	12
2 State production – principal crops	13
3 State production – other major crops	14
4 Rainfall comparisons for principal Australian cropping districts	15
5 Supply and disposal of Australian wheat, oilseeds and pulses	16
6 Supply and disposal of Australian coarse grains	17
7 Australian grain prices	18

### Wheat growing regions

- ◆ Wheat terminals
- Australian premium white wheat area
- Predominantly Australian premium white and hard wheats area
- Predominantly hard wheat area



### Australian meteorological districts



## overview

- Summer crop production is forecast to rise by 32 per cent to around 3.8 million tonnes in 2003-04, nearly 1 million tonnes more than the previous season but down on the 5.3 million tonnes achieved in 2000-01.
- Heavy rains in late January and early February in northern New South Wales and southern Queensland boosted the earlier sown summer crops, that were previously suffering from moisture stress, and have allowed some late plantings in central Queensland.
- Summer crop areas are estimated to be 14 per cent higher than last year, reflecting significantly higher plantings in Queensland, whereas plantings in northern New South Wales fell slightly.
- Australian winter crop production is estimated to have increased by 131 per cent to a record 39.4 million tonnes in 2003-04, with record crops in Victoria and Western Australia.
- Both the wheat and barley crops are new records. Wheat production is estimated to be up 148 per cent on the 2002-03 harvest, to 24.9 million tonnes and barley by 130 per cent to 8.5 million tonnes. Canola production increased by 93 per cent to 1.6 million tonnes and pulses by 68 per cent to just under 2 million tonnes.

## Seasonal conditions

Details of the rainfall received over the past four months for the major cropping areas in Australia are provided in table 4. All of the summer cropping regions in northern New South Wales and Queensland received average to substantially above average rainfall in December and January. Further good followup rains have occurred in February. This has aided those summer crops sown in the latter part of 2003 and has led to some late plantings of sorghum and sunflower.

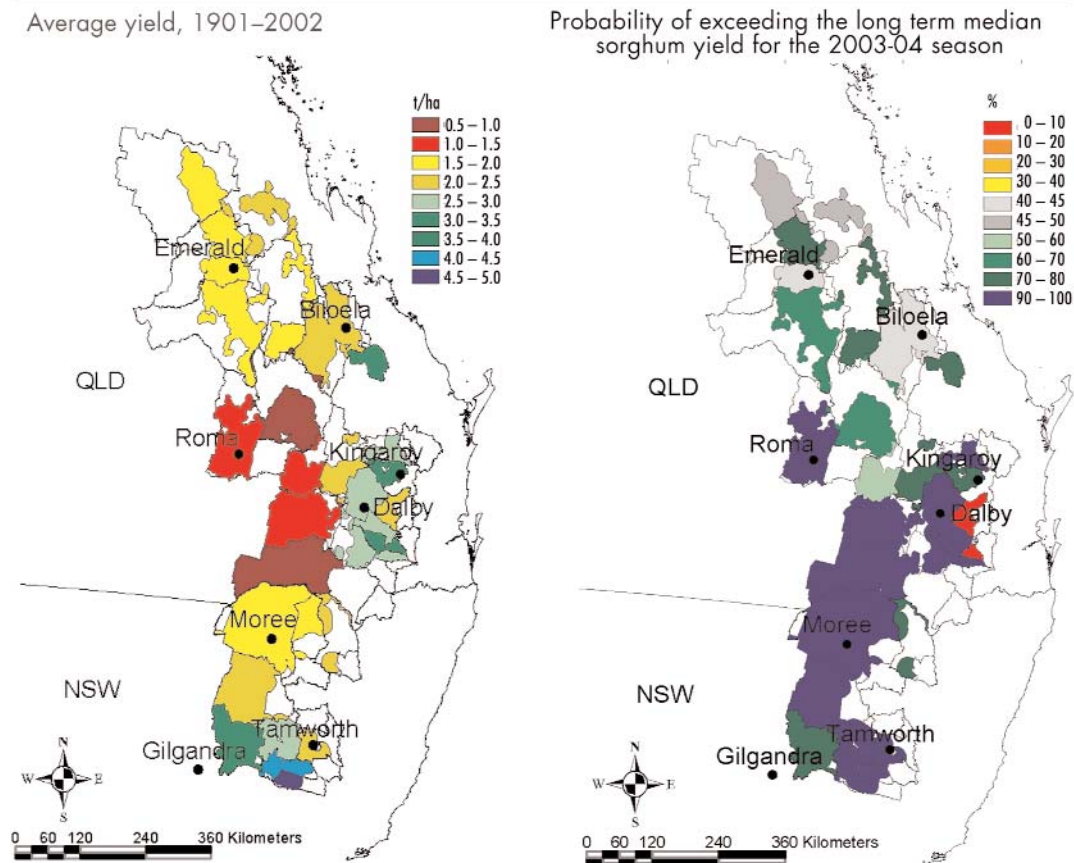
As well as helping the summer grain crop, rainfall in the northern cropping areas has recharged subsoil moisture profiles, especially in areas with heavy clay soils, such as the Darling Downs and Liverpool Plains. As a result, soil moisture stored over the summer period is likely to contribute to increased winter crop production in 2004-05, although pre-planting rains will also be necessary in autumn.

## Three month rainfall outlook

The National Climate Centre’s latest seasonal rainfall outlook for late summer to mid-autumn shows no strong swings toward either wetter or drier conditions. The chances of above average seasonal falls are generally close to a neutral 50 per cent. This outlook is based on the fact that Pacific and Indian Ocean temperatures have a varying influence on Australian rainfall during summer and autumn. For the February–April period, the chances of above median rainfall are between 40 and 55 per cent across all major cropping areas in Australia ([click here for map](#)).

According to the Bureau of Meteorology, the Southern Oscillation Index (SOI) continues in a neutral phase. While January’s value of the SOI was –13.3, the 90 day average for the period ended 9 February was –1.0.

### **1** Simulated medium sorghum yield, by shire



*Source:* State of Queensland, Dept of Primary Industries. This seasonal sorghum outlook is based on historical data, the state of the El Niño Southern Oscillation phenomenon and a simple agro-climatic sorghum stress index model (SSIM) that is sensitive to water deficit or excess during the growing season.

As part of its research into yield forecasting, the Queensland Department of Primary Industries' Agricultural Production Systems Research Unit (APSRU) has mapped long term median sorghum yields (map 1) and estimates of the probability of those median yields in the current season (map 2). The information in map 2 reveals a greater than 60 per cent probability of yields exceeding the long term median across most of the sorghum growing regions of Queensland and northern New South Wales (colored green and blue, although there are some areas (red) in south eastern Queensland that have a low chance of exceeding median yields.

## Summer crops

The total summer crop area is estimated to have risen by 14 per cent to 1.27 million hectares in 2003-04 (table A). This is despite shortages of irrigation water, which constrained cotton and rice areas at the time of planting in 2003.

Although the northern cropping regions of New South Wales and Queensland experienced periods of hot weather during November, December and early January, good rains were also received during mid-December, late January and into February. These rains were beneficial to crops already planted and have led to some late plantings of sorghum and sunflower, particularly in central Queensland. Assuming the continuation of improved seasonal conditions in these regions, summer crop production in 2003-04 is forecast to increase by 32 per cent to 3.8 million tonnes. The area planted to the major summer broadacre crops of sorghum and maize is estimated to have increased by 11 per cent to a combined 0.82 million hectares in 2003-04, with production rising by 38 per cent to 2.6 million tonnes.

The area planted to cotton in 2003-04 was around 10 per cent lower than in the previous season, at around 201 000 hectares. There was also a significant difference in plantings of

### **A** Australian summer crop plantings and production <sup>a</sup>

	New South Wales		Queensland		Australia	
	'000 ha	Mt	'000 ha	Mt	'000 ha	Mt
1993-94	516	1.84	598	1.15	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	825	3.39	802	1.76	1 761	5.27
2001-02 <b>p</b>	770	3.14	773	1.77	1 632	5.03
2002-03 <b>p</b>	507	1.63	528	1.19	1 117	2.91
2003-04 <b>f</b>	440	1.88	758	1.85	1 273	3.83
<i>% change</i>	<i>-13</i>	<i>16</i>	<i>44</i>	<i>55</i>	<i>14</i>	<i>32</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.

dryland cotton compared with irrigated cotton. The reduced availability of irrigation water for cotton at the time of planting led to the area sown under irrigation declining by 32 per cent to 151 000 hectares. However, the area sown to dryland cotton increased 22 fold, from 2300 hectares in 2002-03 to 50 400 hectares in 2003-04. As a result of recent rains across the major cotton growing areas of New South Wales and Queensland, yields are expected to improve. Lint and cottonseed production is forecast to fall by 26 per cent to 287 000 tonnes and 405 000 tonnes respectively.

The area sown to rice is estimated to have risen by 71 per cent to 65 000 hectares and rice production is forecast to rise by 53 per cent to 600 000 tonnes as a result of rice growers receiving higher water allocations for the current season compared with the previous season and with the recent rains helping to replenish dams. However, total area planted is still well below the 177 000 hectares planted in 2000-01.

## Winter crops

Total winter crop production is now estimated to be a record 39.4 million tonnes in 2003-03, up 22.4 million tonnes from last season's drought affected crop (table B). Estimates for Australian winter crop production for 2003-04 have been revised upward since the last estimates made in December, largely as a result of record harvests in Western Australia and Victoria.

Western Australia and Victoria have experienced a dramatic turnaround from last year's drought, with total grain production in those states estimated to be a record 15.6 million tonnes and 6.2 million tonnes respectively. This was a result of mild 2003 winter conditions

## **B** Australian winter crop production <sup>a</sup>

	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	27.79
1994-95	1.47	1.80	0.31	7.91	2.98	14.70
1995-96	6.74	4.35	0.74	10.22	5.16	27.79
1996-97	11.27	4.55	2.59	11.32	5.36	35.85
1997-98	8.29	3.21	1.63	12.06	5.22	31.12
1998-99	9.52	3.56	2.57	12.12	6.24	34.74
1999-2000	11.07	4.86	2.22	13.30	4.63	36.94
2000-01	10.50	5.91	1.34	8.70	7.33	34.70
2001-02 <b>p</b>	10.83	5.57	1.14	12.01	8.75	39.27
2002-03 <b>p</b>	3.33	1.79	0.84	6.75	3.95	17.03
2003-04 <b>f</b>	8.08	6.21	1.36	15.65	7.30	39.39
<i>% change</i>	<i>142</i>	<i>246</i>	<i>62</i>	<i>132</i>	<i>85</i>	<i>131</i>

<sup>a</sup> State production includes wheat, barley, oats, canola, lupins, field peas, chickpeas, faba beans and lentils. Australian totals also include triticale, linseed, safflower and vetch. Estimates for field peas, chickpeas, faba beans, lentils and vetch are sourced from Pulse Australia. **p** ABARE preliminary estimate. **f** ABARE forecast.

and good rainfalls that occurred at critical times across most cropping regions which led to above average yields. Wheat production is estimated to have risen by 167 per cent to 10.65 million tonnes in Western Australia in 2003-04 and nearly quadrupled to 3.35 million tonnes in Victoria. Barley production is estimated to have more than doubled to 2.95 million tonnes in Western Australia and risen by 268 per cent to 1.65 million tonnes in Victoria. Canola production is estimated to have reached 610 000 tonnes in Western Australia and 420 000 tonnes in Victoria.

Production in South Australia was also up significantly, reaching 7.3 million tonnes, the third biggest crop on record. Again South Australia experienced mild winter conditions and favorable rains at critical times. This resulted in average to above average yields for most crops, although frost, wet weather and hailstorms in the latter part of 2003 affected final yields and grain quality in some regions. Wheat production increased by 88 per cent to 3.8 million tonnes in 2003-04, barley production nearly doubled to 2.6 million tonnes and canola was a record 310 000 tonnes.

Winter crop production in New South Wales was up considerably on last year, although grain quality was a problem in some regions. Total winter grain production is estimated to have increased by 142 per cent to almost 8.1 million tonnes. Below average rains, hot winds, and isolated pockets of frost and disease in spring contributed to poor yields, particularly in the northern cropping regions of New South Wales. Late season rainfall and hail at the end of 2003 also disrupted the grain harvest in the southern cropping regions and some quality downgrading of grain (mainly barley and canola) occurred. Wheat production in New South Wales is estimated to have increased by 139 per cent to just over 6.0 million tonnes in 2003-04, barley by 187 per cent to over 1.1 million tonnes, and canola by 63 per cent to 0.28 million tonnes.

Queensland winter crop production is estimated to have been 1.36 million tonnes, up 62 per cent from last year. Like northern New South Wales, below average rains particularly in the central highlands, hot dry winds in spring, and isolated pockets of frost and disease contributed to the poor yields. Wheat production is estimated to have risen by 74 per cent to almost 1.1 million tonnes in 2003-04, while the barley harvest is estimated to be 38 per cent higher at just over 0.2 million tonnes.

## New South Wales

- In New South Wales, total winter crop production in 2003-04 is estimated to have increased by 142 per cent to just almost 8.1 million tonnes. Most areas of the state experienced dry conditions and above average temperatures during September that degraded the yield and quality of winter crops. Late November rains were of little benefit to crops that had matured early as a result of moisture stress. Harvesting conditions were ideal in the northern and central regions, while the southern cropping regions experienced rain and hail storm interruptions in late November and early December and consequent downgrades in quality.

- **Wheat** production in New South Wales in 2003-04 is estimated to have increased by around 139 per cent to 6.05 million tonnes, with the estimated area planted 10 per cent higher than last season. Northern regions of the state produced good quality wheat, high in protein and high quality durum from average yields. In the central areas, grain quality was good to excellent, with high protein; however, yields were below average due to dry conditions. Southern growing regions experienced variable yields and quality as a result of dry growing conditions and late rains at harvest.

**New South Wales major crop estimates, 2003-04**

	Area s	Yield s	Pro- duction s	Production change from 2002-03
	'000 ha	t/ha	kt	%
Wheat	3 250	1.86	6 050	139
Barley	610	1.87	1 140	187
Canola	195	1.45	282	63
Sorghum	190	3.82	726	27
Cottonseed	110	2.07	227	-47
Rice	65	9.23	600	53

s ABARE estimate.

- The **barley** harvest is estimated to have increased by 187 per cent to 1.14 million tonnes in 2003-04. Grain quality was variable across the state, with high levels of screenings in the north. A significant proportion of the crop is of malting quality. In the south of the state, the grain was of below average quality, with much of the crop going to the domestic feed grain market.
- An estimated 282 000 tonnes of **canola** was harvested in 2003-04, up 63 per cent on the previous season's crop. Below average rainfall in the growing season, together with hot and dry conditions in September and late frosts, reduced yields. Crop quality was variable across the state, with oil content ranging from 30-43 per cent in the central west to 42-44 per cent in the Riverina.

- Most **pulse** crops produced average to below average yields as a result of heat and moisture stress in the growing period and late frosts in September. An outbreak of fungal disease reduced chickpea yields in northern New South Wales. The estimated total pulse harvest of 183 000 tonnes in 2003-04 was 62 per cent higher than the previous crop.
- In December and early January, northern parts of the state experienced hot, dry conditions, which stressed early planted summer crops, particularly early grown sorghum. However, northern cropping areas received good rain in the latter half of January and into February and this helped to revive those crops. In addition, soil moisture levels in the northern cropping areas have improved markedly and this will contribute to more favorable planting conditions for the upcoming winter crop.
- The total area planted to **rice** is estimated to have increased by 71 per cent to 65 000 hectares, while rice production is forecast to rise by around 53 per cent to 600 000 tonnes in 2003-04. The season started poorly with the second lowest October temperatures on record resulting in poor establishment and some replanting. With warmer than average temperatures in November, December and early January, the rice crop recovered well and is likely to record above average yields.
- The 2003-04 **sorghum** crop is forecast to be around 726 000 tonnes, 27 per cent higher than last year. The total area sown to sorghum across the state is expected to be around 190 000 hectares. Sorghum crops planted in October suffered from hot, dry conditions in December and early January and are likely to have benefited little from the January rains. However, these rains will greatly benefit later plantings of sorghum.
- **Cottonseed** and **cotton lint** production for New South Wales in 2003-04 are both forecast to fall by around 47 per cent, to 227 000 tonnes and 161 000 tonnes respectively. Low availabilities of irrigation water and low levels of subsoil moisture have limited area planted. This follows a 43 per cent reduction in area sown to cotton due to dry conditions in the previous season. The 2003-04 crop had a late start because of cool conditions, and around 7–10 per cent of the crop was replanted because of disease, hail and sandblasting events. The recent rains, however, are forecast to lead to better yields than previously expected.

# Victoria

- In Victoria, the major cropping areas received average rainfall through April–October. Drier conditions in September were offset by cooler weather that eased plant stress and maintained yields at average to above average across the state. However, in some regions, frosts together with low moisture levels have resulted in below average yields, particularly in some parts of the Mallee. In other regions, more moist conditions resulted in increased incidences of fungal disease, while rains in late November reduced yields at harvest.

- The area sown to winter grains in most regions throughout Victoria is estimated to have increased by 2 per cent to 2.8 million hectares in 2003-04. However, the planting of some crops was limited by the late break to the season that resulted in reduced canola plantings and increased plantings of barley and wheat in some regions. Total winter crop production in Victoria is estimated to be a record of almost 6.2 million tonnes in 2003-04, or more than tripple the drought affected 2002-03 crop.

**Victorian winter crop estimates, 2003-04**

	Area s	Yield s	Pro- duction s	Production change from 2002-03
	'000 ha	t/ha	kt	%
Wheat	1 370	2.45	3 350	279
Barley	740	2.23	1 650	268
Canola	230	1.83	420	146

s ABARE estimate.

- The area planted to **wheat** in Victoria is estimated to have increased by 12 per cent to almost 1.4 million hectares in 2003-04. Wheat production is estimated to have been 3.35 million tonnes in 2003-04, nearly four times greater than in 2002-03.
- While the area planted to **barley** is estimated to have been 4 per cent lower at around 740 000 hectares in 2003-04, production is estimated to have more than tripled to 1.65 million tonnes.
- Victorian **canola** production has improved on last year's drought affected outcomes. Despite the lower area planted (estimated at around 230 000 hectares due to late rains) the canola crop is estimated to have reached 420 000 tonnes in 2003-04, more than double that of the previous year.

# Queensland

- The prospects for summer crops in Queensland improved considerably with widespread rain across most of the major cropping areas in January and early February. Above to very much above average rainfall was recorded in nearly all areas of central and southern Queensland during January. Soil moisture profiles have been recharged and will mean that above average yields are likely to be achieved for most summer crops in 2003-04.

- Sorghum production is forecast to increase by 44 per cent to nearly 1.4 million tonnes reflecting increased sowings and well above average yields. Sowings occurred on the Darling Downs in October and November and benefited from further rains in December and January. The January rain was too late to enable significant additional plantings to take place in southern Queensland. However, in central Queensland the late rain is expected to result in significant plantings of summer crops — plantings are expected to be completed by mid to late February. Further rain at around flowering for late planted crops will ensure above average yields.

**Queensland winter crop estimates, 2003-04**

	Area s	Yield s	Pro- duction s	Production change from 2002-03
	'000 ha	t/ha	kt	%
Wheat	805	1.30	1 050	74
Barley	127	1.69	215	38
Sorghum	540	2.56	1382	44
Cottonseed	91	1.95	178	48

s ABARE estimate.

- With the timely rains the area planted to sunflowers in Queensland is forecast to increase 131 by per cent to around 60 000 hectares — in central Queensland sunflowers can be planted up till March. The production of sunflowers is forecast to reach 68 000 tonnes.
- Favorable cotton prices and improved seasonal conditions are expected to result in the dryland area increasing from virtually zero to around 30 000 hectares. Overall, the area planted is estimated to increase to 91 000 hectares, well below the record area of 185 000 hectares harvested in 2000-01. Cottonseed production is forecast to increase by 48 per cent to 178 000 tonnes in 2003-04.
- Total winter production is estimated to have almost reached 1.4 million tonnes, well above the drought affected crop of the previous year. Wheat production is estimated to have risen by 74 per cent to nearly 1.1 million tonnes in 2003-04, while barley production is estimated to be 38 per cent higher at around 215 000 tonnes in 2003-04. The dry finish to the season reduced yields in many areas, with late sown crops being particularly affected.

## Western Australia

- Winter crop production in Western Australia is estimated to have been a record 15.6 million tonnes in 2003-04 — around 2.3 million tonnes higher than the previous record in 1999-2000. Excellent seasonal conditions across most of the major cropping regions resulted in well above average yields. By the end of January the Cooperative Bulk Handling authority in Western Australia had received 14.6 million tonnes of grain.
- **Wheat** production is estimated to have increased by 167 per cent to a record 10.65 million tonnes in 2003-04, reflecting an increase in area sown and higher yields. While the quality of the crop was generally good there was some incidences of high screenings.

### Western Australia winter crop estimates, 2003-04

- Production of **barley** is estimated to have more than doubled to a record 2.95 million tonnes — well above the previous largest harvest of 2.26 million tonnes in 2001-02. The increase in production reflects an expansion in the area sown combined with well above average yields. Generally there has been some downgrading of the barley crop from malt to feed quality reflecting high screenings (high proportion of small grain) and cleaving (where the grain splits open because of wet weather).
- **Canola** production is estimated to have more than doubled to an estimated 610 000 tonnes in 2003-04. The cool moist seasonal conditions resulted in relatively high oil content in the canola crop.
- While the area planted to **lupins** in Western Australia in 2003-04 is estimated to have fallen by 38 per cent to around 500 000 hectares, production is estimated to have increased by 30 per cent to 751 000 tonnes.

	Area s	Yield s	Pro- duction s	Production change from 2002-03
	'000 ha	t/ha	kt	%
Wheat	4 970	2.14	10 650	167
Barley	1 240	2.38	2 950	112
Canola	400	1.53	610	112
Lupins	500	1.50	751	30

s ABARE estimate.

## South Australia

- Total winter crop production is estimated to have been 7.3 million tonnes, the third highest crop on record for South Australia. The crop was 17 per cent below the record crop of 2001-02.
- Although seasonal conditions were generally positive, the dry finish affected the quality of some of the crops harvested in South Australia. Overall the quality of the grain was good, although there were some coloring concerns with the lentil and lupin crops. The dry finish contributed to wheat not meeting earlier expectations on crop size.

- The South Australian wheat harvest is estimated at 3.8 million tonnes, also the third largest crop on record. The quality of the wheat was good, although protein levels were variable between regions.

**South Australia winter crop, 2003-04**

	Area s	Yield s	Pro- duction s	Production change from 2002-03
	'000 ha	t/ha	kt	%
Wheat	1 998	1.90	3 800	88
Barley	1 140	2.24	2 550	96
Canola	180	1.72	310	49

s ABARE estimate.

- Estimated barley production was 2.55 million tonnes, the second largest barley crop on record. Production was 8 per cent lower than the record crop in 2001-02. Overall the quality of the crop was good, although there were high levels of screening in some areas and the protein levels were variable.
- The canola crop was a record, with production estimated to have been 310 000 tonnes. This is an increase of 14 per cent from the previous record achieved in 2001-02, with the average yield for the crop being 1.72 tonnes per hectare. The quality of the crop was very high and the oil content of the grain was excellent.
- Of the pulse crops, lentil production is estimated at 90 000 tonnes, up by around 48 per cent on the previous year's production. There were quality concerns with the colouring of the lentils due to seasonal effects. Field pea production is estimated to have been 160 000 tonnes for the 2003-04 season.

# 1 Crop production in Australia

At 11 February 2004

	Area planted				Yield				Production			
	2002-03		2003-04		2002-03		2003-04		2002-03		2003-04	
	Five year average a	2002-03 current a	2003-04 previous	2003-04 current	Five year average a	2002-03 current a	2003-04 previous	2003-04 current	Five year average a	2002-03 current a	2003-04 previous	2003-04 current
'000 ha	'000 ha	'000 ha	'000 ha	t/ha	t/ha	t/ha	t/ha	kt	kt	kt	kt	
Wheat	11 564	11 045	12 352	12 401	1.93	0.91	1.94	2.01	22 371	10 058	23 910	24 920
Barley	3 289	3 772	3 840	3 800	1.97	0.98	2.02	2.24	6 505	3 713	7 743	8 525
Oats <b>b</b>	773	906	910	890	1.82	1.02	1.80	1.79	1 407	926	1 638	1 596
Triticale	382	305	366	366	1.99	0.88	1.90	1.90	761	269	695	695
Sorghum <b>b</b>	659	673	800	730	2.75	2.29	2.56	2.89	1 809	1 541	2 048	2 108
Maize	72	60	88	85	5.00	5.27	5.18	5.42	363	316	455	461
Canola	1 331	1 190	1 003	1 005	1.28	0.71	1.41	1.61	1 701	841	1 416	1 622
Sunflower	105	40	60	81	1.09	0.63	0.92	1.16	119	25	55	94
Cottonseed <b>c</b>	480	224	182	201	2.19	2.43	2.14	2.02	1 041	546	389	405
- lint	480	224	182	201	1.55	1.72	1.51	1.43	736	386	275	287
Rice	151	38	60	65	8.93	10.29	9.78	9.23	1 348	391	587	600
Lupins <b>d</b>	1 300	930	638	638	1.14	0.77	1.65	1.49	1 499	716	1 052	953
Field peas <b>d</b>	358	312	301	301	1.13	0.51	1.41	1.35	402	160	424	407
Chickpeas <b>d</b>	251	201	162	152	0.87	0.68	1.13	1.17	207	136	182	178
Faba beans <b>d</b>	165	157	155	155	1.51	0.69	1.83	1.79	252	108	283	277
Lentils <b>d</b>	95	165	128	131	1.13	0.41	1.62	1.34	121	67	207	175

**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: Pulse Australia for 2001-02, 2002-03 and 2003-04; 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.

## 2 State production – principal crops

At 11 February 2004

	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
<b>Wheat</b>												
2003-04 - current ABARE estimate	3 250	6 050	1 370	3 350	805	1 050	4 970	10 650	1 998	3 800	8	20
2003-04 - previous ABARE estimate	3 250	5 950	1 370	3 200	805	1 050	4 970	9 830	1 950	3 850	8	30
2002-03 - current ABS estimate	2 946	2 535	1 226	883	520	602	4 432	3 984	1 913	2 025	8	29
Five year average to 2001-02 <b>a</b>	3 330	7 396	1 064	2 296	945	1 458	4 417	7 695	1 803	3 505	5	20
<b>Barley</b>												
2003-04 - current ABARE estimate	610	1 140	740	1 650	127	215	1 240	2 950	1 070	2 550	13	20
2003-04 - previous ABARE estimate	640	1 120	740	1 421	127	194	1 180	2 407	1 140	2 565	13	36
2002-03 - current ABS estimate	619	397	769	448	110	156	1 131	1 390	1 135	1 298	8	23
Five year average to 2001-02 <b>a</b>	619	1 257	633	1 263	127	213	890	1 647	1 010	2 098	10	27
<b>Oats <b>b</b></b>												
2002-03 - current ABS estimate	309	115	190	259	10	2	311	473	82	68	4	9
<b>Lupins <b>c</b></b>												
2003-04 - current ABARE estimate	42	58	30	51	0	0	500	751	65	94	0	0
2003-04 - previous ABARE estimate	42	58	30	51	0	0	500	851	63	99	0	0
2002-03 - current ABS estimate	108	35	41	11	0	0	804	577	90	92	0	1
Five year average to 2001-02 <b>a</b>	104	148	37	42	0	0	1 080	1 202	79	107	0	0
<b>Canola</b>												
2003-04 - current ABARE estimate	195	282	230	420	0	0	400	610	180	310	0	0
2003-04 - previous ABARE estimate	193	251	230	345	0	0	400	540	180	280	0	0
2002-03 - current ABS estimate	476	173	250	171	0	0	338	288	198	207	0	1
Five year average to 2001-02 <b>a</b>	444	667	221	303	1	1	521	529	143	199	1	1
<b>Sorghum</b>												
2003-04 - current ABARE estimate	190	726	0	0	540	1 382	0	0	0	0	0	0
2003-04 - previous ABARE estimate	260	805	0	3	540	1 235	0	3	0	0	0	0
2002-03 - current ABS estimate	257	573	5	3	408	963	3	2	0	0	0	0
Five year average to 2001-02 <b>a</b>	211	709	2	4	444	1 092	2	3	0	0	0	0
<b>Cottonseed <b>d</b></b>												
2003-04 - current ABARE estimate	110	227	0	0	91	178	0	0	0	0	0	0
2003-04 - previous ABARE estimate	98	229	0	0	84	159	0	0	0	0	0	0
2002-03 - latest ABARE estimate	165	425	0	0	59	120	0	0	0	0	0	0
Five year average to 2001-02 <b>a</b>	322	713	0	0	158	328	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 lupinus. *Source*: Pulse Australia for 2001-02, 2002-03, 2003-04; ABARE for previous years. **d** Cottonseed area is estimated harvested area. **s** ABARE estimate. **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.

3 State production – other major crops At 11 February 2004

	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
<b>Field peas</b>												
2003-04 - current estimate <b>a</b>	27	33	109	134	0	0	51	81	114	160	0	0
2003-04 - previous estimate <b>a</b>	27	33	109	154	0	0	51	81	112	177	0	0
2002-03 - latest ABARE estimate	12	9	110	11	0	0	71	31	119	109	0	0
Five year average to 2001-02 <b>b</b>	20	22	144	132	1	0	58	49	134	199	1	1
<b>Maize</b>												
2003-04 - current estimate	29	247	1	7	53	201	2	6	0	0	0	0
2003-04 - previous estimate	35	267	1	7	50	175	2	6	0	0	0	0
2002-03 - latest ABARE estimate	25	212	1	5	32	90	2	9	0	0	0	0
Five year average to 2001-02 <b>b</b>	25	190	1	7	46	165	1	4	0	0	0	0
<b>Chickpeas</b>												
2003-04 - current estimate <b>a</b>	61	73	6	6	76	91	6	5	3	3	0	0
2003-04 - previous estimate <b>a</b>	66	76	6	7	81	91	6	5	4	4	0	0
2002-03 - latest ABARE estimate	71	51	9	0	111	81	6	2	4	3	0	0
Five year average to 2001-02 <b>b</b>	86	85	61	35	46	44	50	36	7	7	0	0
<b>Sunflowerseed</b>												
2003-04 - current estimate	21	26	0	0	60	68	0	0	0	0	0	0
2003-04 - previous estimate	35	33	0	0	25	22	0	0	0	0	0	0
2002-03 - latest ABARE estimate	14	12	0	0	26	13	0	0	0	0	0	0
Five year average to 2001-02 <b>b</b>	33	42	2	3	67	72	0	0	1	1	0	0
<b>Faba beans</b>												
2003-04 - current estimate <b>a</b>	15	17	50	90	0	0	7	10	83	160	0	0
2003-04 - previous estimate <b>a</b>	15	17	50	90	0	0	7	10	83	166	0	0
2002-03 - latest ABARE estimate	17	18	50	5	0	0	7	2	83	83	0	0
Five year average to 2001-02 <b>b</b>	29	43	53	75	2	2	20	16	61	115	0	0
<b>Lentils</b>												
2003-04 - current estimate <b>a</b>	2	2	60	80	0	0	3	3	66	90	0	0
2003-04 - previous estimate <b>a</b>	2	2	60	100	0	0	3	3	69	110	0	0
2002-03 - latest ABARE estimate	2	1	90	4	0	0	3	2	70	61	0	0
Five year average to 2001-02 <b>b</b>	2	2	67	73	0	0	3	2	24	45	0	0

**a** Source: Pulse Australia for 2001-02, 2002-03 and 2003-04; 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.

## 4 Rainfall comparisons for principal Australian cropping districts

	October			November			December			January		
	Normal a	2002	2003	Normal a	2002	2003	Normal a	2002	2003	Normal a	2003	2004 p
	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm
<b>Queensland</b>												
Central Highlands (35)	42	5	47	60	13	15	85	38	92	94	13	177
Maranoa (43)	46	15	53	58	20	33	68	36	68	75	10	154
West Darling Downs (42)	48	26	64	58	15	26	70	59	101	77	11	149
East Darling Downs (41)	63	29	95	72	30	29	93	90	133	90	16	152
Moreton South Coast (40)	76	40	84	94	41	30	129	101	129	152	7	203
<b>New South Wales</b>												
North West Plains (W) (52)	42	12	46	48	11	39	51	42	46	71	15	152
North West Plains (E) (53)	49	19	60	59	18	41	62	60	65	76	15	162
North West Slopes (N) (54)	61	31	96	71	38	44	78	73	94	83	17	195
North West Slopes (S) (55)	76	11	73	83	40	59	96	93	61	105	16	158
Northern Tablelands (N) (56)	61	35	123	65	60	62	74	83	101	82	31	199
Central West Plains (S) (50)	44	4	41	40	5	24	44	16	37	47	21	54
Central West Plains (N) (51)	41	6	40	41	7	26	42	19	41	55	27	61
Central West Slopes (N) (64)	54	9	69	56	18	49	61	48	38	77	19	61
Central West Slopes (S) (65)	56	2	54	51	11	38	51	27	45	59	30	50
Central Tablelands (N) (62)	58	3	81	60	23	83	61	52	54	71	17	53
Central Tablelands (S) (63)	75	4	73	75	20	88	80	49	62	94	29	54
Riverina (W) (75)	37	5	40	26	8	36	28	7	55	29	14	13
Riverina (E) (74)	47	5	52	34	11	44	35	9	66	35	13	17
South West Slopes (N) (73)	59	4	58	48	8	47	48	17	69	50	12	34
South West Slopes (S) (72)	83	17	85	61	22	77	58	28	80	55	12	42
Southern Tablelands (GM)(70)	64	13	71	61	16	78	60	38	66	62	15	51
<b>Victoria</b>												
North Mallee (76)	33	10	34	24	17	18	20	34	39	20	4	7
South Mallee (77)	37	12	38	27	23	14	23	26	37	21	7	7
North Wimmera (78)	41	15	50	30	30	11	25	27	35	22	9	9
South Wimmera (79)	50	33	66	36	33	18	29	27	38	26	15	16
Lower North (80)	44	8	45	31	20	32	28	17	56	29	17	7
Upper North (81)	51	16	57	36	25	31	33	16	65	34	24	11
Lower North East (82)	80	26	90	58	40	67	54	23	129	48	24	29
Upper North East (83)	109	47	99	80	50	61	70	36	120	60	33	43
North Central (88)	71	39	80	54	33	32	47	27	65	41	31	30
Central Western (89)	63	46	93	53	44	28	43	31	39	36	25	32
<b>Western Australia</b>												
North Coast (8)	18	15	6	10	4	18	8	15	1	11	1	8
Central Coast (9)	50	42	18	23	15	27	12	4	2	10	1	4
Northern Central (10)	19	14	8	13	9	24	11	22	7	13	4	12
South Coast (9A)	65	59	57	36	24	36	21	13	10	17	6	22
South Central (10A)	29	24	29	20	18	18	13	14	9	14	1	21
South East (12)	14	4	12	16	19	44	16	31	13	21	20	28
<b>South Australia</b>												
Upper South East (25B)	41	21	47	29	38	13	25	19	36	18	13	9
Murray Mallee (25A)	32	9	36	23	21	13	19	16	30	17	4	5
Murray River (24)	32	9	34	23	20	14	21	17	30	17	5	6
East Central (23)	53	24	54	34	32	14	28	14	27	21	16	10
West Central (22)	36	32	48	23	40	16	20	7	23	15	22	10
Lower North (21)	42	13	30	29	24	12	24	14	30	20	11	8
Upper North (19)	32	3	46	25	21	15	23	14	36	22	7	5
Western (18)	27	10	28	20	24	19	19	15	17	12	23	4
<b>Tasmania</b>												
Northern (91)	90	110	66	68	47	20	64	41	64	48	74	147
Midlands (93)	54	62	26	48	28	12	55	12	39	40	32	106

a The definition of normal rainfall reflects a simple arithmetic average of rainfall over the period 1913 to 2003. p Preliminary.

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

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

## 5 Supply and disposal of Australian wheat, oilseeds and pulses <sup>a</sup>

	1998-99	1999-00	2000-01	2001-02	2002-03 <sup>s</sup>	2003-04 <sup>f</sup>
	kt	kt	kt	kt	kt	kt
<b>Wheat</b>						
Production	21 464	24 758	22 108	24 299	10 058	24 930
Domestic use	4 306	4 636	4 703	4 796	7 706	4 977
– human and industrial	2 117	2 159	2 185	2 208	2 231	2 254
– feed <sup>b</sup>	1 641	1 930	2 000	2 100	2 700	2 185 <sup>c</sup>
– seed	548	546	519	497	556	538
Exports	16 391	17 784	16 085	16 304	9 068	15 200
Change in stocks	768	2 338	1 320	3 199	-6 716	4 753
<b>Canola</b>						
Production	1 690	2 426	1 775	1 756	841	1 622
Domestic use	355	370	286	399	374	457
– crushers	345	362	279	393	369	450
– seed	10	7	7	6	5	7
Exports	1 355	2 033	1 392	1 380	518	1 178
<b>Pulses – major crops</b>						
Production						
Lupins	1 696	1 968	1 055	1 215	716	953
Field peas	370	357	456	512	160	407
Chickpeas	188	230	162	258	136	178
Apparent domestic use <sup>b</sup>						
Lupins	501	516	546	534	617	489
Field peas	31	68	93	75	68	137
Chickpeas	28	26	23	24	20	13
Exports						
Lupins	1 194	1 452	509	416	189	464
Field peas	267	289	362	428	150	273
Chickpeas	120	243	176	272	116	207

<sup>a</sup> 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. <sup>b</sup> Calculated as a residual: production less exports less other domestic uses less change in stocks. <sup>c</sup> Does not include imports. <sup>s</sup> ABARE estimate. <sup>f</sup> 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.

## 6 Supply and disposal of Australian coarse grains <sup>a</sup>

	1998-99	1999-00	2000-01	2001-02	2002-03 <sup>s</sup>	2003-04 <sup>f</sup>
	kt	kt	kt	kt	kt	kt
<b>Barley</b>						
Production	5 987	5 032	6 743	8 280	3 713	8 525
Domestic use	2 158	2 011	2 325	2 499	1 936	2 426
– as malt and other human use	151	154	158	161	165	168
– feed	1 890	1 700	2 000	2 200	1 600	2 100
– seed	117	157	168	138	171	158
Export	4 765	3 325	4 567	5 274	2 607	5 225
– feed barley	2 607	1 524	2 143	2 971	885	2 833
– malting barley	1 635	1 234	1 824	1 705	1 099	1 717
– malt (grain equivalent)	525	569	602	600	624	674
<b>Oats</b>						
Production	1 798	1 118	1 050	1 434	926	1 596
Domestic use	1 550	983	964	1 244	804	1 422
– human	116	119	122	125	128	131
– feed	1 406	833	805	1 085	634	1 255
– seed	28	31	37	34	43	37
Export	248	135	86	190	121	277
<b>Triticale <sup>b</sup></b>						
Production	708	764	841	860	269	695
Domestic use	708	758	840	860	269	695
– feed	690	744	826	847	251	676
– seed	18	14	14	13	18	19
<b>Sorghum</b>						
Production	1 891	2 116	1 935	2 021	1 541	2 108
Domestic use	1 399	1 452	1 433	1 646	1 466	1 703
– feed	1 396	1 448	1 429	1 644	1 462	1 699
– seed	3	4	4	3	4	4
Export	493	665	501	375	75	405
<b>Maize</b>						
Production	338	406	345	457	316	461
Domestic use	302	353	300	396	297	440
– human, industrial	94	96	99	101	104	106
– feed	206	256	200	293	192	333
– seed	1	1	1	1	1	1
Export	36	53	45	61	19	20
<b>Total coarse grains</b>						
Production	10 722	9 436	10 914	13 052	6 765	13 385
Domestic use	6 116	5 557	5 863	6 645	4 772	6 687
– human, industrial	361	369	378	387	396	406
– feed	5 588	4 981	5 261	6 069	4 139	6 062 <sup>c</sup>
– seed	167	207	224	189	237	219
Export	5 543	4 177	5 199	5 900	2 822	5 818

<sup>a</sup> 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. <sup>b</sup> Excludes small quantities of triticale for export. <sup>c</sup> Does not include imports. <sup>s</sup> ABARE estimate. <sup>f</sup> ABARE forecast.

Sources: Australian Bureau of Statistics; ABARE.

## 7 Australian grain prices <sup>a</sup>

	2002		2003		2004			
	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec		Jan-Mar <sup>s</sup>
	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t		A\$/t
<b>Wheat</b>								
Domestic								
Feed – Sydney	277	347	326	288	239	208	207	
Export								
Australian standard white <sup>b</sup>	353	367	295	262	259	258	238	
International								
US no.2 hard red winter, fob Gulf <sup>b</sup>	301	330	270	223	222	228	210	
<b>Barley</b>								
Domestic								
2 row feed – Sydney	258	332	337	292	259	187	181	
Export <sup>c</sup>								
Feed (bulk)	191	223	250	223	202	213	199	
Malting (bulk)	245	250	311	286	374	229	258	
International								
Feed – US no. 2 fob Portland <sup>b</sup>	222	241	221	199	202	188	172	
<b>Sorghum</b>								
Domestic								
Feed – Sydney	256	331	313	255	202	198	197	
Export <sup>c</sup>	224	244	307	254	243	199	208	
International								
US del. Gulf <sup>b</sup>	205	209	196	177	163	168	160	
<b>Oats</b>								
Domestic								
Feed – Sydney	272	350	358	356	245	157	140	
Export <sup>c</sup>	245	220	388	312	332	357	224	
International								
US heavy white, del. Portland <sup>b</sup>	299	303	293	276	244	201	192	
<b>Maize</b>								
Domestic								
Feed – Sydney	292	380	390	311	288	249	242	
International								
US no.2 fob Gulf <sup>b</sup>	197	195	179	167	153	151	148	
<b>Oilseeds</b>								
Domestic								
Canola – del. Melbourne	501	544	451	401	396	408	403	
Sunflower – del. Melbourne	404	428	448	463	432	423	364	
Soybeans – US cif Rotterdam <sup>b</sup>	414	428	425	405	395	457	353	
<b>Pulses</b>								
Domestic								
Lupins – del. Perth	235	284	270	260	263	240	249	
Field peas – del. Melbourne	340	397	397	430	342	255	346	
Chickpeas – del. Melbourne	521	523	523	495	438	365	431	
Export <sup>c</sup>								
Chickpeas	708	598	622	565	520	321	475	
Field peas	395	404	388	392	423	325	338	

<sup>a</sup> 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. <sup>b</sup> Average of daily offer prices made in US\$, converted to A\$ using monthly average of daily exchange rates. <sup>c</sup> 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. <sup>s</sup> ABARE estimate. <sup>na</sup> Not available.

*Note:* Prices used in these calculations exclude the GST.