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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, 17 February 2004

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- 2003-04 summer crop planting and production updates

ABARE project 1076

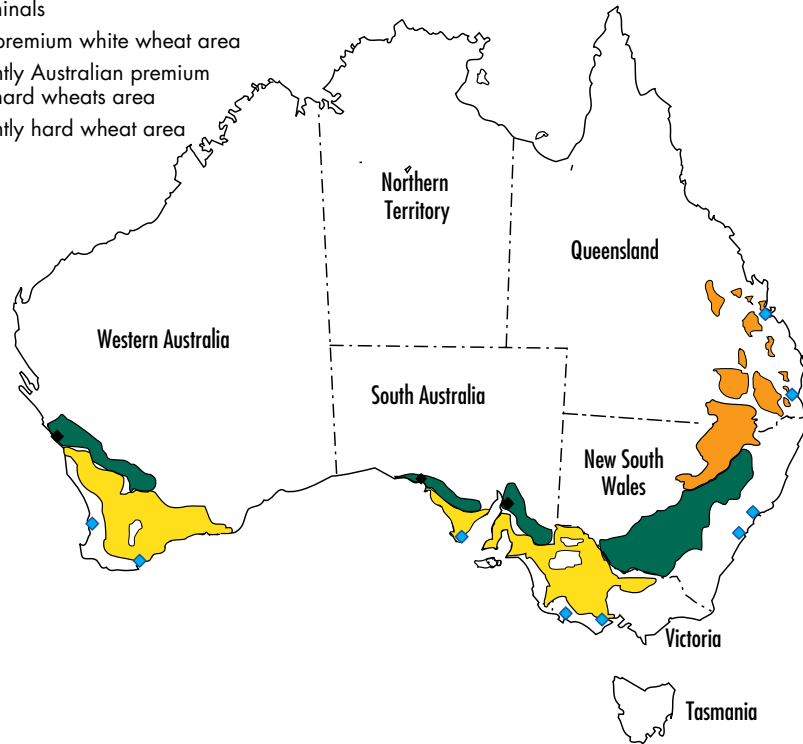
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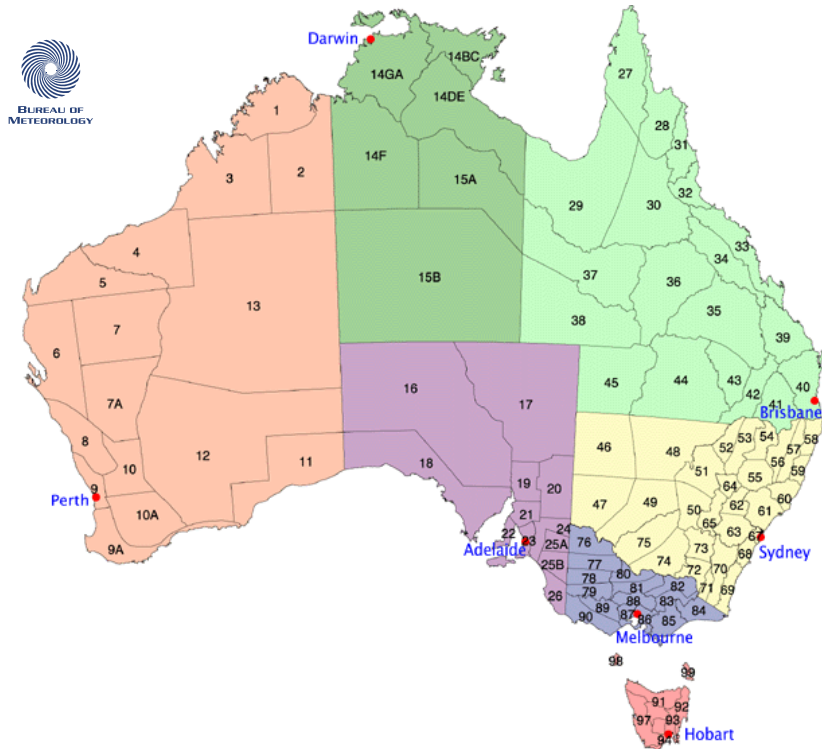
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### Wheat growing regions

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



### Australian meteorological districts



## overview

- Australian winter crop production is forecast to reach around 37.6 million tonnes in 2003-04, 20.6 million tonnes more than last season's drought affected crop. This represents a 121 per cent rise on estimates of grain production for 2002-03 recently released by the Australian Bureau of Statistics.
- After a generally poor start to the season across much of the grain belt, many crops, particularly in southern regions (where late plantings also occurred), recovered following mild conditions and favorable rains predominantly in June, August and October.
- However, there was some damage to crops, particularly in New South Wales, Queensland and to a lesser extent in some crop growing regions of Victoria and South Australia, because of hot dry winds in September and isolated pockets of frost and disease during October and early November. Some crops in southern regions of Australia have also recently suffered from rain and hail damage, which is likely to adversely affect final yields and grain quality.
- Wheat production in 2003-04 is forecast to rise by 138 per cent to around 23.9 million tonnes, barley by 109 per cent to 7.7 million tonnes, canola by 68 per cent to 1.4 million tonnes and pulses by 81 per cent to 2.1 million tonnes.
- Areas sown to summer grain crops are forecast to increase by 19 per cent to 1.3 million hectares in 2003-04. The area sown to rice is forecast to increase by 58 per cent following an improved allocation of water for irrigation relative to last season. However, the area sown to cotton is estimated to be down 10 per cent from last season to 182 000 hectares as water allocations for cotton are likely to be severely curtailed.

## Seasonal conditions

Details of the rainfall received over the past two seasons during the important April–October period for the major grain growing regions are given in table A, along with rainfall received in this period also expressed as a percentage of the average April–October rainfall for the period 1913–2003. As can be seen, most of the cropping regions in Victoria, South Australia and Tasmania received above long term average rainfall in 2003. However, the above average rainfall in Tasmania caused considerable water logging for their crops, which in turn is likely to reduce yields. For the other states, while some regions received above average rainfall, the majority were below their long term averages although above average rainfall was received in June, August and October (see table 4).

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Despite below average rainfall in most cropping regions of Western Australia, above average yields are being achieved, leading to a record grain crop, as rainfall was received at critical times throughout the season for crop growth and grain fill.

In South Australia, Victoria and southern New South Wales there is also a likelihood of average to above average yields in most grain growing regions, leading to sizable crops, although hot, dry winds in September and isolated pockets of frost and disease had a negative impact during October and early November. Crops in southern regions have also recently suffered from some rain and hail damage, which is likely to have an impact on final yields and grain quality.

While cropping areas in northern New South Wales and Queensland received significantly more rain than last season, rainfall was patchy at the time of planting and at other critical times throughout the season. This, coupled with hot dry winds in September and isolated pockets of frost and disease during October and early November, has led to below average yields and production for winter crops in those regions.

### Three month rainfall outlook

The National Climate Centre's latest seasonal rainfall outlook for the summer period December–February indicates above average seasonal falls are generally a 50:50 prospect for the summer cropping areas of central and southern Queensland, northern New South Wales and for the winter crop growing areas in the rest of Australia ([click here for map](#)).

According to the Bureau of Meteorology, the Southern Oscillation Index (SOI) continues in a neutral phase. October's value of the SOI was –2, the same as that recorded in August and September. The approximate SOI for the 30 days ended 28 November was –2.6. Computer models are unanimously indicating a continuation of a somewhat warm but neutral situation during the next five months.

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 and estimates of the probability of those median yields in the current

### **A** Aggregate April–October rainfall in major grain growing regions

	Average			Percentage of average	
	1913–2003	2002	2003	2002	2003
	mm	mm	mm	%	%
<b>Queensland</b>					
Central Highlands (35)	210	122	162	58	77
Maranoa (43)	230	121	246	53	107
West Darling Downs (42)	239	155	257	65	107
East Darling Downs (41)	295	143	261	48	88
Moreton South Coast (40)	460	275	316	60	69

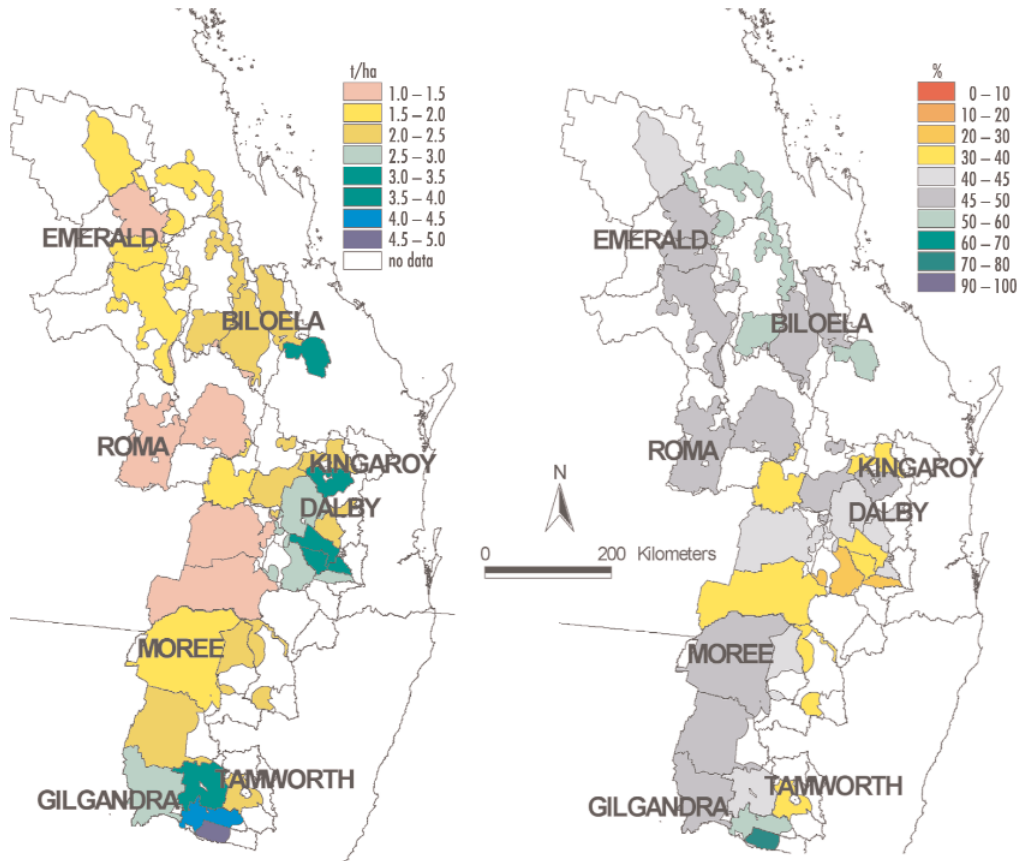
## A Aggregate April–October rainfall in major grain growing regions

	Average 1913–2003	2002	2003	Percentage of average	
				2002	2003
	mm	mm	mm	%	%
<b>New South Wales</b>					
North West Plains (W) (52)	240	94	232	39	97
North West Plains (E) (53)	279	118	282	42	101
North West Slopes (N) (54)	311	129	294	41	94
North West Slopes (S) (55)	327	114	328	35	100
Northern Tablelands (N) (56)	368	167	349	45	95
Central West Plains (S) (50)	263	126	254	48	97
Central West Plains (N) (51)	247	95	284	38	115
Central West Slopes (N) (64)	321	137	366	43	114
Central West Slopes (S) (65)	337	164	293	49	87
Central Tablelands (N) (62)	341	141	367	41	108
Central Tablelands (S) (63)	473	196	359	41	76
Riverina (W) (75)	224	105	238	47	106
Riverina (E) (74)	299	144	323	48	108
South West Slopes (N) (73)	371	226	337	61	91
South West Slopes (S) (72)	549	396	537	72	98
Southern Tablelands (GM)(70)	373	212	331	57	89
<b>Victoria</b>					
North Mallee (76)	203	117	224	58	110
South Mallee (77)	237	136	258	57	109
North Wimmera (78)	284	169	296	60	104
South Wimmera (79)	362	255	408	71	113
Lower North (80)	286	123	320	43	112
Upper North (81)	346	186	400	54	116
Lower North East (82)	550	425	686	77	125
Upper North East (83)	771	485	723	63	94
North Central (88)	501	319	513	64	102
Central Western (89)	425	334	444	79	104
<b>South Australia</b>					
Upper South East (25B)	313	215	334	69	107
Murray Mallee (25A)	211	113	229	54	108
Murray River (24)	227	145	253	64	111
East Central (23)	459	307	459	67	100
West Central (22)	332	279	397	84	120
Lower North (21)	321	201	291	63	91
Upper North (19)	226	97	181	43	80
Western (18)	251	149	183	59	73
<b>Western Australia</b>					
North Coast (8)	328	216	309	66	94
Central Coast (9)	745	522	609	70	82
Northern Central (10)	280	175	274	63	98
South Coast (9A)	763	553	653	72	86
South Central (10A)	341	238	344	70	101
South East (12)	160	76	145	48	91
<b>Tasmania</b>					
Northern (91)	709	777	957	110	135
Midlands (93)	328	326	463	99	141

## 1 Simulated medium sorghum yield, by shire

Long term, 1901–2002

Probability of exceeding the long term median yield based on SOI phase consistently near zero in September/October



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.

season (map 1). The information in the second map reveals a 50:50 probability of yields exceeding the long term median across most of the sorghum growing regions of Queensland and northern New South Wales, although there are some areas (colored yellow and orange) that have a low chance of exceeding median yields and other smaller areas (colored green) that have a high chance of exceeding median yields.

### Winter crops

Total winter crop production is now forecast at 37.6 million tonnes in 2003-03, up 20.6 million tonnes from last season's drought affected crop, but below the record production of 39.3 million tonnes harvested in 2001-02 (table B).

ABARE's estimate for 2002-03 Australian winter crop production has been revised in line with the preliminary estimates for area sown and production for major crops recently released by the Australian Bureau of Statistics. The ABS estimates are based on a 64 per cent response rate of farms from their 2003 Agricultural Survey.

While the estimate for the total Australian winter crop production for 2003-04 is only slightly up on that expected in September, production outcomes by state have changed considerably.

Western Australia has had a dramatic turnaround from last year's drought, with total grain production forecast to be a record 14.4 million tonnes. This is a result of mild winter conditions and good rainfall that occurred at critical times across most cropping regions. Wheat production is forecast to rise by 147 per cent to 9.8 million tonnes in 2003-04, while barley is expected to be 73 per cent higher at 2.4 million tonnes and canola up 87 per cent at 0.54 million tonnes.

Production in Victoria and South Australia is also expected to be up significantly, reaching 5.8 and 7.4 million tonnes respectively – their second biggest crops on record. Again both states experienced mild winter conditions and favorable rains predominantly in June, August and October. This has led to average or above average yields for most crops, although the wet weather and hail storms at the end of November are likely to affect final yields and grain quality for some crops such as barley. Wheat production is forecast to have more than tripled to 3.2 million tonnes in Victoria in 2003-04 and increased by 90 per cent to 3.9 million tonnes in South Australia. Barley production is forecast to more than triple to 1.4 million tonnes in Victoria in 2003-04 and almost double to 2.6 million tonnes in South Australia.

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

	<b>New South Wales</b>	<b>Victoria</b>	<b>Queensland</b>	<b>Western Australia</b>	<b>South Australia</b>	<b>Australia</b>
	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>	7.93	5.80	1.34	14.35	7.39	37.59
<i>% change</i>	<i>138</i>	<i>223</i>	<i>60</i>	<i>113</i>	<i>87</i>	<i>121</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.

Winter crop production in New South Wales, while up considerably from last year is now forecast to be lower than was expected in September. Total winter grain production is forecast to be up by 138 per cent to 7.9 million tonnes. Below average rains and hot winds in September, and isolated pockets of frost and disease during October and early November contributed to poor yields, particularly in the northern cropping regions of New South Wales. Late season rainfall and hail at the end of November has disrupted the grain harvest in the southern cropping regions and some quality downgrading of grain (mainly barley and canola) is likely to occur. Wheat production is forecast to increase by 135 per cent to 5.9 million tonnes in 2003-04, barley by 182 per cent to 1.1 million tonnes, and canola by 45 per cent to 0.25 million tonnes.

With harvest near completion, Queensland winter crop production is estimated to be 1.3 million tonnes, up 60 per cent from last year. Like northern New South Wales, below average rains particularly in the central highlands, hot dry winds in September, and isolated pockets of frost and disease during October and early November contributed to the poor yields. Wheat production is estimated to have risen by 74 per cent to 1.05 million tonnes in 2003-04, while the barley harvest is estimated to be 25 per cent higher at 0.2 million tonnes.

## Summer crops

The total summer crop area is forecast to rise by 19 per cent to 1.3 million hectares in 2003-04 (table C). This is despite shortages of irrigation water, which have constrained plantings of cotton and rice in 2003-04. Given average seasonal conditions and yields, summer crop production in 2003-04 is forecast to increase by 30 per cent to 3.7 million tonnes. The reduced availability of irrigation water for cotton production is forecast to lead to the area sown to cotton declining by 10 per cent to 182 000 hectares and cotton seed production falling by 19 per cent to 389 000 tonnes. The area sown to rice is forecast to rise by 58 per cent to

### **C** 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>	491	1.58	522	1.17	1 095	2.85
2003-04 <b>f</b>	513	1.98	713	1.61	1 301	3.70
<i>% change</i>	<i>4</i>	<i>25</i>	<i>37</i>	<i>37</i>	<i>19</i>	<i>30</i>

<sup>a</sup> 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.

60 000 hectares and rice production is forecast to rise by 50 per cent to 587 000 tonnes as a result of rice growers in the Murray Valley receiving 50 per cent of their water allocations for the coming season compared with only 8 per cent last season. However, total area planted is still well below the 177 000 hectares planted in 2000-01.

Although subsoil moisture remains low in most summer cropping areas of southern Queensland and northern New South Wales, average to above average rainfall was recorded in October and November which enabled significant areas of sorghum to be planted as well as aiding development of those crops already sown. However, plantings in central Queensland and the Dawson–Callide area have been constrained as these areas did not receive recent rains. Further rain is needed during the next couple of months to ensure widespread plantings in these areas. Assuming improved seasonal conditions, the area planted to the major summer broadacre crops of sorghum and maize is forecast to increase by 50 per cent to a combined 0.89 million hectares in 2003-04, with production rising by 35 per cent to 2.5 million tonnes.

## New South Wales

- The prospects for winter crops in many of the major cropping areas of New South Wales deteriorated during the spring. Hot, dry and windy conditions during September reduced the yield potential of many crops in southern and central New South Wales. A widespread frost in late September is also likely to have adversely affected yields and grain quality.
- **Wheat** production is forecast to increase by 135 per cent to over 5.9 million tonnes in 2003-04. There was insufficient rain through autumn and winter to replenish subsoil moisture, so the adverse conditions in September resulted in stress for most wheat crops, particularly in the southern and central areas of the state. In northern New South Wales conditions have been patchy, resulting in a considerable variation in yields. Crop yields in the Riverina region of southern New South Wales are expected to be better than in most other areas of the state.
- Wheat harvested from the northern and central regions has consisted of an above average proportion of prime hard wheats. Given the dry finish in most areas of the southern and central regions there is also likely to be a relatively high proportion of pinched grain with associated higher than normal screenings.
- **Barley** production is forecast to increase considerably to 1.12 million tonnes in 2003-04. Grain quality has been affected by dry spring conditions and frost damage. As a result there has been some downgrading of malting varieties to feed quality.
- **Canola** production is estimated to increase by 45 per cent to 251 000 tonnes in 2003-04. Hot, dry and windy conditions in September combined with a severe frost in late September have reduced yield potential. The impact of frost was particularly severe in the central west of the state. Cool October conditions mitigated some of the effects of the dry finish to the season.
- October and November rains across the northern cropping areas enabled significant areas of **sorghum** to be planted. However, subsoil moisture remains low in most summer cropping areas. The area sown to sorghum is estimated to be 260 000 hectares, similar to

**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	1.83	5 950	135
Barley	640	1.75	1 120	182
Canola	193	1.30	251	45
Sorghum	260	3.10	805	41
Cottonseed	98	2.34	229	-39

s ABARE estimate.

that planted over the past three seasons. Sorghum production is forecast to increase by 41 per cent to 0.81 million tonnes.

- The area planted to **rice** in 2003-04 is likely to again be affected by the availability of irrigation water. However, significantly higher water allocations for the Murray Valley (compared with allocations in 2002-03) are expected to lead to an increase in the area planted to rice. Water allocations for the Murrumbidgee Irrigation Area are expected to be similar to those available in 2002-03. Overall, the area planted to rice is estimated to increase by 58 per cent 60 000 hectares. Cool October and early November conditions delayed plantings and early establishment of the crop.
- ✦ Continuing low water storage levels in the main northern irrigation dams has constrained the area planted to irrigated **cotton** in New South Wales. The area planted to irrigated cotton is estimated to fall by around 40 per cent, while the area planted to dryland cotton is estimated to increase following planting rains in October. Overall, the area planted to cotton is estimated to decline by 35 per cent to 98 000 hectares in 2003-04.

## Victoria

- In Victoria, the major cropping areas received average rainfall during the April–October period. 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 have resulted in increased incidence of fungal disease, while rain in late November is expected to reduce 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 and resulted in reduced canola plantings and increased plantings of barley and wheat in some regions. With harvest under way, total winter crop production in Victoria is estimated to be around 5.8 million tonnes in 2003-04, more than triple last season's drought affected 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	2.34	3 200	262
Barley	740	1.92	1 421	217
Canola	230	1.50	345	102

s ABARE estimate.

- The area planted to **wheat** in Victoria is estimated to be up by 12 per cent to almost 1.4 million hectares in 2003-04. Assuming no further adverse weather events occur over the remainder of the season, wheat production is forecast to be 3.2 million tonnes this year.
- The area planted to **barley** is estimated to be 4 per cent lower at around 740 000 hectares in 2003-04, with production forecast to more than triple to around 1.42 million tonnes.
- Victorian **canola** production has improved on last year's drought affected outcome. Despite the lower area planted (estimated at around 230 000 hectares due to late rains) the canola crop is forecast to come in at around 345 000 tonnes in 2003-04, double that of the previous year.

# Queensland

- Total winter crop production in Queensland is forecast to increase by 60 per cent to 1.34 million tonnes. Hot and dry conditions in September significantly reduced the yield potential of most winter crops. Widespread rainfall in October was too late to benefit the winter crops, although the October rain enabled summer crops to be planted, particularly on the Darling Downs. However, soil moisture profiles still remain well below average.
- **Wheat** production is forecast to rise by 74 per cent to 1.05 million tonnes in 2003-04, reflecting an increase in the area planted and higher yields. Below average rainfall in September resulted in depletion of soil moisture reserves and, combined with very hot temperatures, increased moisture stress levels in many cropping areas. The areas most affected were the Darling Downs, the South West and the Central Highlands. Yields in the Central Highlands have been very poor. Despite a relatively high incidence of small grain size, a high proportion of prime hard wheat was delivered.

**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	1.53	194	25
Sorghum	540	2.29	1 235	28
Cottonseed	84	1.89	159	54

s ABARE estimate.

- **Barley** production is forecast to increase by 25 per cent to 194 000 tonnes in 2003-04, reflecting an increase in the area planted and improved seasonal conditions compared with the previous year. However, the dry finish to the season reduced yields in many areas — with the dry finish to the season stressing many of the late sown crops.
- The area planted to **sorghum** is forecast to increase by 32 per cent to 540 000 hectares. Sowing has occurred on the Darling Downs following the October rain. Late November rains enabled additional plantings to take place as well as aiding development of crops already sown. There have been no plantings in Central Queensland; small plantings have taken place in the Dawson–Callide area. In general, significant rain is required in both central and southern Queensland to boost crop prospects.
- Low water availability in the main storage dams is expected to again restrict the area planted to **cotton** in 2003-04. Favorable cotton prices and improved seasonal conditions are expected to result in the dryland area increasing from virtually zero to around 26 000 hectares. Overall, the area planted is forecast to increase to 84 000 hectares, well below the record area of 185 000 hectares harvested in 2000-01.

## Western Australia

- Excellent seasonal conditions in nearly all the major cropping regions in Western Australia have resulted in a forecast record winter harvest. Winter crop production is estimated to reach 14.4 million tonnes in 2003-04 — around 1 million tonnes higher than the previous record in 2000-01.
- Wheat production is forecast to rise by 147 per cent to a record 9.8 million tonnes in 2003-04, reflecting an increase in area sown and higher yields. Timely rains throughout the growing season have led to record yields in most wheat growing areas. Cool conditions during the spring have resulted in some incidence of stripe rust. There have also been reports of crown rot infestations, particularly in the north eastern wheat belt where farmers have not been able to plant break crop in three years. The cool conditions have delayed the maturity of the crop, with the harvest now expected to continue through to the end of December.

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

	Area s	Yield s	Pro- duction s	Production change from 2002-03
	'000 ha	t/ha	kt	%
Wheat	4 970	1.98	9 830	147
Barley	1 180	2.04	2 407	73
Canola	400	1.35	540	87
Lupins	500	1.70	851	47

s ABARE estimate.

- Production of barley is forecast to increase by 73 per cent to 2.4 million tonnes — well above the record harvest of 2.26 million tonnes in 2001-02. The increase in production reflects an expansion in area sown combined with well above average yields. Heavy mid-November rains across northern grain areas are likely to result in downgrading of some malting variety barley to feed quality.
- Canola production is forecast to rise by 87 per cent to 540 000 tonnes in 2003-04. While seasonal conditions have been excellent in most areas, continued cold and wet conditions in October are expected to dampen yield prospects in the high rainfall areas. Early crop deliveries indicate that the oil content is likely to average around 43 per cent.
- 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 forecast to rise by 47 per cent to 851 000 tonnes.

## South Australia

- Average to above average rainfall was recorded across the major cropping areas in South Australia in October, following on from the generally good rains in the preceding months. Conditions have tended to be cool to mild through the month, with a few warm to hot days. Strong winds caused moisture loss in some regions.
- Crop development throughout the state has largely been good, with average to above average yields aided by cool to mild conditions in most regions. Frosts were reported in some districts in September. However, it appears that crop damage has been minimal. With harvest under way, reported incidence of disease has been low across the state. Assuming average weather conditions until completion of the harvest, total winter crop production in South Australia is forecast to be around 7.4 million tonnes, up 87 per cent on last season's crop.

### South Australia winter crop, 2003-04

	Area s	Yield s	Pro- duction s	Production change from 2002-03
	'000 ha	t/ha	kt	%
Wheat	1 950	1.97	3 850	90
Barley	1 140	2.25	2 565	98
Canola	180	1.56	280	35

s ABARE estimate.

- South Australian **wheat** plantings are estimated to be largely unchanged at around 2 million hectares in 2003-04. However, wheat production is forecast to be around 3.9 million tonnes, 90 per cent higher than last year.
- While the area planted to **barley** is estimated to be similar to that of last season, at around 1.14 million hectares, production in 2003-04 forecast to nearly double to 2.57 million tonnes.
- The area planted to **canola** is estimated to be around 180 000 hectares. Drier than average conditions at planting resulted in the area sown to canola being scaled back in favor of barley, wheat and other crops. But with the better season, canola production is forecast to be around 280 000 tonnes, up 35 per cent on last year.
- Of the **pulse** crops, the area planted to lentils is estimated to be marginally lower at around 69 000 hectares, while production is forecast to be up 80 per cent to 110 000 tonnes. Field pea production is forecast to be up 62 per cent to 177 000 tonnes in 2003-04, despite the area planted being down more than 6 per cent on the previous year.

## 1 Crop production in Australia At 26 November 2003

	Area planted				Yield				Production			
	2002-03		2003-04		2002-03		2003-04		2002-03		2003-04	
	average a	current a	previous	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
Wheat	11 564	11 045	12 176	12 352	1.93	0.91	1.98	1.94	22 371	10 058	24 078	23 910
Barley	3 289	3 772	3 653	3 840	1.97	0.98	2.01	2.02	6 505	3 713	7 331	7 743
Oats <b>b</b>	773	906	831	910	1.82	1.02	1.73	1.80	1 407	926	1 434	1 638
Triticale	382	305	341	366	1.99	0.88	1.95	1.90	761	269	663	695
Sorghum <b>b</b>	659	673	800	800	2.75	2.29	2.56	2.56	1 809	1 541	2 048	2 048
Maize	72	60	93	88	5.00	5.27	5.36	5.18	363	316	499	455
Canola	1 331	1 263	983	1 003	1.28	0.67	1.39	1.41	1 701	841	1 368	1 416
Sunflower	105	40	83	60	1.09	0.62	1.00	0.92	119	25	83	55
Cottonseed <b>c</b>	480	203	135	182	2.19	2.37	2.37	2.14	1 041	482	321	389
- lint	480	203	135	182	1.55	1.67	1.68	1.51	736	341	227	275
Rice	151	38	45	60	8.93	10.29	9.78	9.78	1 348	391	440	587
Lupins <b>d</b>	1 299	1 043	638	638	1.14	0.69	1.65	1.65	1 499	716	1 052	1 052
Field peas <b>d</b>	358	312	301	301	1.13	0.51	1.41	1.41	402	160	424	424
Chickpeas <b>d</b>	251	201	162	162	0.87	0.68	1.13	1.13	207	136	182	182
Faba beans <b>d</b>	165	157	155	155	1.51	0.69	1.83	1.83	252	108	283	283
Lentils <b>d</b>	95	165	128	128	1.13	0.41	1.62	1.62	121	67	207	207

**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 26 November 2003

	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	5 950	1 370	3 200	805	1 050	4 970	9 830	1 950	3 850	8	30
2003-04 - previous ABARE estimate	3 400	7 170	1 400	3 200	720	1 000	4 650	9 000	2 000	3 680	6	28
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 <sup>a</sup>	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	640	1 120	740	1 421	127	194	1 180	2 407	1 140	2 565	13	36
2003-04 - previous ABARE estimate	650	1 274	720	1 346	120	187	1 100	2 178	1 050	2 310	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 <sup>a</sup>	619	1 257	633	1 263	127	213	890	1 647	1 010	2 098	10	27
<b>Oats <sup>b</sup></b>												
2002-03 - current ABS estimate	309	115	190	259	10	2	311	473	82	68	4	9
<b>Lupinus <sup>c</sup></b>												
2003-04 - current ABARE estimate	42	58	30	51	0	0	500	851	63	99	0	0
2003-04 - previous ABARE estimate	42	58	30	51	0	0	500	851	65	93	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 <sup>a</sup>	104	148	37	42	0	0	1 080	1 202	79	107	0	0
<b>Canola</b>												
2003-04 - current ABARE estimate	193	251	230	345	0	0	400	540	180	280	0	0
2003-04 - previous ABARE estimate	200	300	230	350	0	0	370	445	183	273	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 <sup>a</sup>	444	667	221	303	1	1	521	529	143	199	1	1
<b>Sorghum</b>												
2003-04 - current ABARE estimate	260	805	0	3	540	1 235	0	3	0	0	0	0
2003-04 - previous ABARE estimate	240	783	0	3	560	1 257	0	4	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 <sup>a</sup>	211	709	2	4	444	1 092	2	3	0	0	0	0
<b>Cottonseed <sup>d</sup></b>												
2003-04 - current ABARE estimate	98	229	0	0	84	159	0	0	0	0	0	0
2003-04 - previous ABARE estimate	83	217	0	0	52	104	0	0	0	0	0	0
2002-03 - latest ABARE estimate	150	378	0	0	54	104	0	0	0	0	0	0
Five year average to 2001-02 <sup>a</sup>	322	713	0	0	158	328	0	0	0	0	0	0

<sup>a</sup> Based on data from ABS, *Principal Agricultural Commodities*, cat. no. 7111.0; ABS, *Agricultural Commodities, Australia*, cat. no. 7121.0; and ABARE estimates. <sup>b</sup> Area harvested for grain, current season estimates, by state, are no longer produced because of difficulties in obtaining consistent data at the state level. <sup>c</sup> Includes albus lupinus. <sup>d</sup> Cottonseed area is estimated harvested area. <sup>e</sup> ABARE estimate. <sup>f</sup> 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 26 November 2003

	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	154	0	0	51	81	112	177	0	0
2003-04 - previous estimate <b>a</b>	27	33	109	154	0	0	51	81	114	156	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	35	267	1	7	50	175	2	6	0	0	0	0
2003-04 - previous estimate	40	306	1	7	50	180	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>	66	76	6	7	81	91	6	5	4	4	0	0
2003-04 - previous estimate <b>a</b>	66	76	6	7	81	91	6	5	3	3	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	35	33	0	0	25	22	0	0	0	0	0	0
2003-04 - previous estimate	30	33	0	0	53	50	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	166	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	100	0	0	3	3	69	110	0	0
2003-04 - previous estimate <b>a</b>	2	2	60	100	0	0	3	3	63	102	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

	July			August			September			October		
	Normal a	2002	2003	Normal a	2002	2003	Normal a	2002	2003	Normal a	2002	2003 p
	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm
<b>Queensland</b>												
Central Highlands (35)	27	2	9	21	38	33	22	1	2	42	5	47
Maranoa (43)	34	7	26	25	41	35	26	3	0	46	15	53
West Darling Downs (42)	35	4	24	25	59	37	27	7	1	48	26	64
East Darling Downs (41)	42	2	26	31	50	18	37	10	3	62	29	95
Moreton South Coast (40)	56	2	26	37	91	33	44	10	7	76	40	84
<b>New South Wales</b>												
North West Plains (W) (52)	37	2	30	27	18	52	29	23	0	42	12	46
North West Plains (E) (53)	43	4	39	33	24	50	34	28	2	48	19	60
North West Slopes (N) (54)	47	3	36	38	29	36	40	28	2	61	31	96
North West Slopes (S) (55)	54	5	35	46	16	69	51	38	8	75	11	73
Northern Tablelands (N) (56)	48	4	30	43	35	36	44	34	6	61	35	123
Central West Plains (S) (50)	36	7	50	36	10	77	33	45	9	44	4	41
Central West Plains (N) (51)	35	1	28	30	6	72	30	34	4	41	6	40
Central West Slopes (N) (64)	47	4	33	42	7	99	42	40	11	54	9	69
Central West Slopes (S) (65)	49	15	49	48	11	82	43	46	14	56	2	54
Central Tablelands (N) (62)	49	8	36	48	10	99	46	34	12	58	3	81
Central Tablelands (S) (63)	65	23	48	66	20	73	60	36	25	75	4	73
Riverina (W) (75)	31	8	55	31	14	55	30	25	15	37	5	40
Riverina (E) (74)	43	16	68	45	17	69	41	33	27	47	5	52
South West Slopes (N) (73)	56	29	62	55	28	76	49	60	40	59	4	58
South West Slopes (S) (72)	88	64	86	90	51	130	75	82	75	83	17	85
Southern Tablelands (GM)(70)	50	24	36	51	25	59	51	43	35	64	13	71
<b>Victoria</b>												
North Mallee (76)	30	15	33	30	16	52	31	17	21	33	10	34
South Mallee (77)	35	15	43	36	19	55	36	21	27	37	12	38
North Wimmera (78)	44	25	37	45	23	68	43	28	31	41	15	50
South Wimmera (79)	59	48	56	59	35	80	53	43	50	50	33	66
Lower North (80)	42	15	63	44	16	62	42	21	26	44	8	45
Upper North (81)	53	22	71	54	25	79	50	31	33	51	16	57
Lower North East (82)	90	62	133	90	49	153	76	88	84	80	26	90
Upper North East (83)	128	63	129	132	46	134	106	95	94	109	47	99
North Central (88)	79	40	90	83	41	98	73	51	54	71	39	80
Central Western (89)	63	62	67	70	42	79	65	56	60	63	46	93
<b>Western Australia</b>												
North Coast (8)	72	48	48	53	38	84	28	23	41	18	15	6
Central Coast (9)	168	111	119	126	79	113	76	56	89	50	42	18
Northern Central (10)	59	35	42	45	30	67	26	19	29	19	14	8
South Coast (9A)	159	109	125	126	94	108	88	69	114	65	59	57
South Central (10A)	68	48	56	55	39	68	38	27	55	29	24	29
South East (12)	26	9	16	23	10	29	14	6	20	14	4	12
<b>South Australia</b>												
Upper South East (25B)	50	38	49	52	29	69	47	34	35	41	21	47
Murray Mallee (25A)	31	17	23	33	15	53	32	19	23	32	9	36
Murray River (24)	35	25	25	36	16	57	34	22	28	32	9	34
East Central (23)	79	63	59	75	33	87	64	47	55	53	24	54
West Central (22)	60	63	58	54	40	73	44	41	27	36	32	48
Lower North (21)	53	39	35	53	23	71	49	26	25	42	13	30
Upper North (19)	37	18	17	36	11	44	34	14	4	31	3	46
Western (18)	46	27	25	42	17	54	33	12	15	27	10	28
<b>Tasmania</b>												
Northern (91)	126	151	158	116	116	172	95	170	175	91	110	66
Midlands (93)	47	44	57	48	47	104	45	81	82	54	62	26

a The definition of normal rainfall reflects a simple arithmetic average of rainfall over the period 1913 to 2002. 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	23 910
Domestic use	4 306	4 636	4 703	4 796	7 706	5 003
– 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	487	2 775	565
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	3 707
<b>Canola</b>						
Production	1 690	2 426	1 775	1 756	841	1 416
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	524	958
<b>Pulses – major crops</b>						
Production						
Lupins	1 696	1 968	1 055	1 215	716	1 052
Field peas	370	357	456	512	160	424
Chickpeas	188	230	162	258	136	182
Apparent domestic use <sup>b</sup>						
Lupins	501	516	546	534	617	531
Field peas	31	68	93	75	68	73
Chickpeas	28	26	23	24	20	26
Exports						
Lupins	1 194	1 452	509	416	189	521
Field peas	267	289	362	428	150	351
Chickpeas	120	243	176	272	116	156

<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	7 743
Domestic use	2 158	2 011	2 325	2 499	2 137	2 465
– as malt and other human use	151	154	158	161	165	168
– feed	1 890	1 700	2 000	2 200	1 800	2 150
– seed	117	157	168	138	173	147
Export	4 765	3 325	4 567	5 274	2 510	5 002
– feed barley	2 607	1 524	2 143	2 971	832	2 662
– malting barley	1 635	1 234	1 824	1 705	1 091	1 705
– malt (grain equivalent)	525	569	602	600	588	635
<b>Oats</b>						
Production	1 798	1 118	1 050	1 434	926	1 638
Domestic use	1 550	983	964	1 244	804	1 450
– human	116	119	122	125	128	131
– feed	1 406	833	805	1 085	633	1 285
– seed	28	31	37	34	44	34
Export	248	135	86	190	122	310
<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	683
– seed	18	14	14	13	18	12
<b>Sorghum</b>						
Production	1 891	2 116	1 935	2 021	1 541	2 048
Domestic use	1 399	1 452	1 433	1 646	1 466	1 643
– feed	1 396	1 448	1 429	1 644	1 462	1 639
– seed	3	4	4	3	4	4
Export	493	665	501	375	75	405
<b>Maize</b>						
Production	338	406	345	457	316	455
Domestic use	302	353	300	396	285	422
– human, industrial	94	96	99	101	104	106
– feed	206	256	200	293	180	315
– seed	1	1	1	1	1	1
Export	36	53	45	61	23	32
<b>Total coarse grains</b>						
Production	10 722	9 436	10 914	13 052	6 765	12 579
Domestic use	6 116	5 557	5 863	6 645	4 962	6 675
– human, industrial	361	369	378	387	396	406
– feed	5 588	4 981	5 261	6 069	4 326	6 072 <sup>c</sup>
– seed	167	207	224	189	240	198
Export	5 543	4 177	5 199	5 900	2 730	5 627

<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			
	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t
<b>Wheat</b>							
Domestic							
Feed – Sydney	221	277	347	326	288	239	208
Export							
Australian standard white <b>b</b>	278	353	367	295	262	259	258
International							
US no.2 hard red winter, fob Gulf <b>b</b>	239	301	330	270	223	222	228
<b>Barley</b>							
Domestic							
2 row feed – Sydney	205	258	332	337	292	259	206
Export <b>c</b>							
Feed (bulk)	237	191	223	250	223	202	184
Malting (bulk)	303	245	250	311	286	374	264
International							
Feed – US no. 2 fob Portland <b>b</b>	200	222	241	221	199	202	184
<b>Sorghum</b>							
Domestic							
Feed – Sydney	195	256	331	313	255	202	200
Export <b>c</b>	182	224	244	307	254	243	262
International							
US del. Gulf <b>b</b>	173	205	209	196	177	163	156
<b>Oats</b>							
Domestic							
Feed – Sydney	211	272	350	358	356	245	176
Export <b>c</b>	337	245	220	388	312	332	263
International							
US heavy white, del. Portland <b>b</b>	303	299	303	293	276	244	209
<b>Maize</b>							
Domestic							
Feed – Sydney	239	292	380	390	311	288	245
International							
US no.2 fob Gulf <b>b</b>	164	197	195	179	167	153	147
<b>Oilseeds</b>							
Domestic							
Canola – del. Melbourne	388	501	544	451	401	396	408
Sunflower – del. Melbourne	380	404	428	448	463	432	423
Soybeans – US cif Rotterdam <b>b</b>	390	414	428	425	405	395	457
<b>Pulses</b>							
Domestic							
Lupins – del. Perth	215	235	284	270	260	263	270
Field peas – del. Melbourne	327	340	397	397	430	342	258
Chickpeas – del. Melbourne	520	521	523	523	495	438	369
Export <b>c</b>							
Chickpeas	615	708	598	622	565	520	508
Field peas	345	395	404	388	392	423	426

**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.