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The next issue of Australian crop report is scheduled to be released on 2 December 2014.

In the next issue:

2014–15 winter crop area and production forecasts updated

2014–15 summer crop area and production forecasts updated

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Overview

After a generally favourable opening to the 2014–15 winter crop season, conditions over winter have been mixed, resulting in mixed crop prospects.

The outlook for winter crops in South Australia is positive, reflecting generally average rainfall during winter and high levels of soil moisture. In contrast, winter rainfall in Western Australia has generally been below to well below average. In New South Wales, seasonal conditions have been highly variable but on average, crop yields are expected to improve from the well below average yields in 2013–14. Seasonal conditions have generally been dry in Victoria over winter, particularly in the major growing regions of the Mallee and the Wimmera. In Queensland, rainfall was below average between May and July but generally above average in August. While August rainfall benefited winter crops on the Darling Downs, it was too late to benefit crops in central Queensland.

The Bureau of Meteorology's latest three-month rainfall outlook for spring (September to November) 2014, issued on 28 August 2014, does not indicate a strong tendency for either wetter or drier than normal conditions across the major cropping regions in Queensland, South Australia and Western Australia. However, in most of New South Wales and parts of central Victoria, conditions are likely to be drier than normal.

For Australia as a whole, total **winter crop** production is forecast to fall by 12 per cent in 2014–15 to 38.6 million tonnes, which is a slight downward revision from the ABARES June 2014 forecast.

For the major winter crops: **wheat** production is forecast to decline by 10 per cent in 2014–15 to 24.2 million tonnes, **barley** production is forecast to fall by 21 per cent to 7.5 million tonnes and **canola** production is forecast to fall by 10 per cent to 3.4 million tonnes.

Sufficient and timely rainfall during spring is critical to realising the forecast winter crop production, particularly in areas where soil moisture levels are low.

Table 1 Winter crop production, Australia

Year	New South Wales	Victoria	Queensland	South Australia	Western Australia	Australia
	kt	kt	kt	kt	kt	kt
2004–05	10 715	4 219	1 392	5 298	12 979	34 681
2005–06	11 984	6 271	1 435	7 518	13 946	41 236
2006–07	3 796	1 751	925	2 793	8 279	17 588
2007–08	4 001	4 695	1 195	4 706	10 762	25 423
2008–09	9 441	3 890	2 327	4 864	13 786	34 386
2009–10	7 789	5 892	1 618	7 036	12 944	35 352
2010–11	14 786	7 629	1 822	9 317	8 045	41 681
2011–12	11 955	7 348	2 330	7 368	16 599	45 666
2012–13	11 127	6 879	2 157	6 468	11 241	37 928
2013–14 s	9 476	7 086	1 645	8 603	17 231	44 106
2014–15 f	9 840	6 288	1 457	7 594	13 358	38 607
% change 2013–14 to 2014–15	4	–11	–11	–12	–22	–12

f ABARES forecast. **s** ABARES estimate.

Note: Includes barley, canola, chickpeas, faba beans, field peas, lentils, linseed, lupins, oats, safflower, triticale and wheat.

Table 2 Winter crop area, Australia

Year	New South Wales	Victoria	Queensland	South Australia	Western Australia	Australia
	'000 ha	'000 ha	'000 ha	'000 ha	'000 ha	'000 ha
2004–05	6 441	3 195	861	3 965	7 933	22 417
2005–06	5 595	2 972	969	3 868	7 408	20 837
2006–07	5 673	3 085	810	4 141	6 478	20 215
2007–08	6 314	3 378	876	4 131	7 266	21 988
2008–09	6 296	3 494	1 212	3 979	7 900	22 909
2009–10	6 108	3 491	1 176	3 783	8 272	22 853
2010–11	6 159	3 460	1 220	3 821	7 716	22 401
2011–12	5 968	3 408	1 208	3 840	8 251	22 693
2012–13	5 848	3 454	1 225	3 775	8 094	22 413
2013–14 s	5 754	3 401	1 125	3 950	8 210	22 459
2014–15 f	5 779	3 428	1 112	3 986	8 260	22 587
% change 2013–14 to 2014–15	0	1	–1	1	1	1

f ABARES forecast. **s** ABARES estimate.

Note: Includes barley, canola, chickpeas, faba beans, field peas, lentils, linseed, lupins, oats, safflower, triticale and wheat.

The area planted to **summer crops** in 2014–15 is forecast to rise by 6 per cent to 1.2 million hectares. The area planted to cotton is forecast to fall significantly, largely offsetting the substantial increase expected in area planted to grain sorghum. Total summer crop production is forecast to rise by 12 per cent to 4.1 million tonnes, reflecting an assumed return to average yields from the low yields in 2013–14.

August rainfall was average to above average in major summer cropping regions. Widespread rainfall received in mid August increased the level of upper layer soil moisture. However, further rainfall will be required during spring and summer to realise forecast planted area.

The area planted to **grain sorghum** is forecast to rise by 26 per cent in 2014–15 to 623 000 hectares. This increase reflects favourable grain sorghum prices and an assumption of average and timely spring rainfall in growing regions. Assuming average yields, production is forecast to rise by 67 per cent to 1.8 million tonnes.

The area planted to **rice** is forecast to rise by 20 per cent in 2014–15 to 91 000 hectares, reflecting expected favourable returns to growers. Production is forecast to increase by 7 per cent to around 890 000 tonnes, assuming sufficient irrigation water is available to support average yields.

The area planted to **cotton** is forecast to decline by 28 per cent in 2014–15 to 282 000 hectares, which largely reflects reduced availability of irrigation water following three years of plentiful water supplies. The forecast area planted to cotton assumes average rainfall will be received in September 2014. The average cotton yield is assumed to decline by 9 per cent and production is forecast to decline by 35 per cent to 580 000 tonnes of cotton lint and 820 000 tonnes of cottonseed.

Table 3 Summer crop plantings and production, Australia

Year	New South Wales		Queensland		Australia	
	'000 ha	kt	'000 ha	kt	'000 ha	kt
2004–05	524	2 020	812	1 842	1 342	3 878
2005–06	776	2 791	645	1 516	1 433	4 352
2006–07	338	1 037	545	1 099	918	2 166
2007–08	398	1 668	791	2 877	1 199	4 567
2008–09	402	1 430	746	2 350	1 156	3 794
2009–10	381	1 405	514	1 342	903	2 764
2010–11	713	2 514	790	1 901	1 514	4 446
2011–12	769	3 101	792	2 394	1 578	5 546
2012–13	702	3 222	687	2 260	1 405	5 536
2013–14 s	539	2 155	572	1 493	1 125	3 685
2014–15 f	554	2 361	621	1 727	1 188	4 124
% change 2013–14 to 2014–15	3	10	8	16	6	12

f ABARES forecast. **s** ABARES estimate.

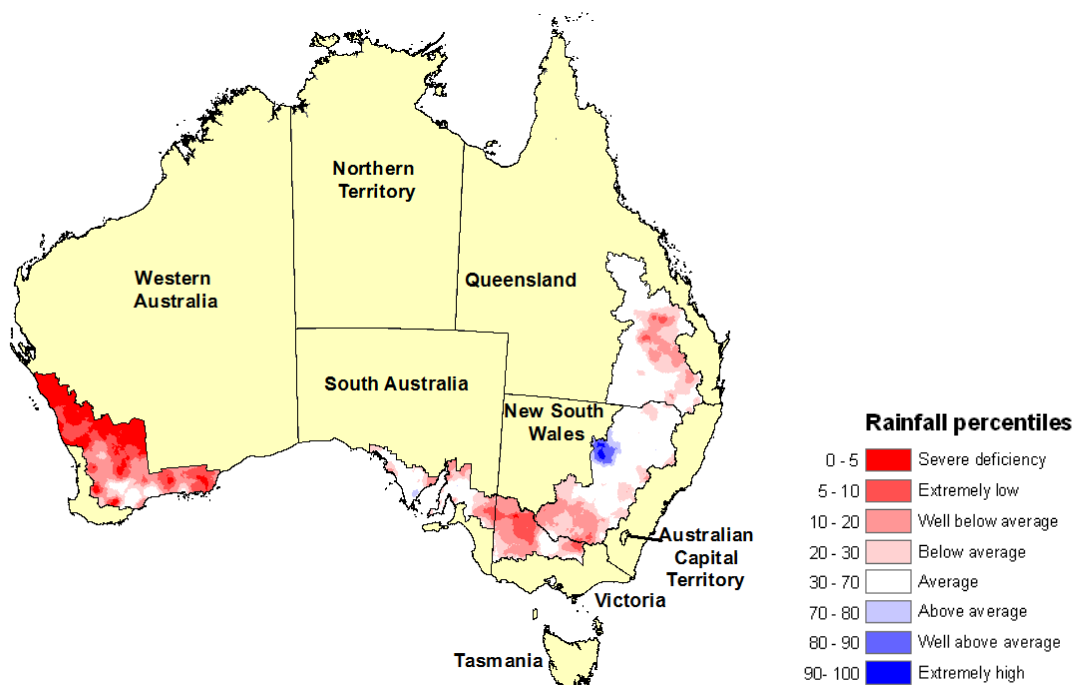
Note: State production includes cottonseed, grain sorghum, corn (maize), mung beans, rice, peanuts, soybeans and sunflower. Total for Australia also includes navy beans and small areas and volumes of summer crops in other states. Summer crop production figures include northern wet season rice and northern dry season cotton and rice.

Climatic and agronomic conditions

Winter (June to August) 2014 rainfall was generally average across cropping regions in South Australia, central and northern New South Wales and parts of Queensland. Winter rainfall was below average to severely deficient over large parts of the cropping zone in Western Australia, Victoria, central Queensland and the southern cropping region of New South Wales (Map 1).

Rainfall in June 2014 was at least average over most of Australia's winter cropping regions. However, Western Australia received severely deficient to extremely low rainfall. Much of eastern Australia received below average rainfall during July 2014, with mostly average rainfall received in Western Australia and South Australia. During August 2014 rainfall ranged from severely deficient to below average across most cropping regions in Victoria, South Australia, Western Australia and southern New South Wales. Cropping regions in northern New South Wales and Queensland generally recorded average to above average falls.

Map 1 Australian rainfall percentiles, 1 June 2014 to 31 August 2014

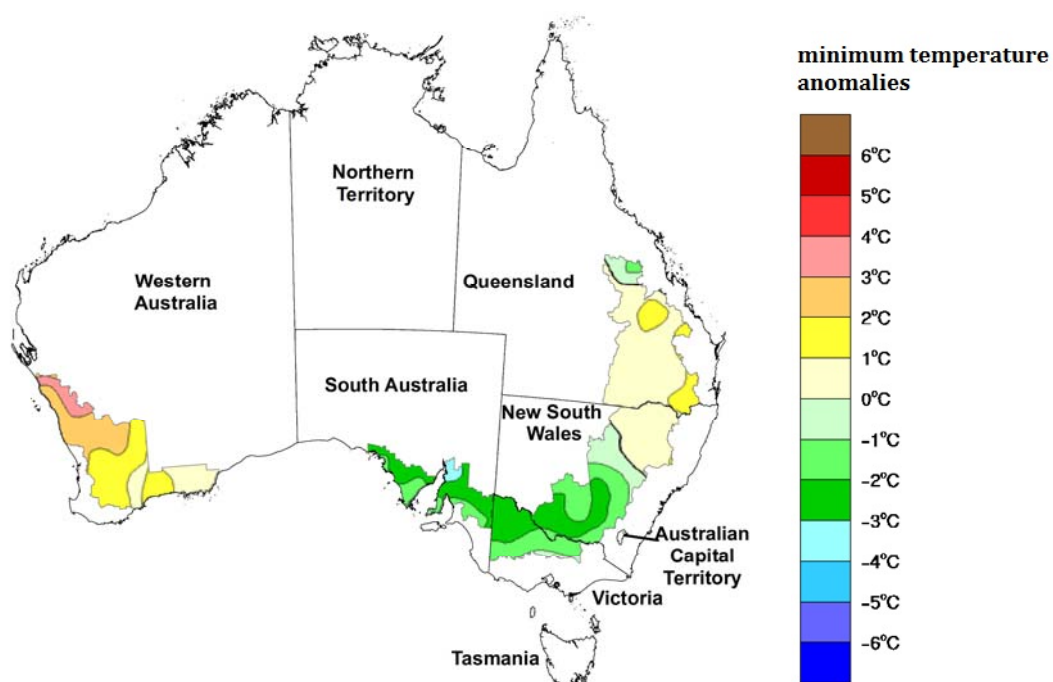


Note: Rainfall percentiles are displayed for cropping regions only.

Source: Bureau of Meteorology

Well below average temperatures across widespread areas of eastern Australia were recorded during early August 2014 (Map 2). In contrast, well above average temperatures were recorded across much of Western Australia. For the month of August 2014, minimum temperature anomalies of between two and four degrees below average were recorded across the wheat-sheep zones of New South Wales, Victoria and South Australia. A number of crop growing regions experienced a severe frost in the first two weeks of August.

Map 2 Australian minimum temperature anomalies, August 2014

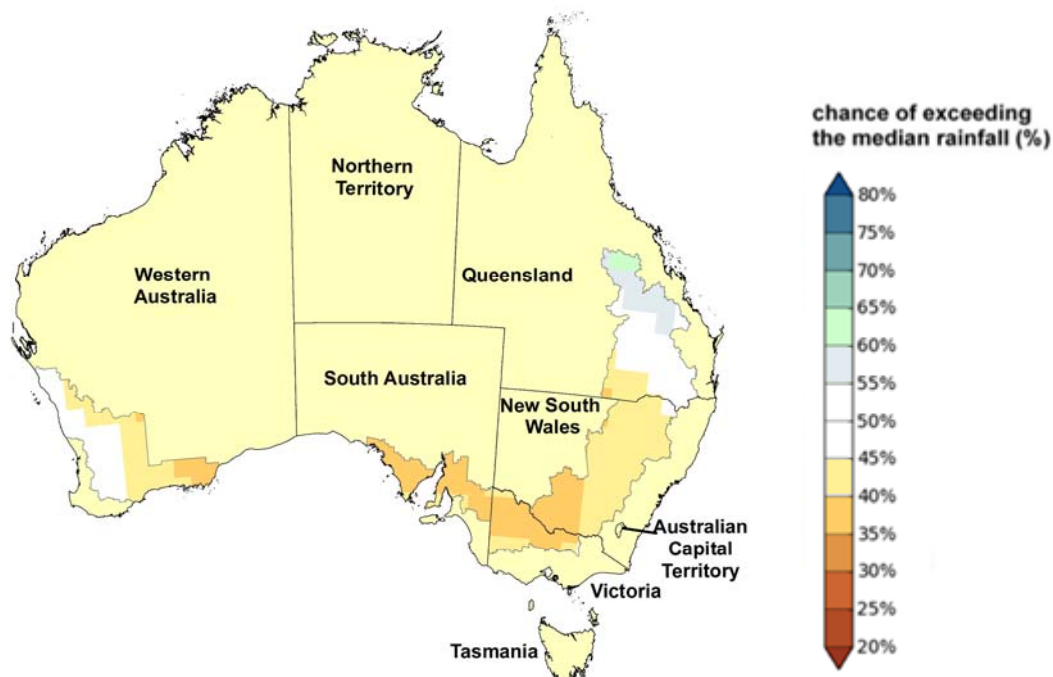


Note: Minimum temperature anomalies displayed for cropping regions only.

Source: Bureau of Meteorology

The Bureau of Meteorology's monthly rainfall outlook for September 2014 favours drier than average conditions for cropping regions in New South Wales, Victoria and South Australia. The outlook favours close to average conditions across most cropping regions in Western Australia and Queensland during September 2014 (Map 3).

Map 3 Rainfall outlook, September 2014

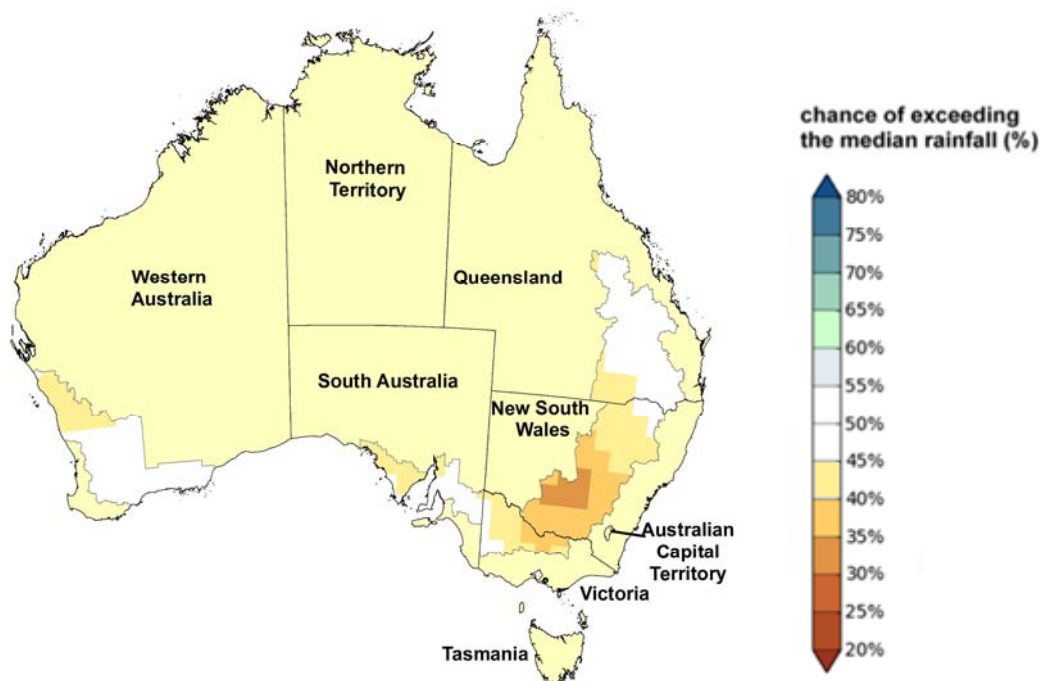


Note: Outlook displayed for cropping regions only.

Source: Bureau of Meteorology

The Bureau of Meteorology seasonal rainfall outlook for spring (September to November) 2014 indicates drier than average conditions for cropping regions in New South Wales and Victoria. The outlook favours close to average conditions across most cropping regions in Western Australia, South Australia and Queensland (Map 4).

Map 4 Rainfall outlook, September to November 2014



Note: Outlook displayed for cropping regions only.
Source: Bureau of Meteorology

The temperature outlook for spring (September to November) 2014 indicates warmer than average days and nights across most cropping regions across southern Australia, with average daytime and night-time temperatures more likely in cropping regions in northern New South Wales and Queensland.

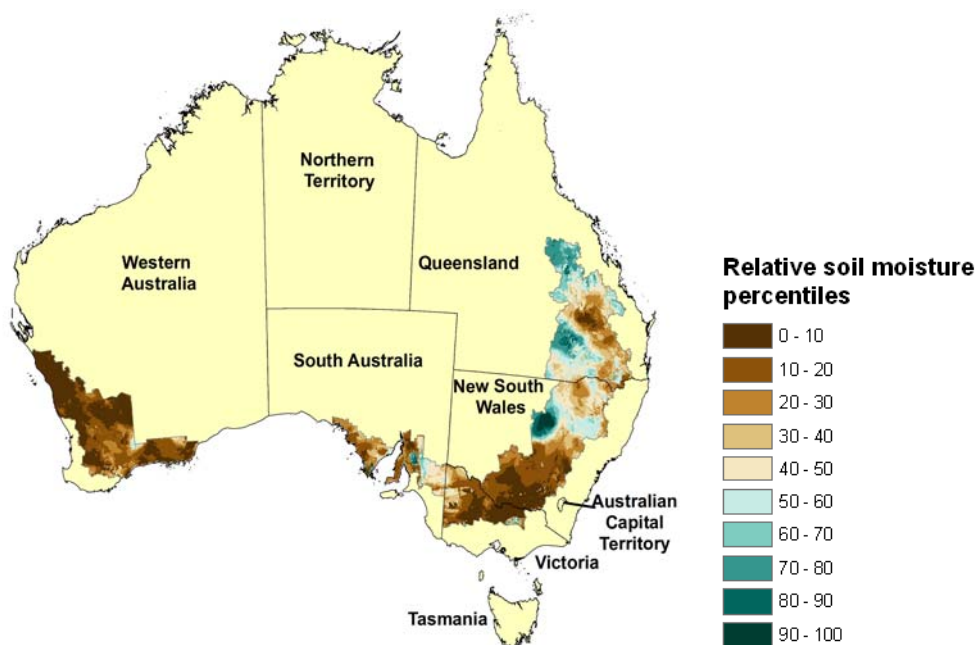
Maps 5 and 6 show the relative levels of modelled upper layer (~0.2 metres) and lower layer (~0.2 to ~1.5 metres) soil moisture for cropping zones across Australia during August 2014. Soil moisture estimates are relative to the standard climatological 1961–90 reference period and presented in percentiles.

The 90th to 100th percentiles in maps 5 and 6 indicate where the estimated soil moisture level for August 2014 falls into the wettest 10 per cent of estimated soil moisture levels for that month during the 1961–90 reference period. The 0 to 10th percentiles indicate where the estimated soil moisture levels for August 2014 fell into the driest 10 per cent of estimated soil moisture levels for that month during the 1961–90 reference period. These data are from a collaborative project between the Bureau of Meteorology, the Commonwealth Scientific and Industrial Research Organisation (CSIRO) and ABARES that estimates soil moisture and other components of water balance at high resolution across Australia.

Upper layer soil moisture responds quickly to seasonal conditions and will often show a pattern that reflects rainfall and temperature events of the same month. Lower layer soil moisture is a larger, deeper store that is slower to respond to seasonal conditions and tends to reflect the accumulated effects of events that have occurred over longer periods.

Relative upper layer soil moisture during August 2014 (Map 5) was predominantly below average throughout most cropping regions in New South Wales, Victoria, South Australia and Western Australia and parts of Queensland. Relative upper layer soil moisture during August 2014 was average to above average in some northern cropping regions in New South Wales and northern and south-western cropping regions in Queensland.

Map 5 Upper layer soil moisture, August average 2014

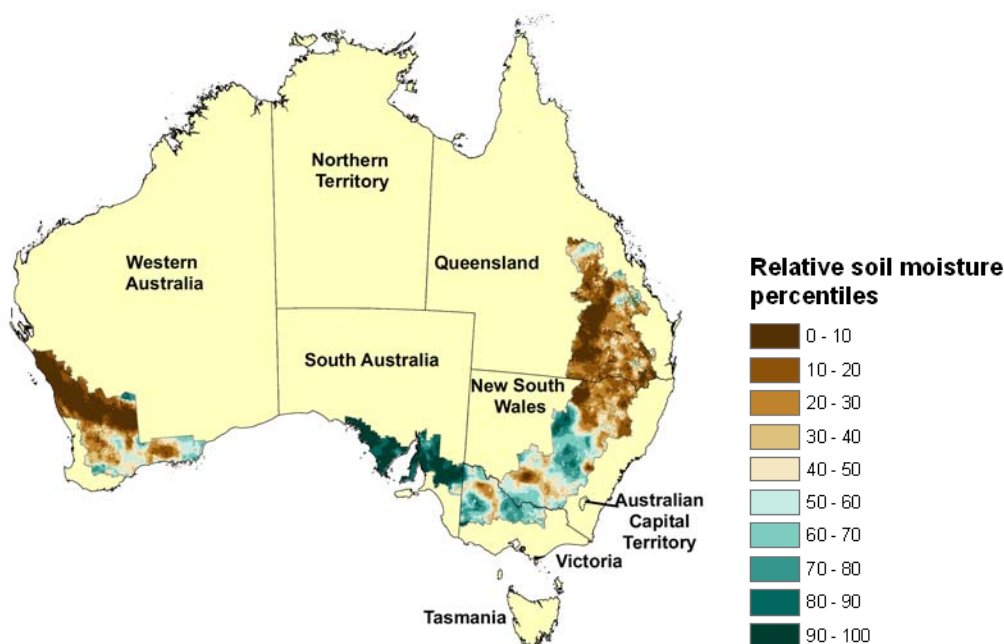


Note: Relative upper layer soil moisture displayed for cropping regions only.

Sources: ABARES; Bureau of Meteorology (Australian Water Availability Project); CSIRO

Relative soil moisture in the lower layer during August 2014 (Map 6) was average to above average in many areas of the cropping zone in the eastern states (including South Australia). However, large areas of the cropping zone in southern and northern New South Wales, western Victoria, Queensland and Western Australia were below average. Producers in these areas will be reliant on timely in-crop rainfall.

Map 6 Lower layer soil moisture, August average 2014



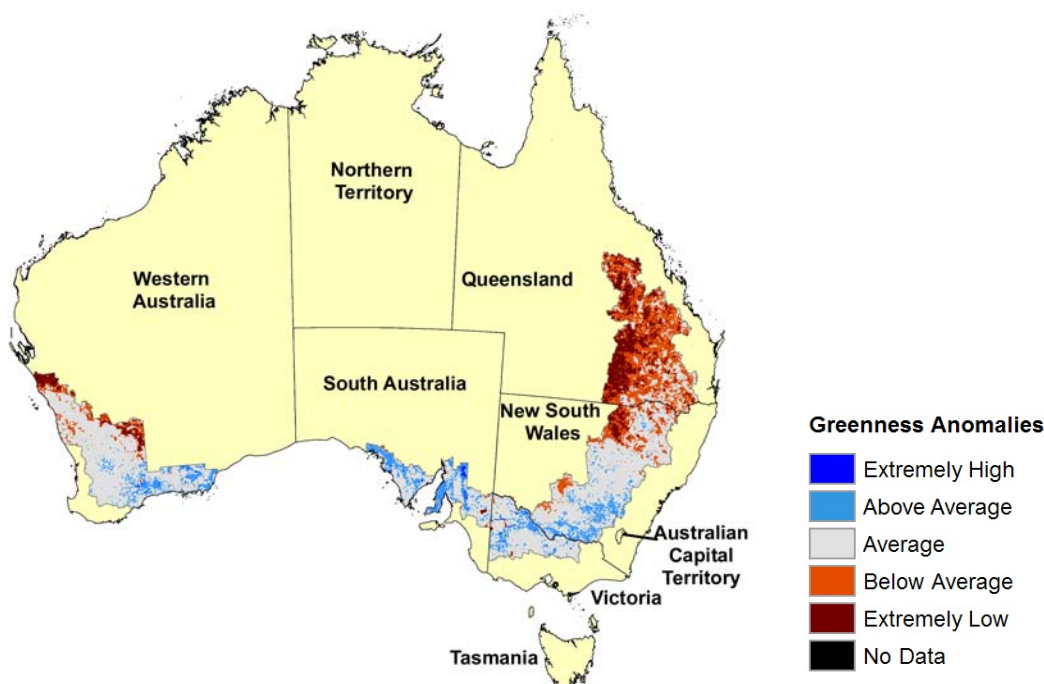
Note: Relative lower layer soil moisture displayed for cropping regions only.

Sources: ABARES; Bureau of Meteorology (Australian Water Availability Project); CSIRO

Map 7 shows vegetation greenness anomalies during August 2014 for cropping zones across Australia. This is based on land surface data collected from satellites and indicates the level of photosynthetic activity (or greenness) of plants. It can indicate the effectiveness of rainfall for plant growth and can be used to help assess the impacts of seasonal conditions on pasture and crop production. The anomalies are calculated as the difference between the greenness for the month and the average for the month, calculated over the 17-year period (1992–2008). Below average anomalies generally indicate unfavourable plant growing conditions and above average anomalies generally indicate favourable plant growing conditions. Plant growing conditions are strongly influenced by rainfall and temperature and there is often a strong correlation between these three factors.

Greenness anomalies during August 2014 indicate that vegetation is less green than normal (extremely low to below average) throughout most of the cropping regions in northern New South Wales and Queensland, and parts of northern and eastern Western Australia. Vegetation greenness anomalies during August 2014 was average to above average in the central and southern cropping regions in Western Australia and New South Wales, and most cropping regions in South Australia and Victoria.

Map 7 Vegetation greenness anomalies, August 2014



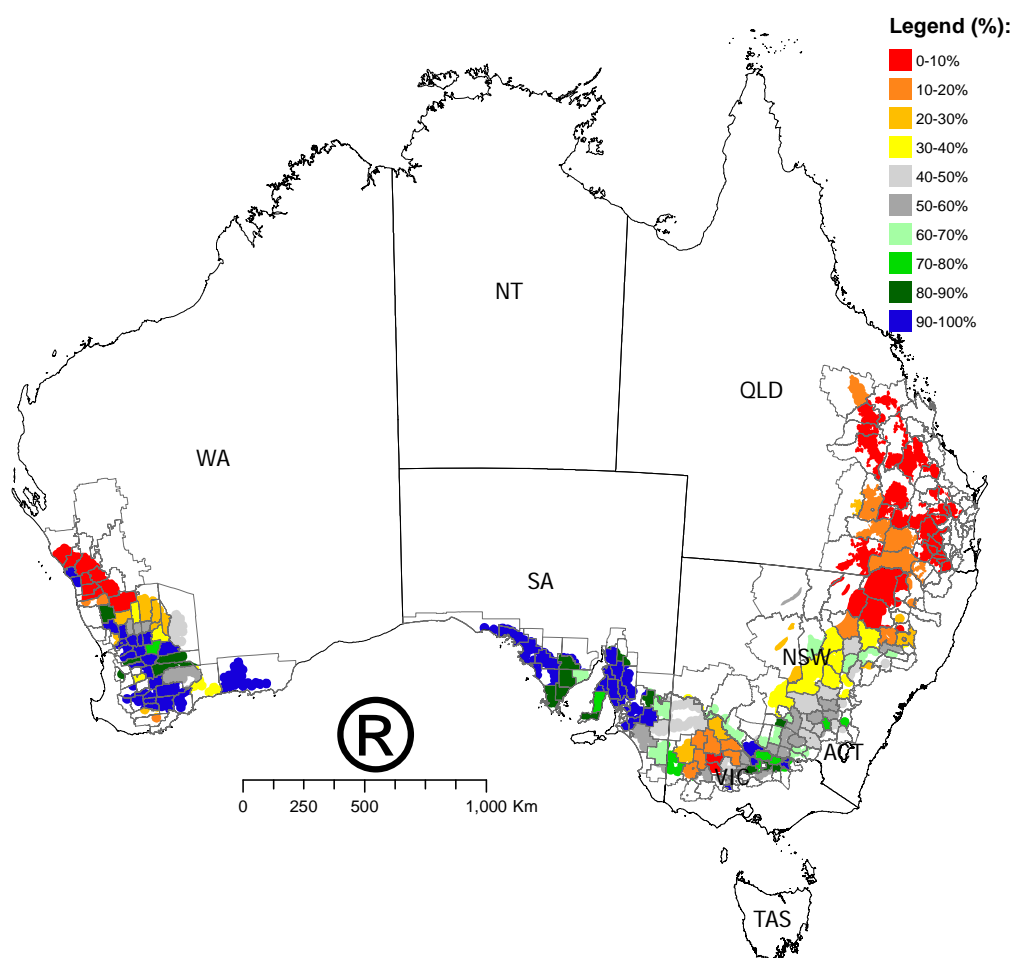
Note: Vegetation greenness anomalies displayed for cropping regions only.

Source: Bureau of Meteorology

The Queensland Alliance for Agriculture and Food Innovation's shire-scale wheat forecasting system produces yield predictions for wheat. The system combines starting soil moisture conditions with the seasonal outlook, including the most recent trend in the Southern Oscillation Index.

At the beginning of August 2014 the probability of exceeding average wheat yields is variable for cropping regions across Australia (Map 8). Parts of the cropping zone in northern Western Australia, western Victoria, northern New South Wales and southern Queensland have a reduced chance (between zero and 30 per cent) of exceeding the median yield, largely due to below average rainfall in recent months. The chance of exceeding median yields (between 60 and 100 per cent) is higher in southern Western Australia, parts of Victoria and New South Wales and much of South Australia.

**Map 8 Probability of exceeding long-term simulated median shire wheat yield,
1 August 2014**



Source: Queensland Alliance for Agriculture and Food Innovation

Table 4 Rainfall in major cropping districts

District	District no.	June median mm	June 2014 mm	July median mm	July 2014 mm	August median mm	August 2014 mm
New South Wales							
NW Plains (W)	52	33	37	30	9	19	35
NW Plains (E)	53	37	43	37	11	30	49
N W Slopes (N)	54	38	51	42	12	36	64
NW Slopes (S)	55	43	48	42	24	41	58
N Tablelands (N)	56	43	44	44	20	42	70
CW Plains (S)	50	39	63	36	18	30	28
CW Plains (N)	51	33	55	28	20	23	48
CW Slopes (N)	64	40	55	44	33	36	43
CW Slopes (S)	65	47	72	50	36	45	22
C Tablelands (N)	62	42	44	45	39	45	36
C Tablelands (S)	63	54	62	56	34	59	69
Riverina (W)	75	32	43	30	15	32	10
Riverina (E)	74	44	63	41	20	43	8
S W Slopes (N)	73	57	90	59	40	62	28
S W Slopes (S)	72	93	157	102	76	114	33
Victoria							
N Mallee	76	26	17	29	18	30	10
S Mallee	77	33	30	33	24	36	9
N Wimmera	78	42	40	42	34	43	15
S Wimmera	79	60	71	65	54	65	23
Lower North	80	41	66	40	25	40	6
Upper North	81	54	77	55	40	53	9
Lower North East	82	108	157	113	102	118	26
North Central	88	81	103	83	81	85	28
Western Plains	89	57	87	60	59	67	38
West Coast	90	85	129	90	94	93	51
Queensland							
Central Highlands	35	28	15	17	2	13	30
Maranoa	43	25	17	22	6	19	37
W Darling Downs	42	27	18	28	6	19	36
E Darling Downs	41	31	21	32	7	24	41
Moreton S Coast	40	37	22	37	8	29	74

continued ...

Table 4 Rainfall in major cropping districts (continued)

District	District no.	June median mm	June 2014 mm	July median mm	July 2014 mm	August median mm	August 2014 mm
South Australia							
Upper South East	25B	51	68	53	52	57	19
Murray Mallee	25A	31	31	32	23	35	11
Murray River	24	29	34	27	26	30	15
East Central	23	74	97	77	91	75	21
Yorke Peninsula	22A	53	77	57	56	54	14
Lower North	21	43	70	44	42	47	11
Upper North	19	25	25	29	15	27	14
Western Agricultural	18	31	37	29	33	28	5
Western Australia							
North Coast	8	71	27	64	46	48	20
Central Coast	9	147	80	142	135	113	64
Northern Central	10	54	23	50	49	43	19
South Central	10A	57	27	60	67	50	41
South East	12	19	6	18	13	16	7

Note: Median rainfall is calculated over the period 1900 to 2014. Australian rainfall districts are shown in Map 9.

Source: Bureau of Meteorology monthly district rainfall reports

Map 9 Australian rainfall districts



Note: Displayed for major cropping districts only. See Table 4 for district names and observed district rainfall.

Source: Bureau of Meteorology

Crop conditions and production forecasts, by state

New South Wales

Seasonal conditions have varied considerably across New South Wales so far this season.

In the central and southern cropping areas, rainfall was generally average between May and July. Rainfall in August was average to below average in the central cropping zone but was largely below average to very much below average in the southern cropping region. Frost events also occurred in many parts of the southern region during August. Nevertheless, wheat and barley yields are expected to be higher in these regions than the well below average yields achieved in 2013–14.

In the northern cropping region, rainfall between May and July was mostly below average. August rainfall was mainly above average but was largely too late to benefit winter crops. Yields in this region are expected to be lower than in 2013–14.

August rainfall in the northern region replenished upper layer soil moisture levels but further rainfall will be needed to facilitate the planting of summer crops and aid crop development.

The Bureau of Meteorology's three-month rainfall outlook for spring (September to November) indicates the chance of exceeding the median rainfall in the southern and central cropping regions is below 35 per cent. In the northern region, the chance of exceeding median rainfall is around 45 per cent.

Total **winter crop** production in New South Wales is forecast to increase by 4 per cent in 2014–15 to 9.8 million tonnes, largely reflecting the expected increase in yields in the southern and central regions. The total area planted to winter crops is estimated to be largely unchanged at around 5.8 million hectares.

Wheat production is forecast to increase by 6 per cent in 2014–15 to 7 million tonnes. The area planted to wheat is estimated to have increased by 3 per cent to 3.9 million hectares and the average yield is forecast to rise by around 3 per cent from last season.

Barley production is forecast to fall by 3 per cent in 2014–15 to 1.1 million tonnes, driven by a 4 per cent decline in the area planted to 640 000 hectares. The average yield is forecast to increase marginally.

Canola production is forecast to remain steady in 2014–15 at around 904 000 tonnes. The area planted to canola is estimated to have increased by 4 per cent to 650 000 hectares. This is expected to be largely offset by a forecast fall in the average yield, largely reflecting frost damage in the southern cropping region.

Table 5 Winter crop forecasts, New South Wales, 2014–15

Crop	Area '000 ha	Yield t/ha	Production kt	Area change %	Prod. change %
Wheat	3 900	1.80	7 020	3	6
Barley	640	1.78	1 139	–4	–3
Canola	650	1.39	904	4	0

Note: Yields are based on area planted.

The total area planted to **summer crops** in New South Wales is forecast to increase by 3 per cent in 2014–15 to 554 000 hectares. Total summer crop production is forecast to be around 2.4 million tonnes.

The area planted to **grain sorghum** is forecast to increase by 43 per cent in 2014–15 to 200 000 hectares. Above average rainfall in northern New South Wales in August was timely in preparation for plantings. Assuming adequate and timely rainfall is received during spring and summer, grain sorghum production is forecast to reach around 660 000 tonnes in 2014–15.

The area planted to **cotton** is forecast to fall by 28 per cent in 2014–15 to 183 500 hectares, reflecting a fall in the supply of irrigation water. Production is forecast to fall by 36 per cent to 381 000 tonnes of cotton lint and 539 000 tonnes of cottonseed, which reflects the expected fall in planted area and a forecast 10 per cent decline in average yields.

The area planted to **rice** is forecast to rise by 20 per cent in 2014–15 to 90 000 hectares, reflecting favourable expected returns to growers. Production is forecast to increase by 7 per cent to 890 000 tonnes, assuming sufficient irrigation water is available to support average yields.

Table 6 Summer crop forecasts, New South Wales, 2014–15

Crop	Area '000 ha	Yield t/ha	Production kt	Area change %	Prod. change %
Grain sorghum	200	3.30	660	43	164
Cotton lint	184	2.08	381	–28	–36
Cottonseed	184	2.94	539	–28	–36
Rice	90	9.89	890	20	7

Note: Yields are based on area planted.

Queensland

Seasonal conditions were generally unfavourable during winter across the cropping regions in Queensland and have reduced the prospects for winter crops. Following broadly average rainfall in June, rainfall in July was generally well below to very much below average. Although rainfall in August was average to above average for the month, very little rainfall fell in the first two weeks. Widespread and heavy rainfall in mid August is expected to have benefited crops sown in the Darling Downs but came too late to benefit winter crops in central Queensland.

The Bureau of Meteorology's seasonal rainfall outlook indicates a broadly equal chance of receiving above average or below average spring rainfall across the cropping regions in Queensland. The temperature outlook indicates an equal chance of above average or below

average maximum temperatures during spring but only a 20 per cent to 40 per cent chance of exceeding average maximum temperatures in September.

Winter crop production in Queensland is forecast to fall by 11 per cent in 2014–15 to around 1.5 million tonnes, largely because of the generally unfavourable seasonal conditions over winter. The total area planted to winter crops in Queensland is estimated to have decreased by around 1 per cent to around 1.1 million hectares, 8 per cent below the five-year average to 2012–13.

Wheat production is forecast to fall by 8 per cent in 2014–15 to around 1.1 million tonnes. A forecast 13 per cent fall in average yield is expected to more than offset an estimated 5 per cent increase in planted area.

Barley production is forecast to fall by 8 per cent in 2014–15 to 127 000 tonnes, reflecting an expected 8 per cent decline in average yield. The area planted to barley is estimated to have remained largely unchanged in 2014–15.

Chickpea production is forecast to decline by 28 per cent in 2014–15 to 213 000 tonnes. This reflects an estimated 28 per cent fall in the area planted to chickpeas.

Table 7 Winter crop forecasts, Queensland, 2014–15

Crop	Area	Yield	Production	Area change	Prod. change
	'000 ha	t/ha	kt	%	%
Wheat	840	1.31	1 100	5	–8
Barley	90	1.42	127	0	–8
Chickpeas	155	1.37	213	–28	–28

Note: Yields are based on area planted.

The area planted to **summer crops** in Queensland is forecast to increase to 621 000 hectares in 2014–15, around 8 per cent higher than the below average area planted in 2013–14. This is driven by a forecast rise in the area planted to grain sorghum, which reflects favourable grain sorghum prices and the availability of fallow land. Total summer crop production in Queensland is forecast to increase by 16 per cent to 1.7 million tonnes.

The area planted to **grain sorghum** is forecast to rise by 20 per cent in 2014–15 to 420 000 hectares. Timely and sufficient rainfall during the grain sorghum planting window, which runs from September to February in Queensland, will be critical to realising this forecast. Assuming a return to average yields, production is forecast to rise by 39 per cent to around 1.2 million tonnes.

The area planted to **cotton** in Queensland is forecast to decline by 28 per cent in 2014–15 to 98 500 hectares. Cotton production is forecast to decrease by 33 per cent in 2014–15 to 199 000 tonnes of cotton lint and 281 000 tonnes of cottonseed, assuming a 8 per cent fall in average yields.

Table 8 Summer crop forecasts, Queensland, 2014–15

Crop	Area '000 ha	Yield t/ha	Production kt	Area change %	Prod. change %
Grain sorghum	420	2.81	1 181	20	39
Cotton lint	99	2.02	199	-28	-33
Cottonseed	99	2.86	281	-28	-33

Note: Yields are based on area planted.

Victoria

Seasonal conditions in Victoria were generally favourable for planting and early crop development but dry during winter. Additionally, frost during August adversely affected prospects, especially for canola, pulses, legumes and early-sown cereals in the Mallee region.

Sufficient and timely rainfall over spring will be critical to crop development. The Bureau of Meteorology's latest three-month seasonal outlook (September to November) suggests slightly drier and warmer conditions than normal across central Victoria. For most of the major cropping regions, the Bureau of Meteorology's seasonal outlook suggests a less than 40 per cent chance of receiving at least median rainfall in September.

Winter crop production in Victoria is forecast to decline by 11 per cent in 2014–15 to around 6.3 million tonnes, largely reflecting expected falls in yields from those achieved in 2013–14. The area planted to winter crops in Victoria is estimated to have increased by 1 per cent.

Wheat production is forecast to decrease by 11 per cent in 2014–15 to around 3.1 million tonnes, driven by an expected 13 per cent fall in the average yield. The area planted to wheat is estimated to have increased by 2 per cent in 2014–15, largely at the expense of barley.

Barely production is forecast to decline by 15 per cent in 2014–15 to around 1.9 million tonnes, with the average yield is forecast to fall by 14 per cent. Additionally, the area planted to barley is estimated to have fallen by 1 per cent.

Canola production is forecast to decrease by 8 per cent in 2014–15 to 569 000 tonnes, with an increase in planted area expected to be more than offset by a 12 per cent decline in average yield.

Table 9 Winter crop forecasts, Victoria, 2014–15

Crop	Area '000 ha	Yield t/ha	Production kt	Area change %	Prod. change %
Wheat	1 642	1.92	3 147	2	-11
Barley	906	2.05	1 854	-1	-15
Canola	455	1.25	569	5	-8

Note: Yields are based on area planted.

South Australia

Growing conditions have been largely favourable in the major cropping regions of South Australia.

Above average rainfall in autumn followed by generally average rainfall in winter has resulted in favourable levels of soil moisture across most of the major cropping regions. This means crops in South Australia are well placed to withstand drier than average conditions during spring, if these eventuate. Temperatures during winter were average to above average, which has facilitated crop development.

The Bureau of Meteorology's latest three-month rainfall outlook for spring (September to November) suggests a 50 per cent likelihood of exceeding median rainfall in most of South Australia's cropping regions. However, the chance is slightly lower across the Eyre Peninsula, at around 40 to 45 per cent.

The outlook for winter crop yields is largely positive but yields are forecast to average lower than the well above average yields achieved in 2013–14. However, because crop development is a few weeks ahead of normal, crops face a higher chance of being damaged by any early spring frosts.

Total **winter crop** production in South Australia is forecast to fall by 12 per cent in 2014–15 to 7.6 million tonnes, reflecting an expected decline in average yields. However, yields are still expected to be above average as a result of the generally favourable seasonal conditions. The area planted to winter crops is estimated to have increased by 1 per cent to almost 4 million hectares, the highest since 2007–08.

Wheat production is forecast to fall by 12 per cent in 2014–15 to around 4.5 million tonnes, reflecting an expected 14 per cent decline in average yield. The area planted to wheat is estimated to have increased by around 3 per cent to around 2.4 million hectares.

Barley production is forecast to fall by 15 per cent in 2014–15 to 1.9 million tonnes, largely because of a forecast 13 per cent decline in average yield from the near record yields of last season. The area planted to barley is forecast to be 2 per cent lower at 870 000 hectares.

Canola production is forecast to fall by 10 per cent in 2014–15 to 396 000 tonnes, reflecting an expected 6 per cent decline in average yield. The area planted to canola is estimated to have declined by 4 per cent to 285 000 hectares.

Table 10 Winter crop forecasts, South Australia, 2014–15

Crop	Area	Yield	Production	Area change	Prod. change
	'000 ha	t/ha	kt	%	%
Wheat	2 350	1.93	4 536	3	-12
Barley	870	2.17	1 888	-2	-15
Canola	285	1.39	396	-4	-10

Note: Yields are based on area planted.

Western Australia

After a generally favourable opening to the cropping season, winter growing conditions across the Western Australian grains belt have been mixed. Winter rainfall was generally below average to very much below average, but timely rainfall in southern and western regions has benefited crops. Temperatures were well above average over winter and were especially so during August.

The Bureau of Meteorology's latest three-month rainfall outlook for spring (September to November) indicates an equal chance of above average or below average spring rainfall in the Western Australian grains belt. The outlook points to a greater than 50 per cent chance of exceeding average maximum spring temperatures, including a 75 per cent to 80 per cent chance of exceeding average maximum temperatures in September.

Soil moisture in many regions of the grains belt is low and the chance of warmer than average temperatures is greater than 50 per cent. Therefore, sufficient and timely spring rainfall will be critical to achieving the forecast level of production.

Total **winter crop** production in Western Australia is forecast to be 13.4 million tonnes in 2014–15, a 22 per cent decrease from the record level of production in 2013–14. Favourable levels of soil moisture are expected to assist development of crops in the southern regions of the grains belt over spring. Yields in these regions are expected to be above average. In contrast, crops in northern and eastern regions had much lower levels of soil moisture at the start of spring and are expected to achieve below average yields.

Wheat production is forecast to decrease by 20 per cent in 2014–15 to 8.4 million tonnes. The area planted to wheat is estimated to have risen by 2 per cent to 5.1 million hectares. The forecast yield of 1.65 tonnes a hectare is around the 10-year average to 2012–13.

Barley production is forecast to decrease by 34 per cent in 2014–15 to around 2.5 million tonnes, largely reflecting a forecast 29 per cent fall in average yield from the record achieved in 2013–14.

Canola production is forecast to fall by 16 per cent in 2014–15 to around 1.5 million tonnes, reflecting a 17 per cent decline in average yield. The area planted to canola is estimated to have risen by 2 per cent to a record 1.3 million hectares.

Lupins production is forecast to fall by 12 per cent in 2014–15 to 408 000 tonnes, driven by a forecast 34 per cent fall in average yield. The area planted to lupins is estimated to have increased by 20 per cent.

Table 11 Winter crop forecasts, Western Australia, 2014–15

Crop	Area '000 ha	Yield t/ha	Production kt	Area change %	Prod. change %
Wheat	5 097	1.65	8 400	2	–20
Barley	1 263	1.99	2 511	–6	–34
Canola	1 322	1.15	1 518	2	–16
Lupins	295	1.38	408	20	–12

Note: Yields are based on area planted.

Table 12 Australian winter crop production and area

Crop	Area			Production		
	2012-13	2013-14 s	2014-15 f	2012-13	2013-14 s	2014-15 f
	'000 ha	'000 ha	'000 ha	kt	kt	kt
Wheat	12 979	13 512	13 837	22 856	27 013	24 234
Barley	3 644	3 920	3 778	7 472	9 545	7 547
Canola	3 272	2 655	2 714	4 142	3 760	3 388
Chickpeas	574	507	339	813	629	470
Faba beans	203	152	168	377	328	337
Field peas	281	245	231	320	342	302
Lentils	165	169	174	185	254	324
Lupins	450	387	437	459	625	576
Oats	729	744	739	1 121	1 326	1 165
Triticale	99	152	152	171	268	251

f ABARES forecast. **s** ABARES estimate.

Note: The crop year refers to crops planted during the 12 months to 31 March. Slight discrepancies may appear between tables as a result of including the Australian Capital Territory and Northern Territory in the Australian totals.

Sources: ABARES; Australian Bureau of Statistics; Pulse Australia

Table 13 Australian summer crop production and area

Crop	Area			Production		
	2012-13	2013-14 s	2014-15 f	2012-13	2013-14 s	2014-15 f
	'000 ha	'000 ha	'000 ha	kt	kt	kt
Grain sorghum	648	493	623	2 230	1 107	1 844
Cottonseed a	442	392	282	1 439	1 259	820
Cotton lint a	442	392	282	1 018	890	580
Rice (paddy)	114	76	91	1 161	833	894
Corn (maize)	79	58	67	507	335	383
Soybeans	41	31	38	92	63	77
Sunflower	30	27	37	44	32	44

a Cotton area is estimated harvested area. **f** ABARES forecast. **s** ABARES estimate.

Note: The crop year refers to crops planted during the 12 months to 31 March. Slight discrepancies may appear between tables as a result of including the Australian Capital Territory and Northern Territory in the Australian totals. Rice, cottonseed and cotton lint include northern dry and wet season crops.

Sources: ABARES; Australian Bureau of Statistics

Table 14 State production, major crops

Crop	New South Wales		Victoria		Queensland		South Australia		Western Australia		Tasmania	
	area '000 ha	prod. kt	area '000 ha	prod. kt	area '000 ha	prod. kt	area '000 ha	prod. kt	area '000 ha	prod. kt	area '000 ha	prod. kt
Winter crops												
Wheat												
2014–15 f	3 900	7 020	1 642	3 147	840	1 100	2 350	4 536	5 097	8 400	8	32
2013–14 s	3 800	6 612	1 610	3 541	800	1 200	2 279	5 128	5 015	10 500	8	32
2012–13	3 487	7 365	1 592	3 423	866	1 614	2 119	3 679	4 909	6 744	6	30
Five-year average to 2013–14	3 791	7 658	1 693	3 663	897	1 514	2 222	4 656	4 945	8 282	7	31
Barley												
2014–15 f	640	1 139	906	1 854	90	127	870	1 888	1 263	2 511	8	27
2013–14 s	670	1 179	915	2 178	90	138	888	2 225	1 350	3 800	7	25
2012–13	619	1 286	854	1 952	90	170	861	1 794	1 215	2 252	5	17
Five-year average to 2013–14	758	1 464	876	1 989	84	152	885	2 005	1 266	2 583	8	26
Canola												
2014–15 f	650	904	455	569	1	0	285	396	1 322	1 518	1	1
2013–14 s	625	900	434	618	1	0	298	442	1 297	1 800	0	0
2012–13	1 025	1 495	589	866	1	1	336	415	1 320	1 364	1	1
Five-year average to 2013–14	631	915	411	596	1	1	263	378	1 125	1 228	1	1
Oats												
2014–15 f	250	270	150	270	20	10	86	153	230	456	3	6
2013–14 s	250	250	150	315	15	8	86	160	240	588	3	6
2012–13	234	276	117	233	48	14	68	88	258	502	4	7
Five-year average to 2013–14	270	293	147	264	21	12	74	119	261	506	3	7

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Table 14 State production, major crops (continued)

Crop	New South Wales		Victoria		Queensland		South Australia		Western 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
Summer crops												
Grain sorghum												
2014–15 f	200	660	1	2	420	1 181	0	0	1	1	0	0
2013–14 s	140	250	1	2	350	850	0	0	1	2	0	0
2012–13	214	747	1	4	431	1 475	0	1	1	2	0	0
Five-year average to 2013–14	187	628	1	2	397	1 170	0	0	1	1	0	0
Cottonseed a												
2014–15 f	184	539	0	0	99	281	0	0	0	0	0	0
2013–14 s	256	836	0	0	136	423	0	0	0	0	0	0
2012–13	284	949	0	0	159	490	0	0	0	0	0	0
Five-year average to 2013–14	274	803	0	0	173	445	0	0	0	0	0	0
Rice												
2014–15 f	90	890	0	2	0	2	0	0	0	0	0	0
2013–14 s	75	828	0	2	0	2	0	0	0	0	0	0
2012–13	113	1 158	0	3	0	0	0	0	0	0	0	0
Five-year average to 2013–14	77	762	0	3	0	1	0	0	0	0	0	0

a Cottonseed area is estimated harvested area. Includes northern dry season crop. **f** ABARES forecast. **s** ABARES estimate.

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.

Sources: ABARES; Australian Bureau of Statistics

Table 15 State production, other crops

Crop	New South Wales		Victoria		Queensland		South Australia		Western 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
Winter crops												
Chickpeas												
2014–15 f	145	195	27	48	155	213	8	10	4	3	0	0
2013–14 s	220	251	48	50	216	296	19	27	5	6	0	0
2012–13	280	379	49	52	218	357	20	22	6	4	0	0
Five-year average to 2013–14	280	320	44	50	181	232	14	17	5	4	0	0
Field peas												
2014–15 f	51	66	45	60	0	0	110	0	24	29	1	1
2013–14 s	50	53	51	68	0	0	112	0	32	37	1	1
2012–13	53	66	52	65	0	0	114	0	62	59	1	1
Five-year average to 2013–14	43	48	54	75	0	0	115	0	63	60	1	1
Lentils												
2014–15 f	1	1	83	124	0	0	91	199	0	0	0	0
2013–14 s	1	1	79	112	0	0	89	141	1	1	0	0
2012–13	1	1	77	80	0	0	87	103	1	1	0	0
Five-year average to 2013–14	1	1	79	104	0	0	86	144	1	1	0	0
Lupins												
2014–15 f	56	61	32	38	0	0	55	70	295	408	0	0
2013–14 s	57	57	28	29	0	0	56	78	246	461	0	0
2012–13	58	63	29	26	0	0	61	74	303	295	0	0
Five-year average to 2013–14	85	108	36	39	0	0	59	78	414	513	0	0

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Table 15 State production, other crops (continued)

Crop	New South Wales		Victoria		Queensland		South Australia		Western 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
Summer crops												
Corn (maize)												
2014–15 f	22	180	1	7	41	182	0	0	1	4	0	0
2013–14 s	20	166	2	12	35	151	0	0	1	7	0	0
2012–13	34	261	3	28	40	213	0	1	1	3	0	0
Five-year average to 2013–14	24	195	2	16	38	180	0	1	1	4	0	0
Soybeans												
2014–15 f	25	53	1	2	12	23	0	0	0	0	0	0
2013–14 s	20	42	1	2	10	19	0	0	0	0	0	0
2012–13	28	64	1	2	12	25	0	0	0	0	0	0
Five-year average to 2013–14	21	46	1	2	10	18	0	0	0	0	0	0
Sunflower												
2014–15 f	23	30	1	1	13	13	0	0	0	0	0	0
2013–14 s	18	23	1	1	8	8	0	0	0	0	0	0
2012–13	19	30	1	2	10	12	0	0	0	0	0	0
Five-year average to 2013–14	20	28	1	1	11	12	0	0	0	0	0	0

f ABARES forecast. s ABARES estimate.

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.

Sources: ABARES; Australian Bureau of Statistics; Pulse Australia

Table 16 Australian supply and disposal of wheat, oilseeds and pulses

Crop	2007-08 kt	2008-09 kt	2009-10 kt	2010-11 kt	2011-12 kt	2012-13 kt
Wheat						
Production	13 569	21 420	21 834	27 410	29 905	22 856
Apparent domestic use	6 517	7 306	4 999	5 663	6 334	6 590
– seed	677	694	675	695	649	676
– other a	5 841	6 612	4 324	4 968	5 685	5 915
Exports b	7 444	14 707	14 791	18 584	24 656	18 644
Imports b	6	12	15	12	14	17
Canola						
Production	1 214	1 844	1 907	2 359	3 427	4 142
Apparent domestic use a	743	778	721	810	871	631
Exports	472	1 067	1 187	1 549	2 557	3 512
Pulses						
Production						
– lupins	662	708	823	808	982	459
– field peas	268	238	356	395	342	320
– chickpeas	313	443	487	513	673	813
Apparent domestic use a						
– lupins	585	404	470	621	416	290
– field peas	129	104	196	95	130	145
– chickpeas	87	1	1	39	93	1
Exports						
– lupins	77	304	353	186	565	169
– field peas	141	137	162	302	215	177
– chickpeas	222	506	492	461	598	815

a Calculated as a residual: production plus imports less exports less any observed or assumed change in stocks and, for wheat only, less seed use. **b** Includes grain and grain equivalent of wheat flour.

Note: Production, use, trade and stock data are on a marketing year basis: 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 because of reductions or increases in stocks. The export data refer to marketing year export periods so are not comparable with financial year export figures published elsewhere.

Sources: ABARES; Australian Bureau of Statistics; Pulse Australia

Table 17 Australian supply and disposal of coarse grains

Crop	2007-08 kt	2008-09 kt	2009-10 kt	2010-11 kt	2011-12 kt	2012-13 kt
Barley						
Production	7 160	7 997	7 865	7 995	8 221	7 472
Apparent domestic use	3 105	4 104	3 230	2 631	2 075	2 182
– seed	188	221	226	199	166	167
– other a	2 917	3 884	3 004	2 432	1 909	2 015
Export	4 055	3 892	4 635	5 364	6 146	5 289
– feed barley	2 303	2 254	2 668	3 601	3 758	2 972
– malting barley	1 083	980	1 248	1 062	1 619	1 512
– malt (grain equivalent)	669	658	720	700	770	805
Oats						
Production	1 502	1 160	1 162	1 128	1 262	1 121
Apparent domestic use	1 321	999	954	1 009	1 058	976
– seed	48	59	42	41	40	35
– other a	1 273	940	912	969	1 019	941
Export	181	161	208	118	204	145
Triticale						
Production	450	363	545	355	285	171
Apparent domestic use	450	363	545	355	285	171
– seed	16	18	9	7	5	8
– other a	434	345	536	348	280	164
Export	0	0	0	0	0	0
Grain sorghum						
Production	3 790	2 692	1 508	1 935	2 239	2 230
Apparent domestic use	2 833	1 694	1 167	984	1 060	1 084
– seed	4	2	3	3	3	2
– other a	2 829	1 691	1 164	981	1 056	1 081
Export b	110	957	998	341	950	1 179
Corn (maize)						
Production	387	376	328	357	451	507
Apparent domestic use	320	363	321	312	346	403
– seed	1	1	1	1	1	1
– other a	319	362	320	311	345	402
Export b	1	67	13	9	46	106

a Calculated as a residual: production plus imports less exports less any observed or assumed change in stocks less seed use. The sum of domestic use and exports may differ from production as a result of changes in stocks. b Export volumes are shown in the year of actual export, which is typically one year after production.

Note: Production, use and export data are on a marketing year basis: marketing years are November–October for barley, oats and triticale; March–February for grain sorghum and corn (maize).

Sources: ABARES; Australian Bureau of Statistics; Pulse Australia; United Nations Commodity Trade Statistics Database (UN Comtrade)

Table 18 Grains and oilseeds prices

Crop	2012 Q4 A\$/t	2013 Q1 A\$/t	2013 Q2 A\$/t	2013 Q3 A\$/t	2013 Q4 A\$/t	2014 Q1 A\$/t	2014 Q2 A\$/t
Wheat							
Domestic: feed, del. Sydney	306	314	307	293	300	317	327
International: US no.2 hard red winter, fob Gulf a	355	321	327	341	341	344	356
Barley							
Domestic: 2 row feed, del. Sydney	305	301	293	265	241	301	316
Export: feed b	275	294	300	314	262	278	265
Export: malting b	301	319	319	329	327	304	286
International: feed, fob Rouen a	302	288	272	260	270	274	250
Grain sorghum							
Domestic: feed, del. Sydney	289	289	305	312	310	350	338
Export b	286	267	313	357	383	414	349
Oats							
Domestic: feed, del. Sydney	234	232	260	252	203	261	269
International: CME oats nearby contract	248	250	269	269	257	325	271
Corn (maize)							
Domestic: feed, del. Sydney	330	341	356	370	383	410	403
International: US no.2 yellow corn, fob Gulf a	307	295	296	270	215	235	230
Oilseeds							
Domestic: canola, del. Melbourne	566	550	565	550	513	524	532
Domestic: sunflowers, del. Melbourne	520	520	520	520	540	569	599
International: US soybeans, fob Gulf a	563	545	588	595	568	604	616
Pulses							
Domestic: lupins, del. Kwinana	336	331	299	288	309	349	336
Domestic: chickpeas, del. Melbourne	514	518	532	439	390	437	449
Domestic: field peas, del. Melbourne	343	370	396	403	335	366	389
Export: chickpeas b	623	595	612	620	498	537	534
Export: field peas b	411	431	444	489	420	422	431

a Average of daily offer prices made in US\$, converted to A\$ using quarterly average of daily exchange rates. **b** Export unit values reflect the average price received for grain exported over the quarter, not current market prices. These prices are the average unit value (free on board) of Australian exports recorded by the Australian Bureau of Statistics. A long lag time can exist between when exporters negotiate prices and when the product is exported.

Note: Q1 refers to the period January–March; Q2 refers to April–June; Q3 refers to July–September; Q4 refers to October–December. Prices used in these calculations exclude GST.