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The next issue of *Australian crop report* is scheduled to be released on Tuesday 8 December 2020.

### **In the next issue:**

2020–21 winter crop area and production forecasts updated

2020–21 summer crop area and production forecasts

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# National overview

Winter crop prospects in Australia are generally average to above average at the beginning of spring. Crop prospects are strongest in New South Wales where favourable winter rainfall and a strong start to the winter cropping season are expected to result in well above average production. Crop prospects are average to above average in Victoria, South Australia, Western Australia and southern Queensland, despite warmer than average temperatures and below average rainfall in June and July. Soil moisture levels and timely rainfall were sufficient to sustain established crops through this period. Timely August rainfall provided a boost to yield prospects in these regions. However, it is expected August rainfall was generally insufficient for crops in central and northern cropping regions in Queensland to achieve average yields.

Favourable climatic conditions during spring are expected to support the ongoing development of winter crops and provide a good foundation for summer crops. The Bureau of Meteorology's latest three-month climate outlook (September to November), issued on 3 September 2020, indicates spring rainfall is likely to be above average in most cropping regions. However, there are roughly equal chances of higher or lower than average spring rainfall in most cropping regions in Western Australia and below average spring rainfall is most likely in the Geraldton zone and part of the Kwinana zone. Daytime temperatures in September are likely to be above average in most cropping regions and average to below average in October. Night-time temperatures are expected to be higher than average in most cropping regions except in south-western cropping regions in Western Australia.

**Winter crop** production in Australia is forecast to increase by 64% in 2020–21 to 47.9 million tonnes, 20% above the 10-year average to 2019–20 of 40 million tonnes. Around 60% of the forecast increase in production is from increased production in New South Wales. This is an 8% upward revision from the ABARES June 2020 forecast and reflects better than expected crop development during winter. Area planted to winter crops in 2020–21 is estimated to have increased by 23% from the drought affected season in 2019–20.

For the major winter crops, **wheat** production is forecast to increase by 91% to 28.9 million tonnes, 22% above the 10-year average to 2019–20 of 23.7 million tonnes. **Barley** production is forecast to increase by 25% to 11.2 million tonnes, 23% above the 10-year average to 2019–20 of 9.1 million tonnes. **Canola** production is forecast to rise by 47% to 3.4 million tonnes, 4% above the 10-year average to 2019–20 of 3.3 million tonnes.

Amongst other crops, **chickpeas** production is forecast to increase by 152% to 708,000 tonnes and **oats** production is forecast to increase by 93% to 1.7 million tonnes.

**Table 1 Winter crop production, Australia, 2010–11 to 2020–21**

Year	Unit	New South Wales	Victoria	Queensland	South Australia	Western Australia	Australia
2010–11	kt	14,784	7,625	1,821	9,316	8,044	41,672
2011–12	kt	11,952	7,352	2,329	7,371	16,600	45,673
2012–13	kt	11,123	6,886	2,156	6,470	11,244	37,936
2013–14	kt	9,773	6,774	1,516	7,221	16,511	41,881
2014–15	kt	10,445	5,117	1,464	7,439	14,662	39,198
2015–16	kt	11,624	3,568	2,104	6,104	14,206	37,687
2016–17	kt	15,510	9,511	3,159	10,656	17,737	56,675
2017–18	kt	7,743	7,612	1,438	7,022	14,510	38,396
2018–19	kt	3,243	4,603	686	5,487	17,633	31,737
2019–20 <b>s</b>	kt	3,339	7,523	678	6,023	11,619	29,291
2020–21 <b>f</b>	kt	14,808	7,943	1,672	7,723	15,683	47,919
% change 2019–20 to 2020–21		343	6	147	28	35	64

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

Notes: Includes barley, canola, chickpeas, faba beans, field peas, lentils, linseed, lupins, oats, safflower, triticale and wheat. Due to a change in scope by the ABS of its agricultural data collections, crop production is shown for establishments with an estimated value of agricultural operations (EVAO) of \$5,000 or more until 2014–15, and an EVAO of \$40,000 or more from 2015–16.

Sources: ABARES; ABS

**Table 2 Winter crop area, Australia, 2010–11 to 2020–21**

Year	Unit	New South Wales	Victoria	Queensland	South Australia	Western Australia	Australia
2010–11	'000 ha	6,158	3,457	1,217	3,821	7,715	22,392
2011–12	'000 ha	5,969	3,411	1,205	3,838	8,252	22,693
2012–13	'000 ha	5,852	3,457	1,222	3,776	8,097	22,421
2013–14	'000 ha	5,314	3,283	1,105	3,448	8,249	21,419
2014–15	'000 ha	5,491	3,304	995	3,639	8,313	21,760
2015–16	'000 ha	5,375	2,915	1,049	3,152	7,771	20,283
2016–17	'000 ha	6,062	3,231	1,375	3,904	8,531	23,126
2017–18	'000 ha	5,489	3,509	1,302	3,645	7,898	21,861
2018–19	'000 ha	3,990	3,350	725	3,391	8,296	19,771
2019–20 <b>s</b>	'000 ha	3,085	3,171	657	3,512	7,927	18,376
2020–21 <b>f</b>	'000 ha	6,032	3,418	1,152	3,630	8,310	22,562
% change 2019–20 to 2020–21		96	8	75	3	5	23

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

Notes: Includes barley, canola, chickpeas, faba beans, field peas, lentils, linseed, lupins, oats, safflower, triticale and wheat. Due to a change in scope by the ABS of its agricultural data collections, crop production is shown for establishments with an estimated value of agricultural operations (EVAO) of \$5,000 or more until 2014–15, and an EVAO of \$40,000 or more from 2015–16. Area based on planted crop that is harvested, fed off or failed.

Sources: ABARES; ABS

Area planted to **summer crops** in 2020–21 is forecast to rise by 194% to around 1 million hectares, 11% below the 10-year average to 2019–20 of 1.2 million hectares. Area planted to grain sorghum and cotton is forecast to rise significantly compared to the drought affected levels of 2019–20. Summer crop production is forecast to rise by 259% to 3.2 million tonnes, reflecting the expected increase in planted area and an assumed return to average yields from the historically low yields in 2019–20.

Area planted to **grain sorghum** is forecast to rise by 316% in 2020–21 to 595,000 hectares, 13% above the 10-year average to 2019–20 of 525,000 hectares. This forecast increase reflects the favourable outlook for seasonal conditions during spring, favourable grain sorghum prices and the availability of fallow land in summer cropping regions. Assuming average yields, grain sorghum production is forecast to rise by 480% to around 1.7 million tonnes, which is 12% above the 10-year average to 2019–20 of 1.5 million tonnes.

Area planted to **cotton** is forecast to rise by 300% in 2020–21 to 239,000 hectares, 40% below the 10-year average to 2019–20. Area planted to irrigated cotton is forecast to rise due to a significant increase in the supply of irrigation water. Area planted to dryland cotton is forecast to increase significantly to 66,000 hectares, which reflects the favourable outlook for seasonal conditions in spring. Increasing area planted to rice and grain sorghum is expected to constrain the increases in area planted to irrigated and dryland cotton.

Area planted to **rice** is forecast to increase by 392% to around 27,000 hectares because of higher water allocations compared to the drought affected allocations in the last two years.

**Table 3 Summer crop area and production, Australia, 2010–11 to 2020–21**

Year	New South Wales		Queensland		Australia	
	'000 ha	kt	'000 ha	kt	'000 ha	kt
2010–11	713	2,514	790	1,901	1,514	4,446
2011–12	757	3,064	783	2,379	1,556	5,489
2012–13	711	3,205	686	2,250	1,411	5,506
2013–14	568	2,317	559	1,469	1,139	3,847
2014–15	435	2,044	696	2,134	1,149	4,263
2015–16	412	1,646	624	1,814	1,054	3,547
2016–17	662	2,289	566	1,278	1,247	3,668
2017–18	614	2,205	649	1,648	1,283	3,950
2018–19	468	915	603	1,307	1,094	2,338
2019–20 <b>s</b>	101	344	239	461	356	881
2020–21 <b>f</b>	386	1,376	650	1,734	1,047	3,163
% change 2019–20 to 2020–21	284	300	172	276	194	259

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

Note: State production includes cottonseed, grain sorghum, corn (maize), mung beans, rice, peanuts, soybeans and sunflowers. Total for Australia also includes navy beans, and small areas and volumes of summer crops in other states. Due to a change in scope by the ABS of its agricultural data collections, crop production is shown for establishments with an estimated value of agricultural operations (EVAO) of \$5,000 or more until 2014–15, and an EVAO of \$40,000 or more from 2015–16. Area based on planted crop that is harvested, fed off or failed.

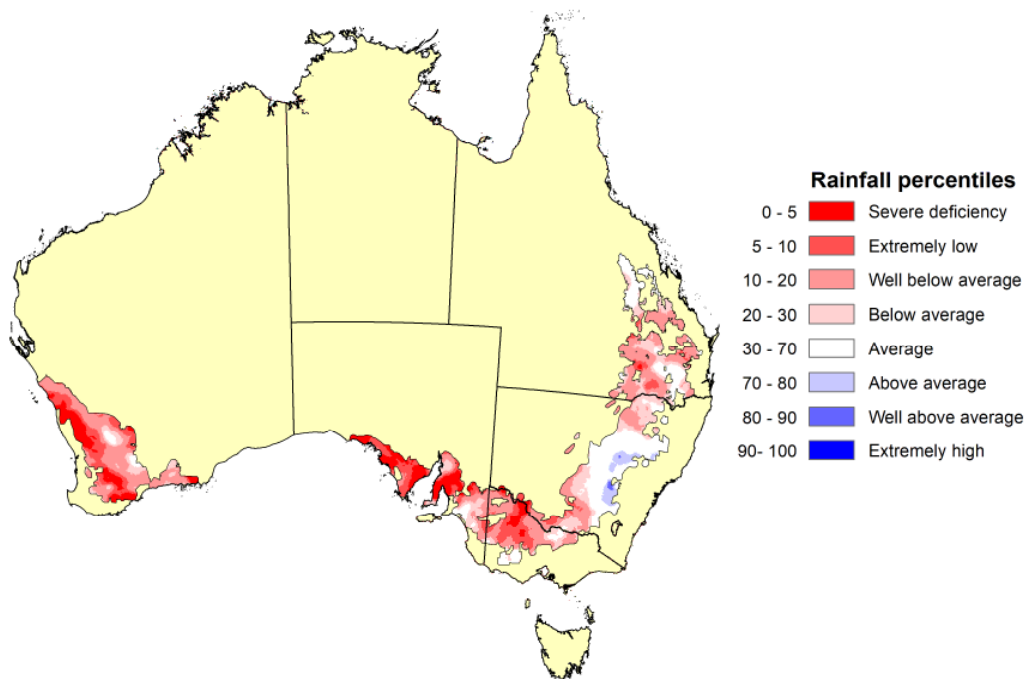
Sources: ABARES; ABS

# Climatic and agronomic conditions

Following above average rainfall from January to April, May to July rainfall was extremely low to below average in most cropping regions in Victoria, Queensland, South Australia and Western Australia. In cropping regions in New South Wales, May to July rainfall ranged from well below average to above average (**Map 1**).

Despite variable rainfall in June and July, close to average yield potentials were preserved across most cropping regions due to a draw down of soil moisture reserves built up during late summer and autumn.

**Map 1 Australian rainfall percentiles, 1 May 2020 to 31 July 2020**

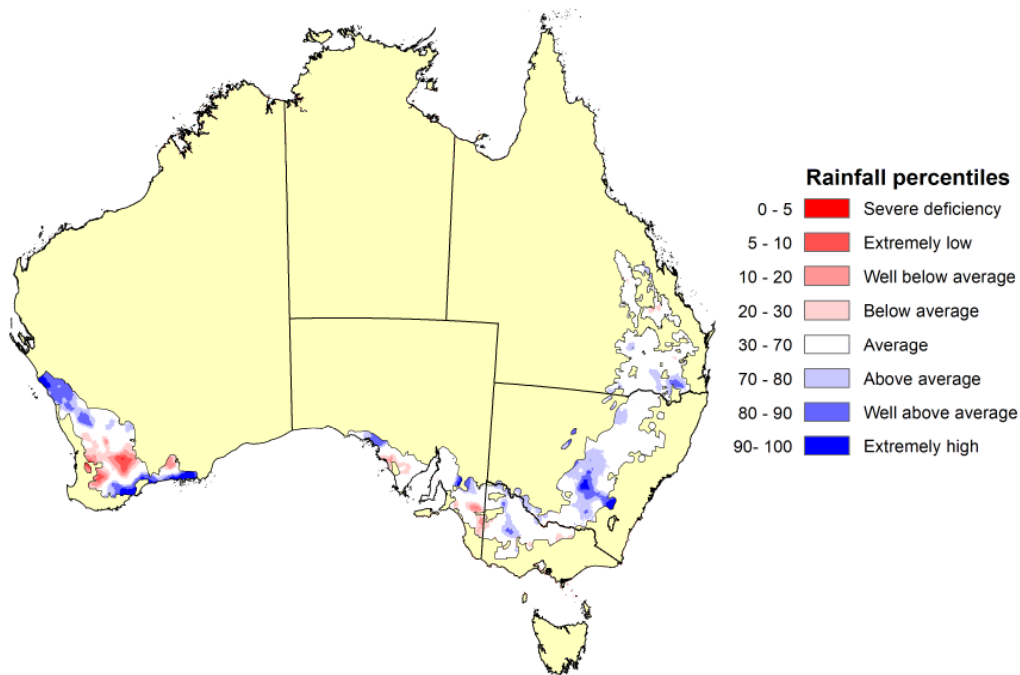


Note: Rainfall percentiles are displayed for cropping regions only.  
Source: Bureau of Meteorology

August rainfall was generally average to above average in most cropping regions except for some southern cropping regions in Western Australia and South Australia where August rainfall was below average (**Map 2**). Substantial August rainfall improved soil moisture across most cropping regions, supporting the final stages of winter crop development and providing a reliable base for the early planting of summer crops.



Map 2 Australian rainfall percentiles, 1 to 31 August 2020

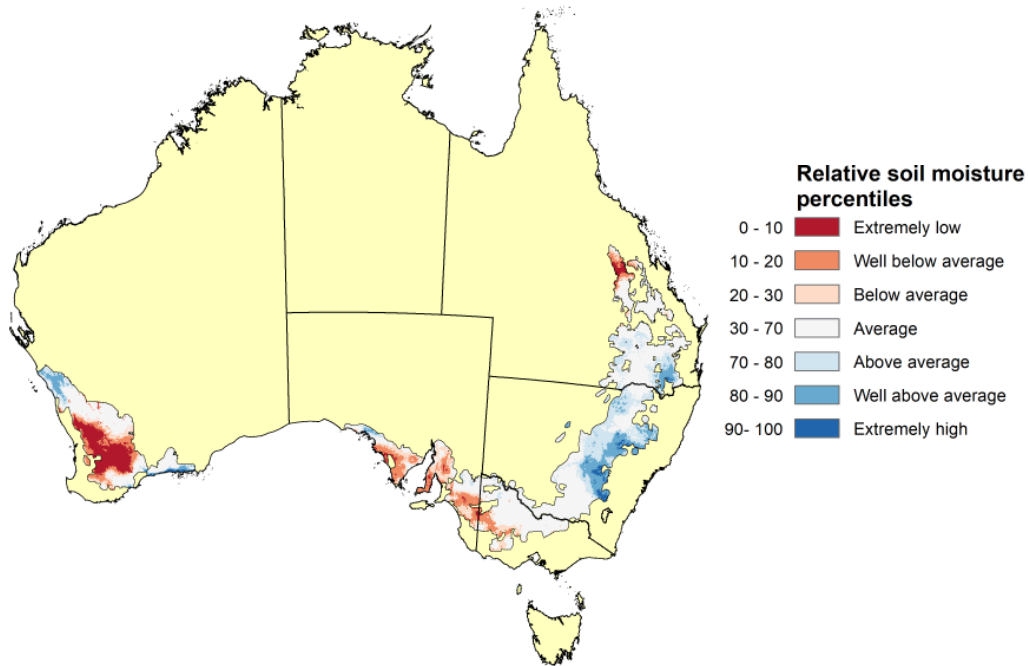


Note: Rainfall percentiles are displayed for cropping regions only.  
 Source: Bureau of Meteorology

**Map 3** shows the relative levels of modelled root zone (0 to ~1 metres) soil moisture for cropping zones across Australia for August 2020. Soil moisture estimates are relative to the historical long-term average (1911 to 2016) and presented in percentiles.

Relative root zone soil moisture for August 2020 was around average to above average for this time of year in most cropping regions in the eastern states. In contrast root zone soil moisture was average to extremely low for this time of year in South Australian and Western Australian cropping regions (**Map 3**).

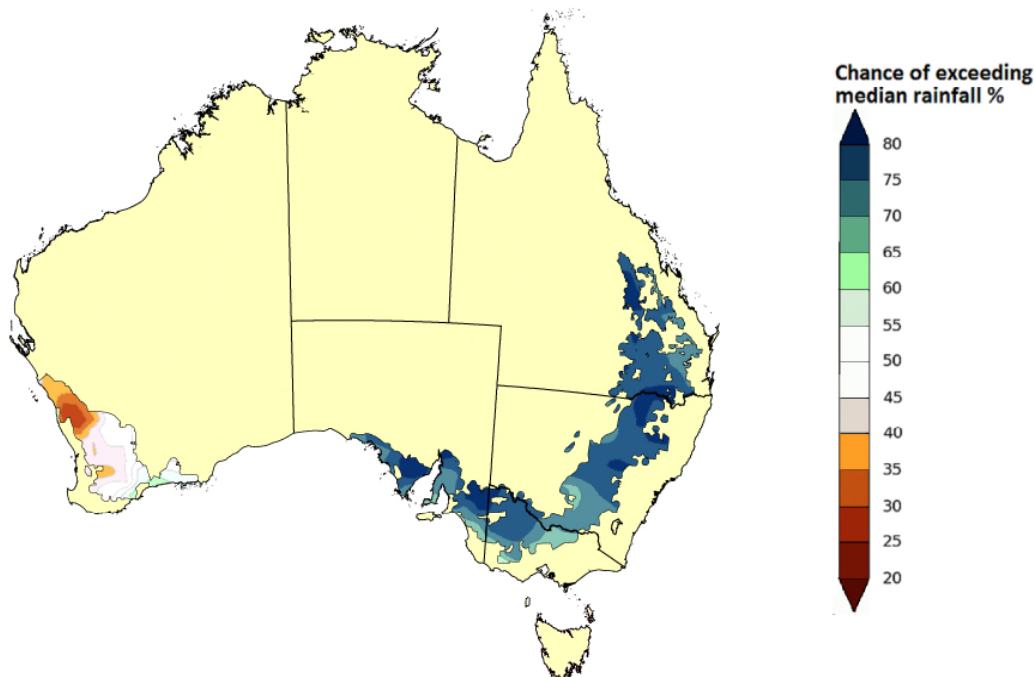
Map 3 Root zone soil moisture, August 2020



Note: Relative root zone soil moisture is displayed for cropping regions only. The extremely high band indicates where the estimated soil moisture level for August 2020 fell into the wettest 10 per cent of estimated soil moisture levels on that day each year between 1911 and 2016. The extremely low band indicates where the estimated soil moisture levels for August 2020 fell into the driest 10 per cent of estimated soil moisture levels on that day between 1911 and 2016. Source: Bureau of Meteorology.

The rainfall outlook presented here provides an indication of how favourable conditions for agricultural production are likely to be over spring. The latest three-month rainfall outlook (September to November), issued by the Bureau of Meteorology on 3 September 2020, suggests that spring rainfall is likely to be above average in most cropping regions. However, there are roughly equal chances of higher or lower than average spring rainfall in most cropping regions in Western Australia and below average spring rainfall is most likely in the Geraldton zone in Western Australia and part of the Kwinana zone. (**Map 4**). It is likely rainfall will not be evenly distributed in most cropping regions over spring with a lower chance of exceeding average rainfall in September than in October and November.

Map 4 Chance of exceeding median rainfall September to November 2020



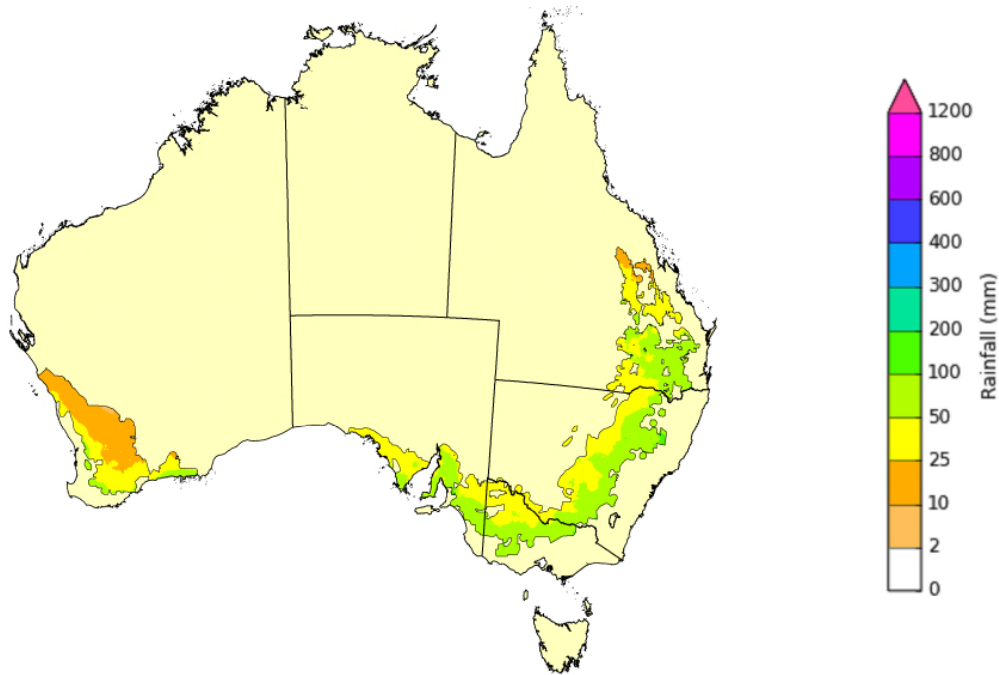
Note: Rainfall outlook is displayed for cropping regions only.  
Source: Bureau of Meteorology

There is a 75% chance of between 25 and 100 millimetres in most cropping regions in Australia during September and October (**Map 5**). It is highly likely spring rainfall totals will be enough to maintain average to above average crop yields through to harvest in regions where crops were in a good position at the end of winter.

There is a 75% chance of rainfall between 10 and 50 millimetres in most cropping regions in Western Australia and northern cropping regions in Queensland. In areas with low levels of soil moisture at the start of spring these probable September to October rainfall totals are unlikely to be sufficient to sustain the current winter crop yield potentials through to harvest.

The outlook for maximum and minimum temperatures for September to November 2020 indicates that daytime temperatures are likely to be around average in spring in most cropping regions. Night-time temperatures are expected to be hotter than average in most cropping regions except in Western Australia where they are more likely to be around average.

Map 5 Rainfall totals that have a 75% chance of occurring, September to October 2020



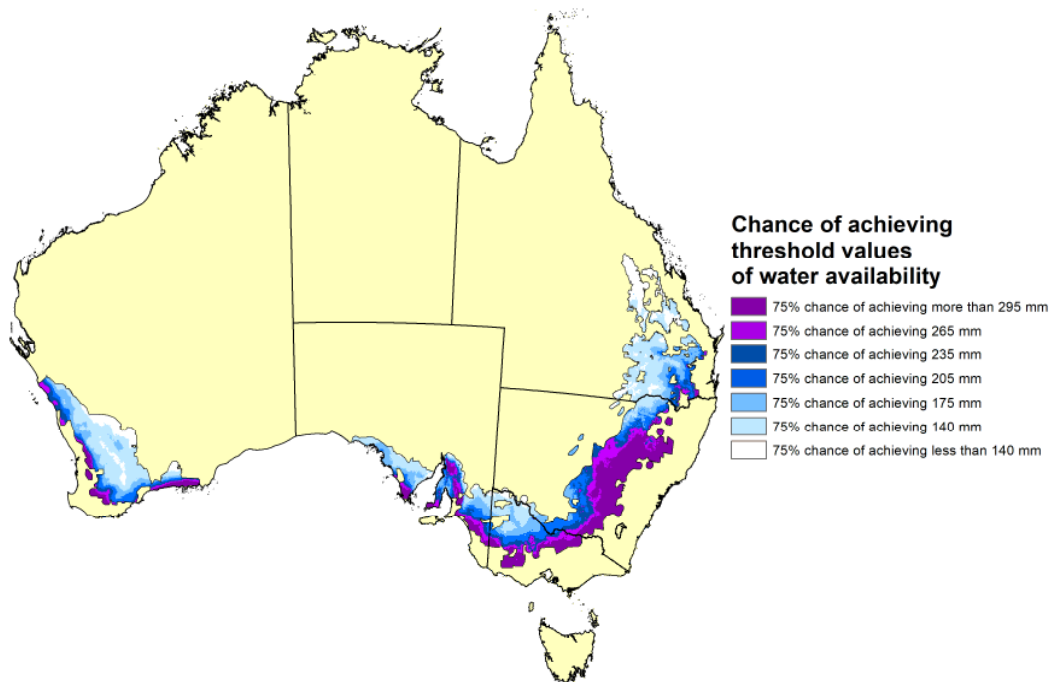
Note: Rainfall outlook is displayed for cropping regions only.  
Source: Bureau of Meteorology

**Map 6** shows modelled water availability levels that have a high chance of occurring by the end of October 2020. Water available for crop growth comes from water stored at sowing time and in-crop rainfall. On average, the total water requirement to achieve the national 5-year average wheat yield of 2.0 tonnes/ha is 235 millimetres, based on a conversion rate of 16kg of wheat per millimetre of water and a standard soil evaporation loss factor of 110 millimetres.

Indicative estimates of water availability are based on modelled plant available soil moisture as at 30 April 2020, recorded rainfall totals as at 31 August 2020, an estimate of rainfall totals with a 75% chance of falling during September and October 2020 derived from the Bureau of Meteorology latest rainfall outlook released on 3 September 2020.

The crop yield associated with a specific level of water availability varies across regions with variations in soil characteristics. Additionally, in some seasons the responsiveness of crop growth to water availability will be better than average (around 22kg/mm) and in other years it will be worse (around 6kg/mm) as responsiveness depends on factors such as temperature, humidity, soil nutrition and the timing of rainfall.

**Map 6 Modelled water availability levels that have a 75% chance of occurring by the end of October 2020**



Note: Modelled water availability is displayed for cropping regions only.  
 Source: ABARES & Bureau of Meteorology

At the end of August 2020, there was a 75% chance of achieving at least 265 millimetres of water availability by the end of October 2020 in eastern and central cropping regions in New South Wales, southern cropping regions in Victoria, central and southern cropping regions in South Australia and far western and southern cropping regions in Western Australia. There is a 75% chance of achieving between 140 and 235 millimetres of water availability by the end of October 2020 in north-western and south-western cropping regions in New South Wales, most cropping regions in Queensland, northern cropping regions in Victoria and South Australia, and most cropping regions in Western Australia.

# Crop conditions and production forecasts, by state

## New South Wales

Seasonal conditions in New South Wales have been excellent this season with above to very much above average rainfall from March to August in nearly all winter cropping regions. Area planted to winter crops in central and northern cropping regions in New South Wales is well above average reflecting timely rainfall leading into the planting window. With above average levels of soil moisture at the end of winter, particularly in central and northern cropping regions in New South Wales, favourable spring rainfall will likely result in significantly above average winter crop yields.

According to the latest three-month rainfall outlook (September to November), issued by the Bureau of Meteorology on 3 September 2020, spring rainfall is very likely to be above average in all cropping regions in New South Wales.

Winter crop production is forecast to rise to 14.8 million tonnes in 2020–21, 49% above the 10-year average to 2019–20 and the largest winter crop since 2016–17. Winter crop yields are forecast to be above average reflecting the ideal seasonal conditions to date and the positive outlook for spring rainfall. Area planted to **winter crops** in New South Wales is estimated to be just over 6 million hectares, 14% above the 10-year average to 2019–20 and almost double the area planted in 2019–20.

**Wheat** production is forecast to be just under 10.3 million tonnes in 2020–21, 58% above the 10-year average to 2019–20. The average yield is forecast to be 2.7 tonnes per hectare, 34% above the 10-year average to 2019–20. Area planted to wheat is estimated to have increased to 3.8 million hectares, which is double the area planted in 2019–20 and 23% above the 10-year average to 2019–20.

**Barley** production is forecast to be 2.5 million tonnes in 2020–21, 52% above the 10-year average to 2019–20. The average yield is forecast to be 2.7 tonnes per hectare, 30% above the ten year average to 2019–20. Area planted to barley is estimated to be 950,000 hectares, 22% above the 10-year average to 2019–20.

**Canola** production is forecast to reach 869,000 tonnes in 2020–21, 2% below the 10-year average to 2019–20. The average yield is forecast to be 1.6 tonnes per hectare, 19% above the 10-year average to 2019–20. Area planted to canola is estimated to be 550,000 hectares.

**Table 4 Winter crop forecasts, New South Wales, 2020–21**

<b>Crop</b>	<b>Area</b>	<b>Yield</b>	<b>Production</b>	<b>Area change</b>	<b>Prod. change</b>
	'000 ha	t/ha	kt	%	%
Wheat	3,800	2.70	10,260	100	391
Barley	950	2.65	2,518	64	262
Canola	550	1.58	869	120	286

Note: Yields are based on area planted. Area based on planted crop that is harvested, fed off or failed. Percent change are relative to last year.

Sources: ABARES

Area planted to **summer crops** in New South Wales in 2020–21 is forecast to increase to around 386,000 hectares. Despite this being close to four times the area planted in 2019–20, it is still 29% below the 10-year average to 2019–20. The significant increase in the area planted to winter crops in northern New South Wales this season will constrain the ability of producers to plant area to summer crops, particularly if the harvest of winter crop is delayed due to weather.

Area planted to **grain sorghum** is forecast to increase to around 145,000 hectares. Despite this being a significant increase from the drought affected planted area in 2019–20, it is 6% below the 10-year average to 2019–20, reflecting the constrained availability of fallow land due to the excellent winter cropping season in northern New South Wales.

Area planted to **cotton** is forecast to increase by 220% in 2020–21 to 135,000 hectares but remain 46% below the 10-year average to 2019–20. The forecast increase is driven by increased dam levels servicing cotton growing regions, particularly in southern and central cropping regions in New South Wales and a favourable spring rainfall outlook for all cotton-growing regions. Lower cotton prices will result in some competition for land from rice in the Riverina and grain sorghum in northern New South Wales.

Area planted to **rice** is forecast to increase to around 26,000 hectares in 2020–21 reflecting an increase in the availability of irrigation water and increased price competitiveness with cotton production.

**Table 5 Summer crop forecasts, New South Wales, 2020–21**

<b>Crop</b>	<b>Area</b> '000 ha	<b>Yield</b> t/ha	<b>Production</b> kt	<b>Area change</b> %	<b>Prod. change</b> %
Grain sorghum	145	3.13	454	1108	1161
Cotton lint	135	2.03	274	220	189
Cottonseed	135	2.88	388	220	189
Rice	26	9.98	258	509	473

Note: Yields are based on area planted, except cotton which is based on area harvested. Area based on planted crop that is harvested, fed off or failed. Percent change are relative to last year.

Sources: ABARES

## Queensland

Winter crop production prospects in Queensland are mixed at the beginning of spring because of variable seasonal conditions over winter. Rainfall in southern Queensland in June and July was average to below average but timely rainfall in early and mid-August generally boosted crop prospects in this region. However, August rainfall in central and northern cropping regions in Queensland was average and insufficient to boost crop prospects in these regions.

The latest 3 monthly climate outlook (September to November) released by the Bureau of Meteorology, on 3 September 2020, indicates that rainfall in most Queensland cropping regions is likely to be above average.

The rainfall forecast for spring in Queensland cropping regions, if realised, will sustain average yield prospects in southern cropping regions in Queensland but is expected to arrive too late and be largely insufficient to improve yield prospects in central and northern cropping regions.

**Winter crop** production in Queensland is forecast to be around 1.7 million tonnes, which is 4% below the 10-year average to 2019–20. Forecast production is 147% higher than drought

affected production in 2019–20, driven by an estimated 75% increase in planted area and an expected 41% improvement in state wide average yields. Winter crop production in Queensland is expected to be constrained by below average production forecast for central and northern cropping regions.

**Wheat** production is forecast to be 1.1 million tonnes in 2020–21, significantly higher than drought affected production last season but still 4% below the 10-year average to 2019–20. Area planted to wheat is estimated to be 750,000 hectares, which is a 17% downward revision from the forecast in the June edition of *Australian crop report*. This is because rainfall in June was generally insufficient for growers to fully realise planting intentions, especially in central and northern cropping regions. The state wide average yield is forecast to be 1.5 tonnes per hectare, which is 10% below the 10-year average to 2019–20.

**Barley** production is forecast to rise significantly to 270,000 tonnes in 2020–21, which is 27% above the 10-year average to 2019–20. This is largely driven by an estimated 200% increase in planted area to 135,000 hectares, which is 31% above the 10-year average to 2019–20. The estimated increase in planted area resulted from an increase in planted area in southern cropping regions.

**Chickpea** production is forecast to rise by 62% to 275,000 tonnes in 2020–21, 21% below the 10-year average 2019–20. This reflects an estimated 35% increase in area planted to chickpeas to 230,000 hectares, which is 11% below the 10-year average to 2019–20 and an average yield expected to be 5% below the 10-year average to 2019–20.

**Table 6 Winter crop forecasts, Queensland, 2020–21**

<b>Crop</b>	<b>Area</b> '000 ha	<b>Yield</b> t/ha	<b>Production</b> kt	<b>Area change</b> %	<b>Prod. change</b> %
Wheat	750	1.47	1103	88	163
Barley	135	2.00	270	200	350
Chickpeas	230	1.20	275	35	62

Note: Yields are based on area planted. Area based on planted crop that is harvested, fed off or failed. Percent change are relative to last year.

Sources: ABARES

Area planted to **summer crops** in Queensland is forecast to increase to 650,000 hectares in 2020–21, around 5% higher than the 10-year average to 2019–20, driven by an expected significant increase in area planted to grain sorghum and cotton from the drought affected season in 2019–20. Summer crop production in Queensland is forecast to increase to 1.7 million tonnes, 4% above the 10-year average to 2019–20.

Area planted to **grain sorghum** is forecast to rise significantly in 2020–21 to 450,000 hectares, 22% above the 10-year average to 2019–20. The expected increase in planted area reflects an expected improvement in seasonal conditions for summer crop planting, favourable grain sorghum prices and the availability of land left fallow earlier in the year because of unfavourable planting conditions for winter crops.

Area planted to **cotton** is forecast to increase significantly in 2020–21 to 104,000 hectares but remain 28% below the 10-year average to 2019–20. An increase in area planted to irrigated cotton is expected to result from recharges of on-farm water storages in southern cropping regions. Area planted to dryland cotton is also expected to rise significantly from last season when most producers opted not to plant because of drought conditions.



Table 7 Summer crop forecasts, Queensland, 2020–21

Crop	Area '000 ha	Yield t/ha	Production kt	Area change %	Prod. Change %
Grain sorghum	450	2.83	1274	246	390
Cotton lint	104	1.74	181	494	367
Cottonseed	104	2.47	257	494	367

Note: Yields are based on area planted, except cotton which is based on area harvested. Area based on planted crop that is harvested, fed off or failed. Percent change are relative to last year.

Sources: ABARES

## Victoria

Below average rainfall during winter is not expected to have substantially reduced crop prospects in Victoria. Above average levels of lower layer soil moisture present at the beginning of winter are expected to have sustained crops. In addition, timely August rainfall in western districts was sufficient to support crops in average to above average condition at the beginning of spring. Root zone soil moisture in August was below average in south western cropping regions. Sufficient and timely spring rainfall will be especially important in these regions to support grain formation.

Spring rainfall is likely to be above average in most cropping regions in Victoria, according to the latest three-month rainfall outlook (September to November) issued by the Bureau of Meteorology on 3 September 2020.

September and October rainfall is expected to be average to above average in most cropping regions, supporting yield prospects. Yields are expected to be above average in most regions.

**Winter crop** production in Victoria is forecast to increase by 6% in 2020–21 to around 7.9 million tonnes. This mostly reflects an expected increase in yields, driven by favourable seasonal conditions in autumn and the favourable spring outlook. The forecast increase in production also reflects an estimated 8% increase in planted area to 3.4 million hectares in 2020–21, as a result of favourable seasonal conditions in autumn, particularly in marginal cropping regions. Significant area of wheat and barley crops is not expected to be cut for hay and fodder because of the favourable seasonal conditions expected during spring and low hay prices.

**Wheat** production is forecast to increase by 14% in 2020–21 to 4.1 million tonnes reflecting an expected increase in the average yield and an estimated increase in planted area. Yields are forecast to increase from last year and be average to above average in most cropping regions. The forecast increase in production also reflects an estimated 10% increase in planted area to 1.6 million hectares.

**Barley** production is forecast to decrease by 6% in 2020–21 to around 2.3 million tonnes, driven by an expected fall in the average yield to 2.7 tonnes per hectare, which is down 11% from the exceptional average yield in 2019–20. Planted area is estimated to have increased by 6%, partially offsetting the effect on production of the expected fall in yields. The average yield for barley is expected to have fallen year-over-year because a smaller area is estimated to have been planted to barley in high-yielding regions in comparison to 2019–20.

**Canola** production is forecast to increase by 18% in 2020–21 to 765,000 tonnes. Planted area for canola production is estimated to have increased by 17% to 450,000 hectares because of

favourable seasonal conditions. The average canola yield is expected to be similar to 2019–20 at around 1.7 tonnes per hectare.

**Table 8 Winter crop forecasts, Victoria, 2020–21**

<b>Crop</b>	<b>Area</b> '000 ha	<b>Yield</b> t/ha	<b>Production</b> kt	<b>Area change</b> %	<b>Prod. Change</b> %
Wheat	1,600	2.56	4,096	10	14
Barley	870	2.70	2,349	6	-6
Canola	450	1.70	765	17	18

Note: Yields are based on area planted. Area based on planted crop that is harvested, fed off or failed. Percent change are relative to last year.

Sources: ABARES

## South Australia

Most cropping regions in South Australia had sufficient levels of soil moisture at the beginning of winter to sustain crops through June and July when rainfall was below average. August rainfall was timely and sufficient in most cropping regions, which boosted crop prospects in these regions. However, below average rainfall in early winter is expected to have reduced yield prospects in parts of the upper Eyre Peninsula and northern Mallee. Sufficient and timely spring rainfall will be important to grain development in some major crop growing regions where root zone soil moisture in August was well below average. It is likely that recent rainfall improved soil moisture levels but it is presently difficult to know by how much as it takes time for rainfall events to show up in root zone soil moisture levels.

According to the latest three-month seasonal outlook (September to November), issued by the Bureau of Meteorology on 3 September 2020, spring rainfall is likely to be above average in all cropping regions in South Australia. Day time temperatures are likely to be above average in September and average to below average in October and night time temperatures are likely to be above average in September in most cropping regions.

The forecast of above average overnight temperatures in September are likely to reduce the chance of significant frost events. Above average temperatures and mostly average rainfall forecast for September and above average rainfall forecast for October are expected to facilitate grain filling and support average to above average yields in most cropping regions.

**Winter crop** production in South Australia is forecast to increase to 7.7 million tonnes in 2020–21, which is 6% above the 10-year average to 2019–20. This is mostly because state wide average yields are expected to increase. Additionally, area planted to winter crops is estimated to have increased in response to favourable autumn rainfall and is larger than each of the previous three years, driven by increases in northern cropping regions.

**Wheat** production is forecast to increase by 41% in 2020–21 to 4.5 million tonnes, reflecting an expected 32% increase in the state wide average yield from the low average yield in 2019–20. The expected average yield is around 3% above the 10-year average to 2019–20. Most area planted to wheat is in Eyre Peninsula, the mid-North and the Murraylands, and yield prospects in these regions are significantly higher than yields last year. Area planted to wheat is estimated to have increased by around 6% to around 2.1 million hectares.

**Barley** production is forecast to increase by 14% in 2020–21 to 2.1 million tonnes, reflecting an expected 14% increase in the state wide average yield. The expected increase in the average

yield is less significant for barley than for wheat because less area is estimated to have been planted to barley in high-yielding regions than last year. This is not the case for wheat. Area planted to barley is estimated to have fallen slightly.

**Canola** production is forecast to increase by 10% in 2020–21 to 330,000 tonnes, reflecting an expected 8% increase in the state wide average yield and an estimated 2% increase in planted area. Yields for canola crops are expected to be higher than last year in most cropping regions, especially in the mid-North.

**Table 9 Winter crop forecasts, South Australia, 2020–21**

<b>Crop</b>	<b>Area</b> '000 ha	<b>Yield</b> t/ha	<b>Production</b> kt	<b>Area change</b> %	<b>Prod. change</b> %
Wheat	2,075	2.17	4500	6	41
Barley	840	2.50	2,100	-1	14
Canola	225	1.47	330	2	10

Note: Yields are based on area planted. Area based on planted crop that is harvested, fed off or failed. Percent change are relative to last year.

Sources: ABARES

## Western Australia

Winter rainfall was below average in most cropping regions in Western Australia. The late break to the season and low levels of soil moisture meant germination and early growth was slow for most crops. Rainfall in Western Australia was below average in June and July but timely rainfall in August boosted yield prospects in most cropping regions. Cereal crops are expected to achieve average to above average yields. However, sufficient and timely spring rainfall will be critical to grain development with root zone soil moisture levels in August well below average to extremely low in some crop growing regions.

According to the latest three-month climate outlook (September to November 2020), issued by the Bureau of Meteorology on 3 September 2020, there are roughly equal chances of higher or lower than average spring rainfall in most cropping regions in Western Australia. However, below average spring rainfall is most likely in the Geraldton zone and part of the Kwinana zone. Daytime and night-time temperatures are likely to be above average in most cropping regions during September. While there are no strong indications for below or above average night-time temperatures in October, daytime temperatures are more likely to be below average.

There is downside risk in the spring rainfall outlook for yield prospects, especially if early spring rainfall is insufficient to sustain crops in regions where root zone soil moisture levels in August were well below average to extremely low. It is likely that recent rainfall lessened this risk but it is presently difficult to know by how much as it takes time for rainfall events to show up in root zone soil moisture levels.

**Winter crop** production in Western Australia is forecast to rise by 35% in 2020–21 to 15.7 million tonnes, 10% higher than the 10-year average to 2019–20. Yields are expected to be higher than in 2019–20. Area planted to winter crops is estimated to have increased by 5%.

**Wheat** production is forecast to increase by 53% to 8.9 million tonnes in 2020–21. An average yield of 1.87 tonnes per hectare is expected, reflecting favourable crop prospects in most growing regions. The forecast average yield is 45% higher than in 2019–20. Area planted to wheat is estimated to have increased by 6% to around 4.8 million hectares.

**Barley** production is forecast to increase by 3% to 3.95 million tonnes, reflecting a forecast 12% rise in the average yield. Area planted to barley is estimated to have fallen by 9% to 1.6 million hectares, with area planted to wheat increasing at the expense of area planted to barley in some growing regions.

**Canola** production is forecast to increase by 26% in 2020–21 to 1.45 million tonnes, returning to the 10-year average to 2019–20. The average yield is expected to be 4% higher than in 2019–20 with more favourable seasonal conditions in major canola growing regions. Area planted to canola is estimated to have increased by 21% to almost 1.2 million hectares because of more favourable conditions than last year during the planting window in the southern cropping regions. Following a poorer start and less favourable early growing conditions in northern cropping regions, August rainfall improved yield prospects for canola in those regions.

**Table 10 Winter crop forecasts, Western Australia, 2020–21**

<b>Crop</b>	<b>Area</b>	<b>Yield</b>	<b>Production</b>	<b>Area change</b>	<b>Prod. change</b>
	'000 ha	t/ha	kt	%	%
Wheat	4,750	1.87	8,900	6	53
Barley	1,600	2.47	3,950	-9	3
Canola	1,150	1.26	1,450	21	26
Lupins	350	1.40	490	0	40

Note: Yields are based on area planted. Area based on planted crop that is harvested, fed off or failed. Percent change are relative to last year.

Sources: ABARES

# Statistical tables

**Table 11 Winter crop production and area, Australia, 2018–19 to 2020–21**

Crop	Area			Production		
	2018–19 '000 ha	2019–20 s '000 ha	2020–21 f '000 ha	2018–19 kt	2019–20 s kt	2020–21 f kt
Wheat	10,402	10,210	12,985	17,598	15,165	28,910
Barley	4,437	4,050	4,402	8,819	9,001	11,217
Canola	2,120	1,808	2,378	2,366	2,329	3,417
Chickpeas	294	263	508	205	281	708
Faba beans	234	196	239	233	327	418
Field peas	230	225	204	160	219	278
Lentils	400	360	338	359	534	497
Lupins	661	484	488	799	475	680
Oats	938	703	943	1,135	860	1,659
Triticale	48	71	71	59	96	129

f ABARES forecast. s ABARES estimate.

Notes: 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 Northern Territory and Australian Capital Territory in Australian totals. Area based on planted crop that is harvested, fed off or failed.

Sources: ABARES; ABS; Pulse Australia

**Table 12 Summer crop production and area, Australia, 2018–19 to 2020–21**

Crop	Area			Production		
	2018–19 '000 ha	2019–20 s '000 ha	2020–21 f '000 ha	2018–19 kt	2019–20 s kt	2020–21 f kt
Grain sorghum	550	143	595	1,160	298	1,728
Cottonseed a	343	60	239	686	189	645
Cotton lint a	343	60	239	485	134	456
Rice	8	6	27	67	53	266
Corn (maize)	59	30	51	327	207	367
Soybeans	13	16	24	15	26	41
Sunflower	11	12	16	9	15	21

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

Notes: 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 Northern Territory and Australian Capital Territory in Australian totals. Area based on planted crop that is harvested, fed off or failed.

Sources: ABARES; ABS; Cotton Australia.

Table 13 Production, major crops, Australian states, 2018–19 to 2020–21

Winter crops	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
<b>Wheat</b>												
2020–21 f	3,800	10,260	1,600	4,096	750	1,103	2,075	4,500	4,750	8,900	10	51
2019–20 s	1,900	2,090	1,450	3,600	400	420	1,950	3,200	4,500	5,800	10	55
2018–19	2,382	1,850	1,403	2,277	420	420	1,821	3,025	4,369	9,979	8	40
Five-year average to 2019–20	2,651	5,072	1,419	3,208	538	885	1,939	4,018	4,444	8,327	9	49
<b>Barley</b>												
2020–21 f	950	2,518	870	2,349	135	270	840	2,100	1,600	3,950	7	30
2019–20 s	580	696	820	2,500	45	60	845	1,850	1,750	3,850	10	45
2018–19	668	909	893	1,337	99	132	873	1,615	1,897	4,798	6	28
Five-year average to 2019–20	807	1,654	869	2,027	107	238	869	2,009	1,651	3,958	7	28
<b>Canola</b>												
2020–21 f	550	869	450	765	2	1	225	330	1,150	1,450	1	2
2019–20 s	250	225	385	650	2	1	220	300	950	1,150	1	3
2018–19	405	263	414	511	1	0	169	243	1,129	1,346	1	3
Five-year average to 2019–20	574	713	389	604	1	1	199	296	1,211	1,519	1	3
<b>Oats</b>												
2020–21 f	320	464	135	243	30	15	65	130	390	800	3	6
2019–20 s	190	171	100	175	35	18	65	90	310	400	3	7
2018–19	334	126	134	165	36	11	115	140	316	687	2	5
Five-year average to 2019–20	299	281	127	241	40	24	78	121	327	684	2	5

continued ...

Table 13 Production, major crops, Australian states, 2018–19 to 2020–21 (continued)

Summer crops	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
<b>Grain sorghum</b>												
2020–21 <b>f</b>	145	454	0	0	450	1,274	0	1	0	0	0	0
2019–20 <b>s</b>	12	36	0	0	130	260	0	0	1	2	0	0
2018–19	152	222	2	3	394	926	0	0	2	9	0	0
Five-year average to 2019–20	109	306	1	1	298	788	0	0	1	4	0	0
<b>Cottonseed <b>a</b></b>												
2020–21 <b>f</b>	135	388	0	0	104	257	0	0	0	0	0	0
2019–20 <b>s</b>	42	134	0	0	18	55	0	0	0	0	0	0
2018–19	227	454	0	0	117	231	0	0	0	0	0	0
Five-year average to 2019–20	231	601	0	0	121	303	0	0	0	0	0	0
<b>Rice</b>												
2020–21 <b>f</b>	26	258	0	0	1	8	0	0	0	0	0	0
2019–20 <b>s</b>	4	45	0	0	1	8	0	0	0	0	0	0
2018–19	7	61	0	0	1	5	0	0	0	0	0	0
Five-year average to 2019–20	36	361	0	0	1	6	0	0	0	0	0	0

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

Note: Zero is used to denote nil or less than 500 tonnes or 500 hectares. Area based on planted crop that is harvested, fed off or failed.

Sources: ABARES; ABS

Table 14 Production, other crops, Australian states, 2018–19 to 2020–21

Winter crops	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
<b>Chickpeas</b>												
2020–21 f	220	352	45	68	230	275	8	9	5	5	0	0
2019–20 s	25	20	50	75	170	170	10	10	8	6	0	0
2018–19	59	22	33	24	165	118	26	27	11	14	0	0
Five-year average to 2019–20	282	346	38	42	329	455	20	22	7	8	0	0
<b>Field peas</b>												
2020–21 f	37	59	47	59	0	0	85	115	35	45	0	0
2019–20 s	35	32	55	55	0	0	105	100	30	32	0	0
2018–19	46	18	83	43	0	0	74	53	27	45	0	0
Five-year average to 2019–20	51	51	65	62	0	0	99	109	28	41	0	0
<b>Lentils</b>												
2020–21 f	7	10	150	180	0	0	170	289	11	18	0	0
2019–20 s	6	5	180	254	0	0	160	260	14	15	0	0
2018–19	8	3	207	128	0	0	169	213	15	15	0	0
Five-year average to 2019–20	5	4	163	177	0	0	161	271	8	7	0	0
<b>Lupins</b>												
2020–21 f	60	96	38	44	0	0	40	50	350	490	0	0
2019–20 s	55	41	34	37	0	0	45	46	350	350	0	0
2018–19	59	24	50	24	0	0	42	37	510	713	0	0
Five-year average to 2019–20	71	58	42	41	0	0	57	64	391	571	0	0

continued ...



Table 14 Production, other crops, Australian states, 2018–19 to 2020–21 (continued)

Summer crops	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
<b>Corn (maize)</b>												
2020–21 f	21	204	4	41	25	118	0	0	0	0	0	4
2019–20 s	10	90	8	50	10	50	0	0	2	13	0	4
2018–19	21	147	7	66	28	88	0	0	2	25	0	0
Five-year average to 2019–20	18	160	7	61	26	113	0	0	1	15	0	2
<b>Soybeans</b>												
2020–21 f	16	28	1	1	7	11	0	0	0	0	0	0
2019–20 s	10	17	1	1	5	8	0	0	0	0	0	0
2018–19	9	6	1	2	4	7	0	0	0	0	0	0
Five-year average to 2019–20	13	17	1	1	6	8	0	0	0	0	0	0
<b>Sunflower</b>												
2020–21 f	10	15	0	0	6	6	0	0	0	0	0	0
2019–20 s	7	10	0	0	5	5	0	0	0	0	0	0
2018–19	5	3	0	0	4	5	0	0	1	1	0	0
Five-year average to 2019–20	8	9	0	0	5	5	0	0	1	1	0	0

f ABARES forecast. s ABARES estimate.

Note: Zero is used to denote nil or less than 500 tonnes or 500 hectares. Area based on planted crop that is harvested, fed off or failed.

Sources: ABARES; ABS; Pulse Australia

Table 15 Supply and disposal of wheat, canola and pulses, Australia, 2013–14 to 2018–19

Crop	2013–14 kt	2014–15 kt	2015–16 kt	2016–17 kt	2017–18 kt	2018–19 <sup>s</sup> kt
<b>Wheat</b>						
Production	25,303	23,743	22,275	31,819	20,941	17,598
Apparent domestic use	6,785	7,154	7,233	7,805	8,685	8,920
– seed	619	564	610	612	508	506
– other <b>a</b>	6,165	6,590	6,623	7,193	8,177	8,414
Exports <b>b</b>	18,612	16,587	16,116	22,636	13,820	8,981
Imports <b>b</b>	20	22	25	25	28	368
<b>Canola</b>						
Production	3832	3540	2775	4313	3893	2366
Apparent domestic use <b>a</b>	969	915	919	856	1488	776
Exports	2863	2626	1857	3458	2406	1591
<b>Pulses</b>						
Production						
– lupins	626	549	652	1031	714	799
– field peas	342	290	205	415	317	160
– chickpeas	629	555	875	2004	998	205
Apparent domestic use <b>a</b>						
– lupins	286	306	398	637	258	540
– field peas	175	124	72	148	189	87
– chickpeas	0	1	1	1	1	1
Exports						
– lupins	340	243	254	395	456	259
– field peas	169	168	134	268	130	75
– chickpeas	629	663	1145	2293	724	372

**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. **s** ABARES estimate.

Notes: Production, use, trade and stock data are on a marketing year basis: October–September for wheat; November–October for canola and pulses. Export data on a marketing year basis are not comparable with financial year export figures published elsewhere. Zero is used to denote nil or less than 500 tonnes. Due to a change in scope by the ABS of its agricultural data collections, crop production is shown for establishments with an estimated value of agricultural operations (EVAO) of \$5,000 or more until 2014–15, and an EVAO of \$40,000 or more from 2015–16.

Sources: ABARES; ABS; Pulse Australia

Table 16 Supply and disposal of coarse grains, Australia, 2013–14 to 2018–19

<b>Crop</b>	<b>2013–14</b>	<b>2014–15</b>	<b>2015–16</b>	<b>2016–17</b>	<b>2017–18</b>	<b>2018–19 s</b>
	<b>kt</b>	<b>kt</b>	<b>kt</b>	<b>kt</b>	<b>kt</b>	<b>kt</b>
<b>Barley</b>						
Production	9,174	8,646	8,992	13,506	9,254	8,819
Apparent domestic use	2,184	2,185	2,418	2,324	3,988	4,482
– seed	184	185	218	186	200	182
– other <b>a</b>	2,000	2,000	2,200	2,139	3,789	4,300
Export	6,957	5,932	6,342	9,873	6,496	4,553
– feed barley	3,944	3,070	4,351	6,364	3,641	1,740
– malting barley	2,273	2,149	1,394	2,826	2,084	1,946
– malt (grain equivalent)	740	713	596	683	771	866
<b>Oats</b>						
Production	1,255	1,198	1,300	2,266	1,227	1,135
Apparent domestic use	1,001	960	1,026	1,708	1,539	1,291
– seed	41	39	49	42	45	34
– other <b>a</b>	960	921	977	1,666	1,494	1,258
Export	116	111	109	106	121	127
<b>Triticale</b>						
Production	126	143	127	150	87	59
Apparent domestic use	126	143	126	150	87	59
– seed	4	4	3	3	2	4
– other <b>a</b>	122	139	123	147	84	56
Export	0	0	1	0	0	0
<b>Grain sorghum</b>						
Production	1,282	2,210	1,791	994	1,255	1,160
Apparent domestic use <b>b</b>	1,162	747	1,036	772	542	975
– seed	4	3	2	2	3	1
– other <b>a</b>	1,158	744	1,034	769	540	974
Export <b>b</b>	1,146	397	1,638	913	277	441
<b>Corn (maize)</b>						
Production	390	495	400	436	387	327
Apparent domestic use <b>b</b>	375	276	430	349	359	344
– seed	1	1	1	1	1	0
– other <b>a</b>	374	276	429	348	358	343
Export <b>b</b>	106	60	64	63	68	73

**a** Calculated as a residual: production plus imports less exports less any observed or assumed change in stocks less seed use. **b** For summer crops, export and apparent domestic use volumes are shown in year of actual export and consumption, which is typically in the year following production. Export data are on a marketing year basis and are not comparable with financial year export figures published elsewhere. **s** ABARES estimate.

Notes: Production, use and export data are on a marketing year basis: November—October for barley, oats and triticale; March—February for grain sorghum and corn (maize). Zero is used to denote nil or less than 500 tonnes. Due to a change in scope by the ABS of its agricultural data collections, crop production is shown for establishments with an estimated value of agricultural operations (EVAO) of \$5,000 or more until 2014–15, and an EVAO of \$40,000 or more from 2015–16. Sources: ABARES; ABS; UN Commodity Trade Statistics Database (UN Comtrade)

**Table 17 Grain, oilseed and pulse prices, fourth quarter 2018 to second quarter 2020**

Crop	2018	2019	2019	2019	2019	2020	2020
	Q4	Q1	Q2	Q3	Q4	Q1	Q2
	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t
<b>Wheat</b>							
Domestic: feed, del. Sydney	451	435	402	402	415	443	423
International: US no. 2 hard red winter, fob Gulf <b>a</b>	331	327	311	303	320	350	341
<b>Barley</b>							
Domestic: 2 row feed, del. Sydney	453	414	390	402	374	371	340
Export: feed <b>b</b>	353	345	344	364	319	308	336
Export: malting <b>b</b>	365	371	424	357	385	348	367
International: feed, fob Rouen <b>a</b>	330	300	273	256	275	287	279
<b>Grain sorghum</b>							
Domestic: feed, del. Sydney	442	402	391	388	433	428	391
Export <b>b</b>	584	401	440	420	732	1279	449
<b>Oats</b>							
Domestic: feed, del. Sydney	518	538	532	506	485	530	524
International: CME oats nearby contract	275	269	288	273	302	301	307
<b>Corn (maize)</b>							
Domestic: feed, del. Sydney	447	520	488	480	489	520	511
International: US no. 2 yellow corn, fob Gulf <b>a</b>	228	237	250	249	244	254	223
<b>Oilseeds</b>							
Domestic: canola, del. Melbourne	610	583	556	560	615	634	654
International: Europe rapeseed, cif Hamburg	596	588	590	613	637	663	628
International: US no. 2 soybeans, fob Gulf <b>a</b>	462	490	483	498	524	535	512
<b>Pulses</b>							
Domestic: lupins, del. Kwinana	363	375	390	396	432	529	552
Domestic: chickpeas, del. Melbourne	804	798	697	651	778	856	736
Domestic: field peas, del. Melbourne	526	617	535	508	489	527	520
Export: chickpeas <b>b</b>	835	896	833	749	830	856	865
Export: field peas <b>b</b>	546	683	689	662	612	663	665

**a** Average of daily offer prices made in US dollars and converted to Australian dollars 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.

Sources: ABARES; ABS; CME Group; Farm Weekly; International Grains Council; Jumbuk AG; The Land; The Weekly Times; US Department of Agriculture