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## AUSTRALIAN CROP REPORT



abareconomics

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

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

ABARE is a professionally independent government economic research agency.

This report was prepared by David Barrett, Peter Berry, Trevor Johnston, Athena Blias and Peter Connell from the Agriculture and Natural Resources Branch.

For further information, contact Peter Connell on +61 2 6272 2042. For subscription details for the *Australian Crop Report*, contact the Publications Sales at [sales@abare.gov.au](mailto:sales@abare.gov.au) or ph +61 2 6272 2010. For general media enquiries, contact Denise Flamia on +61 2 6272 2211.

The next issue of the *Australian Crop Report* is scheduled to be released on Tuesday, 10 June 2003

IN THE NEXT ISSUE ...

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

ABARE project 1076

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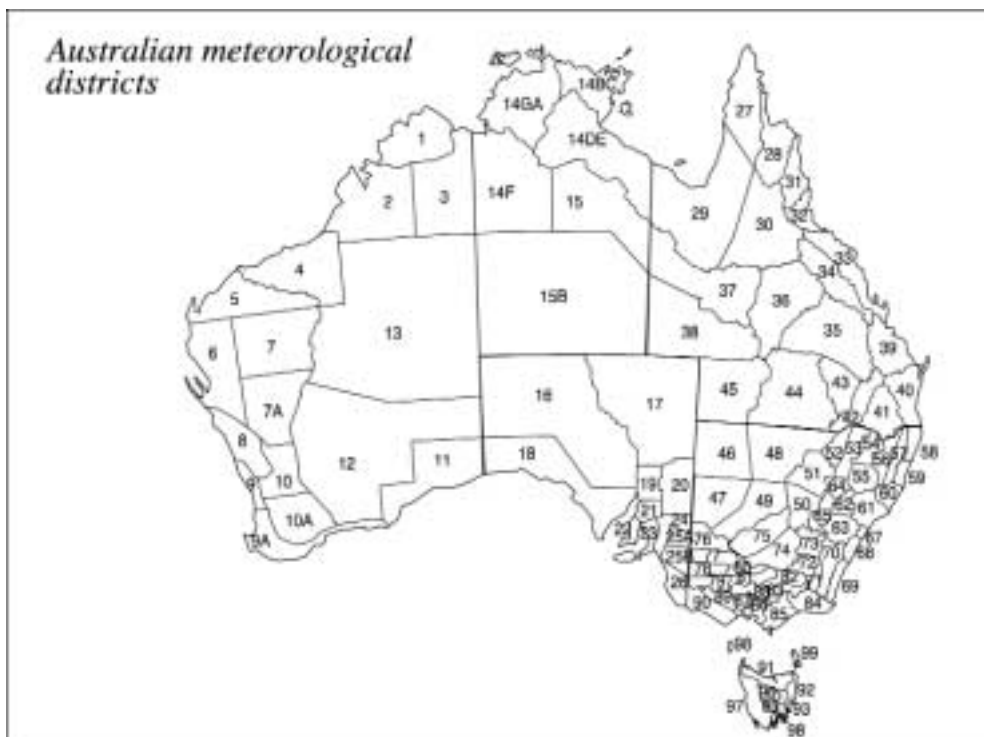
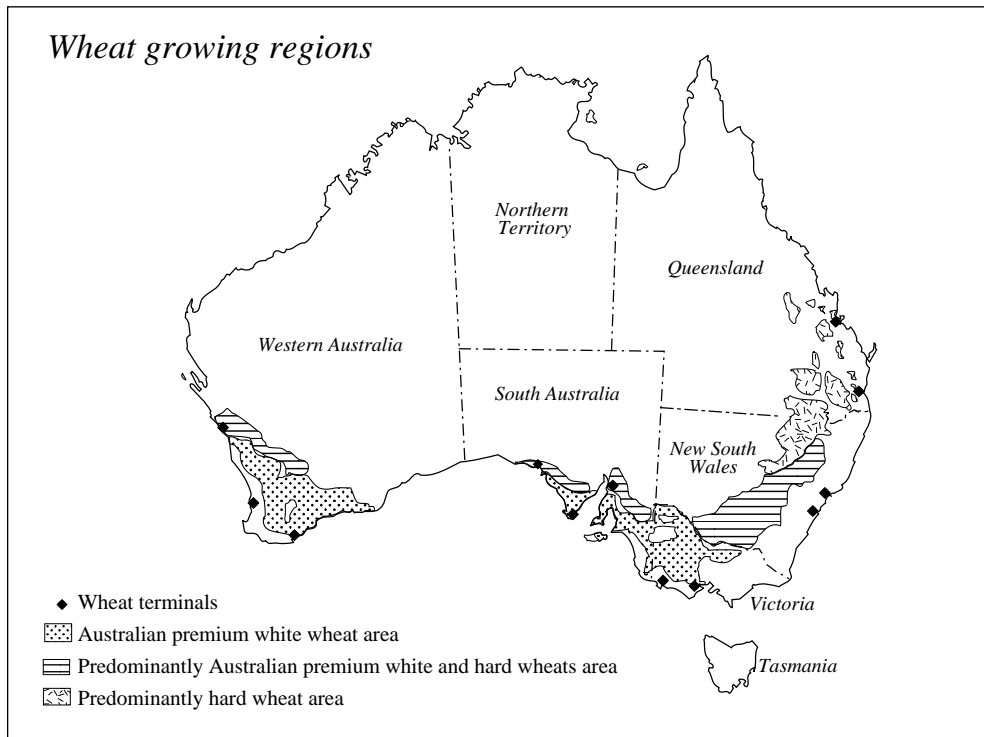
## AUSTRALIAN CROP REPORT

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# AUSTRALIAN CROP REPORT



### Overview

- *The severity of the current drought is exemplified by the poor winter grain crop. The 2002-03 harvest has been estimated at 15.4 million tonnes, down 24.3 million tonnes from last season, and the smallest winter grains crop since 1982-83 when production was 12.0 million tonnes.*
- *Wheat production is forecast to have fallen by 62 per cent to 9.4 million tonnes and barley by 61 per cent to 3.3 million tonnes in 2002-03. Of the other major winter grains, canola production is estimated to have fallen by 65 per cent to 0.6 million tonnes and lupin production by over 56 per cent to 0.5 million tonnes.*
- *Summer crop production has been severely affected by a shortage of irrigation water, which has resulted in a major reduction in the area sown to cotton and rice. Summer dryland crops were generally planted under less than ideal conditions and rainfall in December and January was generally well below average.*
- *While beneficial rains fell in some parts of the summer cropping regions in Queensland in early February, summer crop production is forecast to decline to 1.95 million tonnes, 62 per cent lower than last season.*

### Winter crop production

Total winter crop production is now forecast at 15.4 million tonnes in 2002-03, down 61 per cent when compared with last year's record winter crop of 39.6 million tonnes (table A). Estimates for Australian winter crop production for 2002-03 have been revised downward since the last estimates made in the December *Australian Crop Report*, largely as a result of poorer than expected harvests in Western Australia and South Australia

New South Wales and Victorian producers have been the most severely affected by the drought, with production down 77 per cent and 69 per cent to 2.55 million tonnes and 1.72 million tonnes respectively. It is the lowest winter New South Wales crop since 1994-95 when only 1.47 million tonnes of winter crops were harvested. However, the area sown to winter crops in 2002-03 is estimated to have been around 65 per cent more than the area sown to winter

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

	<b>New South Wales</b>	<b>Victoria</b>	<b>Queensland</b>	<b>Western Australia</b>	<b>South Australia</b>	<b>Australia</b>
	Mt	Mt	Mt	Mt	Mt	Mt
1993-94	7.51	4.37	0.83	9.85	4.84	27.83
1994-95	1.47	1.80	0.31	7.91	2.98	14.71
1995-96	6.74	4.35	0.74	10.22	5.16	27.82
1996-97	11.27	4.55	2.59	11.32	5.36	35.89
1997-98	8.29	3.21	1.63	12.06	5.22	31.15
1998-99	9.52	3.56	2.57	12.12	6.24	34.76
1999-2000	11.07	4.86	2.22	13.30	4.63	36.99
2000-01	10.50	5.91	1.34	8.70	7.33	34.72
2001-02 <sup>p</sup>	11.09	5.63	1.18	12.15	9.04	39.62
2002-03 <sup>p</sup>	2.55	1.72	0.72	6.14	3.80	15.36
<i>% change</i>	<i>-77</i>	<i>-69</i>	<i>-39</i>	<i>-49</i>	<i>-58</i>	<i>-61</i>

<sup>a</sup> State areas include wheat, barley, oats, canola, lupins, field peas, chickpea, faba beans and lentils. Australian totals also include triticale, linseed, safflower and vetch. <sup>p</sup> ABARE preliminary estimate

crops in New South Wales in 1994-95. A similar situation exists in Victoria, and on yield comparisons, average winter crop yields in 2002-03 are the lowest since 1982-83.

While winter crop production in Queensland was down only 39 per cent from last season to around 0.72 million tonnes, production in the previous season in Queensland was also severely reduced by dry conditions.

After a record winter crop harvest in 2001-02 in South Australia of 9.0 million tonnes, production in 2002-03 is estimated to have fallen by 58 per cent to 3.8 million tonnes, the lowest harvest since 1994-95. In Western Australia, production in 2002-03 is estimated to have been halved from last season at 6.1 million tonnes, the lowest harvest since 1987-88.

### *Summer crop production*

The total area planted to summer grain crops in Australia in 2002-03 is forecast at 0.93 million hectares, down 44 per cent from last year (table B). The decline is attributed largely to falls in areas sown to cotton and rice because of shortages of irrigation water. In both industries, growers have been abandoning parts of their crops and using their reduced water allocations on smaller crop areas in an effort to maximise returns.

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

	New South Wales		Queensland		Australia	
	'000 ha	Mt	'000 ha	Mt	'000 ha	Mt
1993-94	516	1.84	598	1.51	1 172	3.09
1994-95	527	2.25	727	1.31	1 317	3.63
1995-96	576	2.30	802	1.58	1 466	3.98
1996-97	655	2.78	689	1.49	1 429	4.37
1997-98	625	2.61	631	1.14	1 341	3.84
1998-99	889	3.25	680	1.67	1 709	5.07
1999-2000	728	2.88	737	2.03	1 550	5.01
2000-01	825	3.39	802	1.76	1 745	5.27
2001-02 <sup>p</sup>	799	3.20	793	1.81	1 665	5.12
2002-03 <sup>f</sup>	376	1.06	475	0.77	928	1.95
<i>% change</i>	<i>-53</i>	<i>-67</i>	<i>-40</i>	<i>-58</i>	<i>-44</i>	<i>-62</i>

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

Sowing conditions for dryland crops were less than adequate, and rainfall during December and January was generally well below average. There have been some very good falls of rain in parts of Queensland in the first half of February particularly in the Central Highlands regions. As many growers had not been able to sow crops in this region in late 2002 because of inadequate rainfall, some growers are considering sowing very late crops in order to receive some cash flow by mid-2003.

Total summer grain crop production is forecast to decline to 1.95 million tonnes, down 62 per cent from the previous year, and would be the smallest summer crop harvest since 1982-83. Similarly, cotton lint production is forecast to decline by 62 per cent to 0.26 million tonnes (1.15 million bales), the lowest harvest since 1986-87 when the industry was considerably smaller.

### *Three month rainfall outlook*

According to the National Climate Centre, the rainfall outlook for the remainder of the summer cropping season in northern New South Wales and Queensland is neutral across much of the grain belt. For the March-May 2003 period ([click here for map](#)), the chances of rainfall being above the median for this period is between 45 and 50 per cent across the major summer cropping areas of Australia.

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For the coming winter cropping season, there is at least a 50 per cent probability that there will be median rainfalls in the March–May period in much of the winter cropping regions in eastern Australia. The exceptions are the Western Slopes and Plains in New South Wales and in south east Queensland where the probability of autumn rains being above the median is around 45–50 per cent. However, the outlook is less promising for winter cropping regions in Western Australia. In some regions, the probability of receiving above median rainfall is only around 35 per cent.

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### *New South Wales*

- With all of New South Wales crop areas drought declared, total winter crop production in 2002-03 is estimated to have decreased by 77 per cent from last season to 2.55 million tonnes — the lowest production since 1994-95.
- **Wheat** production in New South Wales in 2002-03 is estimated to have fallen by around 76 per cent to 1.95 million tonnes. The area planted is estimated to have been 16 per cent lower than last season due to dry conditions at planting. Across the state, protein levels were high with no weather damage, principally due to lack of rain.
- The **barley** harvest is estimated to have declined by 78 per cent to around 310 000 tonnes in 2002-03 following an estimated 39 per cent fall in the area sown. The grain was of above average protein, with much of the crop going to the domestic feed grain market.
- An estimated 90 000 tonnes of **canola** were harvested in 2002-03, down 87 per cent on the previous season's crop. The area sown to canola was an estimated 25 per cent lower than in 2001-02. Many crops, especially in the more marginal areas, were either abandoned or grazed out. The overall quality of the crop was below average with oil content generally in the 36–38 per cent range.
- Yields were well below average for **pulse crops**, but the dry conditions during the growing season resulted in little fungal disease and reduced fungicide programs. Many pulse crops were short and difficult to harvest as a result of the dry conditions. The estimated total pulse harvest of 99 000 tonnes in 2002-03 was 75 per cent lower than the previous crop.
- Summer crops received light, but scattered, rain in most northern cropping areas in December and in early January, but no significant widespread rain had fallen in the period up to mid-February. In addition, water availability for irrigated crops is very low in most irrigated areas.
- The total area planted to **rice** is estimated to have fallen by 69 per cent to 46 000 hectares in 2002-03, while rice production is forecast to fall by around 71 per cent to 370 000 tonnes. Despite good growing conditions, decreased water availability has affected the area planted and production. Growers in the Colleambally and Murrumbidgee valley are expected to

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### *New South Wales winter crop estimates, 2002-03*

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	Area	Yield s	Production s	<i>Production change from 2001-02</i>
	'000 ha	t/ha	kt	%
Wheat	2 950	0.66	1 950	-76
Barley	400	0.78	310	-78
Canola	400	0.23	90	-87

s ABARE estimates.

account for much of this season's crop, with good yields expected as a result of the smaller cropping area and a shift toward higher yielding medium grain varieties.

- The *sorghum* crop is forecast to be around 200 000 tonnes, 75 per cent lower than the 2000-01 crop. The total area sown to sorghum across the state is estimated to have fallen by 47 per cent to around 140 000 hectares. Very hot and dry conditions around the state during December and January have lowered the potential yields and, without some rain over the next month prior to harvest, some crops are expected to be cut for hay or grazed out.
- *Cottonseed and cotton lint* production for New South Wales in 2002-03 are forecast to fall by 59 per cent, to 293 000 tonnes and 207 000 tonnes respectively. This follows a forecast 53 per cent reduction in area harvested of irrigated cotton due to reduced water availability. With a hot, dry start for the crop, insect and disease pressure has been low in most regions.

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### *New South Wales summer crop estimates, 2002-03*

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	Area	Yield f	Production f	<i>Area change from 2001-02</i>
	'000 ha	t/ha	kt	%
Sorghum	140	1.43	200	-75
Sunflowers	20	0.90	18	-49
Cottonseed	131	2.25	293	-59
Cotton lint	131	1.59	207	-59
Rice	46	9.45	370	-71

f ABARE forecast.

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### Victoria

- All the major cropping areas in Victoria, except the south west corner of the state, suffered from relatively poor growing conditions in 2002-03. As a result total winter crop production in Victoria is now estimated to be around 1.72 million tonnes, 69 per cent below the previous year's crop.
- In the Wimmera, *wheat* yields averaged only 0.3–0.4 tonnes per hectare. There was virtually no harvest from crops sown on heavier soils. Crops sown on lighter soils did better, being more responsive to the periodic rain showers that fell during the growing season.
- In the Mallee, there was significantly less area sown to winter crops in 2002-03, with around 20 per cent of the crop not being harvested. In general wheat yields in the Mallee were only 30 per cent of those in the past few years, except in the central Mallee where slightly better yields were achieved.
- Wheat production in Victoria is estimated to be down by 66 per cent to around 950 000 tonnes in 2002-03. The quality of the crop was characterised by relatively high protein and small seed. Similarly, the *barley* harvest is estimated to be 74 per cent lower at around 440 000 tonnes in 2002-03, with around 50 per cent of the crop graded as malting quality.
- The poor conditions also ensured that Victorian *canola* yields were well below average. The crop is estimated to have been 72 per cent lower than last season's at around 101 000 tonnes, with oil content also being lower than in previous years.

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#### Victorian winter crop estimates, 2002-03

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	Area	Yield s	Production s	Production change from 2001-02
	'000 ha	t/ha	kt	%
Wheat	1 450	0.66	950	-66
Barley	680	0.65	440	-74
Canola	250	0.40	101	-72

s ABARE estimate.

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### Queensland

- Total winter crop production is estimated at 0.72 million tonnes, 39 per cent lower than last season. This is the third consecutive year in which poor seasonal conditions have led to relatively low winter crop harvests.
- **Wheat** production is estimated to have declined by 41 per cent to around 550 000 tonnes in 2002-03 as a result of the very dry conditions this season. The quality of the crop is characterised by high protein and small seed size.
- Production of **barley** is estimated to have decreased by 51 per cent to 90 000 tonnes largely reflecting reduced plantings but also below average yields.
- With well below average rainfall and generally low subsoil moisture, summer crop production in Queensland is forecast to be well down on the past couple of years. **Sorghum** production is forecast to decline by 59 per cent to around 550 000 tonnes in 2002-03.
- Rains in November and December enabled planting of summer crops in south east Queensland. However, followup rain has been variable and, combined with relatively high summer temperatures, has placed crops under stress. Yields are expected to be variable and well below average.
- Rain across much of central Queensland in early February has substantially improved the summer crop prospects in that region. Until then very little crop had been planted this year. Although it is nearing the end of the planting season the relatively high returns for sorghum are expected to result in farmers planting around 170 000 hectares in central Queensland this year.

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#### Queensland winter crop estimates, 2002-03

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	Area	Yield s	Production s	Production change from 2001-02
	'000 ha	t/ha	kt	%
Wheat	465	1.18	550	-41
Barley	80	1.13	90	-51

s ABARE estimate.

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### Queensland summer crop estimates, 2002-03

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	Area	Yield †	Production †	Area change from 2001-02
	'000 ha	t/ha	kt	%
Sorghum	340	1.62	550	-59
Sunflowers	35	1.03	36	22
Cottonseed	62	1.27	78	-70
Cotton lint	62	0.90	55	-70

† ABARE forecast.

- Lack of presowing rains and severely reduced irrigation water supplies are estimated to have resulted in a 38 per cent fall in the area of *cotton* to be harvested in 2002-03. The area under irrigation is estimated to have fallen by 40 per cent to around 59 000 hectares, while the dryland area is down an estimated 87 per cent to just over 2000 hectares.
- Cotton lint and cottonseed production are forecast to decline by 70 per cent to 55 000 tonnes and 78 000 tonnes respectively. An early harvest is expected, and, as a result, will have a detrimental effect on fibre quality.

## *Western Australia*

- Widespread drought conditions resulted in Western Australia's winter grain harvest fall by half in 2002-03, to be the lowest harvest since 1987-88. The impacts of the dry conditions were variable across the state, with the central wheat belt in particular being more affected by drought and frost than other areas. Stones and sand in harvest diminished grain quality, due to many crops being harvested close to the ground.
- Grains receivals in Western Australia were largely completed in near record time, with a majority of the 200 CBH receival sites being closed before Christmas. Total grain receivals were around 5.15 million tonnes in 2002-03, down 50 per cent from 2001-02, and far short of the record 12.1 million tonnes received in 1999-2000.
- Very dry conditions have resulted in *wheat* production in 2002-03 falling to an estimated 3.9 million tonnes, down 51 per cent from last year's harvest. Also contributing to the lower harvest was widespread frost damaged, mainly in the central wheat belt areas. Apart from some frost damage grain, wheat received was generally high in quality, with low screenings and high protein levels.
- The *barley* harvest is estimated to have fallen to around 1.15 million tonnes in 2002-03, down 49 per cent on the previous crop of 2.24 million tonnes. High protein levels and screenings were common, and this resulted in increased volumes being classified as feed barley. Only around 45 per cent of the barley crop is expected to meet malting standards, compared with the normal proportion of around 60 per cent.
- The dry conditions at sowing time resulted in a much smaller *canola* crop being sown in 2002-03, particularly in the eastern cropping belt. Total production is estimated to have been around 285 000 tonnes, 35 per cent lower than the previous crop. Average oil content was around 43 per cent.
- *Lupin* production in Western Australia in 2002-03 is estimated to have decreased to around 450 000 tonnes, down by 50 per cent compared with the 2001-02 harvest. Poor seasonal conditions resulted in much of the crop in the Kwinana shipping zone being used for domestic feed.

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### Western Australia winter crop estimates, 2002-03

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	<b>Area</b>	<b>Yield s</b>	<b>Production s</b>	<b>Production change from 2001-02</b>
	'000 ha	t/ha	kt	%
Wheat	4 150	0.94	3 900	-51
Barley	950	1.21	1 150	-49
Canola	400	0.71	285	-35
Lupins	800	0.56	450	-50

s ABARE estimate.

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### South Australia

- Total winter crop production is estimated at 3.80 million tonnes down 58 per cent from the previous year's record crop. Crop yields were highly variable, with the worst hit regions being the Murray Mallee and the Lower Murray districts.
- With the relatively warm spring and early hot summer, harvesting was brought forward in many districts. Overall, grain quality was generally good, although there was some downgrading of barley crops in areas of the Upper North and the North Murray Mallee districts due to small grain and high screenings.
- South Australian *wheat* harvest is estimated at 2.0 million tonnes, nearly 60 per cent lower than in 2001-02. The quality of the grain was generally good, with high protein levels attributed to the dry conditions.
- *Barley* production was also down sharply, at an estimated 1.25 million tonnes, some 57 per cent less than last season's record crop. The protein content of the grain has generally been high, reflecting the drier conditions.
- *Canola* production is estimated to have been about 145 000 tonnes, down 65 per cent from last season. Yields were generally variable, with the oil content being much lower than the previous season's crop.
- Of the pulses, *lentil* production is estimated to have been about 61 000 tonnes, down 53 per cent from last season. *Field pea* production is also estimated to have fallen by 48 per cent to 110 000 tonnes in 2002-03.

#### South Australia winter crop estimates, 2002-03

	Area	Yield s	Production s	Production change from 2001-02
	'000 ha	t/ha	kt	%
Wheat	2 010	1.00	2 000	-59
Barley	970	1.29	1 250	-57
Canola	140	1.04	145	-65

s ABARE estimate.

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## I Crop production in Australia At 12 February 2003

	Area planted				Yield				Production			
	Five year average a	2001-02 current	2002-03 previous	2002-03 current	Five year average a	2001-02 current	2002-03 previous	2002-03 current	Five year average a	2001-02 current	2002-03 previous	2002-03 current
	'000 ha	'000 ha	'000 ha	'000 ha	t/ha	t/ha	t/ha	t/ha	kt	kt	kt	kt
Wheat	11 445	11 597	11 031	11 031	1.93	2.14	0.90	0.85	22 096	24 854	9 980	9 385
Barley	3 221	3 724	3 092	3 092	1.92	2.26	1.05	1.06	6 188	8 423	3 258	3 268
Oats b	826	773	718	718	1.76	1.86	1.02	1.01	1 451	1 439	735	725
Triticale	370	272	264	264	1.96	1.96	1.29	1.02	724	552	341	269
Sorghum b	603	852	483	483	2.79	2.49	1.77	1.56	1 690	2 123	855	755
Maize	69	93	53	60	5.09	5.60	4.60	4.32	352	521	244	259
Canola	1 146	1 364	1 190	1 190	1.32	1.32	0.52	0.52	1 474	1 797	621	621
Sunflower	120	65	45	55	1.11	0.97	0.93	0.98	135	63	42	54
Cottonseed c	474	403	224	192	2.12	2.43	1.51	1.93	997	980	337	371
- lint					1.50	1.72	1.06	1.36	705	693	238	262
Rice d	154	150	46	46	8.89	8.50	8.26	8.04	1 370	1 275	380	370
Lupins e	1 323	1 142	946	930	1.17	1.07	0.69	0.58	1 561	1 220	654	537
Field peas e	357	272	318	312	1.06	1.53	0.55	0.51	376	416	174	160
Chickpeas e	261	195	207	201	0.84	1.32	0.94	0.68	213	258	195	136
Faba beans e	148	180	157	157	1.44	1.94	0.73	0.69	216	350	114	108
Lentils e	67	158	165	165	1.22	1.68	0.52	0.41	76	266	85	67

a Based on data from ABS, *Principal Agricultural Commodities*, cat. no. 7111.0; ABS, *Agricultural Commodities, Australia*, cat. no. 7121.0; and ABARE estimates. b Area harvested for grain. c Cottonseed area is estimated harvested area. d Source: Rice Growers Cooperative Limited. e Source: Pulse Australia for 2001-02 and 2002-03; ABARE for previous years.

Note: Previous estimates are from the previous issue of the *Australian Crop Report*. The crop year refers to crops planted during the twelve months to 31 March. Winter crops are generally both sown and harvested within the nominated twelve month period. Slight discrepancies may appear between table 1 and tables 2 and 3 as a result of the inclusion of the Australian Capital Territory and Northern Territory in the Australian totals. Area and production estimates are from the sources detailed in footnotes to tables 2 and 3. Coverage is for all farms with an estimated value of agricultural operations of more than \$5000.

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## 2 State production – principal crops At 12 February 2003

	New South Wales		Victoria		Queensland		Western Australia		South Australia		Tasmania	
	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt	Area '000 ha	Prod. kt
<b>Wheat</b>												
2002-03 – current ABARE estimate	2 950	1 950	1 450	950	465	550	4 150	3 900	2 010	2 000	6	35
2002-03 – previous ABARE estimate	2 950	2 100	1 450	900	465	450	4 150	4 300	2 010	2 200	6	30
2001-02 – latest ABS estimate	3 498	8 257	1 137	2 812	615	929	4 380	7 931	1 962	4 897	6	27
Five year average to 2000-01 <b>a</b>	3 280	7 460	1 029	2 190	1 020	1 674	4 400	7 646	1 712	3 108	4	17
<b>Barley</b>												
2002-03 – current ABARE estimate	400	310	680	440	80	90	950	1 150	970	1 250	12	28
2002-03 – previous ABARE estimate	400	340	680	390	80	80	950	1 170	970	1 250	12	28
2001-02 – latest ABS estimate	659	1 389	707	1 692	96	184	1 074	2 243	1 181	2 891	7	25
Five year average to 2000-01 <b>a</b>	620	1 278	610	1 169	144	265	854	1 521	981	1 926	12	29
<b>Oats <b>b</b></b>												
2001-02 – latest ABS estimate	236	331	144	352	10	6	292	567	86	171	6	12
<b>Lupinus <b>c</b></b>												
2002-03 – current ABARE estimate	34	21	30	8	0	0	800	450	65	57	0	0
2002-03 – previous ABARE estimate	50	30	30	11	0	0	800	550	66	63	0	0
2001-02 – latest ABS estimate	102	125	33	42	0	0	924	896	83	156	0	0
Five year average to 2000-01 <b>a</b>	95	143	39	45	0	0	1 112	1 275	77	98	0	0
<b>Canola</b>												
2002-03 – current ABARE estimate	400	90	250	101	0	0	400	285	140	145	0	0
2002-03 – previous ABARE estimate	400	90	250	101	0	0	400	270	140	160	0	0
2001-02 – latest ABS estimate	536	716	247	355	1	1	409	439	170	409	1	1
Five year average to 2000-01 <b>a</b>	372	590	192	260	1	1	463	467	117	155	0	0
<b>Sorghum</b>												
2002-03 – current ABARE estimate	140	200	0	0	340	550	3	5	0	0	0	0
2002-03 – previous ABARE estimate	140	280	0	0	340	570	3	5	0	0	0	0
2001-02 – latest ABS estimate	263	785	0	6	589	1 331	0	0	0	0	0	0
Five year average to 2000-01 <b>a</b>	183	639	2	3	417	1 043	2	3	0	0	0	0
<b>Cottonseed <b>d</b></b>												
2002-03 – current ABARE estimate	131	293	0	0	62	78	0	0	0	0	0	0
2002-03 – previous ABARE estimate	155	232	0	0	69	105	0	0	0	0	0	0
2001-02 – latest ABS estimate	288	721	0	0	115	259	0	0	0	0	0	0
Five year average to 2000-01 <b>a</b>	319	683	0	0	155	314	0	0	0	0	0	0

**a** Based on data from ABS, *Principal Agricultural Commodities*, cat. no. 7111.0; ABS, *Agricultural Commodities, Australia*, cat. no. 7121.0; and ABARE estimates. **b** Area harvested for grain; current season estimates, by state, are no longer produced because of difficulties in obtaining consistent data at the state level. **c** Includes albus lupinus. *Source:* Pulse Australia for 2001-02; ABARE for previous years. **d** Cottonseed area is estimated harvested area. **s** ABARE estimate. **f** ABARE forecast.

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

# AUSTRALIAN CROP REPORT

## 3 State production – other major crops At 12 February 2003

	New South Wales		Victoria		Queensland		Western Australia		South Australia		Tasmania	
	Area	Prod.	Area	Prod.	Area	Prod.	Area	Prod.	Area	Prod.	Area	Prod.
	'000 ha	kt	'000 ha	kt	'000 ha	kt	'000 ha	kt	'000 ha	kt	'000 ha	kt
<b>Field peas</b>												
2002-03 – current ABARE estimate <b>a</b>	12	9	110	11	0	0	71	31	119	109	0	0
2002-03 – previous ABARE estimate <b>a</b>	18	12	110	22	0	0	70	30	120	110	0	0
2001-02 – latest ABS estimate	26	33	102	130	0	0	40	45	104	208	0	0
Five year average to 2000-01 <b>b</b>	20	23	154	144	1	0	50	37	133	186	1	1
<b>Maize</b>												
2002-03 – current ABARE estimate <b>a</b>	25	155	1	5	32	90	2	9	0	0	0	0
2002-03 – previous ABARE estimate <b>a</b>	22	145	1	5	28	85	2	9	0	0	0	0
2001-02 – latest ABS estimate	40	330	1	7	50	175	2	9	0	0	0	0
Five year average to 2000-01 <b>b</b>	26	192	1	6	42	151	1	5	0	0	0	0
<b>Chickpeas</b>												
2002-03 – current ABARE estimate <b>a</b>	71	51	9	0	111	81	6	2	4	3	0	0
2002-03 – previous ABARE estimate <b>a</b>	80	70	9	4	110	115	5	3	3	3	0	0
2001-02 – latest ABS estimate	116	162	16	24	46	61	16	11	1	1	0	0
Five year average to 2000-01 <b>b</b>	70	61	85	64	41	37	56	40	9	11	0	0
<b>Sunflowerseed</b>												
2002-03 – current ABARE estimate <b>a</b>	20	18	0	0	35	36	0	0	0	0	0	0
2002-03 – previous ABARE estimate <b>a</b>	20	18	0	0	25	24	0	0	0	0	0	0
2001-02 – latest ABS estimate	35	35	0	0	30	30	0	0	0	0	0	0
Five year average to 2000-01 <b>b</b>	37	46	2	3	80	85	0	0	1	1	0	0
<b>Faba beans</b>												
2002-03 – current ABARE estimate <b>a</b>	17	18	50	5	0	0	7	2	83	83	0	0
2002-03 – previous ABARE estimate <b>a</b>	17	17	50	14	0	0	7	2	83	81	0	0
2001-02 – latest ABS estimate	37	70	55	95	0	0	13	10	75	175	0	0
Five year average to 2000-01 <b>b</b>	23	33	49	69	2	2	21	18	52	94	0	0
<b>Lentils</b>												
2002-03 – current ABARE estimate <b>a</b>	2	1	90	4	0	0	3	2	70	61	0	0
2002-03 – previous ABARE estimate <b>a</b>	2	1	90	17	0	0	3	2	70	66	0	0
2001-02 – latest ABS estimate	3	3	90	130	0	0	5	3	60	130	0	0
Five year average to 2000-01 <b>b</b>	1	1	52	54	0	0	2	1	12	20	0	0

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

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

# AUSTRALIAN CROP REPORT

## 4 Rainfall comparisons for principal Australian cropping districts

	October			November			December			January		
	Normal a	2001	2002	Normal a	2001	2002	Normal a	2001	2002	Normal a	2002	2003 p
	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm
<b>Queensland</b>												
Central Highlands (35)	42	39	5	60	92	13	85	58	38	95	67	13
Maranoa (43)	46	42	15	58	93	20	68	52	36	75	94	10
West Darling Downs (42)	48	51	26	58	102	15	70	51	59	78	59	12
East Darling Downs (41)	62	73	29	73	116	30	93	66	90	91	56	16
Moreton South Coast (40)	76	60	40	95	162	41	129	73	101	153	69	8
<b>New South Wales</b>												
North West Plains (W) (52)	42	49	12	48	85	11	51	29	42	71	58	13
North West Plains (E) (53)	48	51	19	59	111	18	62	37	60	76	64	14
North West Slopes (N) (54)	61	56	31	71	154	38	78	47	73	84	64	17
North West Slopes (S) (55)	75	61	11	83	105	40	96	55	93	106	73	15
Northern Tablelands (N) (56)	61	62	35	65	159	60	74	62	83	83	79	28
Central West Plains (S) (50)	44	42	4	40	38	5	44	11	16	47	99	22
Central West Plains (N) (51)	41	47	6	41	47	7	42	21	19	55	82	27
Central West Slopes (N) (64)	54	72	9	56	53	18	61	33	48	78	93	18
Central West Slopes (S) (65)	56	60	2	51	43	11	51	18	27	60	140	31
Central Tablelands (N) (62)	58	79	3	60	57	23	61	43	52	72	126	15
Central Tablelands (S) (63)	75	69	4	75	57	20	81	20	49	94	150	26
Riverina (W) (75)	37	49	5	26	15	8	28	6	7	29	44	13
Riverina (E) (74)	47	65	5	34	26	11	35	12	9	35	85	15
South West Slopes (N) (73)	59	67	4	48	33	8	48	9	17	51	117	12
South West Slopes (S) (72)	83	122	17	60	55	22	58	26	28	55	111	13
Southern Tablelands (GM)(70)	64	57	13	61	55	16	60	22	38	63	124	16
<b>Victoria</b>												
North Mallee (76)	33	39	10	25	13	17	20	6	34	20	17	4
South Mallee (77)	37	41	12	27	21	23	23	8	26	21	12	8
North Wimmera (78)	41	46	15	30	29	30	25	11	27	22	9	9
South Wimmera (79)	50	73	33	36	43	33	29	25	27	26	20	15
Lower North (80)	44	53	8	31	20	20	27	6	17	29	36	18
Upper North (81)	51	72	16	36	24	25	33	9	16	34	42	24
Lower North East (82)	80	154	26	58	40	40	53	25	23	48	74	25
Upper North East (83)	109	161	47	80	67	50	70	38	36	60	74	33
North Central (88)	71	104	39	54	53	33	47	26	27	41	52	27
Central Western (89)	63	101	46	53	78	44	43	41	31	36	59	25
<b>Western Australia</b>												
North Coast (8)	18	33	15	10	18	4	8	2	15	11	5	2
Central Coast (9)	50	32	42	23	22	15	12	7	4	10	6	1
Northern Central (10)	19	17	14	13	24	9	11	5	22	13	4	5
South Coast (9A)	65	41	59	36	44	24	21	73	13	17	5	6
South Central (10A)	29	22	24	20	42	18	14	42	14	14	4	2
South East (12)	14	35	4	16	24	19	16	37	31	21	23	20
<b>South Australia</b>												
Upper South East (25B)	41	49	21	29	39	38	24	13	19	18	4	12
Murray Mallee (25A)	32	48	9	23	29	21	19	5	16	17	4	4
Murray River (24)	32	45	9	23	26	20	21	8	17	17	4	6
East Central (23)	53	71	24	34	44	32	28	20	14	21	2	16
West Central (22)	36	52	32	23	43	40	20	18	7	15	2	23
Lower North (21)	42	61	13	29	29	24	24	10	14	20	2	11
Upper North (19)	31	57	3	25	15	21	23	15	14	22	1	6
Western (18)	27	27	10	20	35	24	19	41	15	12	4	20
<b>Tasmania</b>												
Northern (91)	91	146	110	68	102	47	64	67	41	48	39	74
Midlands (93)	54	98	62	49	97	28	55	55	12	40	32	34

a The definition of normal rainfall reflects a simple arithmetic average of rainfall over the period 1913 to 2002. p Preliminary.

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

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

## AUSTRALIAN CROP REPORT

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

	1997-98	1998-99	1999-00	2000-01	2001-02 <sup>s</sup>	2002-03 <sup>f</sup>
	kt	kt	kt	kt	kt	kt
<b>Wheat</b>						
Production	19 224	21 464	24 758	22 108	24 854	9 385
Domestic use	4 279	5 006	5 257	5 328	5 427	7 258
– human and industrial	2 174	2 117	2 181	2 206	2 229	2 253
– feed <sup>b</sup>	1 585	2 341	2 530	2 600	2 700	4 500 <sup>c</sup>
– seed	519	548	546	522	496	506
Exports	15 679	16 391	17 784	16 085	16 304	7 789
Change in stocks	- 734	68	1 717	695	3 123	-5 663
<b>Canola</b>						
Production	856	1 690	2 426	1 775	1 797	621
Domestic use	322	355	370	415	395	307
– crushers	315	345	362	409	390	300
– seed	6	10	8	6	5	7
Exports	555	1 355	2 033	1 392	1 380	313
<b>Pulses – major crops</b>						
Production						
Lupins	1 561	1 696	1 968	1 055	1 220	537
Field peas	316	298	357	455	416	160
Chickpeas	199	188	230	146	258	136
Apparent domestic use <sup>b</sup>						
Lupins	600	643	584	399	391	420
Field peas	132	31	68	39	75	67
Chickpeas	34	28	46	44	46	48
Exports						
Lupins	961	1 053	1 384	401	713	234
Field peas	184	267	289	362	432	107
Chickpeas	200	120	243	176	283	146

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

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

## AUSTRALIAN CROP REPORT

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

	1997-98	1998-99	1999-00	2000-01	2001-02 <sup>s</sup>	2002-03 <sup>f</sup>
	kt	kt	kt	kt	kt	kt
<b>Barley</b>						
Production	6 482	5 987	5 032	6 743	8 423	3 268
Domestic use	2 090	2 158	2 011	2 325	2 500	2 117
– as malt and other human use	148	151	154	158	161	165
– feed	1 800	1 890	1 700	2 000	2 200	1 800
– seed	143	117	157	168	139	153
Export	3 463	4 765	3 325	4 567	4 998	1 659
– feed barley	2 025	2 607	1 524	2 143	2 721	544
– malting barley	982	1 635	1 234	1 824	1 678	587
– malt (grain equivalent)	457	525	569	602	600	528
<b>Oats</b>						
Production	1 634	1 798	1 118	1 050	1 439	725
Domestic use	1 480	1 550	983	964	1 249	668
– human	113	116	119	122	125	128
– feed	1 324	1 406	833	805	1 090	505
– seed	44	28	31	37	34	36
Export	154	248	135	86	190	57
<b>Triticale <sup>b</sup></b>						
Production	633	708	764	840	532	269
Domestic use	633	708	758	840	532	269
– feed	614	690	744	826	519	256
– seed	19	18	14	14	13	14
<b>Sorghum</b>						
Production	1 081	1 891	2 116	1 935	2 123	755
Domestic use	897	1 399	1 452	1 433	1 702	671
– feed	894	1 396	1 448	1 429	1 699	667
– seed	3	3	4	4	2	4
Export	184	493	665	501	426	84
<b>Maize</b>						
Production	271	338	406	345	521	259
Domestic use	252	302	353	300	467	232
– human, industrial	96	94	96	99	101	104
– feed	155	206	256	200	365	127
– seed	1	1	1	1	1	1
Export	19	36	53	45	75	35
<b>Total coarse grains</b>						
Production	10 101	10 722	9 436	10 913	13 038	5 276
Domestic use	5 709	6 477	5 927	6 241	6 837	4 353
– human, industrial	357	361	369	378	387	396
– feed	5 143	5 949	5 350	5 639	6 260	3 750 <sup>c</sup>
– seed	209	167	207	224	190	207
Export	3 820	5 542	4 178	5 199	5 448	1 750

<sup>a</sup> Market years are November–October for barley, oats and triticale, and March–February for sorghum and maize. This means that the 2001-02 barley crop harvested in November 2001 to January 2002 is marketed from November 2001 to October 2002. The 2001-02 sorghum crop harvested in March to May 2002 is marketed from March 2002 to February 2003. The sum of domestic use and exports may differ from production as a result of changes in grain stock levels. <sup>b</sup> Excludes small quantities of triticale for export. <sup>c</sup> Does not include imports. <sup>s</sup> ABARE estimate. <sup>f</sup> ABARE forecast.

Sources: Australian Bureau of Statistics; ABARE.

## AUSTRALIAN CROP REPORT

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

	2001		2002				2003
	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar <sup>s</sup>
	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t	A\$/t
<b>Wheat</b>							
Domestic							
Feed – Sydney	204	207	223	221	277	346	340
Export							
Australian standard white <b>b</b>	305	316	302	274	340	375	312
International							
US no.2 hard red winter, fob Gulf <b>b</b>	258	259	250	239	301	330	270
<b>Barley</b>							
Domestic							
2 row feed – Sydney	200	193	213	205	258	332	331
Export <b>c</b>							
Feed (bulk)	212	214	221	237	na	na	na
Malting (bulk)	278	286	274	303	na	na	na
International							
Feed – US no. 2 fob Portland <b>b</b>	218	221	216	200	222	241	229
<b>Sorghum</b>							
Domestic							
Feed – Sydney	186	182	187	195	256	331	343
Export <b>c</b>							
International	183	225	185	182	224	228	221
International							
US del. Gulf <b>b</b>	185	184	189	173	205	209	200
<b>Oats</b>							
Domestic							
Feed – Sydney	179	170	205	211	272	349	352
Export <b>c</b>							
International	288	345	231	337	245	217	229
International							
US heavy white, del. Portland <b>b</b>	229	284	316	303	299	303	296
<b>Maize</b>							
Domestic							
Feed – Sydney	205	220	236	239	292	379	421
International							
US no.2 fob Gulf <b>b</b>	178	172	176	164	197	195	184
<b>Oilseeds</b>							
Domestic							
Canola – del. Melbourne	433	414	389	388	501	544	480
Sunflower – del. Melbourne	344	366	360	380	404	428	435
Soybeans – US cif Rotterdam <b>b</b>	404	368	379	390	414	434	425
<b>Pulses</b>							
Domestic							
Lupins – del. Perth	240	237	219	215	235	284	270
Field peas – del. Melbourne	288	291	327	327	340	397	397
Chickpeas – del. Melbourne	565	535	508	520	521	523	523
Export <b>c</b>							
Chickpeas	637	615	622	615	708	598	570
Field peas	367	404	336	345	395	404	388

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

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