# Crop Report

# Australian Crop Forecasters

## Headline Messages

- SIZEABLE CROP CHANGES IN THIS MONTH'S REPORT. This month we received the bulk of our responses from the ACF Planting Intention survey. As a result we got some invaluable insights into planting trends across different states, regions and commodities. As a result some seemingly severe changes have been made to the forecasts we've attached. The full analysis of our survey figures will be released later this week so keep an eye out for it in your inbox.
- Spot rainfall across select regions of **WA** has gone some distance to salvage this years crop, giving some hope that average yields may still be achievable for the some regions within the state.
- The first of our Crop Ranking Index reports will be released this month, giving an insight into the progress of crops across the country.
- Late sorghum crop yielding well. The remaining unharvested late sorghum crop across the Darling Downs in QLD and Liverpool Plains in northern NSW has been yielding well over the past two months.
- Estimates for the major crops in 13/14: Wheat 23Mt (+11%), Barley 7.9Mt (+16%), Canola 3.0Mt (-18%).
- July rainfall nationally was below average with NSW (largely due to low rainfall throughout the north) & WA below average. VIC & SA above average and QLD receiving rainfall levels in line with the long term mean.

#### **ACF Crop Estimates** 2013/14 2012/13 WHEAT (incl Durum) 13,162,695 13,441,705 Area - ha Yield - t/ha 1.71 1.58 Prodn - (mt) 23.049.410 20.845.435 BARLEY Area - ha 4.225.065 3.843.766 Yield - t/ha 1.88 1.78 Prodn - (mt) 7,949,523 6,845,259 CANOLA 2.947.525 Area - ha 2.565.556 Yield - t/ha 1.20 1.27 Prodn - (mt) 3,080,637 3,738,780 OATS Area - ha 838.211 830.557 Yield - t/ha 1.42 1.49 Prodn - (mt) 1,191,398 1,233,765 TRITICALE Area - ha 298,665 299,030 Yield - t/ha 1.63 1.76 Prodn - (mt) 487,863 527,748 LUPINS 440,238 470,944 Area - ha Yield - t/ha 0.95 1.10 Prodn - (mt) 482,126 446,170 FIELD PEAS 295,848 Area - ha 283,513 Yield - t/ha 0.99 1.13 Prodn - (mt) 320,496 294,165 CHICKPEAS 540,612 542,892 Area - ha Yield - t/ha 1.17 1.33 Prodn - (mt) 630,472 720,344 FABA BEANS Area - ha 183.223 194.060 Yield - t/ha 1.63 1.63 Prodn - (mt) 316,774 299,126 LENTILS 154,380 Area - ha 168,860 Yield - t/ha 1.28 1.10 Prodn - (mt) 216.133 169.330 2012/13 2011/12 SORGHUM 572.104 660,659 Area - ha Yield - t/ha 2.91 Prodn - (mt) 1,667,311 2,231,254 COTTON Area - ha 456,675 601,232

# 2013/14

QLD

Whilst growing conditions have been favourable throughout **QLD** we currently have a wheat forecast that will be the lowest produced in the state since 2010. This is due solely to the fact that we expect a reduced acreage dedicated to wheat (6% from 12/13) - the lowest acreage planted in Queensland since 2007/08. Some of this is due to the late sorghum crop that we're seeing occupy potential acres for wheat. We're also seeing higher levels of barley plantings this year up 6% to 100,000 ha in the coming season. The areas for concern in the state are the Mackay/Fitzroy regions that aren't seeing the above average rainfall that southern areas of the state have been. This is illustrated in the decile map above right.

## NSW

1.82

2.807.149

3,641,868

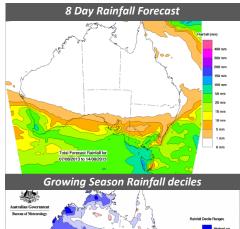
1.81

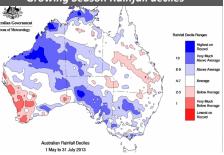
2.130.153

3,649,307

NSW has, for the most part, enjoyed a favourable growing season to date. Continued rains have worked to boost production prospects since they broke on May 31st. The one exception to this being the Walgett region which never demonstrated a moisture profile that was encouraging enough for many growers to commit seed to soil. As a result this will leave a hole in the NSW production figures.

At present wheat production for NSW currently sits at 7Mt, an 8% boost from the 2012/13 season. NSW barley acreage is also forecast to see a sizeable boost, up 20% in NSW from the previous year to 790kha. Canola was a crop we forecast to fall dramatically this year given the dry start to the year on the east coast however this figures is one we've amended as a result of survey numbers we're seeing. As a result we've raised our canola hectares 8% from last month to 659kha, still 26% down on the 2012/13 record year.





**VIC** 

Victoria's growing season has gone from strength to strength after what looked to be a shaky start. July saw another above average rainfall for the state which has now lead to a 5% rise in forecast wheat production from 2012/13 to 3.13Mt. VIC was another state we had forecast steep declines likely for their canola crop. Having seen the results from the planting survey it's evident that many growers in VIC weren't swayed away by the dry start. We still see a 16% decline in acreage to 471kha from last year but this is a lift from previous forecasts.

SA

Australia's sweet spot remained just that throughout July with impressive rainfall across all regions (Outer Adelaide just below average). Wheat production outlook for **SA** are currently at 4.2Mt up 5% from last month on the back of slightly higher acreage and a lift in yield projections. Similarly to Victoria we have amended our canola hectares for SA in light of the planting survey results, bringing the forecast production for **SA** to 420kt for 13/14.

The red on the left side declie map above is a fair representation as to the conditions **WA** growers are experiencing. Whilst the acreage is expected to be in line with the previous season at 4.8Mha, the yield is unfortunately forecast to come in at 1.47t/ha. This is 7% below the average for the state. Areas in the Esperance region are facing an alternative problem in that much of the region is underwater and could lead to an adverse production figure. The results of the planting survey have lead to a number of increases to our WA hectare forecasts vs last month forecast: Wheat 4% higher, barley 5% higher and canola a surprising 16% higher.

Yield - t/ha

Bales