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The next issue of the *Australian Crop Report* is scheduled to be released on Tuesday, 20 February 2007.

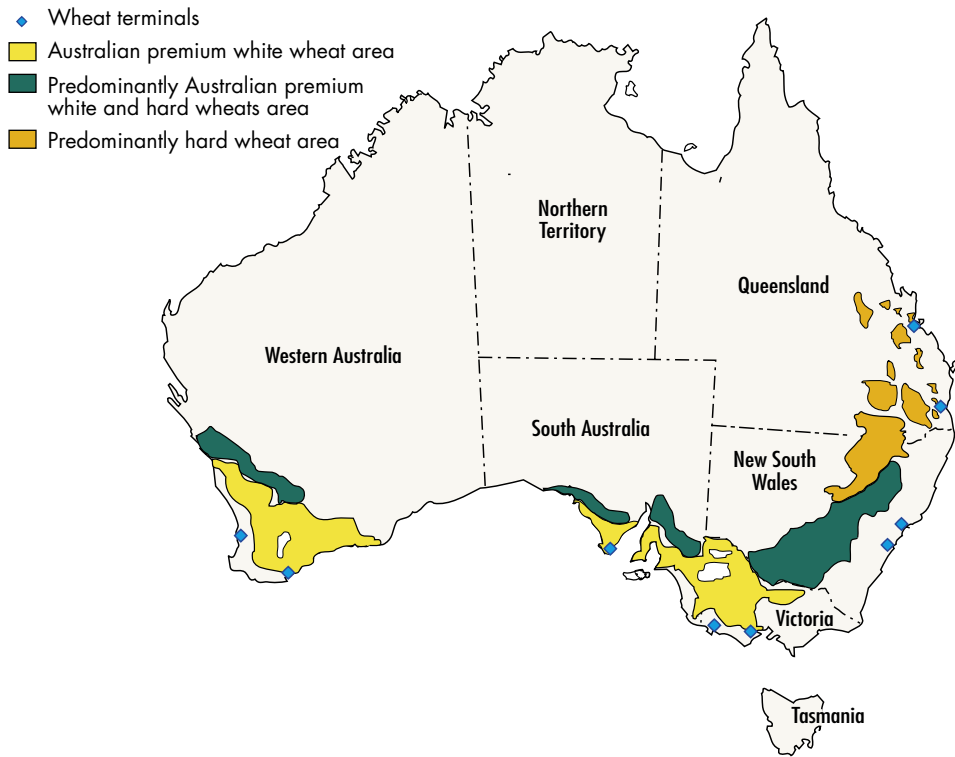
**in the next issue ...**

- > 2006-07 winter crop production estimates updated
- > 2006-07 summer crop area and production estimates

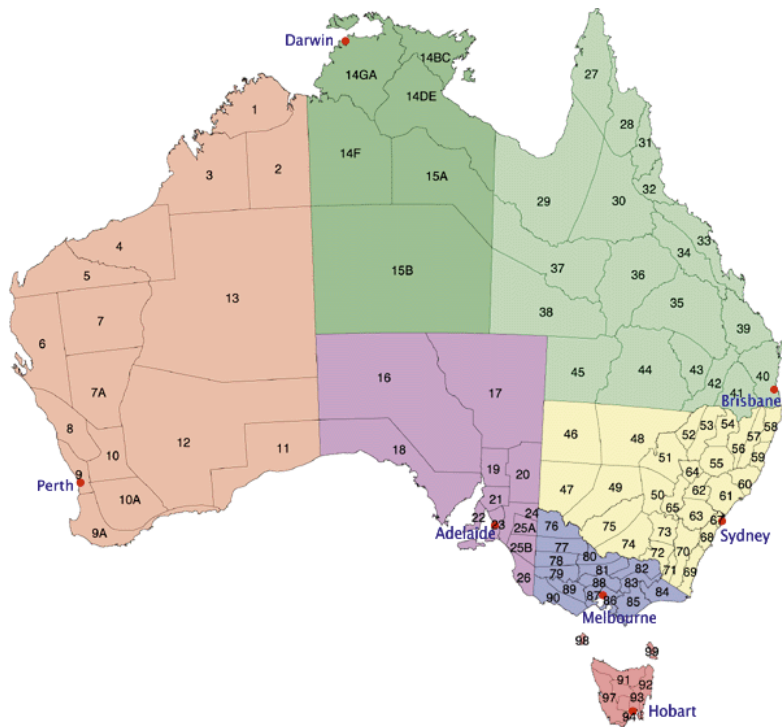
ABARE project 1076

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### Australian meteorological districts



## overview

- > Severe rainfall deficiencies have occurred over most cropping regions of Australia during 2006, particularly from August, with a near total lack of rainfall in late winter to mid spring.
- > On average, it was the driest August–October period since 1900 in South Australia, the second driest in Victoria and the Murray Darling Basin, and the third driest for New South Wales, where the average was boosted by above average falls along the state’s north coast. The lack of rainfall over this period was combined with above average temperatures. In many areas, mean maximum temperatures were the highest on record.
- > Australian winter grains production is forecast to decline by around 62 per cent in 2006–07 to total 15.5 million tonnes, the lowest production in over ten years, reflecting the extreme conditions.
- > Winter crop production in central and southern **New South Wales** declined over the growing season, with below to very much below average rainfall over the April–October period, combined with above average spring temperatures. In northern New South Wales, average winter rainfall was received, resulting in higher yielding crops in that area. However, prospects for the major summer crops, cotton and rice, are not favorable because of a lack of irrigation water. The outlook for grain sorghum production is highly dependent on further summer rainfall, which is needed to replenish soil moisture profiles.
- > Winter crops in **Victoria** were under extreme moisture stress for nearly the entire winter growing period. At the same time, Victoria also recorded the highest maximum spring temperatures since records began. Yields are estimated to be below to very much below average in most areas.
- > Throughout most of southern **Queensland**, the dry start to the season resulted in very few winter crop planting opportunities. However, good planting rainfalls followed by favorable growing conditions in central Queensland resulted in the vast majority of Queensland’s winter grains harvest coming from that region. The area planted to grain sorghum in Queensland is forecast to remain similar to last year’s area. However, subsoil moisture needs significant replenishment before summer crop planting intentions can be realised. It is likely that some planting will be held off until late January to avoid flowering during the heat of summer.
- > The northern part of the **Western Australian** grains belt had a poor start to the season and the area sown to winter crops was reduced considerably. Production in that region is estimated to have been around 20 per cent of average. In the central and southern regions, seasonal conditions were more favorable and crop yields are expected to be close to average.

- > After a promising start to the winter cropping season, prospects in **South Australia** declined significantly over the growing season. Winter rainfall varied from below average to very much below average in most areas, with many areas having their lowest rainfall on record. The lack of rain was combined with above average maximum temperatures in most districts and light frosts, which resulted in yield prospects declining sharply.
- > Of the major **winter crops**, the area planted to wheat in 2006-07 is estimated to have been 14 per cent below last year's, at 11.1 million hectares. Production is estimated to decline by around 61 per cent to 9.7 million tonnes. Barley production is estimated to decline to around 3.7 million tonnes, a 63 per cent drop from the previous season. Canola production is also estimated to fall to around 426 000 tonnes, the lowest in ten years.
- > Total **summer crop** area is forecast to decline by 25 per cent to 1.2 million hectares in 2006-07. In southern Queensland, northern New South Wales and the Riverina, below average winter and spring rainfall has depleted soil moisture profiles and water storage levels, severely limiting summer crop production prospects. Assuming average summer rainfall, summer crop production is forecast to fall by 33 per cent in 2006-07, to around 3.1 million tonnes, with most of the reduction being in cotton and rice.
- > Well below average spring rainfall and high seasonal temperatures have severely limited spring pasture growth in South Australia, New South Wales and south east Queensland, resulting in increased demand for livestock feed. This combined with significantly reduced winter crop production means that **grain and fodder stocks** held on farm will assume increased importance as part of producers' strategies for feeding livestock until autumn 2007.
  - ABS reported that at the end of October, total quantity of grain held in storage facilities operated by the major bulk handling companies was 13.2 million tonnes, of which 9.84 million tonnes was wheat and 2.16 million tonnes was barley.
  - Results from ABARE's broadacre farm survey of fodder and grain stocks held on farm, conducted in October and November 2006, are included in this report.

### *three month rainfall outlook*

Rainfall across most of Australia throughout the entire winter grain growing period was below the long term average. Details of rainfall received in the April-October period are provided in table A.

The Australian Bureau of Meteorology in its latest (23 November 2006) seasonal rainfall outlook for the summer period indicates that for most of the country the chances of accumulating at least average rainfall during the coming three months are close to 50 per cent. ([Click here for map](#))

There is a moderate to strong shift in the odds toward above normal daytime temperatures for summer (December-February) over much of eastern and northern Australia, according to the Bureau of Meteorology. ([Click here for map](#))

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

	average <sup>a</sup>	2004	2005	2006	percentage of average		
					2004	2005	2006
	mm	mm	mm	mm	%	%	%
<b>Queensland</b>							
Central Highlands (35)	209	78	277	161	37	132	77
Maranoa (43)	229	149	286	98	65	125	43
West Darling Downs (42)	238	169	294	105	71	124	44
East Darling Downs (41)	293	189	280	145	65	96	50
Moreton South Coast (40)	454	190	425	230	42	94	51
<b>New South Wales</b>							
North West Plains (W) (52)	240	177	315	164	74	131	68
North West Plains (E) (53)	278	228	355	192	82	128	69
North West Slopes (N) (54)	310	259	342	213	84	110	69
North West Slopes (S) (55)	326	269	379	228	83	116	70
Northern Tablelands (N) (56)	366	290	350	255	79	96	70
Central West Plains (S) (50)	261	216	300	138	83	115	53
Central West Plains (N) (51)	246	187	301	146	76	122	59
Central West Slopes (N) (64)	320	272	358	179	85	112	56
Central West Slopes (S) (65)	335	285	365	134	85	109	40
Central Tablelands (N) (62)	339	293	371	181	86	109	53
Central Tablelands (S) (63)	468	340	412	198	73	88	42
Riverina (W) (75)	223	163	273	127	73	123	57
Riverina (E) (74)	297	237	338	141	80	114	47
South West Slopes (N) (73)	368	295	434	160	80	118	43
South West Slopes (S) (72)	546	475	593	251	87	109	46
Southern Tablelands (GM)(70)	370	267	402	232	72	109	63
<b>Victoria</b>							
North Mallee (76)	202	166	242	117	82	120	58
South Mallee (77)	236	199	250	135	84	106	57
North Wimmera (78)	282	223	269	149	79	95	53
South Wimmera (79)	359	325	341	212	90	95	59
Lower North (80)	283	211	269	155	74	95	55
Upper North (81)	343	279	347	184	81	101	54
Lower North East (82)	548	543	667	267	99	122	49
Upper North East (83)	764	622	686	366	81	90	48
North Central (88)	498	433	436	276	87	88	55
Central Western (89)	422	391	351	268	93	83	63
<b>South Australia</b>							
Upper South East (25B)	311	266	306	153	86	98	49
Murray Mallee (25A)	210	170	251	113	81	119	54
Murray River (24)	227	197	293	134	87	129	59
East Central (23)	456	398	446	242	87	98	53
West Central (22)	331	327	346	202	99	105	61
Lower North (21)	319	249	321	142	78	101	45
Upper North (19)	224	181	229	89	81	102	40
Western (18)	248	210	204	129	85	82	52

continued ...

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

	average <sup>a</sup>	2004	2005	2006	percentage of average		
					2004	2005	2006
	mm	mm	mm	mm	%	%	%
<b>Western Australia</b>							
North Coast (8)	326	261	328	157	80	101	48
Central Coast (9)	738	501	666	370	68	90	50
Northern Central (10)	279	241	287	187	87	103	67
South Coast (9A)	757	524	726	433	69	96	57
South Central (10A)	340	262	389	219	77	114	64
South East (12)	159	154	159	110	97	100	69
<b>Tasmania</b>							
Northern (91)	710	769	878	568	108	124	80
Midlands (93)	328	345	458	241	105	139	73

a. Average from 1913 to 2006.

Averaged over summer, there is a 60–75 per cent probability of higher than normal maximum temperatures across all of Queensland and most of New South Wales. The chances of summer minimum temperatures being higher than the median are 60–85 per cent for Queensland, and the northern half of New South Wales.

### *summer crop production*

Total summer crop area is forecast to decline by 25 per cent to 1.2 million hectares in 2006-07 (table B). In southern Queensland, northern New South Wales and the Riverina, below average winter and spring rainfall has resulted in depleted soil moisture profiles and water storage levels (table C), severely limiting summer crop production prospects. Assuming average summer rainfall, summer crop production is forecast to fall by 33 per cent to 3.1 million tonnes in 2006-07.

The lack of irrigation water for rice growing in 2006-07 means the area planted to rice is estimated to be only 20 000 hectares – 81 per cent below the area planted last year. Further cuts to water allocations after planting are expected to have a significant impact on rice production in 2006-07, as some planted area is likely to be abandoned. The area sown to cotton is forecast to decline by 55 per cent to around 150 000 hectares in 2006-07, the smallest area sown to cotton in twenty years.

The total area planted to grain sorghum is forecast to be 802 000 hectares in 2006-07, 10 per cent less than the record area sown last year. There is likely to be an increase in the area of fallow land available for summer cropping in southern Queensland following the reduction in planting of winter crops in 2006. However, with below average winter rainfall followed by an extremely dry spring, further rainfall will be needed for planting intentions to be realised in most districts. In these areas, subsoil moisture levels will need to be significantly replenished

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

	New South Wales		Queensland		Australia	
	' 000 ha	Mt	' 000 ha	Mt	' 000 ha	Mt
1994-95	527	2.25	727	1.31	1317	3.63
1995-96	576	2.30	802	1.58	1466	3.98
1996-97	655	2.78	689	1.49	1431	4.37
1997-98	617	2.60	640	1.14	1335	3.82
1998-99	885	3.24	721	1.71	1741	5.10
1999-2000	742	2.90	770	2.03	1589	5.03
2000-01	827	3.38	816	1.79	1761	5.29
2001-02	777	3.15	794	1.77	1639	5.02
2002-03	509	1.58	521	1.20	1096	2.87
2003-04	436	1.77	708	1.81	1211	3.68
2004-05	496	2.00	773	1.79	1340	3.89
2005-06 <sup>s</sup>	736	2.78	765	1.65	1581	4.54
2006-07 <sup>f</sup>	470	1.43	646	1.53	1186	3.06
% change	-36	-48	-15	-7	-25	-33

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

before a summer crop can be planted with confidence. Assuming average yields, total grain sorghum production is forecast to reach around 2 million tonnes in 2006-07.

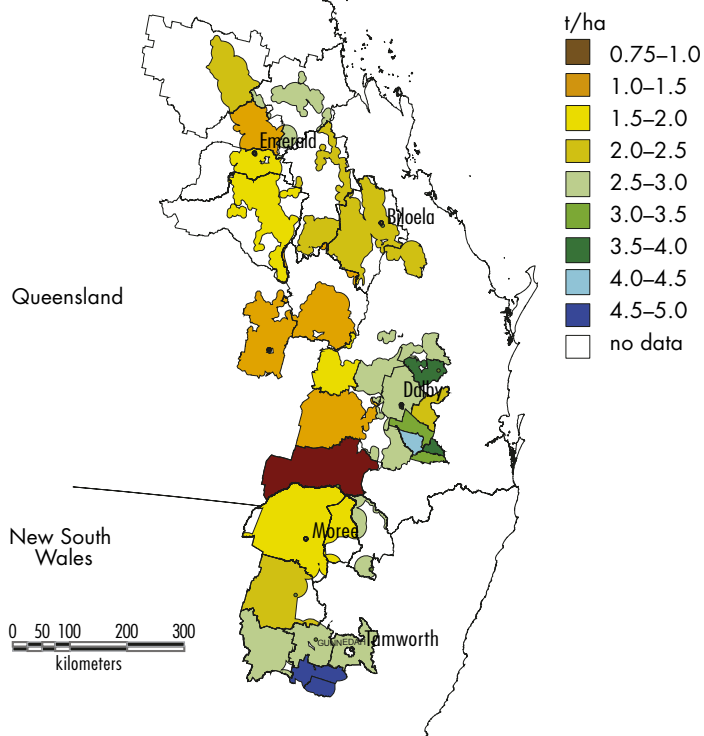
The Queensland Department of Primary Industries' Agricultural Production Systems Research Unit has mapped long term median grain sorghum yields (map 1). In map 2, soil moisture conditions, rainfall and the seasonal outlook have been combined to estimate the probability of exceeding average yields. This information provides background to the development of the summer crop forecasts.

The outlook at the beginning of December (map 2) reveals that the probability of yields exceeding the long term median across most of the grain sorghum growing regions of southern Queensland and northern New South Wales is 0-40 per cent (colored orange, yellow and red), although there are some pockets (colored green) that have a much higher chance of exceeding median yields. In central Queensland the chances are closer to average (colored grey).

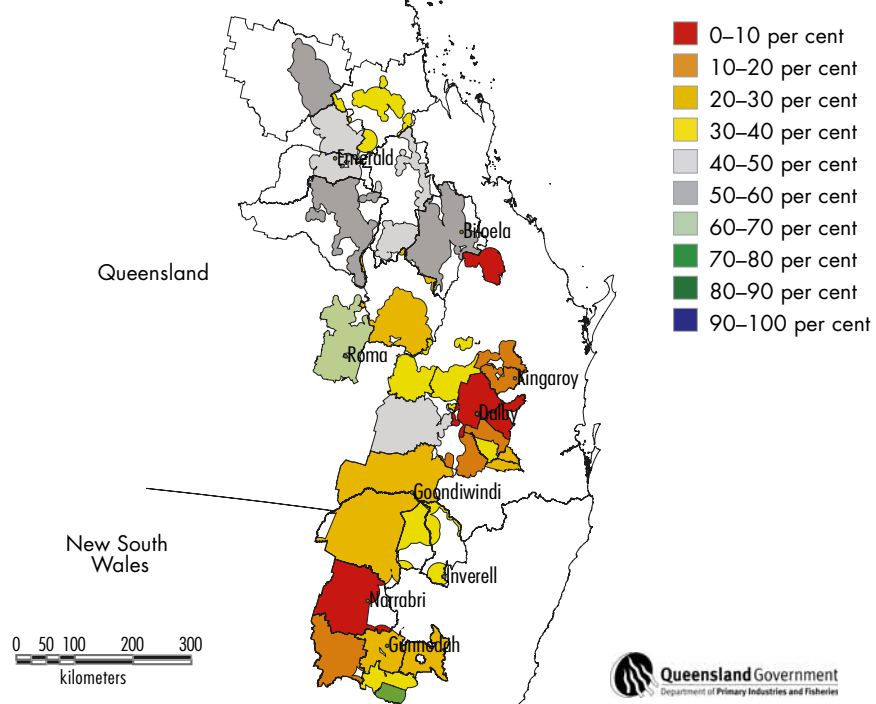
## C water storage and availability

	capacity GL	november 2005 % of capacity	november 2006 % of capacity
<b>Southern Queensland</b>			
Beardmore	82	71	18
Fairbairn	1301	27	13
Glenlyon	254	23	28
Leslie	106	12	11
<b>Northern New South Wales</b>			
Copeton	1362	32	20
Keepit	426	44	10
Pindari	312	65	57
<b>Southern New South Wales and Victoria</b>			
Blowering	1631	67	29
Burrindong	1188	43	18
Burrinjuck	1026	73	30
Dartmouth	3906	62	39
Hume	3038	91	9
Menindee Lakes	1731	26	11
Wyangala	1220	33	13

1 Simulated long term median sorghum yield, by shire (1901–2005)



2 Probability of exceeding the long term median shire sorghum yield, given the SOI phase was 'rapidly rising' at the end of November 2006



## winter crop production

Reflecting one of the driest winter cropping seasons on record in 2006-07, winter grains production is forecast to decline by around 62 per cent to total 15.5 million tonnes (table D). The decline in production is expected to reflect below average yields and a reduced area planted in most states.

Of the major winter grains, wheat production is estimated to fall by around 61 per cent to 9.7 million tonnes in 2006-07. Barley production in 2006-07 is estimated to fall by 63 per cent to 3.7 million tonnes. Canola production is estimated to be around 426 000 tonnes, a 70 per cent fall from the previous season and the lowest production in over ten years.

The largest declines in production are expected to occur in Victoria and New South Wales. Reflecting the extremely poor conditions, production of winter grains in Victoria is estimated to have declined by 76 per cent and in New South Wales by 72 per cent. These harvests will be the lowest in over ten years in New South Wales and over twenty years in Victoria.

Although total winter crop production is forecast to decline in New South Wales and Queensland, there are areas in both states where seasonal conditions have been reasonable. Central Queensland and northern New South Wales are both estimated to have achieved average to above average winter crop production.

### D Australian winter crop production <sup>a</sup>

	New South Wales		Queensland	Western Australia		South Australia	
	Mt	Mt		Mt	Mt	Mt	Mt
1994-95	1.47	1.80	0.31	7.91	2.98	14.70	
1995-96	6.74	4.35	0.74	10.22	5.16	27.79	
1996-97	11.27	4.55	2.59	11.32	5.36	35.85	
1997-98	8.29	3.21	1.63	12.06	5.22	31.12	
1998-99	9.52	3.56	2.57	12.12	6.24	34.74	
1999-2000	11.07	4.86	2.22	13.30	4.63	36.94	
2000-01	10.50	5.91	1.34	8.70	7.33	34.70	
2001-02	10.83	5.57	1.14	12.01	8.75	39.27	
2002-03	3.37	1.84	0.83	6.79	4.15	17.40	
2003-04	10.46	6.64	1.47	16.61	7.29	43.40	
2004-05	10.42	3.99	1.38	12.93	5.26	34.71	
2005-06 <sup>s</sup>	11.17	5.69	1.68	14.26	7.18	40.75	
2006-07 <sup>s</sup>	3.10	1.37	0.87	7.46	2.34	15.50	
% change	-72	-76	-48	-48	-67	-62	

<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>s</sup> ABARE estimate.

## grain and fodder stocks on Australian farms

ABARE's telephone survey of broadacre farms undertaken in October and November revealed that seasonal conditions have deteriorated to the point where around 60 per cent of those surveyed reported the existence of drought conditions. This was similar to the proportion of producers reporting drought conditions in October 2002 at the beginning of the major drought in 2002-03.

Pasture production was generally very poor during the spring of 2006. Consequently, grain stocks held on farm assume increased importance as part of producer strategies for feeding livestock until autumn 2007.

At the beginning of the 2006-07 financial year, broadacre farmers held an average of 270 tonnes of grain on farm (table E). Stocks were distributed fairly evenly between the states.

In the three months to 30 September, on-farm stocks fell significantly as producers took advantage of the rise in grains prices to sell some of their stocks while continuing to feed grain to livestock. Grain stocks fell by more than 75 per cent over that period.

As reported earlier, winter crop production in 2006-07 has been greatly affected by the poor spring seasonal conditions. Even though the returns from selling grain are currently very attractive, broadacre producers have indicated that they intend to add some of the grain produced in 2006-07 to on-farm stocks. This grain will be available for later sale, seed, or could be fed to livestock. The addition to stocks from 2006-07 production is expected to be greatest in Western Australia and Queensland, the states that recorded the best harvest outcomes.

However, with the exception of Western Australia, the amount of grain expected to be held on-farm that would be available for feed between October 2006 and June 2007 is lower

### **E** on-farm stocks of grain, Australian broadacre farms

	on-farm grain stocks		expected addition to stocks from 2006-07 production	grain available for feed from Oct 2006 to June 2007
	1 July 2006	30 Sept 2006		
	tonnes	tonnes	tonnes	tonnes
New South Wales	295	58	84	142
Victoria	284	178	59	237
Queensland	222	18	148	166
South Australia	256	50	109	160
Western Australia	289	64	263	327
Tasmania	244	18	23	41
Australia <sup>a</sup>	269	62	116	177

<sup>a</sup> Excludes the Northern Territory.

Source: ABARE farm surveys - preliminary estimates.

than the quantity of on-farm stocks at the beginning of the financial year. Given the demand among livestock producers in states other than Western Australia for feed grains, this indicates the feed grain market is currently, and is likely to continue to be, very tight.

Around 50 per cent of broadacre producers surveyed also reported that pasture availability on their property at the time of the interview was either poor or nonexistent. A higher proportion of Victorian and Queensland producers rated pasture availability on the lowest two scales compared with other states.

Victorian broadacre farmers faced with the poorest pasture conditions have responded by holding more feed grain on-farm. However, they are only holding around half as much as producers in the same state who reported below average or better pasture conditions.

However, this is not the case in Queensland, where producers have not accumulated substantial stocks of either fodder or grains to feed their livestock. If there is insufficient summer rainfall to generate substantial pasture growth, producers in Queensland with poor pasture availability are likely to be faced with the prospect of purchasing feed or destocking in the latter part of 2006-07.

## F Australian on-farm stocks of grain and fodder

	farms reporting below average or better pasture availability at 30 September 2006		farms reporting poor or no pasture available at 30 September 2006	
	grain available for feed from October 2006 to June 2007 tonnes	hay, silage or other feed (exc. grains) on farm at September 2007 <sup>a</sup> weeks	grain available for feed from October 2006 to June 2007 tonnes	hay, silage or other feed (exc. grains) on farm at 30 September 2006 <sup>a</sup> weeks
New South Wales	114	6	170	10
Victoria	90	27	305	15
Queensland	283	4	78	3
South Australia	180	13	141	15
Western Australia	250	14	592	10
Tasmania	34	14	51	8
Australia <sup>b</sup>	177	10	178	9

<sup>a</sup>. Weeks of feed for current livestock number assuming no change in pasture conditions. <sup>b</sup> Excludes the Northern Territory.  
Source: ABARE farm surveys - preliminary estimates.

# new south wales

- > Expectations for winter crop production have fallen dramatically across most of the cropping regions of southern and central New South Wales, largely because of below average rainfall and high seasonal temperatures throughout spring. Harvesting in northern New South Wales is nearly completed, and yields are expected to be significantly higher than in other regions of the state, reflecting more favorable growing conditions.
- > October 2006 was by far the hottest October on record in New South Wales and statewide rainfall was the lowest on record. Conditions in the Murray Darling Basin were particularly severe, where rainfall was half that of the previous driest October in the 'federation drought' year of 1900.
- > The area planted to **wheat** in New South Wales in 2006-07 is estimated to have fallen by 4 per cent to below 3.4 million hectares. With yields estimated to be well below average following the late sowing of crops and lack of in-crop rainfall, wheat production is estimated to be less than 2.2 million tonnes in 2006-07, a decline of 73 per cent from 2005-06.
- > The area planted to **barley** is estimated to have fallen by 11 per cent to 900 000 hectares in 2006-07, following the late start to the season. Below average spring rainfall is expected to result in significant yield penalties, with production forecast to fall by 76 per cent in 2006-07 to 550 000 tonnes.
- > Although the area planted to **canola** increased by 3 per cent in 2006-07, canola production is estimated to fall by 92 per cent to 20 000 tonnes. The decline in production reflects a significant drop in yields owing to the lack of in-crop rainfall, combined with high temperatures. Substantial areas were also cut for hay as producers realised that crops were unlikely to produce harvestable amounts of grain.
- > The area planted to **grain sorghum** is forecast to fall by 17 per cent from the record area planted last year, reflecting

## winter crop estimates, 2006-07 – New South Wales

	area	yield <sup>a</sup>	production	production change from 2005-06
	'000 ha	t/ha	kt	%
Wheat	3 500	2.26	2 150	73
Barley	1 015	2.21	550	76
Canola	145	1.75	20	92

<sup>a</sup> Yields are based on area planted.

## summer crop forecasts, 2006-07 – New South Wales

	area	yield <sup>a</sup>	production	area change from 2005-06
	'000 ha	t/ha	kt	%
Sorghum	250	3.00	750	-17
Sunflowers	50	1.30	65	-20
Cotton seed	115	2.61	301	-46
Cotton lint	115	1.84	213	-46
Rice	20	6.30	126	-81

<sup>a</sup> Yields are based on area planted.

the lack of adequate spring rainfall to enable planting. With an estimated 250 000 hectares planted and assuming average seasonal conditions, grain sorghum production is forecast to fall by 11 per cent in 2006-07 to 750 000 tonnes.

- > Reduced water storage levels in southern New South Wales following below average winter and spring rainfall led to an initial decrease in water allocations to **rice** producers, resulting in an estimated fall in area sown of 81 per cent to 20 000 hectares in 2006-07. Further cuts to water allocations after planting are expected to significantly affect rice production as some crops are abandoned owing to the lack of sufficient water to carry them through to harvest. Rice production is forecast to fall by 88 per cent in 2006-07 to around 126 000 tonnes.
- > Below average rainfall in the majority of **cotton** growing regions during winter and spring has resulted in reduced water allocations, which are estimated to result in the area planted to cotton falling by 46 per cent in 2006-07. Cottonseed and cotton lint production are both forecast to fall by 47 per cent, to 301 000 tonnes and 213 000 tonnes respectively in 2006-07.

# victoria

- > Winter crops in Victoria have been under extreme stress for nearly the entire winter cropping period. The August-October period was the second driest on record for Victoria since 1900. Victoria also recorded the highest maximum temperatures since records began. Crop yields are expected to be below to very much below average in most areas.
- > Some parts of north west Victoria received no rain in October. Much of eastern Victoria and the south west received much less than the long term average for October. Extreme temperatures were also a feature, with hot days, cold nights and occasional frosts.
- > Harvest is nearing completion in both the Wimmera and the Mallee. Yield estimates are in the range 0-1 tonne per hectare for cereals and zero for most pulses in the Wimmera. Wheat and barley yields in the Mallee are estimated to be in the range 0.3-1 tonne per hectare; however, the poorer paddocks may not be harvested. For the south west, it is estimated that 50-90 per cent of canola crops and around 50 per cent of cereal crops have been cut for hay and silage.
- > Early November rainfall delayed harvest and only those producers with surviving pulses were likely to benefit from the patchy rainfall across the cropping zone.
- > The area sown to winter crops in Victoria is estimated to have declined by 2 per cent in 2006-07 to 2.74 million hectares. However, total winter crop production is estimated to fall by 76 per cent to around 1.4 million tonnes, the lowest in over twenty years.
- > The area planted to **wheat** in Victoria is estimated to have fallen by only 2 per cent to around 1.25 million hectares in 2006-07. However, production is estimated to fall by 76 per cent to around 650 000 tonnes, reflecting well below average yields.
- > The area planted to **barley** in Victoria in 2006-07 is estimated to have been 850 000 hectares, a 9 per cent decline from the previous year. Production is estimated to be 510 000 tonnes, a 75 per cent fall from the previous season, and the lowest barley production since the 1982-83 drought.
- > Canola production in Victoria is estimated to be 50 000 tonnes in 2006-07, an 85 per cent drop from 2005-06. Area planted to **canola** is estimated to have fallen by 5 per cent to 213 000 hectares.

## winter crop estimates, 2006-07 - Victoria

	area	yield <sup>a</sup>	production	production change from 2005-06
	'000 ha	t/ha	kt	%
Wheat	1 250	0.52	650	-76
Barley	850	0.60	510	-75
Canola	213	0.23	50	-85

<sup>a</sup> Yields are based on area planted.

# queensland

- > An extremely dry start to the season resulted in very few planting opportunities throughout most of the southern cropping areas. However, central Queensland received good planting rains in early April, resulting in widespread planting, followed by favorable growing conditions. In 2006-07 the vast majority of Queensland's winter crop has come from central Queensland.
- > Like most states, below average rainfall was recorded over the winter cropping season, with the exception of some parts of central Queensland. A dry October in the Dawson and Callide Valleys was favorable for the region's wheat harvest, which is now complete, with yield estimates in the 2.0-2.5 tonnes per hectare range for wheat and barley crops. Later planted crops have generally not yielded as well as those planted in May. The winter crop harvest has also been completed in the Central Highlands, with wheat yields averaging 2.3-2.5 tonnes per hectare.
- > Widespread November rainfall across the central and southern Downs prompted some of the intended sorghum plantings to go ahead. However, with the extremely dry winter and spring, more rainfall will be needed for planting intentions to be realised. Generally, subsoil moisture needs significant replenishment before a summer crop can be planted with confidence.
- > The area sown to winter crops in Queensland is estimated to have declined by 68 per cent in 2006 07, to 690 000 hectares. Total winter crop production is estimated to have fallen by 48 per cent, to around 870 000 tonnes, reflecting the poor seasonal conditions in southern Queensland.
- > The area planted to **wheat** in Queensland is estimated to have fallen by 43 per cent to 550 000 hectares. Because of the poor season in the southern part of the state, wheat production in Queensland is estimated to be 720 000 tonnes in 2006-07, 48 per cent lower than last year and the smallest wheat harvest since the 2002-03 drought.

## winter crop estimates, 2006-07 - Queensland

	area	yield <sup>a</sup>	production	production change from 2005-06
	'000 ha	t/ha	kt	%
Wheat	550	1.31	720	-48
Barley	90	1.06	95	-63

<sup>a</sup> Yields are based on area planted.

## summer crop forecasts, 2006-07 - Queensland

	area	yield <sup>a</sup>	production	area change from 2005-06
	'000 ha	t/ha	kt	%
Sorghum	550	2.30	1265	-6
Sunflowers	15	0.87	13	241
Cotton seed	34	2.40	82	-72
Cotton lint	34	1.7	58	-72

<sup>a</sup> Yields are based on area planted.

- > The area planted to barley is estimated to have fallen by 42 per cent, to 90 000 hectares in 2006-07, primarily reflecting a significant reduction in sowings on the Darling Downs, one of the state's major **barley** growing regions. Production is estimated to be 95 000 tonnes, a 63 per cent fall from 2005-06.
- > **Chickpea** production is estimated to rise by 58 per cent in 2006-07 to 49 000 tonnes. Early rain in central Queensland allowed a significant area of chickpeas to be planted and growing conditions remained favorable throughout the season. Crops have now been harvested with above average yields and quality achieved. Due to the poor start to the season there were very few planting opportunities in southern Queensland.
- > The area planted to grain **sorghum** is forecast to fall by 6 per cent to 550 000 hectares. However, subsoil moisture needs significant replenishment before summer crop planting intentions can be realised. It is likely that some planting will be held off until late January next year to avoid flowering during the heat of summer.
- > Inadequate water availability in the main water storage dams is forecast to result in a 72 per cent fall in the area planted to **cotton** in 2006-07 to 34 000 hectares. While average winter rainfall in central Queensland improved subsoil moisture profiles and on-farm storages, the drought conditions being experienced in southern Queensland have severely depleted water storages. This is especially the case for the cotton growing areas of the Darling Downs.

## western australia

- > Winter crop production in Western Australia is estimated at 7.5 million tonnes in 2006-07, a fall of 48 per cent when compared with production in the previous season. Seasonal conditions in Western Australia have been variable throughout the cropping season. The northern part of the Western Australian grains belt had a poor start to the season and the area sown to winter crops was reduced considerably. Production in this region is estimated to have been around 20 per cent of average. In the central and southern regions seasonal conditions were more favorable and crop yields are expected to be close to average.
- > Rainfall in May-October across the grains belt was very much below average. However, rainfall in September and October maintained crops in the southern and central regions.
- > Harvesting has commenced in all regions of Western Australia, with some regions starting earlier than usual because of the hot and dry finish to the season. The Cooperative Bulk Handling Authority (CBH) in Western Australia estimates that they will receive 6.6 million tonnes of grain (harvest report no. 2) for the 2006-07 season. By late November it is estimated that 3.5 million tonnes of grain had been received by CBH.
- > **Wheat** production is estimated at 5 million tonnes in 2006-07, a fall of nearly 4.5 million tonnes from the previous season. This is the smallest wheat harvest in Western Australia since 2002-03. Much of the decline in wheat production is estimated to be caused by the poor crops in the northern part of the grains belt.
- > Reflecting an 18 per cent fall in the area sown to **barley** and lower yields than in 2005-06, total barley production in Western Australia is estimated to decline by 36 per cent to below 1.7 million tonnes. Of the barley harvested, high screenings have been recorded, but this was expected given the seasonal conditions in 2006-07.
- > **Canola** production in Western Australia is estimated to be 280 000 tonnes in 2006-07, a decline of 56 per cent from the previous season. It is estimated that of the area planted to canola in 2006-07, around 75 per cent will be harvested. Of the canola that has been harvested the oil content has been a little below average, but reasonable given the growing conditions.
- > The area sown to **lupins** in 2006-07 is estimated at around 350 000 hectares, a little over half the area sown in the previous year. Combined with a reduction in yields, total lupin production in Western Australia is estimated at around 125 000 tonnes, 86 per cent less than in 2005-06.

### winter crop estimates, 2006-07 - Western Australia

	area	yield <sup>a</sup>	production	production change from 2005-06
	'000 ha	t/ha	kt	%
Wheat	4 000	1.25	5 000	-47
Barley	1 070	1.54	1 650	-36
Canola	400	0.70	280	-56
Lupins	350	0.36	125	-86

<sup>a</sup> Yields are based on area planted.

## south australia

- > After a promising start to the season, prospects in South Australia declined throughout the winter cropping season. Growing season rainfall was either very much below average or the lowest on record in almost all districts, with the exception being parts of the far west coast. Conditions in August–October were particularly bad, where lack of rainfall was combined with high temperatures and frequent frosts, putting additional stress on crops.
- > Winter rainfall varied from below average in parts of the Eyre Peninsula to very much below average in most other areas. Much of the south east had the lowest winter rainfall on record. Extreme weather conditions throughout October, with above average maximum temperatures, record low rainfall and widespread frosts, caused further crop failure, particularly in canola and pulses.
- > Despite the severe conditions, the yield potential of cereal crops seems to have stabilised. Harvest is nearing completion and, while yields have been extremely variable, they have often been better than expected, particularly for crops that were sown early.
- > The total area planted to winter crops in South Australia is estimated to have been 3.63 million hectares, with production estimated to be 2.34 million tonnes in 2006-07, a 67 per cent reduction from 2005-06, reflecting the poor season.
- > Area planted to **wheat** in South Australia is estimated have been only 2 per cent lower in 2006-07 at around 2 million hectares, reflecting the early start to the season, combined with a much improved outlook for wheat prices at the time of planting. However, total South Australian wheat production is estimated at 1.2 million tonnes, 66 per cent less than in 2005-06.
- > The area planted to **barley** in 2006-07 is estimated to have been 19 per cent lower than in the previous year, at around 1.1 million hectares, reflecting the dry start and relatively more favorable wheat prices. The smaller area planted and well below average yields mean that barley production in 2006-07 is estimated to be 850 000 tonnes, 68 per cent decline from 2005-06.
- > The area planted to **canola** in South Australia in 2006-07 is estimated to have been similar to last year's, at around 150 000 hectares, reflecting the early break in the season. However, as the season progressed, more and more canola crops failed in the extremely hot and dry spring conditions. In 2006-07, total canola production is estimated to decline by 66 per cent to 75 000 tonnes.

### winter crop estimates, 2006-07 – South Australia

	area	yield <sup>a</sup>	production	production change from 2005-06
	'000 ha	t/ha	kt	%
Wheat	1 980	0.61	1 200	-66
Barley	1 070	0.79	850	-68
Canola	150	0.50	75	-66

<sup>a</sup> Yields are based on area planted.

1 crop production in Australia At 29 November 2006

	Area planted				Yield				Production			
	Five year	2005-06 s	2006-07 f	2006-07 f	Five year	2005-06 s	2006-07 f	2006-07 f	Five year	2005-06 s	2006-07 f	2006-07 f
	average a	current	previous	current	average a	current	previous	current	average a	current	previous	current
Wheat	12 261	12 980	11 138	11 138	1.69	1.93	1.47	0.87	20 915	25 090	9 549	9 739
Barley	4 029	4 739	3 990	3 990	1.83	2.08	1.46	0.92	7 402	9 869	3 588	3 673
Oats b	866	859	794	794	1.56	1.65	1.36	0.80	1 348	1 416	1 080	633
Triticale	408	347	328	328	1.70	1.95	1.60	0.91	693	676	525	300
Sorghum b	747	889	894	802	2.52	2.27	2.56	2.52	1 888	2 019	2 287	2 018
Maize	70	76	72	63	5.56	5.03	5.34	5.24	384	380	385	330
Canola	1 335	962	914	914	1.15	1.50	0.85	0.47	1 529	1 441	440	426
Sunflower	59	79	85	65	1.01	1.24	1.17	1.20	58	98	100	78
Cottonseed c	336	336	231	150	2.50	2.52	2.50	2.56	829	844	577	383
- lint	336	336	231	150	1.75	1.78	1.77	1.81	581	597	408	271
Rice	97	105	45	20	8.41	9.98	8.89	6.30	833	1 048	400	126
Lupins d	1 008	754	500	500	1.03	1.43	0.68	0.35	1 023	1 079	340	174
Field peas d	376	280	342	342	1.04	1.71	1.05	0.43	384	478	360	149
Chickpeas d	184	105	259	259	0.96	1.17	1.05	0.92	170	123	272	239
Faba beans d	179	183	153	153	1.37	1.80	1.11	0.68	245	329	170	104
Lentils d	138	113	152	152	1.10	1.85	1.00	0.25	151	210	152	38

a Based on data from ABS, *Principal Agricultural Commodities*, cat. no. 7111.0; ABS, *Agricultural Commodities, Australia*, cat. no. 7121.0; and ABARE estimates. b Area harvested for grain. c Cottonseed area is estimated harvested area. d Source: Pulse Australia for 2003-04 and 2004-05. s ABARE estimate. f ABARE forecast.  
 Note: The crop year refers to crops planted during the twelve months to 31 March. Winter crops are generally both sown and harvested within the nominated twelve month period. Slight discrepancies may appear between table 1 and tables 2 and 3 as a result of the inclusion of the Australian Capital Territory and Northern Territory in the Australian totals. Area and production estimates are from the sources detailed in footnotes to tables 2 and 3. Coverage is for all farms with an estimated value of agricultural operations of more than \$5000.

## 2 state production – principal crops At 29 November 2006

	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>												
2006-07 current ABARE estimate	3 350	2 150	1 250	650	550	720	4 000	5 000	1 980	1 200	8	19
2006-07 previous ABARE estimate	3 350	2 100	1 250	690	550	750	4 000	4 900	1 980	1 090	8	19
2005-06 latest ABARE estimate	3 500	7 921	1 276	2 705	958	1 385	5 221	9 478	2 017	3 578	8	23
Five year average to 2004-05 <b>a</b>	3 670	6 646	1 251	2 367	701	988	4 661	7 462	1 972	3 425	7	26
<b>Barley</b>												
2006-07 current ABARE estimate	900	550	850	510	90	95	1 070	1 650	1 070	850	10	18
2006-07 previous ABARE estimate	900	580	850	540	90	100	1 070	1 600	1 070	750	10	18
2005-06 latest ABARE estimate	1 015	2 245	937	2 059	156	259	1 303	2 598	1 317	2 685	11	23
Five year average to 2004-05 <b>a</b>	778	1 356	793	1 477	113	175	1 160	2 024	1 176	2 344	8	26
<b>Oats b</b>												
2005-06 latest ABARE estimate	348	492	155	260	9	4	255	521	85	129	7	10
<b>Lupins c</b>												
2006-07 current ABARE estimate	55	14	30	5	0	0	350	125	65	30	0	0
2006-07 previous ABARE estimate	55	57	30	21	0	0	350	210	65	52	0	0
2005-06 latest ABARE estimate	26	48	20	25	0	0	650	926	57	80	0	0
Five year average to 2004-05 <b>a</b>	86	80	34	30	0	0	809	807	78	105	0	1
<b>Canola</b>												
2006-07 current ABARE estimate	150	20	213	50	0	0	400	280	150	75	1	1
2006-07 previous ABARE estimate	150	20	213	90	0	0	400	260	150	70	1	1
2005-06 latest ABARE estimate	145	254	225	338	1	1	440	630	150	218	1	1
Five year average to 2004-05 <b>a</b>	469	528	254	326	1	1	409	417	201	256	1	1
<b>Sorghum</b>												
2006-07 current ABARE forecast	250	750	1	1	550	1 265	1	2	0	0	0	0
2006-07 previous ABARE forecast	295	909	2	5	595	1 369	2	4	0	0	0	0
2005-06 latest ABARE estimate	300	840	2	5	585	1 170	2	4	0	0	0	0
Five year average to 2004-05 <b>a</b>	239	725	1	2	505	1 159	1	1	0	0	0	0
<b>Cottonseed d</b>												
2006-07 current ABARE forecast	115	301	0	0	34	82	0	0	0	0	0	0
2006-07 previous ABARE forecast	158	406	0	0	73	171	0	0	0	0	0	0
2005-06 latest ABARE estimate	214	571	0	0	121	274	0	0	0	0	0	0
Five year average to 2004-05 <b>a</b>	209	538	0	0	127	291	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 lupins. **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.

### 3 state production – other major crops At 29 November 2006

	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>Field peas</b>												
2006-07 current estimate <sup>a</sup>	57	9	90	10	0	0	60	50	135	80	0	0
2006-07 previous estimate <sup>a</sup>	57	72	90	81	0	0	60	72	135	135	0	0
2005-06 latest ABARE estimate	40	80	55	95	0	0	65	88	120	215	0	0
Five year average to 2004-05 <sup>b</sup>	22	16	131	102	0	0	79	65	144	199	1	1
<b>Maize</b>												
2006-07 current forecast <sup>a</sup>	20	160	1	6	40	158	2	6	0	0	0	0
2006-07 previous forecast <sup>a</sup>	24	192	1	7	45	180	2	6	0	0	0	0
2005-06 latest ABARE estimate	26	184	1	7	47	183	2	6	0	0	0	0
Five year average to 2004-05 <sup>b</sup>	24	201	1	7	44	174	0	0	0	0	0	0
<b>Chickpeas</b>												
2006-07 current estimate <sup>a</sup>	167	177	39	10	46	49	2	1	5	3	0	0
2006-07 previous estimate <sup>a</sup>	167	180	39	35	46	51	2	1	5	5	0	0
2005-06 latest ABARE estimate	46	61	16	24	36	31	6	5	1	2	0	0
Five year average to 2004-05 <sup>b</sup>	87	90	8	8	69	62	18	8	2	2	0	0
<b>Sunflowerseed</b>												
2006-07 current forecast <sup>a</sup>	50	65	0	0	15	13	0	0	0	0	0	0
2006-07 previous forecast <sup>a</sup>	70	87	0	0	15	13	0	0	0	0	0	0
2005-06 latest ABARE estimate	75	93	0	0	4	4	0	0	0	0	0	0
Five year average to 2004-05 <sup>b</sup>	22	29	0	0	36	29	0	0	0	0	0	0
<b>Faba beans</b>												
2006-07 current estimate <sup>a</sup>	35	56	40	10	0	0	4	3	74	35	0	0
2006-07 previous estimate <sup>a</sup>	35	52	40	32	0	0	4	4	74	81	0	0
2005-06 latest ABARE estimate	33	70	55	76	0	0	6	8	89	175	0	0
Five year average to 2004-05 <sup>b</sup>	31	47	56	63	0	0	10	7	82	128	0	0
<b>Lentils</b>												
2006-07 current estimate <sup>a</sup>	2	0	80	10	0	0	1	0	70	28	0	0
2006-07 previous estimate <sup>a</sup>	2	2	80	80	0	0	1	0	70	70	0	0
2005-06 latest ABARE estimate	2	3	55	105	0	0	1	2	55	100	0	0
Five year average to 2004-05 <sup>b</sup>	2	2	76	70	0	0	4	3	56	76	0	0

<sup>a</sup> Source: Pulse Australia 2004-05 and 2005-06. <sup>b</sup> Based on data from ABS, *Principal Agricultural Commodities*, cat. no. 7111.0; ABS, *Agricultural Commodities, Australia*, cat. no. 7121.0 and ABARE estimates. <sup>f</sup> ABARE forecast.

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

## 4 rainfall comparisons for principal Australian cropping districts

	July			August			September			October		
	Normal	2005	2006	Normal	2005	2006	Normal	2005	2006	Normal	2005	2006
	a	p	p	a	p	p	a	p	p	a	p	p
	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm
Queensland												
Central Highlands (35)	26	3	<b>26</b>	20	10	<b>3</b>	21	8	<b>15</b>	42	96	<b>4</b>
Maranoa (43)	33	2	<b>25</b>	24	6	<b>3</b>	26	11	<b>10</b>	46	83	<b>5</b>
West Darling Downs (42)	34	4	<b>30</b>	25	8	<b>7</b>	27	11	<b>19</b>	48	88	<b>3</b>
East Darling Downs (41)	41	8	<b>41</b>	30	10	<b>13</b>	36	21	<b>40</b>	62	96	<b>4</b>
Moreton South Coast (40)	55	15	<b>51</b>	36	15	<b>26</b>	43	26	<b>58</b>	76	133	<b>13</b>
New South Wales												
North West Plains (W) (52)	36	10	<b>56</b>	27	18	<b>10</b>	28	40	<b>25</b>	42	65	<b>6</b>
North West Plains (E) (53)	43	19	<b>61</b>	33	20	<b>14</b>	34	50	<b>34</b>	48	68	<b>12</b>
North West Slopes (N) (54)	46	24	<b>54</b>	37	21	<b>18</b>	40	59	<b>40</b>	61	65	<b>18</b>
North West Slopes (S) (55)	54	49	<b>59</b>	46	24	<b>12</b>	51	87	<b>39</b>	75	69	<b>18</b>
Northern Tablelands (N) (56)	48	32	<b>55</b>	43	19	<b>29</b>	44	83	<b>46</b>	61	69	<b>25</b>
Central West Plains (S) (50)	36	37	<b>47</b>	36	37	<b>8</b>	33	75	<b>20</b>	43	56	<b>2</b>
Central West Plains (N) (51)	35	12	<b>55</b>	30	17	<b>7</b>	30	63	<b>25</b>	41	66	<b>4</b>
Central West Slopes (N) (64)	47	32	<b>65</b>	42	24	<b>14</b>	42	92	<b>15</b>	53	76	<b>3</b>
Central West Slopes (S) (65)	49	48	<b>58</b>	48	36	<b>10</b>	43	110	<b>14</b>	56	78	<b>2</b>
Central Tablelands (N) (62)	49	50	<b>62</b>	48	25	<b>14</b>	46	97	<b>24</b>	58	78	<b>6</b>
Central Tablelands (S) (63)	65	65	<b>66</b>	65	34	<b>16</b>	60	110	<b>43</b>	75	87	<b>6</b>
Riverina (W) (75)	31	40	<b>43</b>	32	47	<b>7</b>	30	49	<b>18</b>	37	61	<b>1</b>
Riverina (E) (74)	43	45	<b>41</b>	45	61	<b>12</b>	41	66	<b>23</b>	47	74	<b>1</b>
South West Slopes (N) (73)	56	83	<b>57</b>	55	71	<b>12</b>	49	101	<b>21</b>	58	68	<b>2</b>
South West Slopes (S) (72)	87	101	<b>54</b>	90	114	<b>33</b>	75	138	<b>36</b>	82	91	<b>12</b>
Southern Tablelands (GM)(70)	50	97	<b>57</b>	51	48	<b>20</b>	51	90	<b>31</b>	64	73	<b>5</b>
Victoria												
North Mallee (76)	30	32	<b>36</b>	31	35	<b>7</b>	31	41	<b>18</b>	33	70	<b>1</b>
South Mallee (77)	35	29	<b>38</b>	36	42	<b>7</b>	35	37	<b>25</b>	37	67	<b>1</b>
North Wimmera (78)	44	27	<b>35</b>	45	46	<b>14</b>	43	35	<b>27</b>	41	72	<b>2</b>
South Wimmera (79)	58	35	<b>48</b>	59	70	<b>26</b>	53	44	<b>40</b>	49	77	<b>5</b>
Lower North (80)	42	33	<b>45</b>	44	50	<b>10</b>	41	37	<b>27</b>	44	67	<b>1</b>
Upper North (81)	53	42	<b>53</b>	54	71	<b>18</b>	49	47	<b>32</b>	50	78	<b>1</b>
Lower North East (82)	90	98	<b>61</b>	91	159	<b>31</b>	77	128	<b>39</b>	79	99	<b>7</b>
Upper North East (83)	127	108	<b>77</b>	131	179	<b>39</b>	106	124	<b>55</b>	107	89	<b>15</b>
North Central (88)	79	57	<b>67</b>	82	104	<b>31</b>	72	63	<b>43</b>	70	77	<b>8</b>
Central Western (89)	63	38	<b>55</b>	70	86	<b>31</b>	65	51	<b>45</b>	62	72	<b>13</b>
Western Australia												
North Coast (8)	71	20	<b>32</b>	53	58	<b>38</b>	28	36	<b>32</b>	18	14	<b>7</b>
Central Coast (9)	165	53	<b>83</b>	125	103	<b>114</b>	76	85	<b>62</b>	50	49	<b>24</b>
Northern Central (10)	58	15	<b>28</b>	46	51	<b>31</b>	26	32	<b>46</b>	19	14	<b>13</b>
South Coast (9A)	156	57	<b>105</b>	125	100	<b>110</b>	87	103	<b>50</b>	64	78	<b>31</b>
South Central (10A)	67	23	<b>47</b>	55	56	<b>58</b>	38	48	<b>28</b>	29	36	<b>13</b>
South East (12)	26	12	<b>12</b>	23	39	<b>7</b>	14	17	<b>16</b>	14	13	<b>25</b>
South Australia												
Upper South East (25B)	49	28	<b>30</b>	52	60	<b>10</b>	46	36	<b>25</b>	41	80	<b>1</b>
Murray Mallee (25A)	31	25	<b>30</b>	33	35	<b>4</b>	32	40	<b>13</b>	32	66	<b>0</b>
Murray River (24)	35	39	<b>40</b>	36	39	<b>6</b>	34	50	<b>14</b>	32	70	<b>1</b>
East Central (23)	79	53	<b>59</b>	75	77	<b>16</b>	64	64	<b>32</b>	52	107	<b>1</b>
West Central (22)	60	38	<b>56</b>	54	57	<b>13</b>	44	55	<b>15</b>	36	72	<b>2</b>
Lower North (21)	53	48	<b>40</b>	53	46	<b>6</b>	48	63	<b>11</b>	42	74	<b>0</b>
Upper North (19)	36	41	<b>32</b>	36	27	<b>2</b>	33	60	<b>5</b>	31	47	<b>1</b>
Western (18)	46	27	<b>53</b>	42	28	<b>7</b>	33	54	<b>3</b>	27	36	<b>2</b>
Tasmania												
Northern (91)	127	127	<b>110</b>	116	213	<b>58</b>	96	129	<b>99</b>	91	182	<b>38</b>
Midlands (93)	47	38	<b>40</b>	49	113	<b>15</b>	46	93	<b>50</b>	54	96	<b>28</b>

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

	2001-02	2002-03	2003-04	2004-05	2005-06 <sup>s</sup>	2006-07 <sup>f</sup>
	kt	kt	kt	kt	kt	kt
<b>Wheat</b>						
Production	24 299	10 132	26 132	21 905	25 090	9 739
Domestic use	4 894	5 666	5 139	5 282	5 527	6 188
- human and industrial	2 291	2 378	2 351	2 361	2 408	2 456
- feed <sup>b</sup>	2 100	2 700	2 185 <sup>c</sup>	2 338 <sup>c</sup>	2 618 <sup>c</sup>	3 168 <sup>c</sup>
- seed	503	588	603	584	501	564
Exports	16 317	9 107	17 867	14 675	15 968	10 871
Change in stocks	3 088	-4 641	3 126	1 948	3 594	-7 320
<b>Canola</b>						
Production	1 756	871	1 703	1 542	1 441	426
Domestic use	399	354	501	423	547	332
- crushers	393	349	495	418	543	327
- seed	6	5	6	5	5	5
Exports	1 380	517	1 202	892	831	234
<b>Pulses – major crops</b>						
Production						
Lupins	1 215	726	1 180	937	1 079	174
Field peas	512	178	487	289	478	149
Chickpeas	258	136	178	116	123	239
Apparent domestic use <sup>b</sup>						
Lupins	599	750	468	508	669	104
Field peas	87	85	89	96	107	85
Chickpeas	13	13	9	9	19	18
Exports						
Lupins	416	175	712	365	423	70
Field peas	428	96	221	115	252	97
Chickpeas	272	113	190	152	161	218

<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 change in stocks. <sup>c</sup> Does not include imports. <sup>s</sup> ABARE estimate. <sup>f</sup> ABARE forecast.

*Note:* The export data refer to market year export periods, so are not comparable with financial year export figures published elsewhere.

*Sources:* Australian Bureau of Statistics; ABARE.

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

	2001-02	2002-03	2003-04	2004-05	2005-06 <sup>s</sup>	2006-07 <sup>f</sup>
	kt	kt	kt	kt	kt	kt
<b>Barley</b>						
Production	8 280	3 865	10 382	7 740	9 869	3 673
Domestic use	2 535	2 016	2 476	2 685	2 805	2 907
- as malt and other human use	161	165	168	172	176	166
- feed	2 200	1 650	2 100	2 300	2 450	2 560
- seed	174	201	208	213	180	181
Export	5 274	2 608	6 996	4 862	5 925	2 493
- feed barley	2 971	885	4 241	2 798	3 191	874
- malting barley	1 705	1 099	2 135	1 464	2 074	1 054
- malt (grain equivalent)	600	624	624	601	595	565
<b>Oats</b>						
Production	1 434	957	2 018	1 282	1 416	633
Domestic use	1 244	836	1 809	1 144	1 237	516
- human	125	128	131	134	138	141
- feed	1 076	656	1 635	969	1 061	337
- seed	44	52	43	41	38	39
Export	190	121	210	138	191	116
<b>Triticale <sup>b</sup></b>						
Production	860	327	826	611	676	300
Domestic use	860	327	826	611	676	300
- feed	840	305	807	594	660	283
- seed	20	22	19	17	16	17
<b>Grain sorghum</b>						
Production	2 021	1 465	2 009	2 011	2 019	2 018
Domestic use	1 646	1 401	1 386	1 752	1 721	1 959
- feed	1 643	1 397	1 382	1 748	1 717	1 954
- seed	3	4	4	4	4	5
Export <sup>c</sup>	375	64	623	259	297	59
<b>Maize</b>						
Production	454	310	395	418	380	330
Domestic use	440	294	385	413	375	324
- human, industrial	101	104	106	109	112	115
- feed	338	189	277	303	262	209
- seed	1	1	1	1	1	1
Export <sup>c</sup>	63	16	10	5	8	6
<b>Total coarse grains</b>						
Production	13 049	6 924	15 630	12 062	14 360	6 954
Domestic use	6 726	4 874	6 882	6 606	6 814	6 007
- human, industrial	387	396	406	415	425	421
- feed	6 096	4 197	6 201	5 913	6 149	5 343
- seed	242	281	275	277	240	242
Export	5 903	2 810	7 844	5 264	6 093	2 675

<sup>a</sup> Market years are November–October for barley, oats and triticale, and March–February for sorghum and maize. 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> Exports in this table reflect the volume of grain exported from the respective crops harvested. For example the volume of exports reported for sorghum in 2002-03, were actually shipped in the period March 2003 to February 2004. <sup>s</sup> ABARE estimate. <sup>f</sup> ABARE forecast.

Sources: Australian Bureau of Statistics; ABARE.

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

	2005			2006			
	Apr-Jun A\$/t	Jul-Sep A\$/t	Oct-Dec A\$/t	Jan-Mar A\$/t	Apr-Jun A\$/t	Jul-Sep A\$/t	Oct-Dec <sup>s</sup> A\$/t
<b>Wheat</b>							
Domestic							
Feed - Sydney	206	199	182	183	204	227	319
Export							
Australian standard white <b>b</b>	224	236	255	266	290	292	305
International							
US no.2 hard red winter, fob Gulf <b>b</b>	194	209	228	243	266	273	280
<b>Barley</b>							
Domestic							
2 row feed - Sydney	204	202	170	171	184	208	301
Export <b>c</b>							
Feed (bulk)	168	187	177	179	174	181	222
Malting (bulk)	230	251	248	209	212	207	264
International							
Feed - US no. 2 fob Portland <b>b</b>	154	163	164	165	169	180	235
<b>Sorghum</b>							
Domestic							
Feed - Sydney	178	167	160	171	187	203	261
Export <b>c</b>							
International	166	187	191	174	232	211	244
International							
US del. Gulf <b>b</b>	141	148	158	166	171	178	248
<b>Oats</b>							
Domestic							
Feed - Sydney	217	220	166	159	178	207	327
Export <b>c</b>							
International	257	261	250	268	267	276	286
International							
US heavy white, del. Portland <b>b</b>	181	183	187	193	200	194	208
<b>Maize</b>							
Domestic							
Feed - Sydney	232	222	207	200	222	229	310
International							
US no.2 fob Gulf <b>b</b>	126	133	135	143	147	154	214
<b>Oilseeds</b>							
Domestic							
Canola - del. Melbourne	348	358	336	331	400	426	507
Sunflower - del. Melbourne	330	330	394	400	400	400	434
International							
Soybeans - US cif Rotterdam <b>b</b>	379	367	349	349	354	349	369
<b>Pulses</b>							
Domestic							
Lupins - del. Perth	166	184	156	147	145	204	232
Chickpeas - del. Melbourne	320	320	366	394	515	628	547
Field peas - del. Melbourne	289	293	258	215	236	245	265
Export <b>c</b>							
Chickpeas	443	470	482	689	408	689	601
Field peas	304	304	291	293	256	282	307

<sup>a</sup> 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. <sup>b</sup> Average of daily offer prices made in US\$, converted to A\$ using monthly average of daily exchange rates. <sup>c</sup> 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. <sup>s</sup> ABARE estimate.

Note: Prices used in these calculations exclude the GST.