NSW grains report

17 December 2010

Highlights

- Winter crop production is forecast at 13.47 M tonnes, below the October estimates of around 14.32 M tonnes. An estimated 6.59 M tonnes was harvested last year.
- Harvest has been delayed across the state by the unseasonably wet conditions and is about 60% completed.
- Estimated winter crop area to be harvested is 4.69 M ha, down on the 5.07 M ha estimated in October. About 4.37 M ha was harvested in 2009.
- The wheat harvest area has fallen from 2.96 M ha in October to 2.82 M ha following flooding and crop losses across the state.
- A 604,724 tonne canola harvest is forecast, down on the 650,605 tonnes estimated in October. The wet weather at harvest has caused losses from localised flooding, pod shattering in windrows and shot and sprung grain.
- Downgrading of grain quality across all crops is expected for areas still to be harvested following the recent rainfall across the state.
- Summer crop estimates are for sowings of 616,130 ha (excluding rice), an increase of 86,535 ha on the October forecast. Last year's harvest estimate was 240,652 ha

Seasonal conditions

Wet conditions experienced across most of the grain belt continued in November and December. Most regions received rainfall through this period, with major falls across the state causing flooding in the main river valleys. Rainfall totals from the 1 October to the 15 December include Wagga Wagga – 357 mm, Young – 507 mm, Dubbo – 341 mm and Walgett – 344 mm.

A dry warm period is now needed for summer crops to take advantage of the good rainfall conditions. Cool conditions associated with rain bearing troughs have slowed much of the summer crop growth and development, in particular cotton.

General security water allocations for the major river systems of the Murray Valley, Murrumbidgee, Northern Rivers, Macquarie, Upper Namoi and Lower Darling are now at 100% while the Lachlan is 95% and Gwydir 55 %.

Early summer weed growth resulting from late November and December rains will pose a challenge across the entire state, with an emphasis placed on maintaining clean fallows and full moisture profiles for 2011 winter crops. This could be difficult given the poor trafficability of many paddocks currently.

Currently in specific regions the outlook is:

North – yields for the 1.16 M ha of winter crops have generally been average to above average. The good spring rain and milder temperatures during grain-fill has lifted yields. Yields have varied depending on sowing time, planting moisture, foliar disease levels and growing season rainfall. Harvest has been delayed due to the wet weather, with harvest estimated to be 70% complete.

Centre – the estimated 1.79 M ha will produce average to above yields given the good seasonal conditions across the region through the growing season. The late rain has caused downgrading of grain quality and delayed harvest operations. Current estimates indicate 60% of the crop has now been harvested.

South – an estimated 1.69 M ha will be harvested. Like the centre and north crop yields have been average to above average. The late rain has caused problems with grain quality, with the remainder of the cereal and canola crop to be harvested most likely downgraded due to weather damage. Estimates place 40% of the crop harvested.

Winter crops

Grain yields and quality have been variable across the state and within regions due to the wet weather conditions through November and December. Cereal and canola yields have been average to above average, however pulse yields have been highly variable with chickpeas the worst affected by the continuing wet weather through late spring and the harvest period.

Some winter crop loss has occurred due to flooding in the main river valleys of NSW in early December, with physical crop damage from storms and crops being abandoned due to weather damaged grain and/or untrafficable paddocks for harvest machinery.

Quality of the early harvested cereal crops, canola and faba beans was generally good across the state.

Where harvest has been delayed due to the wet weather grain quality has been severely affected, with downgrading of wheat, barley, canola and chickpeas.

NSW production '000 tonnes

	2010 forecast	2009 harvest estimate
Wheat	**8,750**	**6,452**
Barley	**2,285**	**1,244**
Oats	**752**	**329**
Triticale	**497**	**292**
Canola	**605**	**235**
Chickpea	**227**	**324**
Faba bean	**85**	**46**
Field pea	**50**	**46**
Lupin	**178**	**56**

Wheat – Harvesting of the estimated 2.82 M ha has been hampered by the continual wet weather through November and December. The state's wheat crop harvest is now not expected to be completed before early January, due to untrafficable paddocks and the slower maturity of crops in eastern districts. The current estimates are down 5% on the October forecast due to crop losses from flooding along most of the major river systems in early December, physical crop damage from storms and the likelihood some paddocks are now too wet to harvest. Grain quality is also likely to be too badly affected by the time paddocks dry out enough to allow passage of heavy harvesting equipment.

Weather damage to grain has been significant across the state, with the remaining wheat crop to be harvested expected to make feed grade or at best AH9 or AGP grades. The development of new delivery grades for both weather damaged hard and soft wheat should allow most grain to be delivered to the bulk handlers provided no further major rain events occur.

Estimated average yield across the state is 3.1 t/ha, producing 8.75 M tonnes. An estimated 2.77 M ha was harvested in 2009 producing 4.43 M tonnes.

Production prospects in the north are estimated at 1.85 M tonnes from 0.7 M ha for an average yield of 2.14 t/ha. In the central region production of 3.57 M tonnes is forecast from 1.14 M ha for an average yield of 3.13 t/ha. Yields and quality in the south varies across districts. It is expected that 3.28 M tonnes will be produced from 0.97 M ha for an average yield of 3.38 t/ha.

Barley – An estimated 752,720 ha will now be harvested, down 5% on October forecasts, producing about 2.28 M tonnes for an average yield of 3.04 t/ha. An estimated 575,850 ha was harvested in 2009, producing about 0.94 M tonnes. Grain quality has been variable, ranging from malting grade down to lower feed grades as a result of weather damage resulting in low test weights, staining, cleaving, low falling numbers and shot and sprung grain. The barley yet to be harvested is expected now to be largely feed grade.

Oats – Yield predictions for the estimated 278,370 ha to be harvested are 2.70 t/ha, producing about 751,645 tonnes. In 2009 an estimated 202,355 tonnes was produced from 138,475 ha. With the above average yields, most producers will fill on-farm storages and be aiming to trade or store off farm surplus grain. Yields of milling oats have been good but hectolitre weights and general grain quality have fallen following the recent rain during harvest.

Triticale – Yield potential (3.62 t/ha) of the 137,315 ha will produce an estimated 496,700 tonnes. In 2009 an estimated 264,500 tonnes was produced from 129,445 ha. About 83% of the estimated production is in the south west or on the tablelands with significant tonnages expected in the Albury, Wagga Wagga, Lockhart, Temora, Cootamundra and Young districts. The later maturity of triticale crops, particularly in the eastern districts may reduce the risk of weather damage provided no further rainfall occurs prior to harvest.

Cereal Rye – The estimated 1,950 ha are expected to produce 3,700 tonnes. About 1865 tonnes was produced from 1,325 ha in 2009.

Canola – An estimated 604,724 tonnes will be harvested from 303,445 ha for an average yield of 1.99 t/ha. Some exceptional yields have been reported, in the order of 2.0-2.7 t/ha in the north, ranging up to 3.5 t/ha in the south. Oil contents were above average, ranging from 42-46% in many areas before rain began to impact crops. About 90% of the crop is harvested. Heavy rain in mid November and again in late November/early December delayed windrowing and harvest. Lodged crops were common before windrowing. Subsequent harvest was delayed with

windrows beginning to shatter and with further heavy rain windrows collapsed into the wet soil underneath, resulting in shot and sprung grain in many crops in the centre and south. Some flood damage has occurred in low lying areas. Up to 23,000 ha has been lost to waterlogging, flooding and shot and sprung grain and is unharvestable. Late sclerotinia infection was evident in many crops at windrowing.

Pulses

Pulse crops in general have been subject to a very wet spring leading to increased disease infection, crop lodging and in some cases shot and sprung grain. Grain quality for crops harvested after the November/early December rains will be poor, with staining and fungal mould evident in grain samples. Yield potential on all pulses except chickpeas is generally average to above average. The cool and wet season delayed development, especially in lupin and chickpeas. Lodging was widespread in lupins in the centre, whilst delayed pod set in chickpeas has made for a very late harvest, especially in the north.

Chickpea – An estimated 227,500 tonnes will be harvested from 214,500 ha for an average yield of 1.06 t/ha. About 102,990 ha have already been lost to a combination of high disease pressure, waterlogging and flooding and it remains to be seen if some crops will be harvested. More rain may reduce area and production further as harvest is continuing. Last season an estimated 330,223 tonnes were harvested from 219,310 ha for an average yield of 1.51 t/ha.

Faba bean – Production is estimated at 84,740 tonnes from a harvested area of 39605 ha for an average yield of 2.14 t/ha. Most of the crop in the north was harvested before major weather damage occurred. In 2009 an estimated 70,380 tonnes were produced from 45,300 ha.

Field pea – An estimated 50,200 ha of field peas will produce an average yield of 1.68 t/ha for production of 84,145 tonnes. In 2009 an estimated 33,730 tonnes were produced from 35,730 ha.

Lupin – Production is estimated at 178,183 tonnes from 92,850 ha for an average yield of 1.92 t/ha. About 55% of production is Albus lupins with an estimated average yield of 1.86 t/ha. An average yield of 2.0 t/ha is predicted from the 39,800 ha of Angustifolius lupin. In 2009 an estimated 76,836 tonnes were harvested from 65,690 ha.

Summer crops

Current estimates are for the sowing of 616,130 ha (excluding rice), an increase of 16% on the October forecast of 529,595 ha. About 485,150 ha (79%) of potential area is currently sown. Last year's harvest area was estimated at 239,652 ha. Unlike previous seasons seedbed moisture is not the limiting factor. Fine weather is needed for further sowing of all summer grains. Sorghum has been into planted into some failed chickpea paddocks and there is the potential for more double-cropping this season with full soil moisture profiles. Cotton areas are more than triple those of the 2009/10 crop.

NSW area '000 hectares

	2010/11 forecast	2009/10 harvest estimate
Grain Sorghum	174	156
Maize	30	15
Mungbean	25	5
Soybean	20	18
Sunflower	18	12

Grain Sorghum – Potential sowings are estimated at 173,950 ha. In 2009/10 an estimated 90,565 ha were harvested. Around 57% of the crop has been sown with sowing delayed by wet soils and a very slow winter crop harvest, which is not yet complete

Maize – An estimated 18,760 ha of a potential crop of 30,325 ha is currently sown. Irrigated plantings have increased significantly in the Riverina and the Macquarie valley due to improved water allocations for the first time in a number of years. About 46% of the crop is in the north-west around Moree and on the Liverpool Plains. Around 62% of the crop is sown, with the remainder to be sown in the next 2-3 weeks. In 2009/10 an estimated 14,920 ha were harvested.

Mungbean – Forecast sowings of 25,360 ha are more than double the 11,300 ha forecast in October. The major areas are Moree and Coonamble in the north and Dubbo and Warren in the centre. An estimated 6,210 ha have already been sown as a spring plant option into good seedbed moisture. In 2009/10 an estimated 8,870 ha were harvested.

Soybean – Intended plantings of 19,975 ha are 16% higher than the October forecast. Around 59% is forecast to be on the North Coast. Irrigated plantings in the Riverina have increased due to improved water supplies. About 32% of the crop is currently sown. Fine weather is now needed on the North Coast for sowings to proceed. Inland irrigated areas are 80% sown. In 2009/10 an estimated 14,572 ha were harvested.

Sunflowers – A total planting of 20,270 ha is forecast. Plantings to date are estimated at 8,600 ha of monounsaturated varieties. A further 11,550 ha is forecast to be sown to polyunsaturated varieties. This area should all be sown as soil profiles are full, but some seedbeds are wet which may delay sowing depending on further rainfall. In 2009/10 an estimated 15,420 ha were harvested.

Cotton – The NSW cotton crop is estimated to be 346,250 ha, comprising 193,150 ha irrigated and 153,100 ha dryland on skip row configurations. This is an increase of 14% on late October estimates but does not take account of recent losses from flooding in the Macquarie valley. This extra planting is a result of the very strong prices, in excess of $700/bale in early November. Crop development is later than normal due to the cool, wet conditions and is in need of some warm sunny weather. The crop is currently at the squaring stage with flowering to begin soon.

Rice – Rice establishment and development has been better than expected given the variable temperatures, above average rainfall and consequent reduced solar radiation. Irrigation water is a non issue since the main dams remain full and have been spilling with supplementary water most of the time since mid October. Both Murrumbidgee and Murray valley allocations went to 100% in mid December. Sowing and resowing stretched to early December. Sowing estimates remain at 80,000 ha. Hot conditions are now needed for good growth and yield potential.

Further information

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