



Australian crop report

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The next issue of the *Australian Crop Report* is scheduled to be released on Tuesday, 16 September 2008.

in the next issue ...

- 2008-09 winter crop area estimates and updated production forecasts
- 2008-09 summer crop area and production forecasts.

ABARE project 1076

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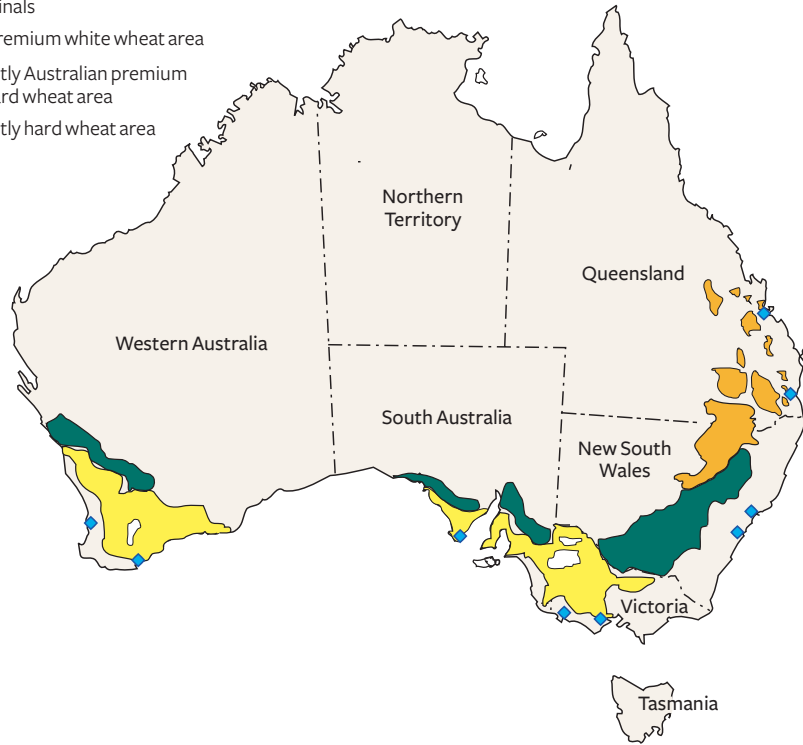
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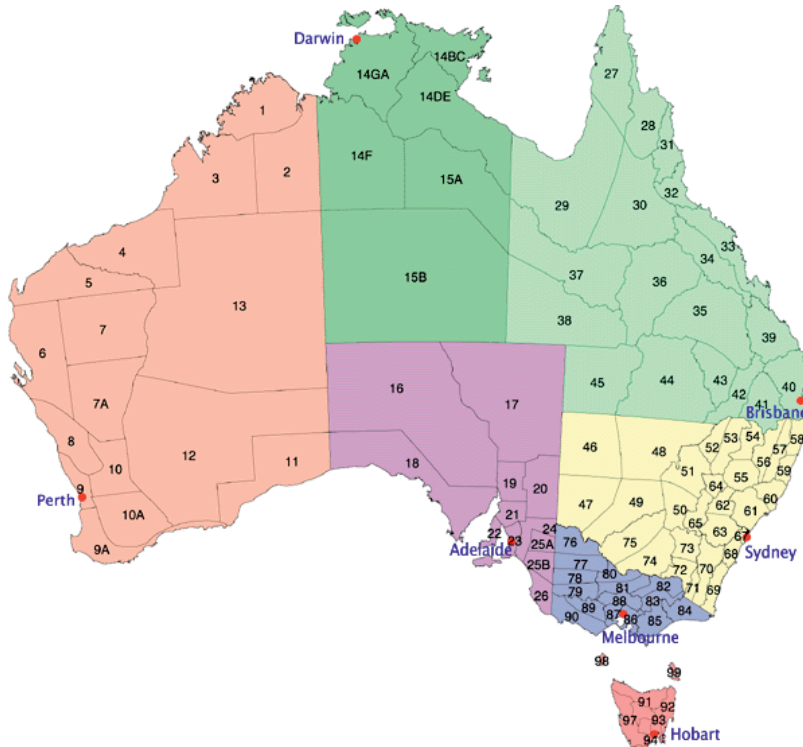
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Australian wheat growing regions

- ◆ Wheat terminals
- Australian premium white wheat area
- Predominantly Australian premium white and hard wheat area
- Predominantly hard wheat area



Australian meteorological districts



Overview

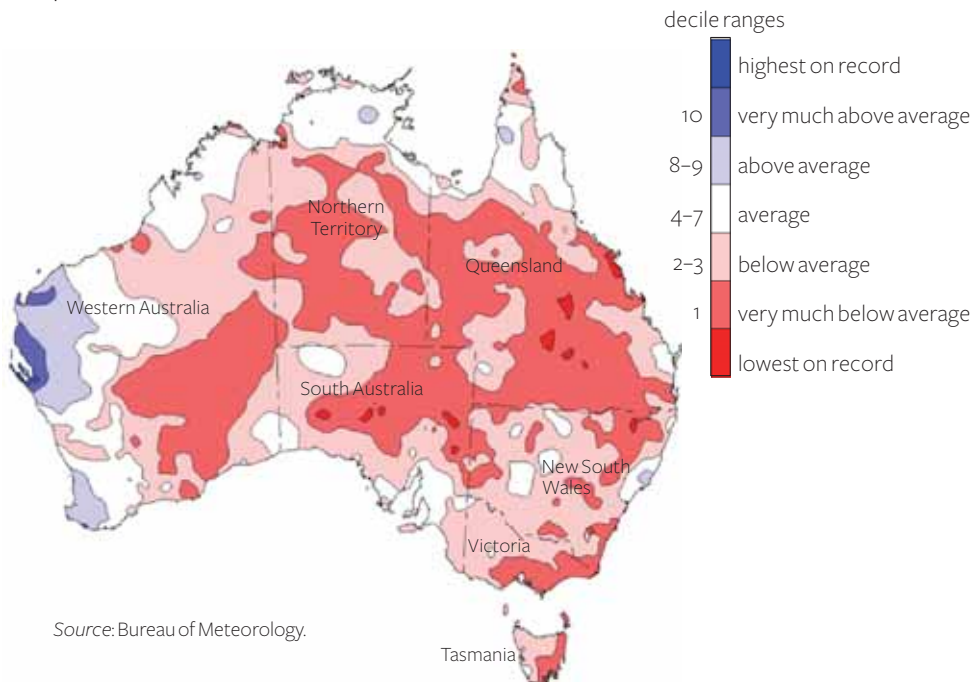
- With the exception of Western Australia, the majority of Australia's winter cropping regions received below average autumn rainfall. The lack of autumn rainfall meant many winter crops were dry sown or not sown during the optimal planting window as growers waited for rain. Wide-spread rainfall in early June in the eastern states provided the moisture for growers to complete intended cropping programs.
- The Australian Bureau of Meteorology in its latest seasonal rainfall outlook (27 May 2008) for the June to August period indicates an increase in the odds toward above average rainfall across most of Queensland and northern New South Wales, with the chance of exceeding average rainfall being between 60 to 70 per cent. In contrast, the Bureau is forecasting below average rainfall for south-west Western Australia, which has only a 30 to 40 per cent chance of exceeding average rainfall. However, the Bureau has advised that because of technical issues, its current confidence in the outlook assessment for Western Australia is low. Across southern New South Wales, Victoria and South Australia, the chance of accumulating at least average rainfall in the June to August period is close to 50 per cent.
- If this rainfall outlook is realised, it is likely to have a negative impact on yields in Western Australia. Conversely the impact on yields in Queensland and northern New South Wales is likely to be positive.
- The total area sown to winter crops in Australia is forecast to increase by 9 per cent to 22.3 million hectares in 2008-09. Total winter crop production in 2008-09 is forecast to reach 37.1 million tonnes, a 65 per cent increase on the drought affected 2007-08 season.
- Of the major winter crops, the area sown to wheat is forecast to rise by 13 per cent to a record 14 million hectares, reflecting relatively high world wheat prices and the attractiveness of cropping to improve short-term cash flow. Assuming an improvement in yields from the 2007-08 season, total wheat production is forecast to reach around 23.7 million tonnes in 2008-09, an increase of 82 per cent. The area sown to barley is forecast to increase only marginally from the previous season, to around 4.5 million hectares in 2008-09. The canola area sown is forecast to increase by around 16 per cent to 1.2 million hectares, reflecting a significant increase in Western Australia. Barley and canola production are forecast to increase to 7.9 million tonnes and 1.7 million tonnes, respectively.
- Total summer crop production in 2007-08 is estimated to have increased by 59 per cent to around 3.5 million tonnes. Favourable sowing conditions and timely rainfall throughout the season has resulted in an estimated grain sorghum crop of around 2.7 million tonnes, double the previous year's harvest. However, a lack of irrigation water severely constrained the area planted to both rice and cotton in 2007-08. Rice production is estimated to have declined by around 88 per cent, to just 19 000 tonnes in 2007-08. Cottonseed and cotton lint production are estimated to have fallen by 54 per cent in 2007-08 to 178 000 and 126 000 tonnes, respectively.

Rainfall

Map 1 illustrates the rainfall deficiencies throughout Queensland, New South Wales, Victoria and parts of South Australia for the March to May 2008 period. The majority of grain growing regions in Western Australia received average to above average rainfall. Rainfall in May 2008 was generally below average across the Australian grains belt. Detail of rainfall received in this period is provided in table A.

The Australian Bureau of Meteorology in its latest seasonal rainfall outlook (27 May 2008) for the winter period indicates an increase in the odds toward above average rainfall across most of Queensland and northern New South Wales, with the chance of exceeding average rainfall being between 60 to 70 per cent. In contrast, the Bureau is forecasting below average rainfall for south-west Western Australia which has only a 30-40 per cent chance of exceeding average rainfall for the season. However, the Bureau has advised that because of technical issues, its current confidence in the outlook assessment for Western Australia is low. Across southern New South Wales, Victoria and South Australia, the chance of accumulating at least average rainfall in the June to August period is relatively close to 50 per cent. (click here for map).

map 1 Australian rainfall deciles, 1 March to 31 May 2008



A March - May rainfall in major grain growing regions

	average ^a mm	2006 mm	2007 mm	2008 mm	2006 % of average	2007 % of average	2008 % of average
Queensland							
Central Highlands (35)	129	120	48	21	93	37	16
Maranoa (43)	116	79	45	13	68	39	11
West Darling Downs (42)	119	55	64	17	46	54	14
East Darling Downs (41)	140	55	64	31	39	46	22
Moreton South Coast (40)	306	107	109	79	35	36	26
New South Wales							
North West Plains (W) (52)	114	59	103	28	52	91	25
North West Plains (E) (53)	127	53	115	30	42	90	24
North West Slopes (N) (54)	135	61	135	20	45	100	15
North West Slopes (S) (55)	129	71	161	31	55	125	24
Northern Tablelands (N) (56)	152	101	174	50	67	115	33
Central West Plains (S) (50)	113	28	110	45	25	97	40
Central West Plains (N) (51)	112	38	106	38	34	94	34
Central West Slopes (N) (64)	139	65	152	38	47	110	27
Central West Slopes (S) (65)	137	29	135	48	21	99	35
Central Tablelands (N) (62)	142	64	162	46	45	114	33
Central Tablelands (S) (63)	210	42	173	81	20	82	39
Riverina (W) (75)	89	34	101	31	38	114	35
Riverina (E) (74)	110	43	113	33	39	103	30
South West Slopes (N) (73)	139	34	146	72	25	105	52
South West Slopes (S) (72)	182	99	205	83	54	113	46
Southern Tablelands (GM) (70)	155	67	126	65	43	81	42
Victoria							
North Mallee (76)	68	59	120	17	86	175	25
South Mallee (77)	80	64	124	20	80	155	25
North Wimmera (78)	88	71	133	22	81	151	25
South Wimmera (79)	110	92	161	36	83	146	33
Lower North (80)	99	62	124	20	63	125	20
Upper North (81)	118	72	154	34	61	130	29
Lower North East (82)	175	120	217	71	69	124	41
Upper North East (83)	240	172	247	74	72	103	31
North Central (88)	161	125	184	43	78	114	27
Central Western (89)	140	116	150	42	83	107	30
South Australia							
Upper South East (25B)	95	93	123	28	98	130	30
Murray Mallee (25A)	66	77	110	14	116	166	21
Murray River (24)	72	87	113	20	121	157	28
East Central (23)	135	136	185	55	101	137	41
West Central (22)	97	114	178	44	118	184	45
Lower North (21)	91	109	142	37	119	155	40
Upper North (19)	68	51	85	17	75	126	25
Western (18)	73	71	118	23	97	161	31
Western Australia							
North Coast (8)	95	42	28	66	44	29	69
Central Coast (9)	171	60	110	91	35	64	53
Northern Central (10)	90	75	50	58	84	56	65
South Coast (9A)	197	121	162	113	61	82	57
South Central (10A)	101	72	70	69	71	69	68
South East (12)	78	95	55	20	122	71	26
Tasmania							
Northern (91)	226	249	310	120	110	137	53
Midlands (93)	126	127	132	58	101	105	46

^a Average from 1913 to 2008.

The national outlook for maximum and minimum temperatures averaged over the winter season, June to August 2008, shows a moderate to strong shift in the odds toward warmer than normal conditions in the south-west corner of Western Australia. Over the rest of the country the chance of exceeding average temperatures is close to 50 per cent. ([click here for map](#)).

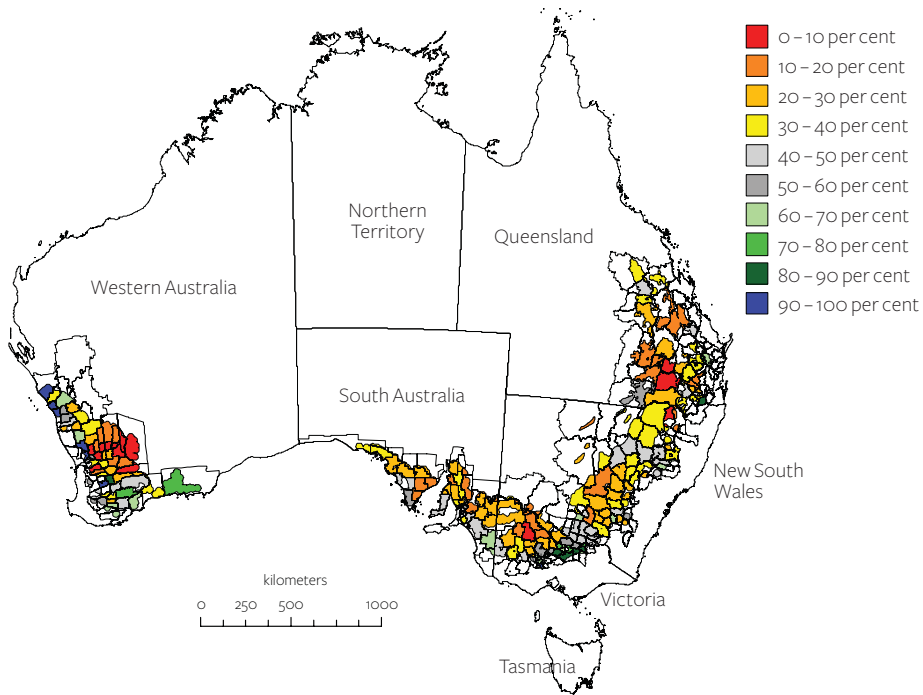
A number of organisations provide forecast yields for grains, including wheat and sorghum. The shire scale wheat forecasting system of the Queensland Department of Primary Industries and Fisheries combines starting soil moisture conditions with the seasonal outlook, including the most recent trend in the Southern Oscillation Index (SOI). The probability of exceeding average wheat yields at the beginning of June, before the recent rainfall, is highly variable across Australia ([map 2](#)). In Queensland the chance of exceeding long term median yields is less than 40 per cent across most of the state (coloured yellow and orange). In New South Wales the chances of exceeding the long-term median yields vary throughout the state from less than 10 per cent to around 50 per cent. Throughout Victoria the chances of exceeding long-term median yields vary between 10 and 80 per cent, with the majority of areas in the lower end of the range. South Australia is also highly variable, with the chances of exceeding median yields between 10 and 70 per cent. Western Australia's chance of exceeding long-term median yields is the most variable, between 10 and 100 per cent. The major grain growing areas in Western Australia are in the lower end of the range.

Winter crop production

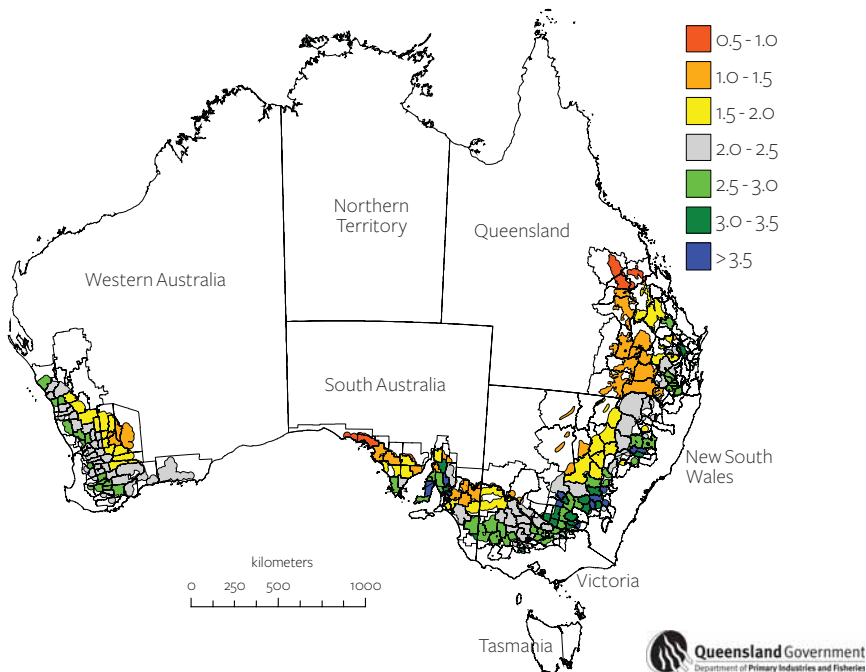
With the exception of Western Australia, the majority of Australia's winter cropping regions received below average autumn rainfall. This meant many winter crops were dry sown or not sown during the optimal planting window, as growers waited for rain. Widespread rainfall in early June provided the moisture for the completion of intended cropping programs.

The total area planted to winter grains is forecast to rise by around 9 per cent to 22.3 million hectares ([table B](#)). Assuming an improvement in yields in 2008-09, total winter crop production is forecast to reach 37.1 million tonnes, a 65 per cent increase in production from last year's drought affected crop ([table C](#)). The forecast rise in production reflects larger areas of planting in most states, combined with improved yields.

map 2 Probability of exceeding the long-term simulated median shire wheat yield (using OZ-Wheat), given the SOI phase was 'rapidly falling' during April-May



map 3 Simulated long-term median wheat yields, by shire, 1901-2005; using OZ-Wheat



B Winter crop area - Australia ^a

	New South Wales '000 ha	Victoria '000 ha	Queensland '000 ha	Western Australia '000 ha	South Australia '000 ha	Australia '000 ha
1996-97	4 676	2 331	1 225	6 793	3 048	18 102
1997-98	4 543	2 315	1 213	7 141	3 047	18 260
1998-99	4 927	2 454	1 420	7 419	3 376	19 582
1999-00	4 955	2 670	1 337	7 464	3 342	19 763
2000-01	5 398	2 706	1 126	7 390	3 667	20 280
2001-02	5 309	2 684	788	7 173	3 866	19 783
2002-03	4 782	2 928	774	7 174	3 965	19 623
2003-04	6 070	3 126	1 067	7 689	4 034	21 982
2004-05	6 456	3 131	878	7 936	4 019	22 444
2005-06	5 556	2 907	967	7 390	3 882	20 728
2006-07	5 603	3 041	792	6 471	4 141	20 117
2007-08 ^s	6 115	3 212	747	6 255	4 073	20 431
2008-09 ^f	6 100	3 288	1 174	7 681	4 068	22 344
<i>% change 2007-08 to 2008-09</i>	0	2	57	23	0	9

^a State areas include wheat, barley, oats, canola, lupins, field peas, chickpeas, faba beans and lentils. Australian totals also include triticale, linseed and safflower. ^f ABARE forecast. ^s ABARE estimate.

C Winter crop production - Australia ^a

	New South Wales Kt	Victoria Kt	Queensland Kt	Western Australia Kt	South Australia Kt	Australia Kt
1996-97	11 285	4 599	2 469	11 192	5 458	35 071
1997-98	8 558	3 398	1 637	12 097	5 360	31 116
1998-99	9 718	3 495	2 322	12 232	6 305	34 159
1999-00	11 495	5 139	2 222	13 311	4 751	36 981
2000-01	10 834	6 232	1 340	8 726	7 486	34 696
2001-02	11 171	5 873	1 142	12 050	8 927	39 240
2002-03	3 505	1 955	836	6 812	4 227	17 402
2003-04	10 766	6 941	1 472	16 682	7 450	43 386
2004-05	10 724	4 203	1 384	12 472	5 849	34 711
2005-06	11 867	6 170	1 426	13 922	7 518	40 985
2006-07	3 879	1 823	907	8 259	2 811	17 613
2007-08 ^s	3 067	3 790	1 159	9 668	4 858	22 524
2008-09 ^f	10 451	5 504	1 822	12 095	6 567	37 136
<i>% change 2007-08 to 2008-09</i>	241	45	57	25	35	65

^a State production include wheat, barley, oats, canola, lupins, field peas, chickpeas, faba beans and lentils. Australian totals also include triticale, linseed and safflowerseed. ^f ABARE forecast. ^s ABARE estimate.

Of the major winter grains, wheat production in 2008-09 is forecast to rise to 23.7 million tonnes, an 82 per cent increase from the previous season. Barley production is forecast to increase to around 8 million tonnes in 2008-09, a 34 per cent increase on the 2007-08 harvest. Canola production is forecast to be 1.7 million tonnes, 56 per cent more than 2007-08 production.

Summer crop production

The total summer crop area is estimated to have increased by around 16 per cent in 2007-08, to just more than 1 million hectares. In October and November 2007, average to above average rainfall throughout the summer cropping regions of northern New South Wales and Queensland resulted in a large area being planted to grain sorghum. However, a lack of irrigation water severely constrained cotton and rice plantings in 2007-08. With timely rainfall throughout summer, total summer crop production is estimated to have increased by 59 per cent to around 3.5 million tonnes (table D).

Grain sorghum production in 2007-08 is estimated to have more than doubled the previous year's harvest at 2.7 million tonnes. This increase reflects a 30 per cent increase in the area sown and favourable growing conditions. The lack of irrigation water for rice in 2007-08 resulted in the estimated area planted falling to 2000 hectares, the smallest area

D Summer crop plantings and production - Australia ^a

	New South Wales		Queensland		Australia	
	'000 ha	Kt	'000 ha	Kt	'000 ha	Kt
1995-96	576	2 055	802	1 488	1 448	3 623
1996-97	655	2 774	689	1 485	1 431	4 374
1997-98	617	2 588	640	1 139	1 335	3 823
1998-99	885	3 228	721	1 712	1 741	5 097
1999-00	742	2 882	771	2 031	1 591	5 025
2000-01	825	3 366	816	1 786	1 761	5 286
2001-02	777	3 146	794	1 772	1 633	4 933
2002-03	509	1 582	521	1 199	1 097	2 868
2003-04	436	1 766	708	1 806	1 211	3 679
2004-05	493	1 984	773	1 788	1 340	3 887
2005-06	760	2 765	615	1 512	1 455	4 389
2006-07	332	1 036	520	1 079	912	2 181
2007-08 ^s	348	1 428	640	1 937	1 062	3 478
% change 2006-07 to 2007-08	5	38	23	80	16	59

^a State production includes sorghum, rice, cottonseed, maize and sunflowers. Australian production also includes soybeans, peanuts, mung beans and navy beans. ^s ABARE estimate.

planted since the industry began in the early 1920s. Despite the lack of water, the season provided favourable growing conditions, resulting in slightly above average yields. However, total rice production is estimated to have fallen by 88 per cent, to around 19 000 tonnes for the 2007-08 season.

Cotton plantings in Australia in 2007-08 were severely limited by shortages of irrigation water and some planted areas were ploughed in because of alleged herbicide spray drift in New South Wales and flood damage in the Emerald region of Queensland. The cotton area harvested in Australia in 2007-08 is estimated to have been 63 000 hectares, the lowest since 1982-83. Generally good growing conditions have been experienced in most cotton producing regions in Australia. This has resulted in surprisingly good cotton yields and better than average fibre quality. Cotton lint production is forecast to be 126 000 tonnes and cottonseed 178 000 tonnes in 2007-08, close to a 55 per cent reduction on the previous year.

New South Wales

- Dry autumn conditions have prevailed across most of New South Wales, particularly in the southern and central regions. There was no significant rainfall by the end of May, with below to very much below average rainfall reported throughout the state during that month. However, widespread rainfall in early June provided the moisture growers required for intended plantings to occur, particularly in the central west.
- As a result of the dry autumn, many crops were dry sown or sown late as growers waited for rain. Despite the late break, the total area planted to winter crops in New South Wales is forecast to remain similar to the area planted last year, at around 6 million hectares. Assuming an improvement in yields on last year, winter crop production is forecast to more than triple to around 10.5 million tonnes in 2008-09.
- The area planted to **wheat** in 2008-09 is forecast to remain unchanged at around 4 million hectares. In northern New South Wales, reasonable subsoil moisture and a favourable rainfall outlook, is expected to lead to an increase in yields. In central and southern New South Wales, in-crop rainfall will be critical because of the late start to the season and a lack of sub-soil moisture. Overall, wheat production is forecast to increase by around 5.6 million tonnes in 2008-09 to be 7.4 million tonnes.
- The area planted to **barley** in 2008-09 is forecast to fall marginally to 1 million hectares. Barley production in 2008-09 is forecast to reach around 1.8 million tonnes, a 1.1 million tonne increase from 2007-08 production, reflecting a forecast improvement in yields.
- The area planted to **canola** is forecast to decrease by 6 per cent in 2008-09 to 225 000 hectares, reflecting the late start to the season in southern and central parts of New South Wales. Assuming average yields, canola production is forecast to increase to 338 000 tonnes in 2008-09, a significant increase from the 44 000 tonnes harvested in the previous year.

Winter crop forecasts, 2008-09 - New South Wales

	area	yield ^a	production	area change from 2007-08
	'000 ha	t/ha	kt	%
Wheat	4 000	1.85	7 412	0
Barley	1 000	1.75	1 754	-1
Canola	225	1.50	338	-6

^ayields are based on area planted.

- Harvest of the 2007-08 **grain sorghum** crop has been completed. Production is estimated to have reached just more than 1 million tonnes, a record for New South Wales. Above average summer rainfall boosted grain sorghum yields to 4.2 tonnes per hectare, compared with a 10 year average of 3.1 tonnes per hectare.
- In 2007-08 **cotton lint** and **cottonseed** production are both forecast to decline by 60 per cent to 88 000 tonnes and 125 000 tonnes, respectively. In 2007-08, the area planted to cotton declined by 62 per cent to 41 000 hectares, as a result of lower water allocations. However, better than average lint yields and fibre quality have been achieved in most regions of New South Wales.
- A lack of irrigation water for **rice** in 2007-08 resulted in the area planted falling to 2000 hectares, the smallest area planted since the industry began in the early 1920s. Despite the lack of water, the season provided favourable growing conditions, resulting in slightly above average yields. However, total rice production fell by 88 per cent, to around 19 000 tonnes for the 2007-08 season.

Summer crop estimates, 2007-08 - New South Wales

	area	yield a	production	production change from 2006-07
	'000 ha	t/ha	kt	%
Sorghum	250	4.20	1 050	173
Sunflowers	28	1.54	43	189
Cotton seed	41	3.03	125	-60
Cotton lint	41	2.15	88	-60
Rice	2	9.65	19	-88

a yields are based on area planted.

Victoria

- Following a mostly dry autumn, rainfall across Victoria's major cropping areas since mid-May 2008 has provided most growers with a reasonable, however late, start to the 2008-09 winter cropping season. In the northern cropping regions a significant proportion of crops were dry sown in autumn, and these have begun to germinate following initial rain. Further follow-up rain is required in most areas for the season ahead.
- The major cropping areas of Victoria received average to below-average rainfall throughout autumn, and the three month outlook from the Bureau of Meteorology suggests winter rainfall is most likely to be similar to the long-term average.
- The area sown to winter crops in Victoria is forecast to increase by 2 per cent in 2008-09, to around 3.3 million hectares. Assuming 10 year average yields for winter crops, total production in 2008-09 is forecast to be 5.5 million tonnes. This is a 45 per cent increase on the drought affected 2007-08 harvest.
- In 2008-09, the area planted to **wheat** is forecast to increase by 7 per cent to a record 1.6 million hectares. Wheat yields are forecast to return to a historical average of 1.78 tonnes per hectare, compared with the drought affected 1.23 tonnes per hectare in the previous year. Wheat production is forecast to be 2.8 million tonnes in 2008-09, around 1 million tonnes more than the previous year's harvest.
- **Barley** production is forecast to increase by nearly 50 per cent in 2008-09 to 1.6 million tonnes. The majority of this increase in production is the result of an assumed return to average yields. The area planted to barley is forecast to increase by 3 per cent to 950 000 hectares.
- The area planted to **canola** is forecast to decline by 19 per cent to 220 000 hectares in 2008-09. The decline is largely the result of the late break to the season in Victoria. Canola production is forecast to increase by 76 per cent in 2008-09 to 352 000 tonnes.

Winter crop forecasts, 2008-09 - Victoria

	area	yield ^a	production	area change from 2007-08
	'000 ha	t/ha	kt	%
Wheat	1600	1.78	2841	7
Barley	950	1.73	1640	3
Canola	220	1.60	352	-19

^ayields are based on area planted.

Queensland

- In early June 2008 good rainfall was received across much of Queensland's winter cropping regions. In central Queensland rainfall ranged from 15 to 50 millimetres while southern Queensland received 15 to 30 millimetres across most areas. This is the first significant rainfall to occur across the Queensland grains belt since above average summer rainfall was received.
- Much of the Queensland grains belt has full sub-soil moisture profiles, the result of above average summer rainfall in these regions. However, below average autumn rainfall in 2008 dried out the top soil. Throughout southern and central Queensland some crops were deep sown, particularly chickpeas, while other were dry sown. The early June rainfall provided growers with the moisture required to complete this cropping.
- The area sown to winter crops in Queensland is forecast to increase by close to 60 per cent in 2008-09 to 1.2 million hectares, the largest area sown in the past eight seasons. Relatively high grain prices and good soil moisture profiles have encouraged the increase in area sown. Irrigated farmers in the St George and Macintyre Valley are also expected to plant winter cereals, taking advantage of the current high grain prices on offer.
- The Bureau of Meteorology three month rainfall outlook for winter is for above average rainfall across much of the Queensland grains belt. Assuming this rainfall occurs, winter crop yield is forecast to be slightly above the 10 year average. Total winter crop production is forecast to be 1.8 million tonnes in 2008-09, a 57 per cent increase on the previous year.
- Queensland wheat area is forecast to increase by 72 per cent to 1 million hectares, the largest area sown to wheat in the past eight seasons. Wheat production in Queensland is forecast to reach 1.6 million tonnes in 2008-09, 72 per cent higher than last year.

Winter crop forecasts, 2008-09 - Queensland

	area	yield ^a	production	area change from 2007-08
	'000 ha	t/ha	kt	%
Wheat	1 000	1.57	1 567	72
Barley	100	1.66	166	12

^ayields are based on area planted.

- The area planted to **barley** is forecast to increase by 11 000 hectares to 100 000 hectares in 2008-09. Barley production is forecast increase by 4 per cent in 2008-09 to 166 000 tonnes.
- The area planted to **chickpeas** is forecast to fall by 14 000 hectares in 2008-09. Chickpea yields are forecast to be 1.5 tonnes per hectare compared with 1.3 tonnes per hectare in the previous year. Although yields are forecast to improve, total chickpea production is forecast to fall by 6 per cent in 2008-09.
- Queensland **grain sorghum** production is estimated to have been a record 1.6 million tonnes in 2007-08. In southern Queensland both early and late sown sorghum crops achieved above average yields. However, yields for late sown crops were not as high, as a result of a lack of follow up rainfall since summer. Grain sorghum yields are estimated at 3.0 tonnes per hectare in 2007-08, compared with the longer term average of 2.4 tonnes per hectare
- **Sunflower** production in 2007-08 is forecast to be substantially higher than in the previous year, at around 31 000 tonnes. Sunflower production was above average in both central and southern Queensland. The area sown to sunflowers was around 20 000 hectares, five times the area sown in 2006-07.
- Queensland is estimated to have produced 37 000 tonnes of **cotton lint** and 53 000 tonnes of **cottonseed** in 2007-08. Production is estimated to be 31 per cent less than in 2006-07 because of shortages of irrigation water and some flood damage in the Emerald region. With the exception of this region, better than average lint yields and fibre quality were achieved in most cotton producing regions of Queensland.

Summer crop estimates, 2007-08 - Queensland

	area	yield ^a	production	production change from 2006-07
	'000 ha	t/ha	kt	%
Sorghum	545	3.00	1 635	82
Sunflowers	20	1.52	31	932
Cotton seed	21	2.46	53	-31
Cotton lint	21	1.74	37	-31

^ayields are based on area planted.

Western Australia

- Rainfall in May 2008 across the Western Australian grains belt was below average. While above average rainfall in April 2008 was beneficial, a lack of follow-up rainfall since has seen winter crop prospects weaken slightly. In early June 2008, 10 to 20 millimetres of rainfall was received across parts of the grains belt, however falls were patchy. Continued rainfall will be needed over the growing season for crop development.
- The northern part of the Western Australian grains belt has had the best start to the winter cropping season for a number of years. Crops planted in April and early May were sown into moisture and have emerged. However, these crops are starting to show signs of moisture stress because of below average May rainfall. Some dry sowing of crops also occurred in this region.
- In the central grains belt, seasonal conditions have been variable and around 70 per cent of planting intentions have been completed. Planting in the Esperance and Great Southern regions is close to completion, however a lack of rainfall is of concern to growers.
- The total winter crop area is forecast to increase by 23 per cent to 7.7 million hectares in 2008-09, one of the largest areas ever sown to winter crops in Western Australia. The increased area planted to winter crops reflects the favourable April rainfall and the high grain prices currently available.
- The Bureau of Meteorology's three month rainfall outlook for winter is for below average rainfall across the Western Australian grain belt. However, the Bureau cautioned that because of technical issues, its confidence in the current outlook for south-west Western Australia for winter is generally low. Given the variability currently being experienced across the grains belt and the chance of below average rainfall, yields are assumed to be slightly below the 10 year average. Even with below average yields total winter crop production is forecast to increase by 25 per cent to 12.1 million tonnes in 2008-09.
- The area sown to **wheat** is forecast to increase by around 27 per cent to 5.2 million hectares in 2008-09, a record wheat area for Western Australia. While wheat yields are assumed to be slightly below the 10 year average at 1.6 tonnes per hectare in 2008-09, this is still above the yield of 1.49 tonnes per hectare achieved last year. Wheat production is forecast to be 8.3 million tonnes, 2 million tonnes greater than the previous year.
- The Western Australian **barley** area is forecast to be 1.2 million hectares, 50 000 hectares higher than the 2007-08 season. However, barley production is forecast to decline by 3 per cent to 2.1 million tonnes in 2008-09 as a result of lower yields.

- It is forecast that the area sown to **canola** will increase by 58 per cent to 65 000 hectares in 2008-09. The large increase in the area planted to canola reflects the early start to the 2008-09 winter cropping season in Western Australia. Canola production is forecast to increase by around 65 000 tonnes to be 730 000 tonne in 2008-09.
- The area sown to **lupins** is forecast to decline by 20 000 hectares in 2008-09. Production is forecast to increase by 113 000 tonnes in 2008-09 to 323 000 tonnes.

Winter crop forecasts, 2008-09 - Western Australia

	area	yield a	production	area change from 2007-08
	'000 ha	t/ha	kt	%
Wheat	5 200	1.60	8 322	27
Barley	1 200	1.78	2 134	4
Canola	615	1.19	730	58
Lupins	280	1.15	323	-7

a yields are based on area planted.

South Australia

- Good rainfall in late April, encouraged winter crop planting in a number of South Australia's grain producing regions. In the Eyre Peninsula, parts of the upper north and through the Mallee districts, rainfall has been light and variable. These regions have no sub-soil moisture and rainfall throughout the growing season will be critical.
- It is estimated that around 60 per cent of intended plantings have been sown in South Australia. Of the crops sown, relatively mild temperatures have resulted in rapid emergence across many areas. However, the emergence of crops has been patchy because of the variable soil moisture and rainfall to date.
- The total area planted to winter crops in South Australia is forecast to be 4.1 million hectares, similar to the previous year. Assuming a return to average yields, total winter crop production is forecast to reach 6.6 million tonnes in 2008-09, a 1.7 million tonne increase from the 2007-08 season.
- The area planted to **wheat** in South Australia is forecast to remain similar to the previous year at 2.2 million hectares. Assuming a return to average yields, wheat production in South Australia is forecast to be 3.5 million tonnes, 1.2 million tonnes more than the previous year.
- In 2008-09 the area planted to **barley** is forecast to remain at around 1.2 million hectares. Assuming a return to average yields, barley production in 2008-09 is forecast to reach 2.2 million tonnes.
- The area planted to **canola** in South Australia in 2008-09 is forecast to increase by 9 per cent to 175 000 hectares. Assuming a return to average yields, canola production is forecast to be around 245 000 tonnes, nearly 60 per cent more than the 2007-08 drought affected harvest.

Winter crop forecasts, 2008-09 - South Australia

	area	yield ^a	production	area change from 2007-08
	'000 ha	t/ha	kt	%
Wheat	2 162	1.62	3 506	0
Barley	1 224	1.81	2 220	0
Canola	175	1.40	245	9

^ayields are based on area planted.

1 Australian crop production

at 11 June 2008

	area planted					yield					production					
	Five year average a	2006-07 a	2007-08 s	2008-09 f	Five year average a	2006-07 a	2007-08 s	2008-09 f	Five year average a	2006-07 a	2007-08 s	2008-09 f	Five year average a	2006-07 a	2007-08 s	2008-09 f
	'000 ha	'000 ha	'000 ha	'000 ha	t/ha	t/ha	t/ha	t/ha	kt	kt	kt	kt	kt	kt	kt	kt
Wheat	12 375	11 798	12 345	13 971	1.50	0.92	1.06	1.70	18 828	10 822	13 039	23 680				
Barley	4 315	4 182	4 405	4 484	1.63	1.02	1.34	1.77	7 145	4 257	5 920	7 942				
Oats b	966	1 003	897	985	1.38	0.75	0.94	1.54	1 339	748	843	1 521				
Triticale	392	369	360	376	1.34	0.54	1.25	1.67	528	199	450	626				
Sorghum b	707	613	800	763	2.44	2.09	3.37	2.54	1 739	1 283	2 691	1 940				
Maize	63	49	68	71	5.47	4.90	5.69	5.30	345	240	387	378				
Canola	1 182	1 052	1 061	1 235	1.04	0.54	1.00	1.35	1 222	573	1 065	1 665				
Sunflower	46	17	48	38	1.10	1.06	1.53	1.26	52	18	74	48				
Cottonseed c	245	144	63	210	2.60	2.70	2.84	2.89	637	388	178	605				
- lint	245	144	63	210	1.84	1.91	2.01	2.04	451	274	126	428				
Rice	57	20	2	30	8.50	8.15	9.65	8.42	499	163	19	253				
Lupins d	853	736	454	426	1.09	0.64	0.73	1.22	920	470	331	521				
Field peas d	379	384	293	309	0.90	0.36	0.91	1.37	336	140	268	423				
Chickpeas d	163	244	306	298	1.00	0.95	1.02	1.33	157	232	313	396				
Faba beans d	169	153	133	113	1.17	0.70	1.04	1.56	198	108	138	176				
Lentils d	136	153	130	106	0.91	0.24	1.01	1.45	114	36	131	153				

a Based on data from ABS, *Principal Agricultural Commodities*, cat. no. 7111.0; ABS, *Agricultural Commodities, Australia*, cat. no. 7121.0; Pulse Australia and ABARE estimates. **b** Area harvested for grain. **c** Cottonseed area is estimated harvested area. **d** Source: Pulse Australia, *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 11 June 2008

	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
Wheat												
2008-09 f	4 000	7 412	1 600	2 841	1 000	1 567	5 200	8 322	2 162	3 506	9	33
2007-08 s	4 000	1 800	1 500	1 850	580	910	4 100	6 100	2 156	2 346	9	33
2006-07	3 596	2 568	1 347	879	638	777	4 037	5 134	2 173	1 446	7	18
Five year average to 2006-07 a	3 677	5 588	1 327	1 950	686	975	4 657	7 592	2 021	2 696	7	27
Barley												
2008-09 f	1 000	1 754	950	1 640	100	166	1 200	2 134	1 224	2 220	10	28
2007-08 s	1 010	650	920	1 100	89	160	1 150	2 200	1 225	1 777	11	33
2006-07	902	753	913	605	81	79	1 083	1 808	1 193	996	7	16
Five year average to 2006-07 a	923	1 447	871	1 333	113	167	1 189	2 141	1 211	2 033	8	24
Oats b												
2007-08 s	400	95	170	240	5	3	230	400	86	95	7	10
Lupins c												
2008-09 f	52	71	28	36	0	0	280	323	65	91	0	0
2007-08 s	62	31	31	25	0	0	300	210	61	65	0	0
2006-07	74	16	43	11	0	0	530	409	89	34	0	0
Five year average to 2006-07 a	69	45	35	22	0	0	668	764	81	87	0	1
Canola												
2008-09 f	225	338	220	352	0	0	615	730	175	245	0	0
2007-08 s	240	44	270	200	0	0	390	665	160	155	1	1
2006-07	283	54	179	42	2	1	411	392	177	84	1	1
Five year average to 2006-07 a	353	292	228	243	1	1	397	465	202	221	1	1
Sorghum												
2008-09 f	256	752	1	1	505	1 184	1	1	0	0	0	0
2007-08 s	250	1 050	3	4	545	1 635	2	2	0	0	0	0
2006-07	162	385	1	0	449	896	0	0	0	0	0	0
Five year average to 2006-07 a	234	672	1	1	470	1 064	1	1	0	0	0	0
Cottonseed d												
2008-09 f	111	333	0	0	99	272	0	0	0	0	0	0
2007-08 s	41	125	0	0	21	53	0	0	0	0	0	0
2006-07	109	311	0	0	35	77	0	0	0	0	0	0
Five year average to 2006-07 a	150	411	0	0	95	226	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. Source: Pulse Australia. **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 ^a

at 11 June 2008

	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
Field peas												
2008-09 f	55	62	54	81	0	0	70	85	130	195	0	0
2007-08 as	46	10	67	60	0	0	50	55	130	143	0	0
2006-07	42	5	102	8	1	1	75	52	163	75	0	0
Five year average to 2006-07 b	30	20	117	73	0	0	79	71	153	171	0	1
Maize												
2008-09 f	25	197	1	7	45	171	0	2	0	0	0	0
2007-08 as	20	176	1	7	45	198	2	6	0	0	0	0
2006-07	20	143	1	3	27	92	1	1	0	0	0	0
Five year average to 2006-07 b	23	182	1	5	39	158	1	2	0	0	0	0
Chickpeas												
2008-09 f	208	269	26	33	52	78	1	2	11	14	0	0
2007-08 as	215	202	17	19	66	83	1	0	8	9	0	0
2006-07	157	176	39	10	41	43	2	1	5	3	0	0
Five year average to 2006-07 b	80	89	15	9	61	53	5	3	3	2	0	0
Sunflowerseed												
2008-09 f	24	39	0	0	38	38	0	0	0	0	0	0
2007-08 as	28	43	0	0	20	31	0	0	0	0	0	0
2006-07	13	15	0	0	4	3	0	0	0	0	0	0
Five year average to 2006-07 b	30	40	0	0	15	12	0	0	0	0	0	0
Faba beans												
2008-09 f	26	41	25	34	0	0	2	4	61	98	0	0
2007-08 as	10	9	34	32	0	0	2	3	87	95	0	0
2006-07	35	60	40	10	0	0	4	3	74	35	0	0
Five year average to 2006-07 b	28	47	51	40	0	0	6	6	83	105	0	0
Lentils												
2008-09 f	0	0	51	71	0	0	1	1	54	81	0	0
2007-08 as	0	0	69	62	0	0	0	0	60	69	0	0
2006-07	2	0	80	8	0	0	1	0	70	28	0	0
Five year average to 2006-07 b	2	1	69	47	0	0	2	2	63	64	0	0

a Source: Pulse Australia. **b** Based on data from ABS, Principal Agricultural Commodities, cat. no. 7111.0; ABS, Agricultural Commodities, Australia, cat. no. 7121.0; Pulse Australia and ABARE estimates. **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.

4 Australian rainfall comparisons for principal cropping districts

	February			March			April			May		
	average	2007	2008	average	2007	2008	average	2007	2008	average	2007	2008
	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm
Queensland												
Central Highlands (35)	42	74	141	60	29	18	86	7	3	95	12	8
Maranoa (43)	46	52	85	59	26	8	69	12	5	76	7	8
West Darling Downs (42)	48	66	111	58	35	9	71	14	8	77	15	16
East Darling Downs (41)	62	51	141	73	37	14	93	17	17	90	10	14
Moreton South Coast (40)	76	86	192	95	53	58	128	20	21	151	36	60
New South Wales												
North West Plains (W) (52)	42	61	105	49	35	12	53	23	16	71	45	12
North West Plains (E) (53)	48	65	117	60	45	11	63	30	19	76	40	16
North West Slopes (N) (54)	61	86	125	71	59	5	80	45	15	84	31	15
North West Slopes (S) (55)	75	79	125	84	82	9	97	32	22	106	47	20
Northern Tablelands (N) (56)	61	92	138	65	92	14	75	55	36	82	27	22
Central West Plains (S) (50)	43	48	64	41	37	30	44	22	15	47	51	7
Central West Plains (N) (51)	40	58	84	41	36	30	44	17	8	55	53	11
Central West Slopes (N) (64)	53	70	101	57	65	26	62	22	12	76	65	22
Central West Slopes (S) (65)	55	57	67	52	40	31	52	32	17	59	63	14
Central Tablelands (N) (62)	58	73	107	62	62	26	62	39	20	71	61	17
Central Tablelands (S) (63)	75	119	103	76	67	40	80	46	41	93	60	14
Riverina (W) (75)	37	22	24	27	30	14	28	31	17	28	40	11
Riverina (E) (74)	47	33	38	35	32	18	36	30	15	35	51	14
South West Slopes (N) (73)	58	41	54	48	39	42	48	50	30	50	57	17
South West Slopes (S) (72)	82	62	77	61	67	46	59	60	37	54	78	27
Southern Tablelands (GM)(70)	63	116	81	62	55	36	60	35	29	62	36	13
Victoria												
North Mallee (76)	32	9	3	25	23	7	20	54	10	21	43	23
South Mallee (77)	37	13	4	28	22	10	23	44	10	21	58	28
North Wimmera (78)	41	17	3	30	19	11	25	44	11	23	70	36
South Wimmera (79)	49	17	6	36	14	20	30	54	16	26	93	42
Lower North (80)	43	16	7	32	30	17	28	34	8	29	54	25
Upper North (81)	50	20	10	37	37	23	34	38	11	34	79	34
Lower North East (82)	78	41	58	59	69	41	55	46	30	48	102	41
Upper North East (83)	107	61	56	81	101	36	70	39	38	60	107	48
North Central (88)	69	26	25	54	49	25	48	34	18	41	101	42
Central Western (89)	62	17	19	53	20	22	43	43	20	36	87	41
Western Australia												
North Coast (8)	18	5	59	10	2	21	8	8	45	12	18	12
Central Coast (9)	50	4	35	23	8	13	12	47	78	10	55	57
Northern Central (10)	19	15	54	13	5	8	11	24	50	14	21	13
South Coast (9A)	64	7	10	36	27	9	21	75	104	18	60	88
South Central (10A)	29	2	12	20	6	5	14	40	64	15	24	35
South East (12)	14	18	47	16	23	4	17	23	16	22	9	5
South Australia												
Upper South East (25B)	41	7	4	29	16	7	25	39	21	19	68	38
Murray Mallee (25A)	32	10	1	23	25	2	20	53	12	17	32	32
Murray River (24)	32	4	2	23	27	4	22	58	16	18	28	34
East Central (23)	52	1	5	34	33	13	29	97	42	22	55	59
West Central (22)	36	2	11	24	27	10	20	77	34	15	74	40
Lower North (21)	42	2	1	29	45	7	24	69	30	20	28	42
Upper North (19)	31	8	2	25	24	2	23	34	15	22	27	18
Western (18)	27	4	8	20	51	5	19	41	18	13	26	15
Tasmania												
Northern (91)	91	30	60	68	58	54	65	27	66	49	225	78
Midlands (93)	54	23	58	48	39	30	54	14	28	40	79	22

a Average rainfall is the simple arithmetic average of rainfall over the period 1913 to 2008. **p** Preliminary.

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

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

5 Australian supply and disposal of wheat, oilseeds and pulses ^a

	2003-04	2004-05	2005-06	2006-07	2007-08 ^s	2008-09 ^f
	kt	kt	kt	kt	kt	kt
Wheat						
Production	26 132	21 905	25 150	10 822	13 039	23 680
Domestic use ^b	5 738	6 024	6 540	7 381	6 440	6 726
- human and industrial	2 518	2 342	2 287	2 264	2 242	2 287
- feed ^{cd}	2 550	3 060	3 672	4 500	3 500	3 745
- seed	670	623	581	617	699	694
Exports	17 868	14 675	15 969	8 685	6 617	16 300
Change in stocks	2 526	1 206	2 641	-5 245	- 18	654
Canola						
Production	1 703	1 542	1 419	573	1 065	1 665
Domestic use	501	423	525	592	483	616
- crushers	495	418	520	587	476	610
- seed	6	5	5	5	6	6
Exports	1 202	892	831	228	533	999
Pulses – major crops						
Production						
lupins	1 180	937	1 285	470	331	521
field peas	487	289	585	140	268	423
chickpeas	178	116	123	232	313	396
Apparent domestic use ^c						
lupins	468	508	555	437	262	284
field peas	89	96	107	114	124	144
chickpeas	9	9	18	22	27	23
Exports						
lupins	712	365	494	93	149	286
field peas	221	115	252	138	206	296
chickpeas	190	152	161	241	286	373

^a Production, use and export data are on a marketing year basis: 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 stocks. ^b Some ABARE estimates have been revised based on additional industry information. ABARE is continuing to investigate data. ^c Calculated as a residual: production less exports less change in stocks. ^d Does not include imports. ^s ABARE estimate. ^f 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 Australian supply and disposal of coarse grains ^a

	2003-04	2004-05	2005-06	2006-07	2007-08 ^s	2008-09 ^f
	kt	kt	kt	kt	kt	kt
Barley						
Production	10 382	7 740	9 482	4 257	5 920	7 942
Domestic use	2 476	2 670	2 760	3 153	2 860	2 915
- as malt and other human use	168	172	176	166	165	169
- feed	2 100	2 300	2 400	2 784	2 500	2 550
- seed	208	198	184	203	195	197
Export	6 999	4 862	5 917	2 562	3 851	5 268
- feed barley	4 241	2 798	3 191	1 192	2 264	3 170
- malting barley	2 135	1 464	2 067	659	890	1 379
- malt (grain equivalent)	624	601	660	627	698	719
Oats						
Production	2 018	1 282	1 688	748	843	1 521
Domestic use	1 809	1 144	1 499	713	739	1 260
- human	131	134	138	141	144	148
- feed	1 635	965	1 314	529	548	1 065
- seed	43	45	47	43	47	48
Export	210	138	191	35	104	260
Triticale ^b						
Production	826	611	676	199	450	626
Domestic use	826	611	676	199	450	626
- feed	807	594	660	181	431	607
- seed	19	17	16	18	19	19
Grain sorghum						
Production	2 009	2 011	1 929	1 283	2 691	1 940
Domestic use	1 386	1 753	1 846	1 173	1 644	1 363
- feed	1 382	1 749	1 842	1 169	1 640	1 359
- seed	4	4	3	4	4	4
Export ^c	623	259	83	110	1 047	576
Maize						
Production	395	418	362	240	387	378
Domestic use	385	413	370	229	375	365
- human, industrial	106	109	112	115	117	120
- feed	277	303	258	113	256	244
- seed	1	1	1	1	1	1
Export ^c	10	5	10	11	12	13
Total coarse grains						
Production	15 630	12 062	14 137	6 727	10 291	12 407
Domestic use	6 882	6 592	7 150	5 467	6 069	6 530
- human, industrial	406	415	425	421	427	437
- feed	6 201	5 910	6 473	4 776	5 376	5 825
- seed	275	266	252	269	266	268
Export	7 845	5 265	6 135	3 656	4 544	6 094

^a Production, use and export data are on a marketing year basis: market years are November–October for barley, oats and triticale; 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. ^b Excludes small quantities of triticale for export. ^c Exports 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. ^s ABARE estimate. ^f ABARE forecast.

Sources: Australian Bureau of Statistics; ABARE.

7 Australian grain prices ^a

	2006		2007		2008		
	Oct-Dec A\$/t	Jan-Mar A\$/t	Apr-Jun A\$/t	Jul-Sep A\$/t	Oct-Dec A\$/t	Jan-Mar A\$/t	Apr-Jun ^s A\$/t
Wheat							
Domestic							
feed - Sydney	323	312	296	345	444	478	441
Export							
Australian standard white b	304	297	289	357	na	na	na
International							
US no.2 hard red winter, fob Gulf b	283	266	259	348	403	473	381
Barley							
Domestic							
2 row feed - Sydney	333	328	320	355	371	313	351
Export c							
feed (bulk)	249	214	242	279	304	325	331
malting (bulk)	263	351	314	296	399	441	436
International							
feed - US no. 2 fob Portland b	269	269	244	330	375	337	322
Sorghum							
Domestic							
feed - Sydney	304	296	284	324	421	326	297
Export c	398	395	409	266	344	332	268
International							
US del. Gulf b	242	246	209	218	223	263	278
Oats							
Domestic							
feed - Sydney	412	465	385	339	389	361	361
Export c	296	409	483	425	444	329	352
International							
US heavy white, del. Portland b	206	234	252	262	285	275	260
Maize							
Domestic							
feed - Sydney	338	387	399	424	451	400	411
International							
US no.2 fob Gulf b	203	218	192	181	194	244	269
Oilseeds							
Domestic							
canola - del. Melbourne	537	543	463	524	648	746	736
sunflower - del. Melbourne	474	550	550	550	942	970	958
International							
soybeans - US cif Rotterdam b	377	405	408	468	545	620	593
Pulses							
Domestic							
lupins - del. Perth	163	0	0	308	318	328	314
chickpeas - del. Melbourne	608	688	687	738	572	584	702
field peas - del. Melbourne	317	378	394	393	433	547	594
Export c							
chickpeas	674	708	793	892	634	649	563
field peas	313	355	391	400	421	504	391

^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.