

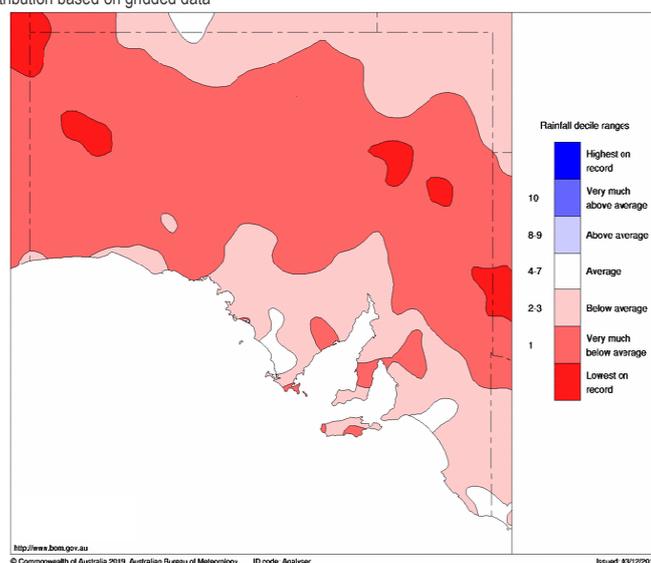
Issue 4 Spring Crop Performance – November 2019

Summary

Early season rainfall was average to above average, providing a timely season opening, normal crop establishment and a return to an average crop area in the state. However, the record dry January to April resulted in dry subsoils in most districts. Rainfall from August through to the end of the growing season was below average except for parts of the lower and western Eyre Peninsula and lower Murray district. Growing season rainfall from April to October (Figure 1) was below average to well below average across the cereal zone and well below average to record low for the pastoral zones. Frequent frosts in early spring has damaged crops in a number of districts.

The best crop prospects are on the Lower Eyre Peninsula, southern Murray Mallee, South East and Kangaroo Island districts where average to above average production is expected. Crops and pasture on the eastern Eyre Peninsula and parts of the northern Murray Mallee are in poor condition, while in other parts, crop potential declined with the lack of rain, although they remain an improvement on the last year's crops in a number of these districts. New season hay is now available but demand remains strong and while prices have eased on last season, they remain above the long-term average. Grain harvest is well progressed at about 50% complete with many farmers in the early finishing districts and areas with generally poor crops already finished.

Figure 1. South Australian Rainfall Deciles 1 April to 31 October 2019
Distribution based on gridded data



Crop area and production for previous five seasons and the new crop

Seasons	2014–15	2015–16	2016–17	2017–18	2018–19	2019–20 Estimate
Area sown (ha)	3,899,000	3,821,000	3,894,000	3,565,000	3,572,000	3,856,000
Production (t)	7,667,000	7,211,000	11,145,000	6,921,000	5,795,000	6,258,000
Farm gate value	\$2.0 billion	\$1.6 billion	\$2.2 billion	\$1.7 billion	\$1.7 billion	\$1.8 billion



The season so far...



RAIN – Below average rainfall for September and October. The growing season (April to October) rainfall (Figure 1) in the cereal zone was below to well below average with small areas at average and both pastoral zones were below average to lowest on record.



SUBSOIL MOISTURE – While early winter rains wetted seedbeds providing good conditions for crop seeding, the good crops established in many districts used the available moisture with dry conditions midwinter onwards not allowing replenishment of subsoil reserves.



CROP MIX – Area sown of 3.9 million ha is a return to average crop size. Area of wheat, barley and other cereals increased at the expense of canola and most pulses due to the dry subsoils. Frost damaged cereal grain crops have been cut for hay instead of leaving for harvest of grain.



CROP GROWTH – Dry conditions across the state since the middle of July, combined with frost, high temperature days in September hastened crop ripening, allowing early commencement of harvest.



LIVESTOCK CONDITION AND FEED – Paddock feed levels are low in the driest areas but some districts have good pasture bulk. Paddocks without plant cover are vulnerable to wind erosion. Reduced stock numbers requiring supplementary feeding. Farmers have increased area of pasture and cut more hay to replenish farm hay supplies and to capitalise on a hay market with good prices. Frosted grain crops, cut for hay added to the hay supply.

Outlook for the year

RAINFALL OUTLOOK – Bureau of Meteorology season update (28 November) is for higher chance of drier and hotter than average conditions through to the end of the year. Late finishing crops in the South East and Kangaroo Island will mature on available moisture. Grain harvest, which is already well progressed, is less likely to be interrupted by rain allowing harvest to finish by end of December for most of the state.

Challenges and opportunities

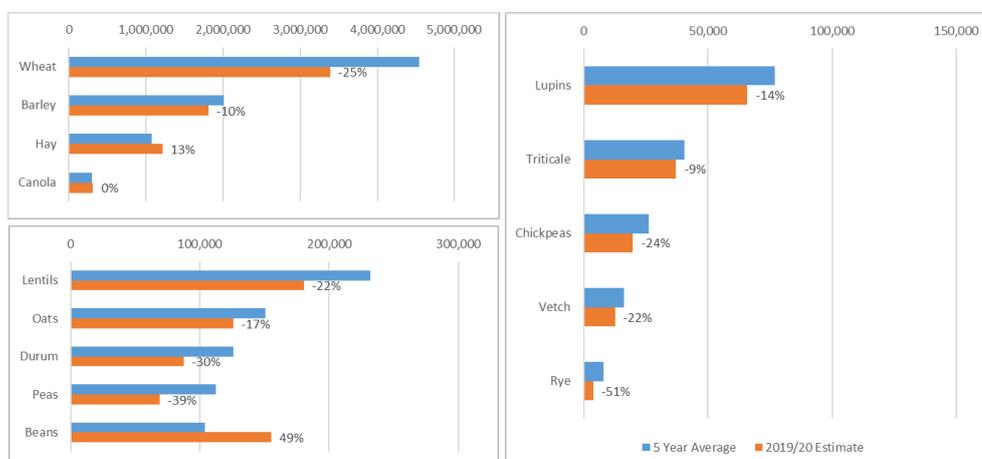
PESTS AND DISEASES – There was less snail activity due to the dry conditions and baiting provided effective control where needed. Foliar disease, although present in some areas, has not caused yield loss. Where insect pests exceeded economic thresholds, crop treatments were successful.

ADVERSE EVENTS – Strong winds continue to cause soil erosion and raised dust where soil surface is dry and has no plant residue cover.

MARKET DRIVERS – An above average northern hemisphere grain crop harvest is contributing to increased global stocks of major grains. Grain prices are slightly down on last season but remain above average. Domestic demand driven by eastern state drought conditions continues to provide domestic price premiums for fodder and feed grains. Some farmers have opted to cut hay over harvesting for grain, mostly where frost damage has occurred. Some farmers not confident of grain yields in a crop with bulk opted to cut for hay to capitalise on the strong domestic hay market.

REGIONAL ISSUES – Below average crop and pasture production and feed and fodder shortages for animals in some districts. Severe dust storms has caused road safety issues. A 5,000 ha fire on Yorke Peninsula in November caused losses of farm infrastructure, livestock and an estimated 2,000 tonnes of unharvested grain.

Figure 2. 2019-20 Crop Production Estimates (tonnes) Compared with 5-year Average (percent change).



May	July	Sept	Nov	Jan 2020	Mar 2020
			This update	Next update	
Seeding intentions	Seeding and crop establishment	Winter crop performance	Spring crop harvest	Harvest	Final summary and estimates