

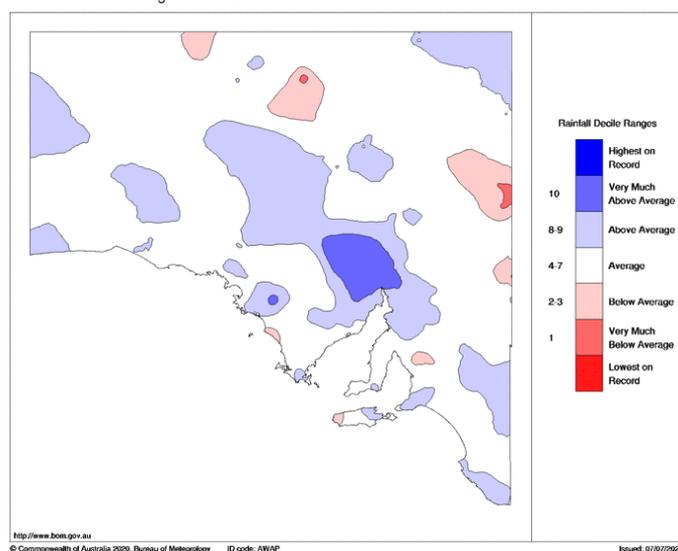
## Issue 2 Season 2020-21: Crop Establishment - July 2020

### Summary

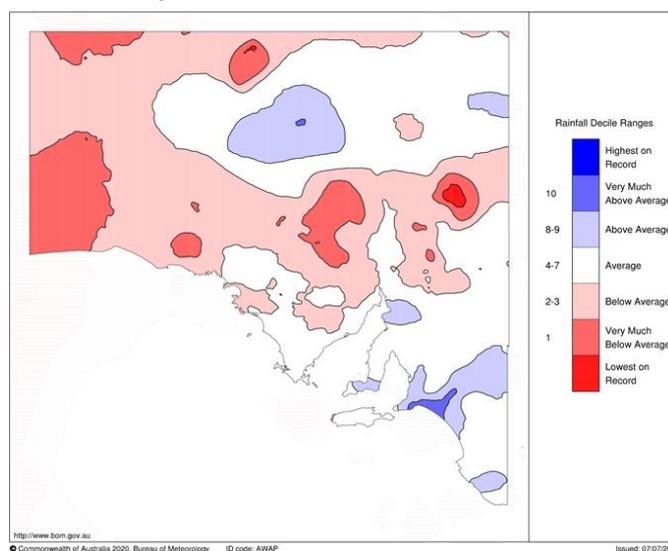
Rainfall for the first three months of 2020 was average to above average, but has been drier than average from April onwards particularly in the west and pastoral districts of the State. Sowing of crops commenced in early to mid-April with crop seeding completed by the end of May. Good rains late in April and a full soil moisture profile enabled normal seeding operations with full cropping programs sown across the State, increasing the crop area compared to last season.

Good available soil moisture across much of the agricultural zone has led to an increase in the area sown to canola and pulses. The lentil area has increased in response to earlier price signals and ideal soil moisture levels. Other crops replaced some of the area intended as barley crop in later sowing districts in response to the introduction of China's Barley tariffs, but overall the barley area sown remains above the 10-year average. The area of wheat, the largest grain crop, as expected has marginally increased with some barley crops swapped out late for wheat and pulses. The area sown to domestic and export hay has increased in a number of districts but declined in others.

**Figure 1. South Australian Rainfall Deciles 1 Jan to 31 March 2020**  
Distribution based on gridded data



**Figure 2. South Australian Rainfall Deciles 1 April to 30 June 2020**  
Distribution based on gridded data



### Sown crop area and production for 2020-21 and previous five seasons

Seasons	2015-6	2016-17	2017-18	2018-19	2019-20	2020-21 Early estimate
Area sown (ha)	3,821,000	3,894,000	3,565,000	3,572,000	3,898,000	4,005,000
Production (t)	7,211,000	11,145,000	6,921,000	5,795,000	6,467,000	8,113,000
Farm gate value	\$1.6 billion	\$2.2 billion	\$1.7 billion	\$1.7 billion	\$2.0 billion	\$2.3 billion

Next update for release September 2020 – Winter Crop Performance

Information accurate as at 15 July 2020.



## The season so far...



**RAIN** – Above average rains for the first three months reverted to below average particularly on Eyre Peninsula and pastoral districts, but remained average and above in central and eastern parts of the State. July to date is very much drier than average across the State.



**SUBSOIL MOISTURE** – Early season rainfall across the agricultural area and pastoral zone has resulted in most locations having good soil moisture to 30 cm or deeper. The higher levels of stored soil moisture is a significant improvement on recent years.



**CROP MIX** – Canola, lentil and bean crop areas increased significantly on last year while the wheat area increased slightly. Some barley crops swapped for other crops at the last minute, responding to China imposing tariffs and likely impacts on barley prices, but the area remains above average. Changes to the area sown to domestic and export hay varies between districts, but overall the area is smaller than last season.



**SEEDING** – The entire crop was sown by end of May. Most early sown crops achieved good emergence and have established well. Later sown crops have been slow growing in the dry cold, frosty conditions.



**LIVESTOCK CONDITION AND FEED** – Pastures were actively growing until the drier, colder conditions arrested growth rates. Supplementary feeding of stock has resumed due to slow growing pastures, but stock are in good condition. Producers in most districts will need to continue to supplementary feed livestock until pastures growth rates improve.

Only small areas of the pastoral zone has sufficient feed to allow restocking. Restocking properties has become problematic with higher stock costs due to easing drought in the eastern States and limited feed availability.

### Outlook for the year

**RAINFALL OUTLOOK** – The Bureau of Meteorology's most recent update of the season outlook for the August to October period is increased probability of being wetter than normal with "La Niña watch" in place. However, outlooks so far for May, June and July have regularly flipped from a wetter outlook to drier.

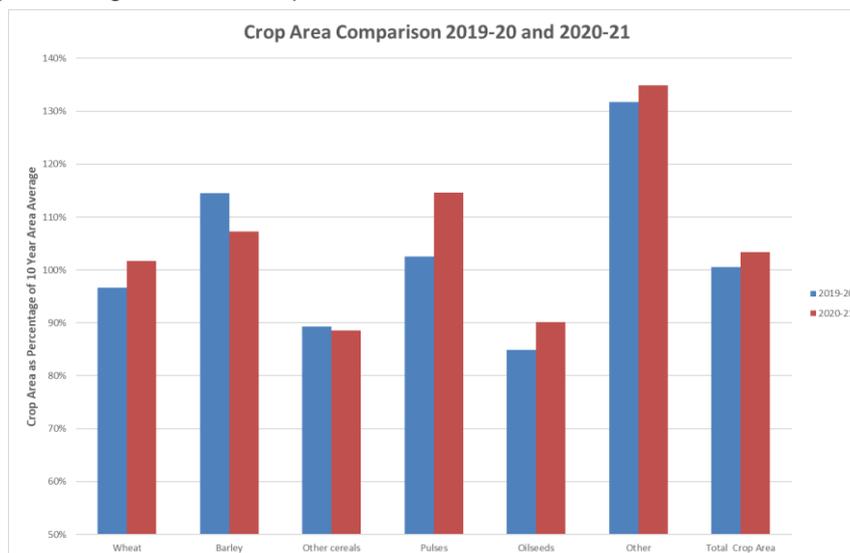
### Challenges and opportunities

**PESTS AND DISEASES** – Reports of high numbers of insect pests damaging crops, with farmers spraying for control. Snails were baited where active. Mice numbers have also been higher than normal in some districts. Paddocks with high mice numbers were also baited.

**ADVERSE EVENTS** – Herbicides and insecticides have been difficult to source if they were not pre-ordered, due to the impact of COVID-19. On the northern half of Eyre Peninsula, strong winds associated with cold fronts in June and July has sand blasted or buried crops.

**MARKET DRIVERS** – Easing grain demand related to the pandemic and large coarse grain crops globally has eased prices on last season. Recent adverse developments in northern hemisphere crop harvests is causing some shorter-term upward volatility but forecast increased stockpiles globally will temper prospects of prices increasing significantly. With the exception of beans, other pulse prices including lentils have eased and canola prices remain similar to last season.

**REGIONAL ISSUES** – Financial recovery from several years of drought and the areas affected by severe bushfires over summer, remains an important focus of recovery efforts in support of affected communities.



May	July	Sept	Nov	Jan 2021	Apr 2021
<b>This Update</b>					
Seeding intentions	<b>Seeding and crop establishment</b>	Winter crop performance	Spring crop harvest	Harvest	Final summary and estimates