Summary

Autumn and early winter rainfall was below average followed by average to above average rains in August, except in the Murray Mallee. The dry conditions of June and July with frequent frosts slowed crop and pasture growth. Crop and pasture in Northern and eastern Eyre Peninsula, parts of the northern Murray Mallee and northern parts of Yorke Peninsula are in poor condition; with strong winds causing soil erosion and frequent sandblasting of crops.

While average to above average August rains improved the outlook across most of the State, the most significant improvement in crop prospects was in the Lower Eyre Peninsula, South East and Kangaroo Island districts where production is now expected to be near or slightly above average. Crop prospects in the Murray Mallee declined. Pasture production is poor to below average requiring ongoing supplementary feeding of livestock. Hay supplies are critically short, but new season hay cut will ease shortages as it becomes available from late September.

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

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<tbody>
<tr>
<td>Area sown (ha)</td>
<td>4,038,000</td>
<td>3,899,000</td>
<td>3,821,000</td>
<td>3,894,000</td>
<td>3,565,000</td>
<td>3,769,000</td>
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<tr>
<td>Production (t)</td>
<td>8,551,000</td>
<td>7,667,000</td>
<td>7,211,000</td>
<td>11,144,000</td>
<td>6,920,000</td>
<td>5,760,000</td>
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<tr>
<td>Farm Gate Value</td>
<td>$2.0 billion</td>
<td>$2.0 billion</td>
<td>$1.6 billion</td>
<td>$2.2 billion</td>
<td>$1.7 billion</td>
<td>$1.7 billion</td>
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Next update for release November 2018 – Early Crop Harvest

Information accurate as at 11 September 2018.
The season so far…

RAIN – Below average rainfall and above average maximum temperatures across the state in July followed by average to above average rain and near average temperatures in August.

SUBSOIL MOISTURE – Soils in most northern districts have low moisture but soil moisture has increased in districts with above average August rainfall including Lower Eyre Peninsula, Kangaroo Island and South East.

CROP MIX – As expected, area sown to barley increased in most districts by an estimated 15%, mostly replacing area sown to pulses including lentils. Wheat area increased on last season to near average wheat crop size. Some cereal grain crops cut for hay instead of leaving for grain harvest.

CROP GROWTH – Dry conditions across the State in July, combined with frost, slowed crop growth. Above average rains in August, especially across Lower Eyre Peninsula and southern and coastal districts of the cereal zone considerably improved crop production prospects, while in drier northern Eyre Peninsula, increased the prospects for some crop harvest, mainly replacing seed.

LIVESTOCK CONDITION AND FEED – Across all districts, paddock feed levels are extremely low. High levels of livestock supplementary feeding. Many farmers have sown an increased area of pasture feed and hay.

Outlook for the year

SPRING RAINFALL OUTLOOK – Bureau of Meteorology season update is for higher chance of drier and hotter than normal conditions into October, increasing the potential for an early start to grain harvest - more likely to commence from late September. November outlook is for rainfall most likely around average, which may result in normal number of rain interruptions to harvest.

Challenges and opportunities

PESTS AND DISEASES – Mice numbers are no longer a concern in most districts. Snail activity across most of the state is less due to the dry conditions and baiting providing effective control to-date. Some reports of foliar disease in pulses and cereals in the higher rainfall areas, but less so in the drier areas.

ADVERSE EVENTS – Strong winds continue to cause soil erosion in paddocks on Eyre Peninsula and in the Murray Mallee with dry soil surface and no plant residue cover.

MARKET DRIVERS – An uncertain global market outlook due to northern hemisphere crop condition is currently providing volatile but above average export pricing. Industry suggests a potential easing of grain prices during harvest but remaining above average. Domestic demand driven by eastern State drought conditions is providing domestic price premiums for fodder and feed grains. Frost damage on flowering cereal crops may make hay cut an option over harvesting a frosted crop for grain.

REGIONAL ISSUES – Below average crop and pasture production and feed and fodder shortages for animals in some districts.

2018-19 Regional Crop Estimate and comparison with 10-year average (tonnes).