

## Issue 1 Season 2020-21: Crop Seeding Intentions - May 2020

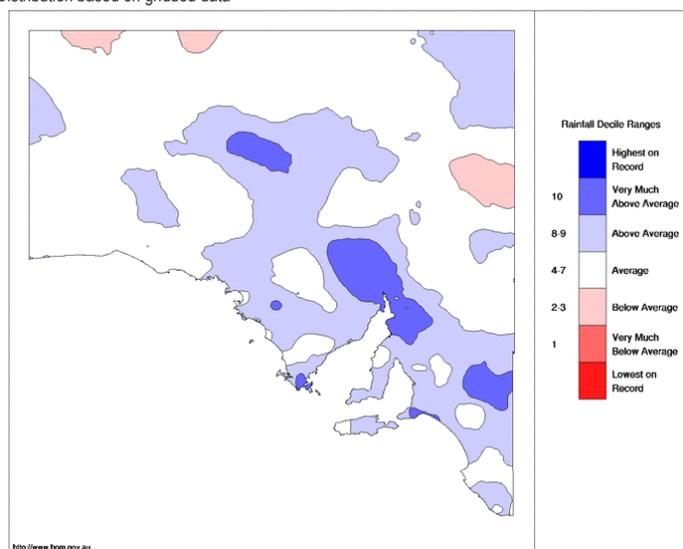
### Summary

Rainfall for the first four months of 2019 was above average through many areas of the State, with most having at least 50 mm more than at this time last year. In the majority of agricultural districts, some dry sowing of crops commenced in early to mid-April. Good late April rains have enabled normal seeding operations to take place, with full cropping programs being sown in most districts, resulting in a likely crop area increase on 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 is expected to increase in response to recent improvement in price and ideal soil moisture levels. The barley area most likely will not change greatly due to the price difference with wheat and the introduction of China's Barley tariffs occurring after most final seeding decisions had been made. The area of wheat, the largest grain crop, is unlikely to change significantly. The area sown to domestic and export hay has increased in a number of districts but declined in others.

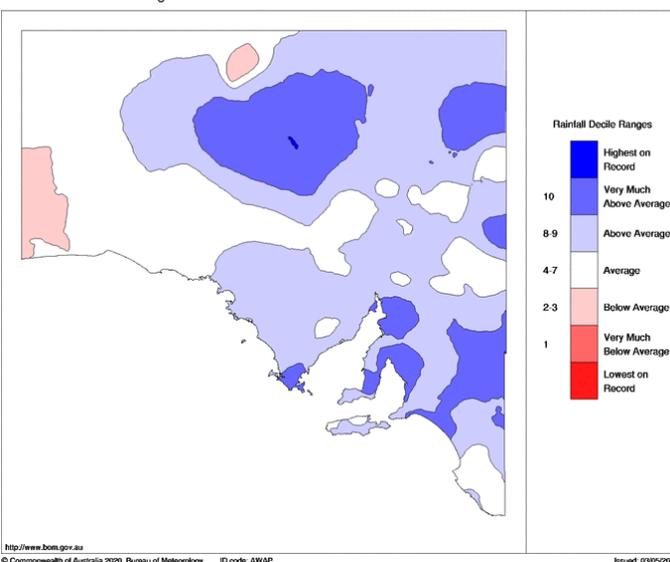
**Figure 1. South Australian Rainfall Deciles 1 January to 30 April 2020**

Distribution based on gridded data



**Figure 2. South Australian Rainfall Deciles April 2020**

Distribution based on gridded data



### Sown crop area and production for previous six seasons

Seasons	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
Area sown (ha)	3,899,000	3,821,000	3,894,000	3,565,000	3,572,000	3,898,000
Production (t)	7,667,000	7,211,000	11,145,000	6,921,000	5,795,000	6,467,000
Farm gate value	\$2.0 billion	\$1.6 billion	\$2.2 billion	\$1.7 billion	\$1.7 billion	\$2.0 billion

Next update for release July 2020 – Seeding and Crop Establishment

2020-21 Crop estimates commence with the July 2020 report.

Information accurate as at 20 May 2020.



## The season so far...



**RAIN** – Year-to-date rainfall has been above average through many areas of the State, with most areas having at least 50 mm more than at this time last year. Parts of the pastoral districts have already had more rain in 2020 than they received for the whole of 2019. May to date has been drier than average, but is providing ideal conditions for seeding.



**SUBSOIL MOISTURE** – Summer and April rainfall across much of the agricultural area and pastoral zone has resulted in most locations having good soil moisture to 30 cm or more. The higher levels of stored soil moisture from the early rains has been a significant improvement on recent years.



**CROP MIX** – The area of wheat is unlikely to change significantly. In spite of China's recent imposing of tariffs on Australian barley, its area is unlikely to change greatly this season, as growers were already committed at the time of the announcement. The area sown to canola and pulses is likely to remain as planned or even increase, particularly in the lower rainfall districts. Of the pulses, lentil area is likely to increase due to prices increasing over the last few months and good soil moisture. Changes to area sown to domestic and export hay varies across districts.



**SEEDING** – In most agricultural districts, some dry sowing began in early to mid-April with pasture feed, followed by some long season wheat, beans and canola. Most early sown crops achieved good emergence, helped by late April rains. Following these rains, sowing of remaining cropping programs has taken place. In some locations, conditions were too wet for operations and seeding halted for several days or more to allow paddocks to dry.



**LIVESTOCK CONDITION AND FEED** – Pastures sown dry or semi-dry in early to mid-April have germinated and are actively growing. In some districts, these will have sufficient growth for grazing by mid-May. Regenerating pastures have also germinated, with rapid early growth and high legume content in most districts. The vast majority of livestock are in good condition. Producers in most districts are continuing to supplementary feed livestock but this is reducing as pastures become available.

The Pastoral Zone has continued to experience highly variable rainfall, resulting in different pasture germination and growth across the zone. However, the area that now has sufficient pasture growth for the next 12 months or more has increased since early March. Additional rain will be required in many areas to provide sufficient pasture growth to enable full re-stocking.

### Outlook for the year

**RAINFALL OUTLOOK** – The Bureau of Meteorology's most recent update of the season outlook for the June to August period shows that, across the entire State, there is increased probability of a wetter than normal winter. Outlooks during May tend to be more reliable than late summer and early autumn.

### Challenges and opportunities

**PESTS AND DISEASES** – Reports of high numbers of insect pests in several districts, with farmers spraying for control before seeding. Snails have been active in a number of districts during April, with baiting to reduce numbers before egg laying. Mice numbers have also been higher than normal in pockets of a number of districts. Paddocks with high mice numbers are being baited before sowing.

**ADVERSE EVENTS** – Shortages of fertiliser and other inputs in the early stages of seeding across the State due to the impact of COVID-19 and the increased cropping programs following good opening rains in NSW. Sufficient fertiliser was sourced so seeding remained timely, although there were delays in delivery and product choice limited. Some herbicides and insecticides remain in short supply and difficult to source if they were not pre-ordered.

**MARKET DRIVERS** – The COVID-19 pandemic has caused disruption to many markets. Chinese Government imposing a tariff on Australian Barley has already disrupted exports to China, Australia's major market for feed and malting barley. Slowing grain demand related to the pandemic and large coarse grain crops globally will further pressure barley prices. International crop production forecasts has already pushed wheat prices down on last season, but northern hemisphere supply issues may limit the downward trend. Pulses and canola prices remain similar to last season, except for lentil prices with some recent upward movement.

**REGIONAL ISSUES** – No significant regional issues from current seasonal conditions. 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 2020	Apr 2020
This update	Next Update				
<b>Seeding intentions</b>	Seeding and crop establishment	Winter crop performance	Spring crop harvest	Harvest	Final summary and estimates