

Crop and Pasture Summary

PIRSA

Issue 3 Season 2020-21: Winter Performance - September 2020

Summary

Rainfall for the first three months of 2020 was average to above average, but from late autumn rainfall was below average until several significant rain events during August. Sowing of crops commenced in early to mid-April with crop seeding completed by the end of May. Crops established well, but persistent dry, frosty conditions through early-mid winter slowed crop growth.

The crops growing in dry conditions of early winter depleted soil moisture across much of the agricultural zone, but in doing so retained good condition and yield potential. August rains maintained the crop yield potential in most districts, especially in the south and Mallee with average to above average crop production expected. However, northern Eyre Peninsula and northern Yorke Peninsula, Mid and Upper North, where crops depleted soil moisture reserves entering into severe moisture stress are not expected to fully recover and will yield below average.

Further spring rains will be required for crops to finish, maintaining production at an estimated at 7.9 million tonnes, close to the current 10-year average.

Figure 1. South Australian Rainfall Deciles 1 April to 31 August 2020

Distribution based on gridded data

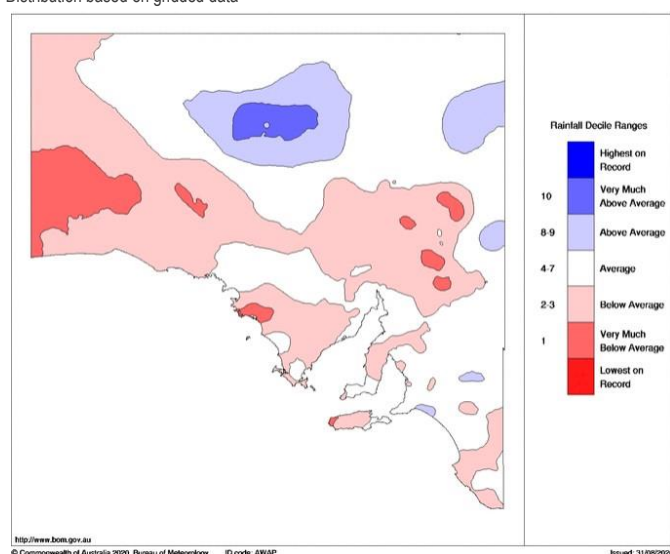
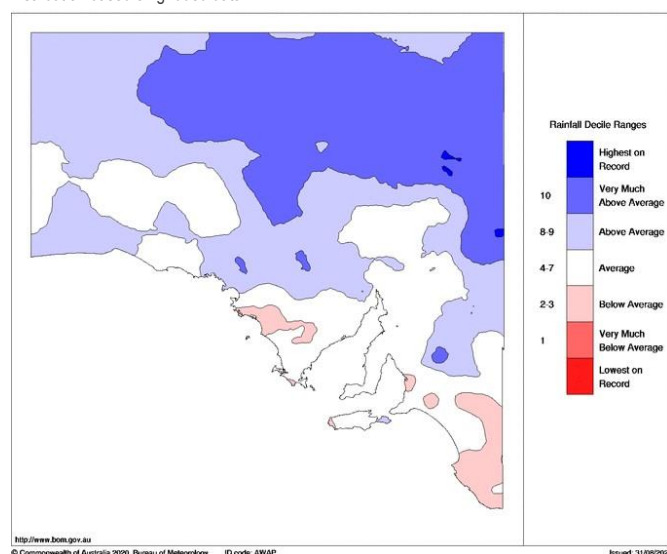


Figure 2. South Australian Rainfall Deciles August 2020

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 estimate
Area sown (ha)	3,821,000	3,894,000	3,565,000	3,572,000	3,898,000	3,988,000
Production (t)	7,211,000	11,145,000	6,921,000	5,795,000	6,467,000	7,932,000
Farm gate value	\$1.6 billion	\$2.2 billion	\$1.7 billion	\$1.7 billion	\$2.0 billion	\$2.2 billion

Next update for release November 2020 – Spring Crop Performance

Information accurate as at 15 September 2020.



The season so far...



RAIN – Above average rains for the first three months of the year and a good opening rain in April, followed by dry conditions from May to first week of August. August rains kept the cropping season on track for near average production. The pastoral zone also received rain in August promoting new feed growth.



SUBSOIL MOISTURE – Summer rainfall across the agricultural area and pastoral zone filled soil profiles. With the dry conditions of winter, crops depleted the soil moisture reserves to low levels in all districts. The crop production outcomes are now critically dependant on spring conditions and rainfall.



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 consequent 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 grew slowly in the dry cold, frosty conditions of early to mid-winter.



LIVESTOCK CONDITION AND FEED – Pastures were actively growing until the drier, frosty conditions arrested growth rates. Lactating stock were hand fed to ensure calf and lamb survival rates. Producers in most districts will need to continue to supplementary feed livestock until pastures improve.

The unfavourable conditions until the August rains has resulted in significant destocking of the pastoral zone through sale or agistment, with restocking possibly not financially viable for some of the smaller operators.

Outlook for the year

RAINFALL OUTLOOK – The Bureau of Meteorology's most recent update of the season outlook (issued 10 September 2020) for remainder of September and October to December period is increased probability of being wetter than normal with "La Niña Watch" upgraded to "Alert". However, so far this season outlooks for higher probability of wetter conditions have not translated to rainfall outcomes.

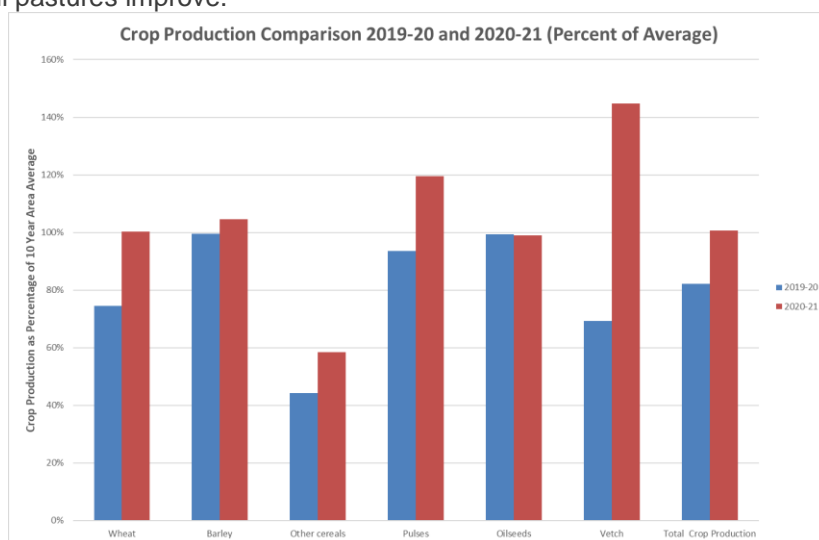
Challenges and opportunities

PESTS AND DISEASES – Red Legged Earth mite is widespread across crops and pastures. Russian Wheat Aphid widespread in cereals and Cowpea aphid in pulse crops with treatments applied to control damage. Crop disease levels are low due to the dry conditions.

ADVERSE EVENTS – On the northern half of Eyre Peninsula, strong winds associated with cold fronts has damaged crops by sand blasting or burial and the dry conditions across the state has resulted in moisture stressed crops, which are not expected to recover in some districts.

MARKET DRIVERS – Lower grain demand due to the easing of Australian drought conditions and large grain crops globally drove barley prices lower. Beans prices have eased significantly on last season's near record high. Canola prices have rallied due to market changes caused by a canola trade issue between Canada and China and a poor canola crop outlook in Europe.

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
This Update			Next update		
Seeding intentions	Seeding and crop establishment	Winter crop performance	Spring crop harvest	Harvest	Final summary and estimates