GIWA Crop Report

Grain Industry Association of Western Australia

12th April 2019

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The 2019 Season – Little Rain in a Dry Start to the Season in Western Australia

To date there has been little rain across the grainbelt of Western Australia to enable growers to sow into moisture, apart from a few pockets in the Albany port zone and the far east Kwinana East port zone where small areas of canola have been planted. The soil profile in all areas except where there is some planting is historically very low, with maps supplied by the Department of Primary Industries and Regional Development (DPIRD) climate group showing virtually no sub-soil moisture available for plant growth.

Growers are generally holding back on dry sowing this year and there has been a noticeable decrease in the urgency to plant crops dry. The long spell from sowing until the break of the season last year, and the absence of an opportunity for a knockdown herbicide treatment for weed control during that period resulted in many cereal crops ending up weedy, or "dirty", at the end of the 2018/2019 season.

The intended crop area mix for the 2019 growing season is generally unchanged from 2018. There are some slight adjustments taking place, or likely to take place, depending on the chance of rain over the next three weeks in some regions. Sentiments of growers is that the market risk for WA barley to China from the current China WTO barley anti-dumping investigation has not had a great impact on planting intentions. Rotation and agronomy are driving plantings and even though barley is priced lower, barley is in front of wheat in most areas.

Wheat plantings look to continue the recent trend downwards, being substituted more for the break crops canola, lupins, legume pasture and pulse crops, rather than barley. The intended barley area is similar to last year in most areas except for the south east Albany port zone where there was an increase in plantings in 2018 being substituted for canola due to the difficult start. The relatively small, but increasing, area of barley in the Geraldton port zone may come back a little this year due to the current lack of sub-soil moisture.

The intended canola plantings this year were on track to increase by about 15 per cent to levels around 2016 and 2017, although the lack of sub-soil moisture in the lower rainfall regions and the lack of rain to date will mean that plantings are now more on track to be similar to 2018. The intended lupin plantings are slightly higher than last year continuing the trend over the last few years, with traditional lupin growing regions increasing plantings, and lupins expanding into less traditional areas in the south of the state. Legume pastures are being sown dry at the moment and the area looks to be slightly greater than last year. The same can be said for pulse crops, although the increase in plantings are more experimental.

GIWA WA Crop Area Estimates April 2019 (hectares)

Port zone	Wheat	Barley	Canola	Oats	Lupins	Pulses	State total
Kwinana	2,600,000	700,000	470,000	150,000	130,000	5,000	**4,055,000**
Albany	530,000	570,000	260,000	150,000	40,000	3,000	**1,553,000**
Esperance	510,000	350,000	200,000	10,000	10,000	30,000	**1,110,000**
Geraldton	920,000	110,000	300,000	10,000	210,000	2,000	**1,552,000**
Totals	**4,560,000**	**1,730,000**	**1,230,000**	**320,000**	**390,000**	**40,000**	**8,270,000**

GIWA gratefully acknowledges the support of DPIRD, CBH, CSIRO and contributions from independent agricultural consultants and agronomists in the production of this report.

Geraldton Zone

Intended crop plantings are similar to last year in the medium and high rainfall regions with any major swings likely to occur in the low rainfall regions depending on the timing of the break to the season. The lack of any significant rainfall to date is a complete contrast to the 2018 season where the majority of the zone had very good levels of sub-soil moisture which contributed to the region returning record tonnages, all the more remarkable given the amount of growing season rainfall and the lack of rain in the spring.

Geraldton zone growers are generally holding back on dry sowing, as per the majority of the grainbelt, with most not intending to start until around ANZAC Day unless it rains between now and then. There are some growers sowing canola based on the anticipated rain this weekend although this is more the exception than the rule.

Wheat area is projected to be similar to last year, although if the break to the season pushes into late May, the barley area will drop off and be replaced by wheat. Wheat's improved ability to finish over barley in warmer conditions in the spring will see it replacing intended barley plantings. Lupin area is projected to continue its trend up due to its value to the rotation, weed control options and price.

There are unprecedented areas of country being spread with lime. The area of deep ripping and spading is back a little on recent years and in an effort to preserve soil health and moisture, due to the dry conditions virtually no ploughing is occurring.

Kwinana Zone

The Midlands

The estimated crop areas for the region are projected to remain similar to 2018. Wheat area is likely to be unchanged and barley could be down slightly due to the current prices being substituted for slight increases in lupins and oat hay. Whilst there is no immediate intention to change intended canola plantings, the lack of sub-soil moisture and the lack of rain will start to impact on plantings as we move into May.

There is some increase in legume pasture plantings occurring in the region.

The slight changes mentioned to potential plantings are likely to be small and most adjustment will be considered around impacts to the rotation rather than any individual factors. Rotations in the region contain 25 to 35 per cent of the area in break crops and any changes will be based around these percentages being maintained.

There is no action in the paddocks at the moment with growers intending to start sowing after Easter.

Kwinana West

The recent rainfall events of up to 50mm on the border of the East and West Kwinana zone around Kellerberrin down to Bruce Rock has halted the small amount of dry sowing for the next week or so until the surface dries out enough to continue to dry sow and not result in a split germination.

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The wheat and barley crop type mix is not likely to change too much from 2018 as more consideration is given to the long term impact on rotations rather than short term changes. The barley area is projected to remain around 50 per cent of the cereal crop in the western areas of the zone due to profit, potential yield compared to wheat, and the ability to control brome grass, even though the barley price has come off from the highs of last year due to the China malt and feed barley market uncertainty.

The canola area may drop back slightly as it could in other areas of the state, depending on the timing of the break to the season. In this region, yield based around time of sowing and potential profit are as important as the weed control benefits.

Lupin and oat areas are projected to be similar to 2018.

Many cereal paddocks were weedier last year. Most growers are going to take things a little slower this year to ensure some of the weedier paddocks have a herbicide knockdown applied before sowing to preserve moisture.

Kwinana East

The eastern areas of the Kwinana East zone is one of the few areas of the state where there is some stored moisture in the soil profile and small areas of crop have been planted. Seeders are ready but on hold and will most likely not get going until the end of the month.

The crop area mix is projected to be unchanged from 2018. The region is predominately wheat with little break crop and less barley than the western areas of the Kwinana zone. The big production plan swings in area are more around leaving ground out to fallow where there is little sub-soil moisture, depending on whether the break has occurred or not by early June.

Albany Zone

Western Albany

Reasonable areas of the zone have some level of stored moisture and small areas of canola have been sown to date.

This region is projected to have only slight changes in crop area from 2018 with wheat likely to be down slightly, barley up, milling oats and oat hay up with the regular oat growers, and canola down. There are going to be small experimental plantings of pulses and the area of legume pasture will increase slightly.

Southern Albany

There have been small areas of crop sown as “graze and grain” crops with most grain growers waiting for more rain (these are dual purpose crops on which sheep are deliberately brought in to feed at certain points in the season, but which bounce back to mature as viable food grain crops).

The dominant cereal in the region is barley and there is likely to be a small reduction in area as the large 2018 area was higher than normal due to the late substitution for canola. The barley area will be closer to intended areas at the start of 2018, rather than what ended up in the ground. The reduction in intended area is also in part due to price risk mitigation from the large areas in the rotation. The reduction in barley area will be taken up by canola and to a lesser extent wheat.

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Eastern Albany (Lakes Region)

The Lakes district has virtually no sub-soil moisture and the isolated areas that did receive rain recently are minor. The shires and growers are collaborating to address serious water shortages in a number of districts, including Ravensthorpe, Jerramungup, Lake Grace. Water is being carted for stock and for pre and post seeding herbicide spraying, which requires clean water rather than the very limited muddied dam water that is available.

The increased barley area for the region is set to continue with barley area being substituted for wheat. The trend away from wheat this year in the region will result in equal areas of wheat and barley for the first time.

The area of canola is already predicted to fall in the region with growers quick to "pull out" of the crop, even though longer term averages have been good. The expansion of canola to soil types not suitable in 2017 resulted in disappointing yields; coupled with the very low yields last year from lack of rain and frost, the region this year will see the area planted to canola to be significantly lower than 2018.

The lupin area will be similar to 2018.

The lack of diversity in crop species and varieties for the region has been a concern for a while and this is highlighted with 75 per cent of barley likely to be Spartacus, and most of the wheat area either Mace or Scepter, with twice the area of Scepter than Mace.

Esperance Zone

The Esperance port zone is very dry with growers commenting that "it has not been this dry at this time of the year for a long while". In the spirit of regional banter, growers in other regions might well say "well it's about time"!

The Esperance port zone has a history of not changing crop areas from one year to the next based on price projections as much as some other regions, and this year looks to be the same.

The barley area is projected to be unchanged from 2018. The smaller area of wheat in the region looks also to be unchanged for the year.

The lack of sub-soil moisture will see canola plantings backing off in a couple of weeks if there is no rain, although this will be more gradual over time than may occur in other regions of the state. There looks to be the continued shift to TT hybrid varieties in the region away from Bonito, which was over 90 per cent of the crop in 2017.

The pulse area is projected to increase slightly with lentil, lupins, peas and vetch similar or slightly more than 2018, and beans in the higher rainfall areas of the Esperance zone increasing significantly.

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Season Outlook, April 2019

Ian Foster, Department of Primary Industries and Regional Development

The past six months have been generally dry across most of the grainbelt, despite intermittent thunderstorms (see Figure 1). The start of 2019 has also seen below normal rainfall as shown in Figure 2.

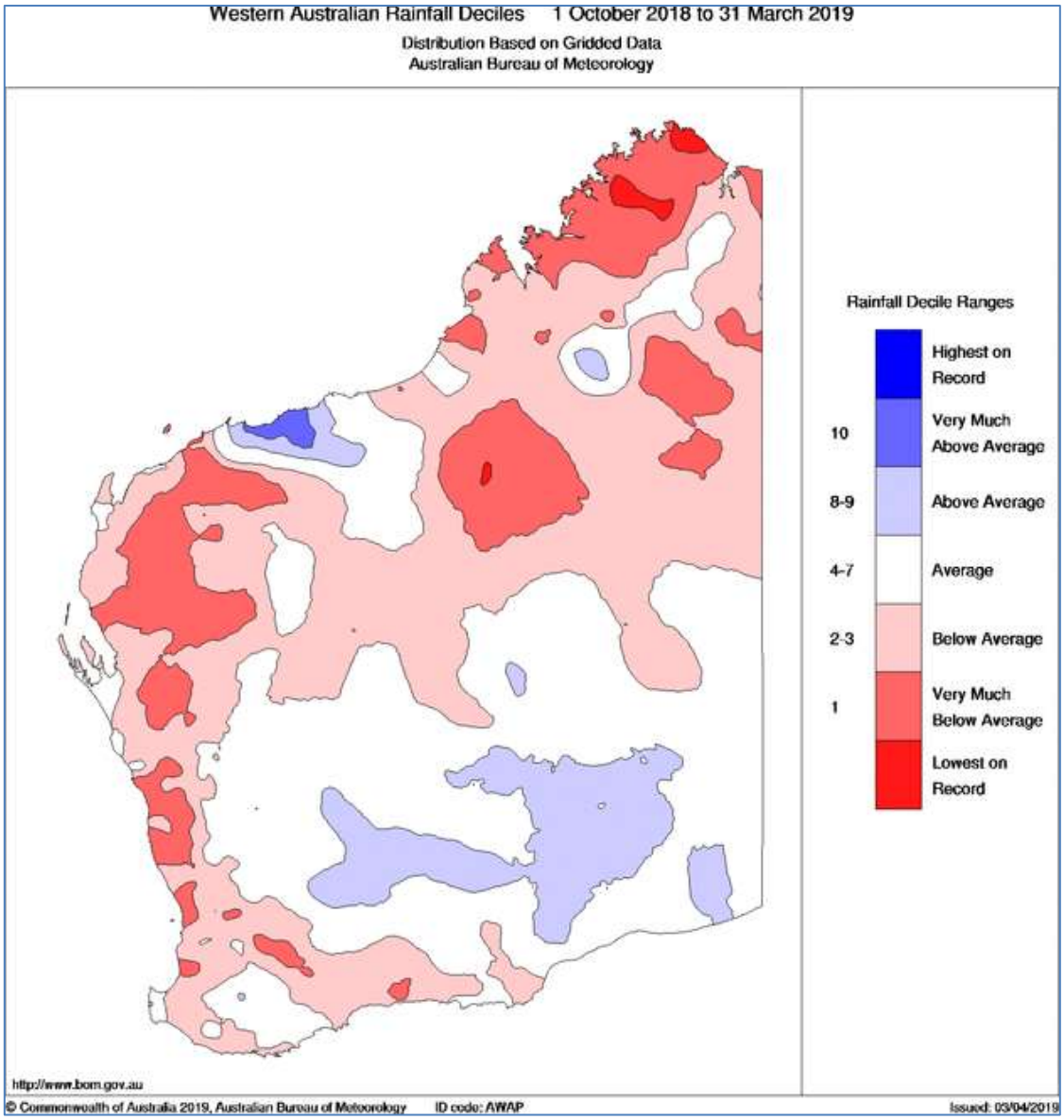

Figure 1. Rainfall deciles for October 2018 to March 2019. From Bureau of Meteorology.

Rain in March for the Great Southern has been the exception and has facilitated early seeding in parts of the region.

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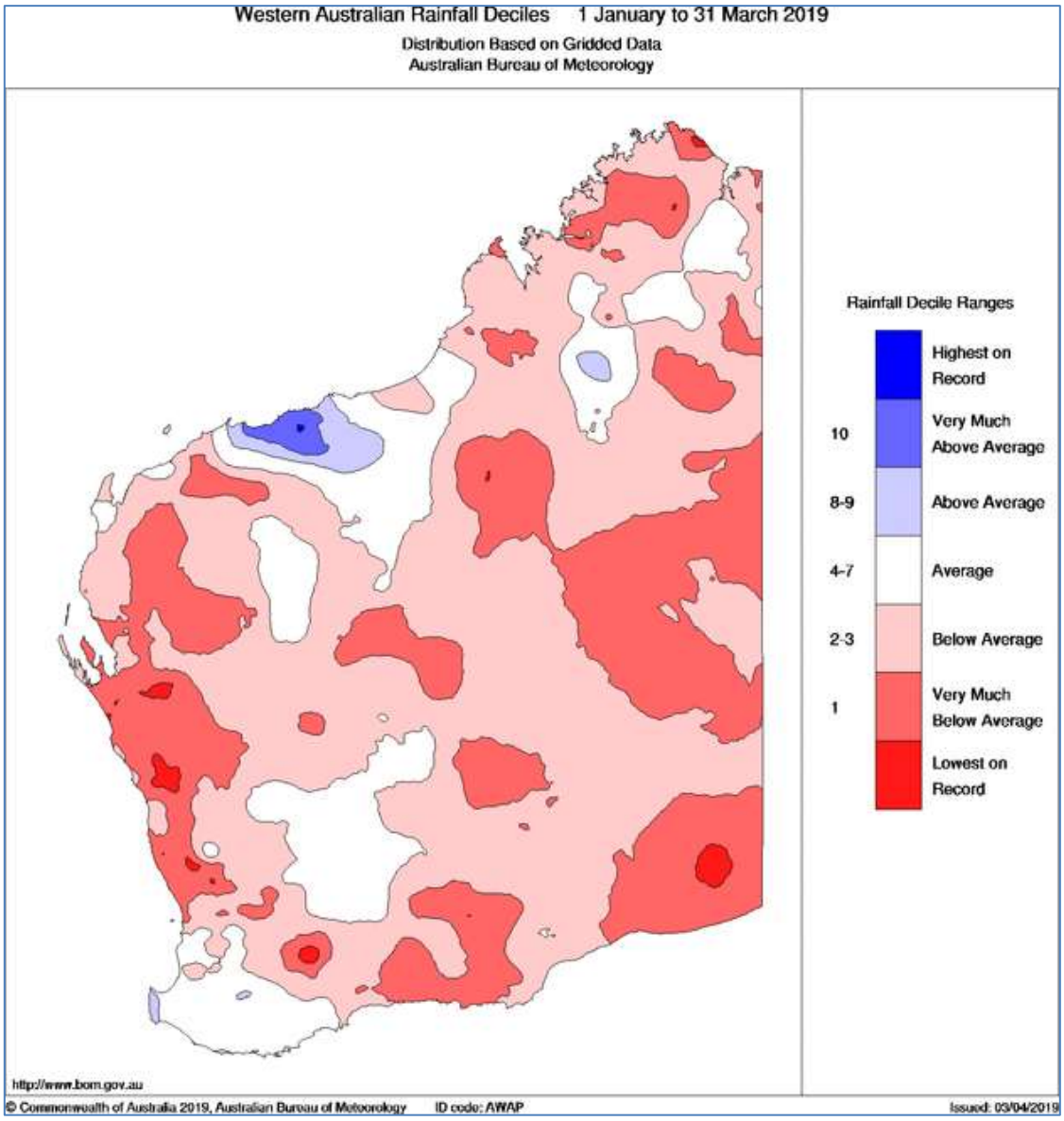

Figure 2. Rainfall deciles for January to March 2019. From Bureau of Meteorology.

Modelled soil water storage indicates there is little soil moisture across much of the grainbelt. See Figure 3 for an average of soil types. Soil water maps for other soil types can be found here.

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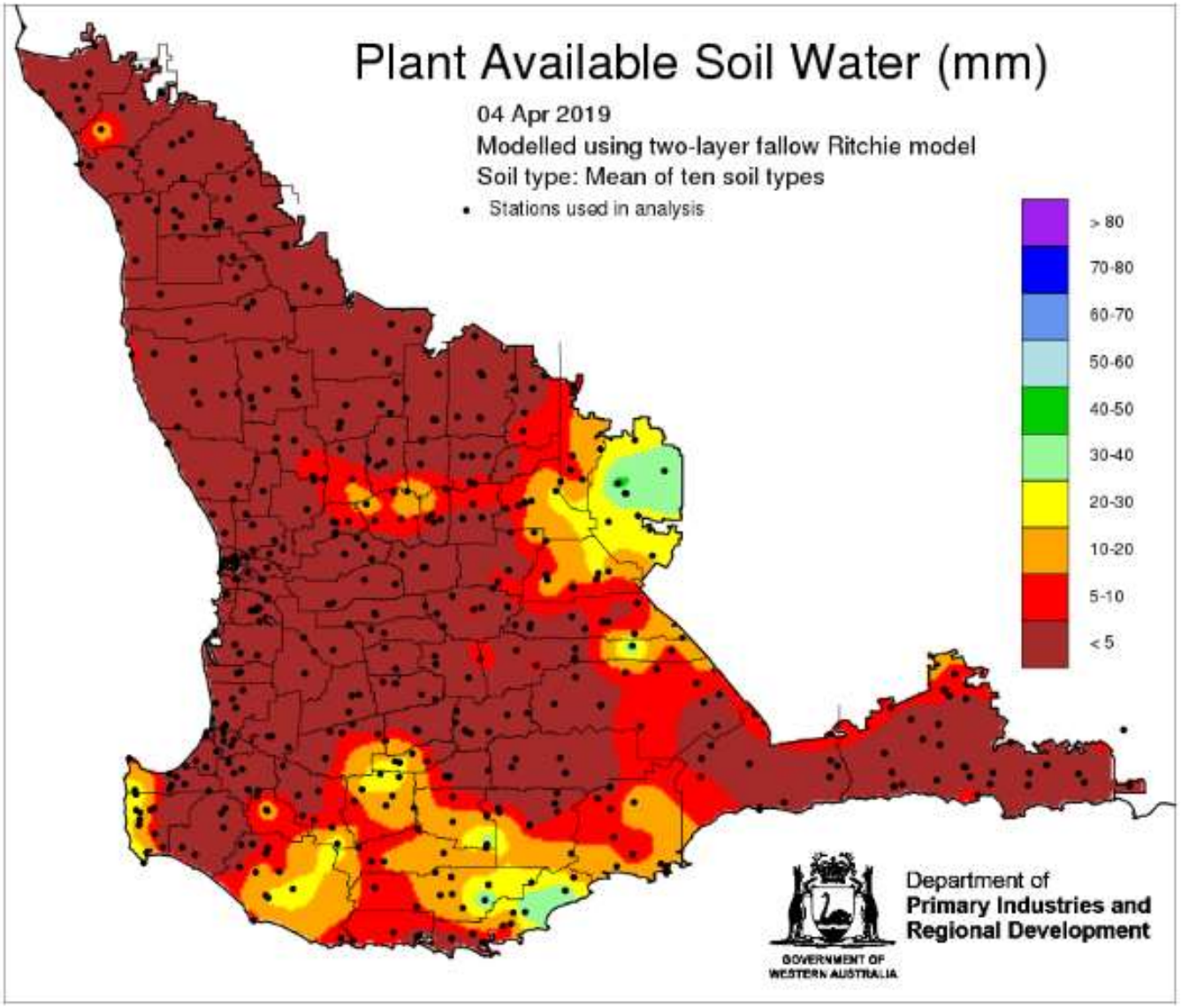

Figure 3. Plant available soil water at 4 April 2019, for a mean of 10 soil types.

The middle part of April should see some rain over most of southern WA, coming from a combination of tropical moisture (tropical low) and a series of weak cold fronts. Heaviest falls are expected to be in the Gascoyne region, which will be welcome to grazing enterprises there.

DPIRD's Statistical Seasonal Forecast (SSF) is indicating less than a 40 per cent chance of exceeding median rainfall for April to October; more information can be found here.

The BoM rainfall outlook for May to July is neutral to below normal, suggesting early season rain may be patchy, as opposed to a widespread break. Most international models also indicate the early part of the growing season is more likely to be below normal. Predicted rain in mid-April is be timely but there remains a risk of follow-up rain in late April / early May.

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Additional information can be sourced from:

DPIRD: Seasonal Climate Information

DPIRD: Potential Yield Tool

DPIRD Extreme Weather Events Tool

BoM: Seasonal Rainfall Outlook, next 3 months

BoM: Decile rainfall for the past 6 months

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