

## South Australia, Victoria & Southern New South Wales

The Pulse harvest is now complete and very pleasing despite below average (decile 2-3) rain during the last 3 months leading up to harvest.

Production figures have been adjusted upwards since our November estimates. Stored subsoil moisture enabled crops to yield better than spring rainfall figures would suggest. Yield is above the long term average for all pulse types in most regions except where frosts and rain on late maturing crops may have had an adverse impact. A quick finish to the season did affect yields in some locations where a longer season is normally expected.

Due to low rainfall, and the short duration of rain events during winter and spring, there has been relatively low disease pressure, with minimal impact on grain quality or yield.

Pulse crops fared better this season than last season's weather damaged harvest. Only late harvested chickpeas have been affected by rainfall this season, particularly in central NSW and regions further north.

## Queensland & Northern New South Wales

The 2011 northern winter pulse season turn out to be one of the better ones in recent years.

Prices have remained firm for both chickpea and faba bean. Chickpea yields have been well above average in most regions with many reports of greater than 2.0 t/ha being received. The exception to this was some parts of north western New South Wales where a dry winter saw only average (1.2 t/ha) to below average yields being achieved. Generally speaking crops were planted during their ideal sowing window with near to full soil moisture profiles. There was limited winter in-crop rainfall, which reduced faba bean yields but had the benefit of minimum disease development in chickpea which was well managed by growers and their advisors.

The long cool spring / early summer provided an extended

podding window for chickpea resulting in significantly higher than average yields. Which, combined with minimal input costs, has resulted in some very healthy gross margins for growers.

A high degree of confidence has returned to the northern pulse industry which will see increased areas again in 2012, dependent upon the seasonal conditions.

## Western Australia

Every season has contrasting affects across Western Australia.

In the northern regions, 2011 was a bumper season after a good start with summer rain providing substantial confidence at seeding. Yield predictions for all grains continued to rise through spring and, even at harvest, yields surprised many as tonnages were tallied. The rainfall tally was above average, but the exceptional yields came from rainfall timing and intensity which was ideal.

The central and southern regions had a poorer start with some areas in dire straits at the end of June. Winter and spring conditions were extremely favourable with most areas experiencing a decile 8 August to October rainfall, and the season turned into a very good one.

The Esperance region experienced a generally poor season. Rainfall was light throughout, decile 2-3, and yields were below average to poor.

The real disappointment came in November with continual rain disrupting harvest and downgrading quality, particularly in cereals. Pulses generally were largely unaffected other than an increase in lodging. Field peas were a little more difficult to harvest than normal. Field peas were also disappointing for yield in the Esperance region.

For lupins, the rain didn't cause as much heartache as the price which fell to 50% of the 2010 drought driven price. This will cause a decline in lupin plantings for 2012 in the central and southern wheatbelts.

## Final Estimated Pulse Production in Australia for 2011 (tonnes)

State	Chickpea		Beans		Field Pea	Lentil	Lupin		Total	% of 2010
	Desi	Kabuli	Faba	Broad	Dun	Red & Green	Sweet Lupin	Albus Lupin		
New South Wales	238,500	13,400	67,400	-	61,900	1,000	46,400	58,500	<b>487,100</b>	<b>91%</b>
Victoria	14,000	51,000	99,000	7,000	60,000	125,000	34,000	300	<b>390,300</b>	<b>101%</b>
Queensland	136,000	2,800	3,300	-	-	-	-	-	<b>142,100</b>	<b>122%</b>
South Australia	1,500	13,000	95,000	35,000	150,000	162,000	82,000	-	<b>538,500</b>	<b>79%</b>
Western Australia	13,000	2,200	3,500	-	32,000	-	678,000	1,400	<b>730,100</b>	<b>212%</b>
<b>Total 2011 (t)</b>	<b>403,000</b>	<b>82,400</b>	<b>268,200</b>	<b>42,000</b>	<b>303,900</b>	<b>288,000</b>	<b>840,400</b>	<b>60,200</b>	<b>2,288,100</b>	<b>111%</b>
<b>% of 2010</b>	<b>129%</b>	<b>124%</b>	<b>94%</b>	<b>87%</b>	<b>71%</b>	<b>94%</b>	<b>161%</b>	<b>66%</b>	<b>111%</b>	
<b>Total 2010 (t)</b>	<b>311,700</b>	<b>66,400</b>	<b>286,700</b>	<b>48,100</b>	<b>428,100</b>	<b>306,300</b>	<b>522,200</b>	<b>91,400</b>	<b>2,060,900</b>	

## Major projects funded by

# Chickpea

## Queensland and Northern New South Wales

The 2011 chickpea season was virtually ideal. Disease incidence and development was minor and well managed by advisers and producers during the growing season. Moisture was not limiting in most areas, with the exception of north western New South Wales. This was followed by a cool spring / early summer that allowed for an extended podding period which pushed yields to well above average in many districts.

The harvest started well, with dry weather ensuring high grain quality. Virtually the entire Queensland crop was harvested and 60% of the northern New South Wales crop was harvested prior to the heavy rains that fell in late November causing flooding in the Moree, Gunnedah, Narrabri and surrounding localities, with some minor crop losses occurring.

Thankfully there was little in the way of additional rainfall. The level of down grading was kept to a minimum and was primarily associated with loose seed coats and increased total defective numbers due to splits and chips. Most samples were easily corrected with grading.

## Western Australia

The 2011 season produced the most desi chickpea tonnage in WA since the 1999 season. Trial yields of 4 t/ha were recorded with paddock yields of 3 t/ha common. Soil moisture was plentiful, enabling an extended flowering and grain fill period to achieve these excellent yields.

Some staining was apparent from the moisture at grain maturity, though at very low levels.

The chickpea industry will continue to expand in 2012, provided the break to the season provides growers with confidence for yield potential.

## South Australia, Victoria & Southern New South Wales

Chickpea in south-eastern Australia performed well, having accessed deep soil moisture and achieving above average yields in most southern cropping regions. There were very few disease or virus issues and conditions were generally ideal for pod set with very few extremes of cold or heat.

Favourable pricing, good yields, excellent quality and confidence in the ascochyta resistance level of the new varieties should instil more confidence in chickpea production this coming season. However, soil suitability for chickpea and the best fit in the crop rotation still needs to be considered by potential chickpea growers in southern Australia.

## Kabuli:

Small kabuli grain quality is far better than the previous two seasons. The lower rainfall regions of Victoria and South Australia have seen chickpea area remain static or increase slightly compared to the more traditional areas that have had grain quality and marketability issues in recent years. Availability of quality seed reduced the potential area sown to chickpea in 2011.

Yields were above average in both the traditional and newer chickpea areas in southern Australia. This, combined with the better prices that are regularly obtained for small kabuli compared to desi types, has seen good financial returns for growers.

## Desi:

Desi types are more suited to the medium to lower rainfall zones. Above average yields combined with good export and domestic demand from local splitters in Victoria will continue to drive interest in desi types.

## Desi Chickpea

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2011 Production (t)	13,000	1,500	14,000	7,000	22,500	136,000	231,460	367,460	<b>402,960</b>
2011 Sown area (ha)	10,000	1,000	9,000	5,000	15,000	70,500	142,000	212,500	<b>237,500</b>
Dec 2011 variation (t)	<i>-1,000</i>	<i>100</i>	<i>2,000</i>	<i>0</i>	<i>2,100</i>	<i>0</i>	<i>33,960</i>	<i>33,960</i>	<i>35,060</i>

## Kabuli Chickpea

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2011 Production (t)	2,200	13,000	51,000	1,200	65,200	2,800	12,140	14,940	<b>82,340</b>
2011 Sown area (ha)	900	8,000	26,000	900	34,900	2,000	8,000	10,000	<b>45,800</b>
Dec 2011 variation (t)	<i>400</i>	<i>1,000</i>	<i>18,000</i>	<i>0</i>	<i>19,000</i>	<i>200</i>	<i>4,140</i>	<i>4,340</i>	<i>23,740</i>

## Field pea

### South Australia and Victoria

Field pea suited the drier winter conditions much better this season than wet years previously. They were also able to pod well and for an extended period in the mild spring temperatures.

Late frosts during mid-October had an impact in some regions, particularly in Victoria and the Upper North in South Australia, but with very little incidence in southern New South Wales.

Consequently, yield and quality has been affected in these areas resulting in smaller grain size or seedcoat discolouration. Earlier flowering varieties in particular had good yields with good early pod set and low disease incidence. Later flowering types like Kaspera, which is still the dominant variety in most regions, matured too quickly and the production tonnage is reduced on earlier spring estimates.

There have been some issues with field pea quality at

harvest, particularly in South Australia (Eyre Peninsula and Upper North). Frost, maturity when crop-topping, and wheel tracks are believed to be partly to blame for poorer grain quality, along with rainfall pre-harvest. Consequently, these quality issues may reduce the field pea area next year in the affected areas

### Western Australia

With the majority of production based in the Esperance region, field pea production was poor in 2011. Yields were below average in the coastal areas and north to Scaddan at about 1.1 to 1.8 t/ha. Further north, the very dry winter and frosts at grain fill, reduced yields to just 200 kg/ha for some. Grain size is average. The vast majority of production is Kaspera type field peas.

While small in area, yields were very good in the wider Dalwallinu region at around 2 t/ha and further north to Mingenew where Kaspera and PBA Gunyah field pea yielded 2 to 3 t/ha.

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2011 Production (t)	32,000	150,000	60,000	55,000	265,000	-	6,890	6,890	<b>303,890</b>
2011 Sown area (ha)	55,000	110,000	38,000	36,000	184,000	-	4,500	4,500	<b>243,500</b>
Dec 2011 variation (t)	<b>-20,000</b>	0	20,000	0	20,000		2,890	2,890	2,890

## Faba/Broad bean

### Faba bean

#### South Australia, Victoria and southern New South Wales

Faba bean crops performed well, mainly due to good subsoil moisture. Less in-crop rainfall saw low levels of disease, particularly chocolate spot, but rust levels were the worst seen in many seasons. Rust has less impact on seed quality compared to the other diseases, but can reduce grain size if it is severe.

The drier spring resulted in less protective fungicide applications this year. Bean price indicators remained positive provided quality was met for the Middle East markets. Not all beans are making number 1 grade, mainly due to budworm damage and poor seed coat colour.

#### Northern New South Wales

Most of the crop in the north was harvested before the major rain in late November.

Yields average 1.54 t/ha which whilst not overly high, did provide for solid financial returns for growers, with many intending to maintain or even increase their faba bean area next season depending on global market signals.

### Broad bean

Broad bean varieties require a long, cool finish, hence yields were not as good as they could have been because of the quick finish to the season in their production area.

### Faba bean

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2011 Production (t)	3,500	95,000	99,000	5,000	199,000	3,250	62,350	65,600	<b>268,100</b>
2011 Sown area (ha)	2,500	55,000	49,000	2,300	106,300	2,000	40,500	42,500	<b>151,300</b>
Dec 2011 variation (t)	0	0	26,000	0	26,000	250	<b>-5,950</b>	<b>-5,700</b>	20,300

### Broad bean

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2011 Production (t)	-	35,000	7,000	-	42,000	-	-	-	<b>42,000</b>
2011 Sown area (ha)	-	17,000	6,000	-	23,000	-	-	-	<b>23,000</b>
Dec 2011 variation (t)		<b>-6,000</b>	0		<b>-6,000</b>				<b>-6,000</b>

# Lupin

## Western Australia

Australian Sweet Lupin production was exceptional in 2011, with yields of 3 to 4 t/ha in many northern regions. Predicting lupin yields was a difficult task and the final yields surprised everyone. The total tonnage for WA has risen enormously since the last report. Paddock averages of over 2 t/ha were recorded in central and southern crops.

Losses to shedding were again a problem as growers postponed lupin harvest in favour of higher value cereals and canola. Quality was good despite the frequent rain during harvest. Some concern is held for the germination percentage of seed lupins. Poor germination percentages were seen in previous years with frequent wetting and drying of the grain after maturity.

Australian Albus Lupin production was the highest for many year in the Geraldton region, based on a resurgence of interest in the variety Andromeda.

Anthrachnose curtailed yields by up to 30%, which was acceptable given the high level of infection. Growers won't be rushing back to albus production without a robust fungicide package to combat anthracnose. The availability of the new variety WALAB 2014 in 2013 will be important in re-establishing the albus industry in Western Australia.

## South Australia, Victoria & Southern New South Wales

Lupins have performed well thanks to early sowing into good soil moisture which helped set up early yield potential in the majority of the lupin areas. Mild spring temperatures suited lupins and extended their flowering period. However, the overall growing season rainfall resulted in less biomass and lower yields compared to the previous wet and high yielding season. Marketing and low prices have again been an issue.

The Albus lupin area fell sharply in Southern and Central New South Wales this year due to large carryover stocks from the previous record crop and lower price indications. This trend may continue if lupin remains in grower storages. However, local livestock feeders are beginning to use them and there have been some export sales.

### Australian Sweet Lupin (*Angustifolius*)

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2011 Production (t)	678,000	82,000	34,000	46,000	162,000	-	400	400	<b>840,400</b>
2011 Sown area (ha)	333,000	65,000	23,000	30,000	118,000	-	350	350	<b>451,350</b>
Dec 2011 variation (t)	173,000	-2,000	4,000	4,000	6,000		0	0	179,000

### Australian Albus Lupin (*Albus*)

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2011 Production (t)	1,400	-	300	35,000	35,300	-	23,450	23,450	<b>60,150</b>
2011 Sown area (ha)	700	-	200	23,000	23,200	-	14,500	14,500	<b>38,400</b>
Dec 2011 variation (t)	200		0	2,000	2,000		7,450	7,450	9,650

# Lentil

## South Australia and Victoria

The lentil crop has performed far better than average for both yield and quality. Less disease and adequate soil moisture set the crop up well. However, frosts, particularly in parts of Victoria, did have an adverse impact on yield. In other areas not frosted, yields were exceptional.

The rain in late November had some minor effect on the harvestable yield and quality of crops not harvested, or in those areas with a longer growing season.

Ascochyta was reported early in some crops, but this was largely controlled by strategic disease management, aided by the drier season. However, susceptible varieties have been affected by ascochyta staining of seed, despite

good management and the dry spring. This could affect use of those varieties next season.

There is some natural paling of the seed coat colour of some lentil samples. Seed quality of these paler types is however good, being free of physical seed coat blemishes or green kernel.

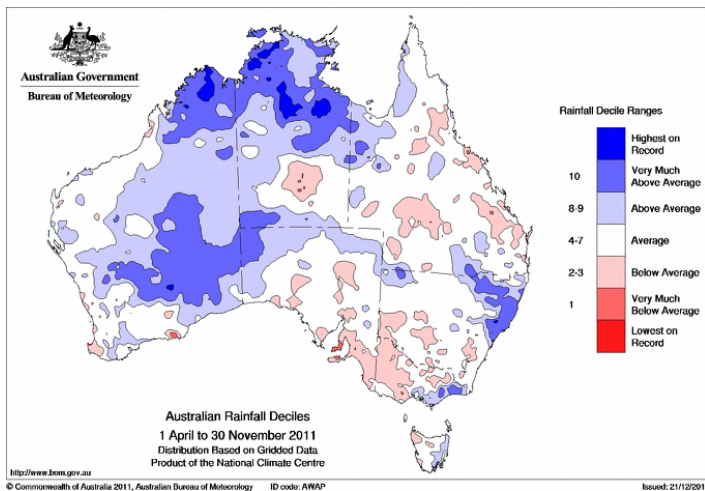
Lentils grown in the more traditional areas have performed well this season. New varieties and improved production techniques are helping to ensure reliable and profitable lentil production. For the same reasons, lentils have also performed extremely well in newer, often lower rainfall production areas.

Because of poor prices and some uncertainties at harvest, there is considerable lentil stored on farm or warehoused. The stock of unsold lentil grain from 2010, of mostly inferior quality, is also creating pricing uncertainty.

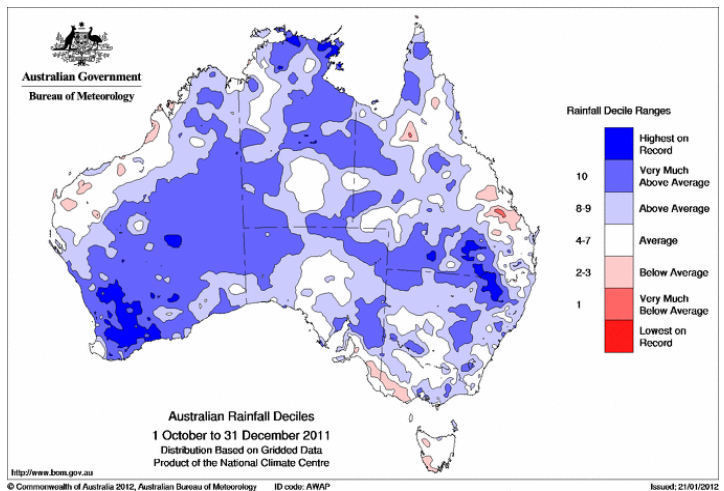
## Red & green lentil

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2011 Production (t)	-	162,000	125,000	1,000	288,000	-	-	-	<b>288,000</b>
2011 Sown area (ha)	-	95,000	77,000	800	172,800	-	-	-	<b>172,800</b>
Dec 2011 variation (t)		10,000	27,000	-100	36,900				36,900

## Australian weather 2011– rainfall

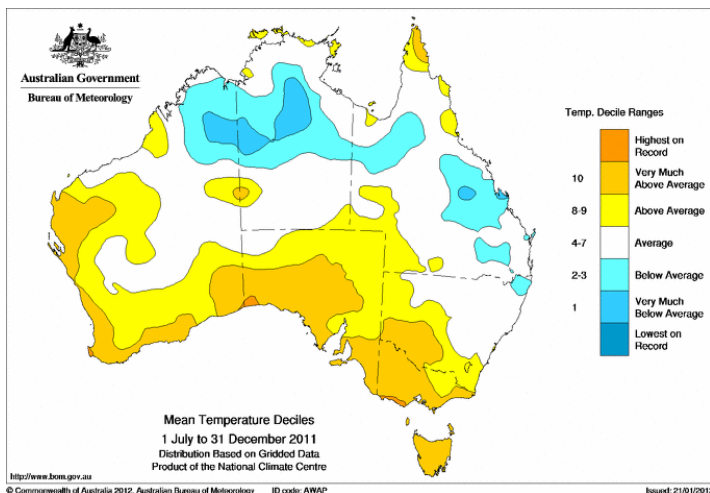


Total rainfall for the winter 'growing' season in southern Australia varied from average (decile 5) in Western Australia, to below average (decile 3) in South Australia and Victoria to above average in northern New South Wales. The Esperance region in Western Australia and the Yorke Peninsular in South Australia were very dry exceptions.



Spring rainfall was plentiful in all areas and well above average. In South Australia and Victoria, this turned a barely average season into a very good one. In Western Australia, the rain turned an exceptional season into a wet harvest with grain quality downgrades. In northern New South Wales and Queensland, some crops didn't get harvested due to flooding and waterlogging.

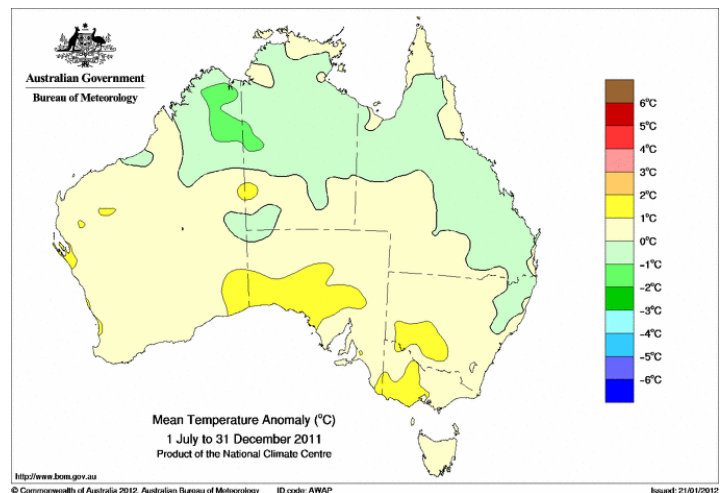
## Australian weather 2011– temperature



Plant growth in most regions was quicker than normal during winter due to above average temperatures. South Australia and Victoria were decile 10, while the western half of Western Australia was also decile 10 with the eastern regions at decile 8-9.

The warmth advanced crop growth several weeks ahead of schedule. This caused some benefit and some problems. Weed and pest control was compromised to some degree as growers needed to accelerate their crop husbandry to keep up.

Yields improved as crops matured earlier with extra soil moisture and a reduction in damaging frost for most regions.



The mean temperature anomaly map shows that temperatures were up to 1°C higher than normal across most of southern Australia.

Western parts of South Australia, western Victoria and south western New South Wales were almost 2°C higher than normal.

Queensland and northern New South Wales by contrast, were up to 1°C cooler than normal

## 5 year area and production averages

Australian Pulse Production	Average 2006/07-2010/11		2011/12 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
Lupin	485,380	451,395	489,750	900,550
Field Pea	298,970	293,679	243,500	303,890
Chickpea	355,460	363,126	283,300	485,300
Lentil	129,700	131,600	172,800	288,000
Bean	148,540	200,932	174,300	310,100
<b>Total</b>	<b>1,418,050</b>	<b>1,440,733</b>	<b>1,363,650</b>	<b>2,287,840</b>

Pulse Production by State	Average 2006/07-2010/11		2011/12 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	369,370	387,993	307,850	486,890
Victoria	216,060	189,360	228,200	390,300
Queensland	95,400	100,674	74,500	142,050
South Australia	345,240	421,020	351,000	538,500
Western Australia	391,980	341,686	402,100	730,100
<b>Total</b>	<b>1,418,050</b>	<b>1,440,733</b>	<b>1,363,650</b>	<b>2,287,840</b>


Chickpea	Average 2006/07-2010/11		2011/12 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	223,400	230,142	155,900	251,800
Victoria	25,500	22,100	35,000	65,000
Queensland	94,200	98,874	72,500	138,800
South Australia	9,440	10,270	9,000	14,500
Western Australia	2,920	1,740	10,900	15,200
<b>Total</b>	<b>355,460</b>	<b>363,126</b>	<b>283,300</b>	<b>485,300</b>

Field Pea	Average 2006/07-2010/11		2011/12 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	48,950	34,919	40,500	61,890
Victoria	61,600	52,720	38,000	60,000
Queensland	-	-	-	-
South Australia	128,800	151,960	110,000	150,000
Western Australia	59,620	54,080	55,000	32,000
<b>Total</b>	<b>298,970</b>	<b>293,679</b>	<b>243,500</b>	<b>303,890</b>

Faba/Broad Bean	Average 2006/07-2010/11		2011/12 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	31,080	51,462	42,800	67,350
Victoria	35,860	37,640	55,000	106,000
Queensland	1,200	1,800	2,000	3,250
South Australia	77,800	107,080	72,000	130,000
Western Australia	2,600	2,950	2,500	3,500
<b>Total</b>	<b>148,540</b>	<b>200,932</b>	<b>174,300</b>	<b>310,100</b>

Lupin	Average 2006/07-2010/11		2011/12 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	65,400	71,289	67,850	104,850
Victoria	28,300	24,640	23,200	34,300
South Australia	65,000	72,600	65,000	82,000
Western Australia	326,680	282,866	333,700	679,400
<b>Total</b>	<b>485,380</b>	<b>451,395</b>	<b>489,750</b>	<b>900,550</b>

Lentil	Average 2006/07-2010/11		2011/12 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	540	180	800	1,000
Victoria	64,800	52,260	77,000	125,000
South Australia	64,200	79,110	95,000	162,000
Western Australia	160	50	0	0
<b>Total</b>	<b>129,700</b>	<b>131,600</b>	<b>172,800</b>	<b>288,000</b>

 <b>Contact details</b>  <b>CEO</b> Tim Edgecombe Pulse Australia Ltd 299 Moray St South Melbourne Vic 3205 Phone: 03 9004 0520 0425 717 133 <a href="mailto:t.edgecombe@pulseaus.com.au">t.edgecombe@pulseaus.com.au</a>	<b>Industry Development Managers</b>		<b>Disclaimer</b> The information herein has been obtained from sources considered reliable but its accuracy and completeness cannot be guaranteed. No liability or responsibility is accepted for any errors or for any negligence, omissions in the contents, default or lack of care for any loss or damage whatsoever that may arise from actions based on any material contained in this publication. Readers who act on this information do so at their own risk. Consult your adviser before making crop, marketing or investment decisions.
	South/Central Wayne Hawthorne 0429 647 455 <a href="mailto:pulse.wayne@bigpond.com">pulse.wayne@bigpond.com</a>	Queensland/Northern NSW Gordon Cumming 0408 923 474 <a href="mailto:pulse.gordon@bigpond.com">pulse.gordon@bigpond.com</a>	
	South/East Trevor Bray 0428 606 886 <a href="mailto:pulse.trevor@bigpond.com">pulse.trevor@bigpond.com</a>	Western Australia Alan Meldrum 0427 384 760 <a href="mailto:pulse.alan@bigpond.com">pulse.alan@bigpond.com</a>	

**Acknowledgments:** Pulse Australia would like to acknowledge the assistance of Domestic and Export Marketers, consultants and commercial agronomists, Rural Solutions SA, NSW DPI, DPI Victoria, Department of Agriculture & Food WA and Queensland Government- DEEDI in providing information for this publication.

Copyright© 2012 Pulse Australia. All rights reserved.  
 This information is provided for the private use of subscribers and may not be republished in part or in full, in any form whatsoever, without the prior written consent of Pulse Australia Limited.