Australian Pulse Crop Forecast

July 21st 2016

Next Forecast: Sept 13

Seasonal conditions across Australia are almost perfect for pulses. Combined with a very large planted area across all pulses, but a record area for Chickpea, the forecast production tonnage is very high. To achieve this, growers need to manage the high risk of disease, and spring weather has to provide timely rain and mild temperatures.

Western Australia

The seasonal conditions continue to set Western Australia up for record breaking production in all but a few districts in the WA grainbelt. The general consensus is that with the current soil moisture levels across the grainbelt, and average rainfall for the rest of the season, a record crop can be expected for Western Australia.

Soils moisture levels across all port zones are high. In the Lakes region, soils are close to being waterlogged, while in the lower Albany zone and along the south coast to Esperance waterlogging is causing delays to weed and disease management along with reduced crop growth. To balance this, crops on well-drained soil types have very high yield potential. Fortunately the below average rainfall received in the Kwinana and Albany zones in June was beneficial to prospects for crops in these zones. The northern districts in the Geraldton Zone, started dry to mid-May but have received significant rainfall events in late May and June.

South Australia & Victoria

Lentil production dominates the southern region in the same fashion as chickpea dominates the northern region. And the 2016 season is shaping up very favourably for pulse crops as they are looking excellent and thriving across Victoria and South Australia. The 'weather gods' continue to align for the southern region grain growers following a near perfect start to the planting season for May and June after the very dry summer period up to April.

Ninety-nine percent of the southern pulse crops were sown by the third week of June and the majority of bean crops had been planted by the second week of May.

Growing conditions are pretty much ideal for both states; crops are advanced, vigorously growing, healthy and clean.

Queensland & northern New South Wales

The 2016 autumn and winter season for the northern New South Wales and Queensland broadacre cropping areas has been like chalk and cheese, until this point of mid-July. In northern NSW, growers recorded good autumn rainfall to build the moisture profile, including those in the very dry western NSW regions. However on the Queensland side of the border, summer and autumn rains were small and sporadic, leaving some large paddocks with variable moisture levels and plenty of run off.

With unseasonally warm temperatures continuing into June, winter crop plantings in the northern region have responded well with good plant populations established in most winter crops. The biggest point of note in these northern regions is the spread of planting dates. Starting from early April in Central Queensland with deep sown chickpeas and still continuing with chickpeas in mid-July throughout the region.

Southern New South Wales

Consistent rain events across southern New South Wales have ensured a full soil moisture profile going into spring. Crops were planted on time, with some dry sown, but received good rain whilst soil temperatures were still high, and have established well. Weather conditions in June and July have been wet and cold, but crops are still progressing well.

There will be an increased disease risk for all the pulse crops when temperatures start to increase in August and September.

Estimated Pulse Production in Australia for 2016 (tonnes)

State	Chickpea		Beans		Field Pea	Lentil	Lupin		Total 2016 (t)	% of 2015 (t)
	Desi	Kabuli	Faba	Broad	Dun	Red & Green	Sweet Lupin	Albus Lupin		
New South Wales	766,000	42,300	132,600	-	77,200	8,400	38,900	38,500	**1,103,900**	**154%**
Queensland	933,000	-	1,900	-	-	-	-	-	**934,900**	**168%**
South Australia	3,400	15,400	163,300	14,400	120,400	261,700	87,800	1,200	**667,600**	**135%**
Victoria	10,400	8,400	185,500	3,500	49,500	145,000	43,600	1,300	**447,200**	**258%**
Western Australia	7,300	2,200	12,000	-	49,100	1,100	700,200	17,700	**789,600**	**163%**
Total	**1,720,100**	**68,300**	**495,300**	**17,900**	**296,200**	**416,200**	**870,500**	**58,700**	**3,943,200**	**163%**
% of 2015 (t)	**177%**	**158%**	**155%**	**73%**	**145%**	**161%**	**157%**	**113%**	**163%**	

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Estimated Pulse Area in Australia for 2016 (hectares)

State	Chickpea		Beans		Field Pea	Lentil	Lupin		Total 2016 (ha)	% of 2015 (ha)
	Desi	Kabuli	Faba	Broad	Dun	Red & Green	Sweet Lupin	Albus Lupin		
New South Wales	491,000	30,800	57,000	-	48,100	5,600	27,000	24,700	**684,200**	**151%**
Queensland	570,000	-	1,200	-	-	-	-	-	**571,200**	**168%**
South Australia	2,800	14,200	108,000	8,000	104,000	142,700	68,000	1,500	**449,200**	**99%**
Victoria	6,400	9,100	117,000	2,200	49,000	105,900	32,000	1,000	**322,600**	**98%**
Western Australia	3,400	900	5,000	-	31,000	800	358,000	7,500	**406,600**	**115%**
Total	**1,073,600**	**55,000**	**288,200**	**10,200**	**232,100**	**255,000**	**485,000**	**34,700**	**2,433,800**	**126%**
% of 2015 (ha)	**175%**	**117%**	**102%**	**42%**	**97%**	**110%**	**109%**	**78%**	**126%**	

Chickpea

Desi Chickpea

Region	Western	Southern				Northern			Australia Total
State	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2016 Production (t)	7,300	3,400	10,400	74,000	87,800	933,000	692,000	1,625,000	**1,720,100**
2016 Sown area (ha)	3,400	2,800	6,400	46,000	55,200	570,000	445,000	1,015,000	**1,073,600**
Var from June 2016 (ha)	0	0	**300**	0	**300**	**285,000**	**210,000**	**495,000**	**495,300**

Kabuli Chickpea

Region	Western	Southern				Northern			Australia Total
State	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2016 Production (t)	2,200	15,400	8,400	3,500	27,300		38,800	38,800	**68,300**
2016 Sown area (ha)	900	14,200	9,100	2,800	26,100		28,000	28,000	**55,000**
Var from June 2016 (ha)	0	0	0	0	0		**5,000**	**5,000**	**5,000**

Queensland & northern New South Wales

As mentioned in the last crop report, the normal winter planting times for all crops has been thrown out the window. With chickpea prices at an all time high, the Pulse Australia phone has being running hot with growers and advisors seeking information and advice on late sowing of chickpeas in the region.

As this publication goes to press there are still some chickpeas being planted through the region to establish Australia's biggest desi chickpea crop ever. This large increase over the June forecast is influenced by several factors, including:

- Soil moisture was variable and was restricting opportunities to plant chickpea in May and early June. Rainfall in the last month has reversed that problem and enabled planting to proceed. Unseasonably heavy rain over much of CQ, 100 to 150 mm on the wet weekend of 16th and 17th July, may reduce the area while around Walgett some chickpea paddocks have been flooded for several weeks. In contrast for the Darling Downs, this heavy black soil region has only received light falls in the last three to four months, with reduced yield potential for chickpeas as a consequence. South of Narrabri and Rowena west, there are reports of fairly wet conditions which is not exactly the best conditions for chickpeas.
- The firm chickpea price and the continuing slide of cereal prices made chickpea, even planted into July, a viable option.

South Australia & Victoria

As always, chickpea has been the last pulse crop to be planted across southern Australia, with the last crop being sown by some decade long chickpea growers around the Laen North via Donald area of Victoria. With a positive rainfall outlook for the southern states, mid to late July sown chickpea crops could be prosperous.

Main varieties planted include PBA Slasher, PBA Striker, Almaz and Genesis 090. There are also areas that have focused on PBA Maiden and PBA Monarch. Managing ascochyta blight throughout the remainder of the growing season is a large obstacle for chickpea growers.

New South Wales

Increased area of chickpea in many regions (Forbes, MIA, Cowra) mostly on well drained paddocks, with the crop stage at 2-3 nodes.

Western Australia

While the area of chickpea in WA remains similar to 2015 due to a seed shortage, conditions and plant health are excellent and yield potential is high. All crops are well established with a low weed burden. PBA Striker, Neelam and Genesis836 are the main varieties grown.

Indicators of pricing for the 2017 harvest will be critical in determining if the area increases. Grower enthusiasm is high and the area is likely to at least double, provided the price outlook remains around moderate levels.

Faba/Broad bean

Faba bean

Region	Western	Southern				Northern			Australia Total
State	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2016 Production (t)	12,000	163,300	185,500	47,000	395,800	1,900	85,600	87,500	**495,300**
2016 Sown area (ha)	5,000	108,000	117,000	24,000	249,000	1,200	33,000	34,200	**288,200**
Var from June 2016 (ha)	**300**	0	0	0	0	0	0	0	**300**

Broad bean

Region	Western	Southern				Northern			Australia Total
State	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2016 Production (t)		14,400	3,500		17,900				**17,900**
2016 Sown area (ha)		8,000	2,200		10,200				**10,200**
Var from June 2016 (ha)		0	0		0				0

South Australia & Victoria

Ninety nine percent of faba bean crops in South Australia and Victoria were sown by mid-May. Growing conditions are near perfect with regular moisture, mild day and overnight temperatures, which sees crops fairly advanced with plant height ranging between 25cm and 40cm. The biggest challenges for growers during August and September will be protecting the crops from disease, both foliar and on the flower.

Expanding off a low base is the south west region of Victoria for faba bean plantings, while the area planted across the Wimmera and SA mid north remains similar to 2015. There has been drop of faba bean planting in the Mallee regions of both states in favour of lentils due to the declining faba bean price.

Broadbean

Kangaroo Island is reported to have over 1,000 hectares of broad beans planted for this season, while the South East of SA and South West of Victoria are the key areas. Except for the South East of SA, a large percentage of growers who have grown broad beans have switched back to the larger faba bean varieties, PBA Rana and PBA Zahra.

Western Australia

Early April planting is providing faba bean in WA with excellent yield potential. Soil moisture is high in the Albany and Esperance regions.

New South Wales

The area has increased in many districts. Crops may be affected a little by higher rainfall and will need to be checked for disease when conditions warm up. Crop stage is around 6-8 node.

Queensland & northern New South Wales

Faba beans in the region are average to reasonable. Some dry conditions post planting in April and early May have not helped the strike and some mystery ailments are being investigated.

Lentil

Region	Western	Southern				Northern			Australia Total
State	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2016 Production (t)	1,100	261,700	145,000	8,400	416,200				**416,200**
2016 Sown area (ha)	800	142,700	105,900	5,600	255,000				**255,000**
Var from June 2016 (ha)	**800**	**2,200**	**4,900**	0	**7,900**				**7,900**

South Australia & Victoria

Lentil crops are wearing the 'yellow jersey' and leading the planting area peloton for the 2016 season. All lentil production regions across southeast Australia have expanded, some off a lower base than others, eg The Eyre Peninsula, SA Mallee, VIC Mallee, Central and North East regions. PBA HurricaneXT has been the variety of choice for first time growers especially in the areas considered more marginal for pulse growing (low to medium rainfall with tight finishes).

Growers on the Eyre Peninsula are hedging their bets in terms of yield potential by planting both the small seed, herbicide tolerate PBA HurricaneXT and large seeded PBA Jumbo 2. A significant amount of the Murray river regions of SA (lower, northern and southern) have planted both PBA HurricaneXT and PBA Bolt.

There are many first time production paddocks of lentil sown around the central and north east regions Victorian regions near Shepparton, Echuca, Colbinabbin and Yarrawonga.

From Mildura to Hopetown, Berriwillock to Swan Hill and over to the border are almost exclusively growing PBA HurricaneXT, with a small area of PBA Bolt and PBA Jumbo2. The south west has only a few lentil crops planted, mainly first time growers, in Streatham, Darlington and Tatyoon.

The biggest challenge for the Yorke Peninsula growers who are sowing lentils in very tight rotations will be managing disease, especially as crops have an advanced growth stage given the favourable growing conditions.

New South Wales

Large increase in area in the SW and Central areas, mostly in western districts which have not had waterlogging problems so far. Crop stage is at 2-3 node.

Lupin

Australian Sweet Lupin (Angustifolius)

Region	Western	Southern				Northern			Australia Total
State	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2016 Production (t)	700,200	87,800	43,600	24,500	155,900		14,350	14,350	**870,450**
2016 Sown area (ha)	358,000	68,000	32,000	16,000	116,000		11,000	11,000	**485,000**
Var from June 2016 (ha)	**5,000**	0	0	0	0		-2,000	-2,000	**3,000**

Australian Albus Lupin (Albus)

Region	Western	Southern				Northern			Australia Total
State	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2016 Production (t)	17,700	1,200	1,300	24,300	26,800		14,150	14,150	**58,650**
2016 Sown area (ha)	7,500	1,500	1,000	13,500	16,000		11,200	11,200	**34,700**
Var from June 2016 (ha)	0	0	0	0	0		-8,000	-8,000	-8,000

Western Australia

Australian Sweet lupin growth is well advanced across all port zones in WA. The late March and April rains enabled very early planting in all regions with excellent establishment, especially on the more difficult soil types, eg deep sands, where water repellency often causes establishment issues.

In the Geraldton zone, most crops are early to full flower with a few crops already setting pods. Soil moisture is at excellent levels, indicating that yield potential is high with a full two months of the growing season to come. Disease and pest levels are minimal.

In the Kwinana, Albany and Esperance port zones, lupins are less developed due to the colder climate, however growth is still ahead of the 'normal' stage for July.

In the most southern districts, waterlogging is causing delays to weed control and in some cases reduced growth and yield potential. However, the area of lupin impacted by waterlogging is low and this is unlikely to have an undue influence on the final tonnage produced.

Mandelup, PBA Barlock, Coromup and Jenabillup are the main varieties grown this year. PBA Jurien is being bulked up in many districts and it is likely to become the dominant variety grown across WA by 2018.

Albus lupins are principally grown in the northern Geraldton port zone. The area is similar to 2015 and unlikely to change in coming years without a significant jump in the market price. Yield potential for 2016 is excellent.

Southern New South Wales

The lupin area of both Australian Sweet and Albus lupins is around the 2015 levels with no problems so far with weeds, disease or pests. Crop stage is 6-8 node.

South Australia & Victoria

The area sown to Lupin is under pressure from field pea and vetch hay. The sandier, less alkaline soils is the main lupin production soil type. The biggest challenge with narrow leaf lupin crop moving into the wetter months of August and September is dealing with the disease sclerotinia and any of the root rots.

Yield potential for all lupin crops is average to above average.

Field pea

Region	Western	Southern				Northern			Australia Total
State	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2016 Production (t)	49,100	120,400	49,500	60,500	230,400		16,700	16,700	**296,200**
2016 Sown area (ha)	31,000	104,000	49,000	40,000	193,000		8,100	8,100	**232,100**
Var from June 2016 (ha)	0	0	0	0	0		0	0	0

Western Australia

Conditions across WA are excellent for field pea in 2016, with only a few districts suffering waterlogging, mainly along the south coast. To date all crops are clean of disease and weeds. However, black spot remains a threat especially where field pea was planted earlier than late May. Yield potential is looking to be excellent. The vast majority of field pea is 'kaspa type' duns with PBA Gunyah and PBA Wharton the main varieties.

New South Wales

Most field pea crops are used mostly for green/brown manuring for weed control/soil conditioning. Some will be used as double break for weeds (canola-peas-wheat). Crop stage is at 2-4 node.

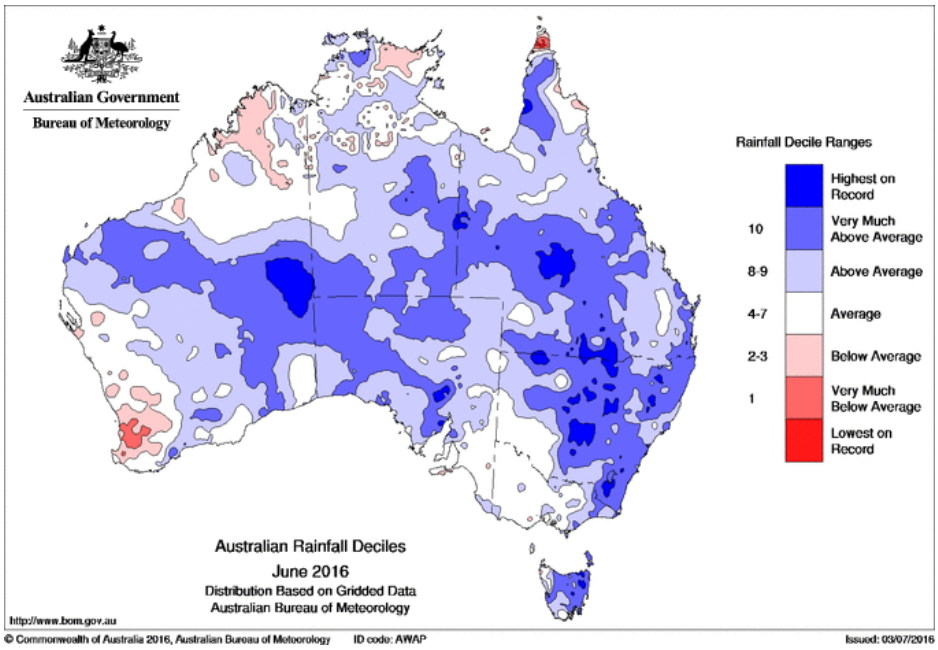
South Australia & Victoria

The area planted to field pea has been served a Wimbledon ace from lentils and vetch hay for the 2016 season. Prices and the potential profit of other pulse crops over field pea has seen the area sown to field pea under pressure.

The 'Kaspa' type dun field pea is the most common type planted. As the interest in white field pea continues, there are pockets of concentrated production areas on the mid to upper north regions of South Australia where white field pea may provide the best fit.

Crop conditions are perhaps too good for field pea, with some blackspot disease identified in the north east region of Victoria.

Australian Weather - June 2016 rainfall



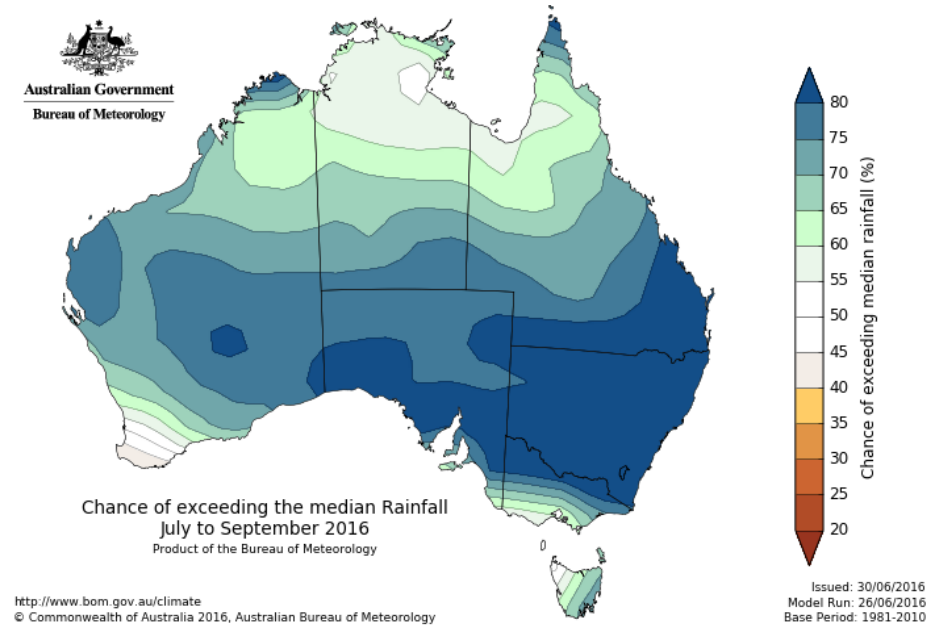
June 2016 Rainfall deciles

The June rainfall decile ranking shows well above average rainfall was recorded in Queensland and New South Wales, the Eyre Peninsula of South Australia and the south coast of Western Australia.

June rainfall was average in Victoria and south east South Australia.

While rainfall was below average for the central parts of Western Australia, autumn rainfall in Western Australia was widespread and above average for the period, leading to very high levels of stored soil water.

The rainfall outlook for July is poor for Western Australia but above average in most regions of eastern Australia.



Rainfall outlook to September

July to September rainfall is likely to be above average across most of Australia. However, southwest WA and western Tasmania have roughly equal chances of a wetter or drier three months.

July is likely to be wetter for most of Australia, except southwest WA.

Historical outlook accuracy for July to September is moderate over most of Australia, but low in parts of the tropical north, near the WA border and central SA.

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