

South Australia, Victoria & Southern New South Wales

Pulse crops yields in South Australia, Victoria and southern New South Wales were affected by a very dry September and October, aided only by some slight reprieve of mild temperatures and modest rains that fell in mid-October.

Rainfall for the 3 months August to October was less than decile 3 in the major pulse producing areas in south-eastern Australia. Similarly, growing season rainfall for the 6 months May to October was decile 3 or less in all parts of the southern region with the exception of southern Victoria (decile 5). Moisture in soil profiles through spring was very low in most cases.

The relatively slow dry down of crops last spring helped yields, and quality. Hot winds can increase shattering and pod loss, hence harvestable yields, and there were several of these events during harvest.

Despite the dry spring, crop yields were quite respectable in the major pulse production areas of Yorke Peninsula, Lower to Mid North, Lower Eyre Peninsula, the SE of South Australia, south-eastern New South Wales, and the Wimmera in Victoria. Areas such as the Upper Eyre Peninsula, the Upper North and Mallee areas of South Australia, Victoria and south-western New South Wales were more affected by low soil moisture and minimal spring rainfall and yields were below average.

Queensland & Northern New South Wales

There has been only minor changes in final production figures for the various crops in the northern region from the November report and this one.

This is as expected given that the bulk of the northern harvest 70 to 90% had occurred by the time that the November report was compiled.

The primary differences is a reduction in the total Desi chickpea reduction of 5%.

Western Australia

Harvest conditions in Western Australia were damp in southern regions which did cause some quality defects in cereals. Generally pulses were unaffected as they had been harvested before most of the wet weather arrived.

The Geraldton port zone received rain in mid to late November after most lupin crops had been harvested. In the Kwinana zone field peas were off before rain arrived. The area of lupin was small and the rain had little effect on yield or quality.

The Albany zone received extensive harvest rain in late November and into December. This disrupted harvest but again, pulses were mostly harvested early and received little damage.

The Esperance port zone had an above average winter followed by a dry spring which reduced yield potential to average. The harvest rain in November was normal for the region and little damage was noted in all crops.

Final Estimated Pulse Production in Australia for 2012 (tonnes)

State	Chickpea		Beans		Field Pea	Lentil	Lupin		Total	% of 2011
	Desi	Kabuli	Faba	Broad	Dun	Red & Green	Sweet Lupin	Albus Lupin		
New South Wales	310,800	15,700	123,400	-	65,700	500	30,200	33,000	579,300	119%
Victoria	11,200	41,000	112,000	14,300	65,000	80,000	26,100	200	349,800	90%
Queensland	307,200	2,000	-	-	-	-	-	-	309,200	218%
South Australia	2,500	19,000	88,600	33,000	130,000	103,000	74,000	-	450,100	84%
Western Australia	3,700	300	5,900	-	59,000	-	294,400	800	364,100	50%
Total 2012 (t)	635,400	78,000	329,900	47,300	319,700	183,500	424,700	34,000	2,052,500	90%
% of 2011	158%	95%	123%	113%	105%	64%	51%	56%	90%	
Total 2011 (t)	403,000	82,400	268,200	42,000	303,900	288,000	840,400	60,200	2,288,100	

Major projects funded by

Chickpea

Queensland and Northern New South Wales

Queensland's final estimate of 307,200 tonnes is an increase of 1.5% over the December estimate. This increase is in the central Queensland region where final yields were slightly higher than expected due to a cooler finish to the season providing and extra week of pod fill.

The northern New South Wales final estimate of 296,000 tonnes is a decrease of 11% compared to the December estimate.

This decrease is primarily attributed to early high temperatures reducing the pod fill window by 5 to 10 days depending on the area. The most significant area for desi chickpea production is the north western region of northern New South Wales where the estimate has been reduced by 27,000 tonnes (13%) due to the early seasonal finish.

Western Australia

Chickpea production was low in 2012. The late break to the season meant the sowing window never opened for chickpea. With mostly a dry soil profile, the production risk was too high and most growers favoured cereals to chickpea.

South Australia, Victoria & Southern New South Wales

Key southern production areas of the Wimmera in Victoria and Yorke Peninsula and Mid North in South Australia would have benefited from more spring rainfall as pod set was good. Chickpea in the traditional drier areas like the Victorian Mallee recorded good yields.

PBA Slasher is the new desi chickpea variety in the south, and it will be marketed in commercial quantities this year for the first time. Yields and seed size of the larger seeded Kabulis suffered with the dry conditions that prevailed.

The Desi and kabuli chickpea outlook for 2012/13 was relatively positive and could lead to an increased 2013/14 area. Desi will still be minor compared with the small kabuli in South Australia and Victoria due to price premiums for kabulis.

Desi Chickpea

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2012 Production (t)	3,700	2,500	11,200	14,500	28,200	307,200	296,300	603,500	635,400
2012 Sown area (ha)	5,500	2,300	10,000	12,000	24,300	207,000	255,000	462,000	491,800
Dec 2012 variation (t)	0	0	0	0	0	4,500	-36,800	-32,300	-32,300

Kabuli Chickpea

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2012 Production (t)	300	19,000	41,000	2,200	62,200	2,000	13,500	15,500	78,000
2012 Sown area (ha)	500	18,000	39,000	2,000	59,000	1,000	11,300	12,300	71,800
Dec 2012 variation (t)	0	0	0	0	0	0	-300	-300	-300

Field pea

South Australia and Victoria

Field pea crops withstood the dry spring conditions very well, and benefitted from low disease levels. Frost was not generally an issue, but did affect yield and quality in some areas. Late bacterial blight affected some field pea areas as well. Availability of early maturing varieties has assisted field pea growers to attain profitable yields in drier conditions. Field peas delivered close to average yields in most areas.

Movement towards brown manuring to address issues like weed herbicide resistance and low protein wheat has occurred in some south and eastern areas in New South Wales. This makes it more difficult to predict how much grain will be harvested. The final outcome of grain or hay is often determined by seasonal conditions and fodder versus grain prices at the time.

Western Australia

Field pea fared somewhat better with the majority of the crop in the Esperance Port zone. With at least average seasonal conditions, yields were about average and grain quality was very good. Field peas in the west Kwinana zone were well grown but suffered for the dry winter to produce below average yields. Grain quality was acceptable to good.

Field Pea

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2012 Production (t)	59,000	130,000	65,000	54,900	249,900		10,780	10,780	319,680
2012 Sown area (ha)	62,000	113,500	52,000	46,000	211,500		7,000	7,000	280,500
Dec 2012 variation (t)	-1,000	-16,000	0	0	-16,000		0	0	-17,000

Faba/Broad bean

Faba bean

South Australia, Victoria and southern New South Wales

Faba bean crops showed good condition across South Australia, Victoria and southern NSW, with good pod set and few reports of disease. Faba beans tend to be grown in the better rainfall districts, but dried down earlier than normal in the dry spring. It affected grain quality as well as yield. Frost has had minimal impact, but the quick finish caused some wrinkling or seed discolouration.

Broad beans also showed good potential, despite the drier conditions, with little disease pressure. There was just sufficient rainfall in production areas to date, but seed size was not as large as achieved in better seasons.

Northern New South Wales

Faba bean yield estimates have been very difficult to pin down all season long.

They started out high, given that the crop was planted

during the optimum window with good soil moisture and follow up rains.

Then as we moved through August/September with no rain yields estimates were being significantly reduced amongst concerns that the crop would run out of stored soil moisture to fill the grain.

The final estimate of 113,000 tonnes is an 8% increase over November's estimate and is only 10,000 tonnes short of the initial July forecast of 123,000 tonnes.

Demonstrating the robustness of this crop when it is planted on time with excellent starting moisture.

Time and again we see the importance of April planting for Faba beans in northern NSW, if they are planted during early April with a full soil moisture profile at planting or soon after, then we can expect solid yields of approx. 2.0 t/ha. If they are planted into marginal moisture or later than the last week of April, then the yield potential is greatly reduced to the point that it is often recommended that they are not planted under these conditions as it is highly unlikely that the crop will be profitable for the grower.

Faba bean

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2012 Production (t)	5,900	88,600	112,000	10,300	210,900		113,100	113,100	329,900
2012 Sown area (ha)	3,500	61,000	60,000	4,300	125,300		50,100	50,100	178,900
Dec 2012 variation (t)	0	0	0	-400	-400		8,400	8,400	8,000

Broad bean

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2012 Production (t)		33,000	14,300		47,300				47,300
2012 Sown area (ha)		17,000	7,000		24,000				24,000
Dec 2012 variation (t)		0	0		0				0

Lupin

Western Australia

Well established lupin crops were able to attain slightly below average yields in the Geraldton Port zone and into the west Kwinana zone. However, well established lupin crops were in the minority. With most lupins dry sown, the light rainfall prior to the main break to the season in June caused partial germinations and plant thinning. The late break reduced the yield potential significantly. Additionally, the sown area was lower than recent years with low profitability the chief reason. 2012 was not a good year for lupins.

South Australia, Victoria & Southern New South Wales

Lupins have responded well to the warmer growing conditions during spring, with pod set being quite reasonable. Yield expectations are respectable despite the dry spring.

Lupin area in southern Australia is less than in the last two years because of consistently poor grain price, stocks on hand and imported soybean meal prices being low. Pricing has now improved based on current and anticipated imported soybean meal prices. This will help encourage a greater area in 2013.

Australian Sweet Lupin (*Angustifolius*)

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2012 Production (t)	294,400	74,000	26,100	28,300	128,400		1,900	1,900	424,700
2012 Sown area (ha)	302,000	60,500	29,000	26,500	116,000		1,500	1,500	419,500
Dec 2012 variation (t)	0	-4,000	0	0	-4,000		0	0	-4,000

Australian Albus Lupin (*Albus*)

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2012 Production (t)	800		200	18,700	18,900		14,300	14,300	34,000
2012 Sown area (ha)	800		200	17,500	17,700		12,200	12,200	30,700
Dec 2012 variation (t)	0		0	0	0		-1,600	-1,600	-1,600

Lentil

South Australia and Victoria

Lentils performed very well in the main production areas despite drier conditions. Hot winds followed by minor rain caused some yield loss in early November. Frost had an impact in the some districts as well. Strong and hot winds caused some shattering and pod loss in some areas. Production tonnage was still quite reasonable as yields in key production areas of the Wimmera in Victoria and Yorke Peninsula in South Australia were average despite the drier conditions.

Lentils matured quicker than normal, depending on the variety, and were at risk from strong, hot winds or rain on mature or desiccated crops. Harvest was all over by early December.

Lentils in lower rainfall areas have done quite well, with earlier maturing varieties being sown into stubble systems and with low disease incidence. Average yields and marketable quality was achieved.

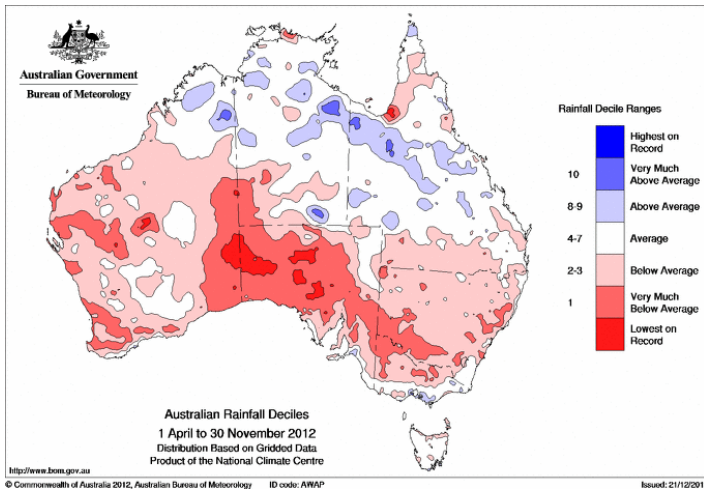
Grain size of lentil was smaller than normal.

Newer varieties like PBA Blitz and PBA Herald-XT will be marketed in volume for the first time this year, along with considerable tonnage of PBA Flash (pale seed coat). The current prices and slow marketing of the 2012/13 lentil crop will impact on future sowings and variety choice.

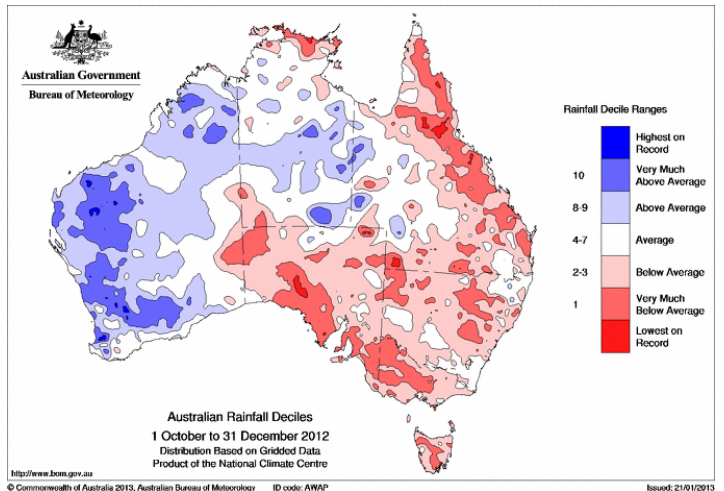
Red & green lentil

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2012 Production (t)		103,000	80,000	500	183,500				183,500
2012 Sown area (ha)		86,700	77,000	700	164,400				164,400
Dec 2012 variation (t)		-5,000	0	0	-5,000				-5,000

Australian weather 2012– rainfall



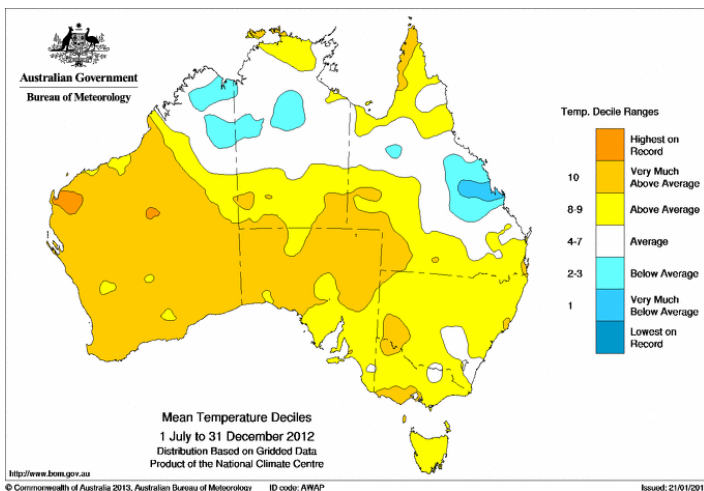
Total rainfall for the winter 'growing' season in southern Australia was generally poor and varied from very much below average (decile 1) in Western Australia and southern Australia, to below average (decile 3) in south east South Australia, Victoria, New South Wales and south east Queensland. Stored soil water in most regions of eastern Australia supported good crop growth despite the low winter rainfall totals.



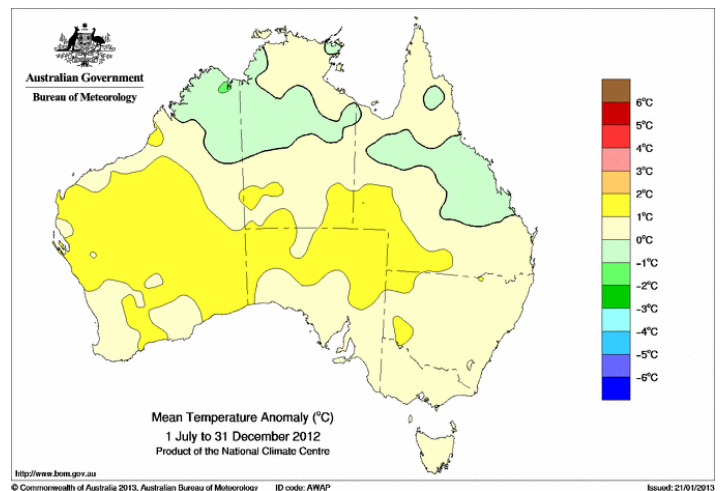
Spring rainfall was scant in southern and eastern Australia, recording only decile 1 to 3. In Western Australia, spring rainfall was crucial for crop production after a very dry winter and recorded a decile 5 to 8.

In a repeat of harvest 2011, Western Australia recorded a wet harvest with grain quality downgrades in central and southern regions.

Australian weather 2012– temperature



In a repeat of 2011, all regions of Australia recorded above average temperatures. This enabled plant growth to be quicker than normal during winter. South Australia, Victoria, Queensland and New South Wales were decile 8 to 9, while Western Australia was warmer than average at decile 10.



The mean temperature anomaly map shows that temperatures were up to 1°C higher than normal across all regions of Australia with winter crop production.

5 year area and production averages

Australian Pulse Production	Average 2007/08-2011/12		2012/13 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
Lupin	483,350	596,749	450,200	458,700
Field Pea	279,250	324,697	280,500	319,680
Chickpea	363,300	413,716	563,600	713,400
Lentil	133,760	181,920	164,400	183,500
Bean	149,740	239,252	202,900	377,200
Total	1,409,400	1,756,335	1,661,600	2,052,480

Pulse Production by State	Average 2007/08-2011/12		2012/13 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	369,780	433,661	446,100	579,280
Victoria	204,700	258,420	274,200	349,800
Queensland	102,100	120,484	208,000	309,200
South Australia	343,840	491,800	359,000	450,100
Western Australia	388,980	451,970	374,300	364,100
Total	1,409,400	1,756,335	1,661,600	2,052,480

Chickpea	Average 2007/08-2011/12		2012/13 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	223,240	245,332	280,300	326,500
Victoria	24,700	33,100	49,000	52,200
Queensland	100,500	118,034	208,000	309,200
South Australia	10,240	12,650	20,300	21,500
Western Australia	4,620	4,600	6,000	4,000
Total	363,300	413,716	563,600	713,400

Field Pea	Average 2007/08-2011/12		2012/13 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	45,630	45,537	53,000	65,680
Victoria	51,200	62,720	52,000	65,000
Queensland	0	0	0	0
South Australia	123,800	165,960	113,500	130,000
Western Australia	58,620	50,480	62,000	59,000
Total	279,250	324,697	280,500	319,680

Faba/Broad Bean	Average 2007/08-2011/12		2012/13 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	32,580	52,932	54,400	123,400
Victoria	37,660	56,440	67,000	126,300
Queensland	1,600	2,450	0	0
South Australia	75,600	124,280	78,000	121,600
Western Australia	2,300	3,150	3,500	5,900
Total	149,740	239,252	202,900	377,200

Lupin	Average 2007/08-2011/12		2012/13 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	68,030	89,519	57,700	63,200
Victoria	26,940	30,500	29,200	26,300
South Australia	65,000	83,000	60,500	74,000
Western Australia	323,380	393,730	302,800	295,200
Total	483,350	596,749	450,200	458,700

Lentil	Average 2007/08-2011/12		2012/13 estimates	
	Area Planted (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
New South Wales	300	340	700	500
Victoria	64,200	75,660	77,000	80,000
South Australia	69,200	105,910	86,700	103,000
Western Australia	60	10	0	0
Total	133,760	181,920	164,400	183,500

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