

South Australia, Victoria & Southern New South Wales

With few areas receiving late spring/summer/early autumn rainfall, soil moisture is low across south eastern Australia. Thunder storms in early March did help parts of southern New South Wales. With rain already fallen, the further forecast rainfall across the region during the week of April 25 may be enough to provide a seasonal break for some areas.

Grower confidence continues with pulses, including lentil, across most south eastern regions despite the dry summer period. Cereal prices are profitable, and pulse profitability appears relatively promising. The Canola area is likely to decrease because of the current dry conditions.

Herbicide residues are a potential concern to pulse growers given the absence of sufficient 2012 in-crop and summer rainfall to break residues down during the plant-back period. This may limit paddock selection for pulse crops in some areas.

Dry April conditions across South Australia, Victoria and southern New South Wales mean that substantial rain is needed for sowing. The Lupin and Faba bean area could decrease if there is a late seasonal break. A percentage of pulses will be sown dry to maximise yield potential.

Soil conditions range from relatively dry soil profiles to some moisture from summer rain. Areas in parts of southern New South Wales had rain in March, but are awaiting sufficient rain to wet the surface enough to allow seeding.

Summer fallow or weed management has not been necessary in areas other than where March rain fell. Cereal stubble loads from last year has led to stubble burning in some areas, increasing the risk of damage to pulses from wind erosion after sowing.

Sowing has or will soon commence in much of the "drier" areas. Traditional "wetter" areas will wait for rain as early

sowing is not nearly as important for yield potential.

Seed quality is generally be good this year, unlike the two previous years, and seed supplies will not limit the area sown to pulses.

Queensland & Northern New South Wales

Central Queensland has good levels of soil moisture. The forecast area of desi chickpea (100,000 ha) is almost assured of being planted.

Eastern south Queensland and eastern north New South Wales are dry and require 50mm of rain to plant. Western Queensland is also dry and needs 50mm of rain to plant. The planting window extends to the end of May.

Western New South Wales is dry. However, the planting window is shorter, extending only to mid May.

The Faba bean planting window is the end of April in northern New South Wales and is already almost closed. There is no upside to the forecast area and it could drop to 15,000 ha.

Western Australia

Patchy thunderstorms during summer were followed by widespread above average rain in March. Most regions have some soil moisture, but recent hot weather means this is at depth rather than near the surface.

The exception is the Esperance region where very heavy rain fell during March, leaving excellent soil moisture and a general sowing opportunity for canola and lupin in April.

Dry sowing of lupins will commence by April 15 in northern regions.

Overall, the 2013 season is shaping up to hold more promise than last year. Grower confidence generally is high. However, this is not translating to lupin and field pea production. The profitability of both crops is markedly less than that of canola. When combined with the need for

Estimated Pulse Area in Australia for 2013 (hectares)

State	Chickpea		Beans		Field Pea	Lentil	Lupin		Total	% of 2012
	Desi	Kabuli	Faba	Broad	Dun	Red & Green	Sweet Lupin	Albus Lupin		
New South Wales	222,000	13,300	36,100	-	53,000	700	29,750	34,700	389,550	87%
Victoria	10,000	39,000	62,000	8,000	51,000	77,000	29,000	150	276,150	101%
Queensland	207,000	1,000	-	-	-	-	-	-	208,000	100%
South Australia	2,300	18,000	61,000	19,000	113,500	86,700	57,500	-	358,000	100%
Western Australia	7,300	500	4,000	-	43,000	-	254,000	800	309,600	83%
Total 2013 (ha)	448,600	71,800	163,100	27,000	260,500	164,400	370,250	35,650	1,541,300	93%
% of 2012	91%	100%	91%	113%	93%	100%	88%	116%	93%	

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Chickpea

Queensland and Northern New South Wales

Continuing dry weather is of concern in most northern production regions, with the exception of central Queensland.

In central Queensland planting of desi chickpea is underway with good subsoil moisture levels. After the excellent financial returns experienced by growers for chickpea over the last 2 to 3 years, growers are again very keen to increase their area planted to chickpea especially in light of the depressed cereal prices. This has seen the area forecast to be planted increased to a record area of 110,000 ha.

Western Queensland and northern western New South Wales are still very dry, having experienced a dry finish to the last winter cropping season and a dry summer season. These areas also missed out on much of the rainfall during the Australia Day period in late January. Whilst these areas typically represent a significant part of the total area planted to chickpea, the current forecast is well back on the last couple of years due to the degree of uncertainty surrounding the likelihood of receiving timely and adequate planting rains.

The preferred planting window for much of this area is mid to late May, even into the first 2 weeks of June if needed. There is still time, but with the current weather forecast not looking promising, concern continues to build with each passing week. For growers who can deep plant chickpea into moisture, planting is expected to start in the next 2 weeks.

Western Australia

Chickpea production will rise in 2013 in WA.

Seasonal prospects are more promising than last year with some soil moisture and the opportunity to establish a large part of growers programs before needing to sow chickpea.

Many growers are bulking up the new varieties PBA Striker and Neelam to improve yield potential. The majority of the 2013 crop will be Genesis 836 and PBA Slasher.

A good season is needed in 2013 to rejuvenate confidence in chickpea after the drought year of 2012. The recent rain has reduced the production risk for chickpea, and with a strong price outlook, growers will sow seed destined for the 2012 crop which never left the shed.

South Australia, Victoria & Southern New South Wales

Interest in chickpea continues to be high in south eastern Australia. The chickpea area is likely to be similar to last year for both desi and kabuli chickpeas. Higher prices are usually obtained for kabuli compared to desi types, but kabuli markets and prices are not always available until well after harvest. Genesis 090 is the production yard-stick in south eastern Australia for small kabuli production. However, desi yields are usually higher and growers need to do gross margin comparisons and have their kabuli market and delivery options clear before sowing.

Kabuli

The 7-8mm kabuli is the predominant type grown in South Australia and Victoria (cv Genesis 090). As well there is some interest in the newer varieties like Genesis Kalkee that have larger seed size (8-10mm). These can only be grown in the reliable rainfall districts. More disease protection is required, and growers need to make arrangements with their marketers to produce these larger seeded types.

Kabuli chickpeas were slow to move to markets this year, so growers need to be aware of storage needs and market timing when growing these kabulis.

Desi

Interest in desi chickpea continues in south-eastern Australia with good prices obtained.

The new desi varieties have widespread adaptation to both medium and low rainfall environments and have performed well. Their uptake has been slower than perhaps expected, and the desi area remains relatively less than small kabuli in South Australia and Victoria. The absence of local delivery points is limiting desi production in South Australia in particular. Sufficient tonnage needs to be produced to boost grower confidence to fully embrace desi chickpeas.

The area of desi chickpea in southern New South Wales will also be maintained, but on a small scale by comparison with central and northern New South Wales.

Desi Chickpea

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2013 Sown area (ha)	7,300	2,300	10,000	12,000	24,300	207,000	210,000	417,000	448,600
Variation from 2012 (ha)	1,800	0	0	0	0	0	-45,000	-45,000	-43,200

Kabuli Chickpea

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2013 Sown area (ha)	500	18,000	39,000	2,000	59,000	1,000	11,300	12,300	71,800
Variation from 2012 (ha)	0	0	0	0	0	0	0	0	0

Field pea

South Australia, Victoria & southern New South Wales

Field pea prices have been strong, and this has helped continue interest in field peas in south-eastern Australia. Field pea drought tolerance is seen as an advantage over other pulse crops in a year that could be potentially dry, based on current absence of rainfall.

'Kaspa type' varieties are the majority type of field pea production in south eastern and Western Australia. In eastern areas where bacterial blight has been a major risk growers are now adopting the new varieties that have some resistance to the disease. However, these varieties are produce the traditional 'dun' type grain.

The field pea area in Victoria and South Australia should be maintained, particularly in the lower rainfall areas. Other areas such as southern New South Wales have seen slight increases in field pea area in recent years. Bacterial blight has been and continues to be a major

threat, and limits confidence in field pea, despite new variety releases with improved resistance to the disease.

Field pea for either forage or as a brown manure crop, has become more popular in southern New South Wales. This is driven by the need to control weeds and provide nitrogen for following crops. Note also that for a field pea grain crop in these areas, the final outcome as either grain or hay is often determined by seasonal dry conditions, frost or fodder prices.

Western Australia

Continuing grower preference for canola as a main profit driver and break crop for cereals will cause the field pea area in WA to decline in 2013.

Growing conditions in the Esperance Port zone are very favourable for yield potential after very high rainfall totals in March and provide a very early sowing opportunity for canola. As field pea must be planted later to avoid Blackspot disease, the current conditions don't favour field pea in the rotation for 2013.

Field Pea

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2013 Sown area (ha)	43,000	113,500	51,000	41,000	205,500		12,000	12,000	260,500
Variation from 2012 (ha)	-19,000	0	-1,000	-5,000	-6,000		5,000	5,000	-20,000

Faba/Broad bean

Faba bean

South Australia, Victoria & southern New South Wales

The forecast area for faba bean has maintained or increased slightly in the south due to improved prices and demand in 2012 and 2013. There is now increased confidence in disease and crop management. However, the risk to bean quality at delivery and consequent marketability problems from wet harvest conditions still exist.

Faba bean have rotational benefits and fit into the both mixed farming and continual cropping systems. Wetter areas tend to sow to faba bean because of their waterlogging tolerance being better than other pulses, cereals and canola. Beans have also found a niche in some medium to lower rainfall areas when sown early and into no-till stubble systems. Faba beans are now starting to be grown on more acidic soil conditions with correct emphasis on inoculation to ensure nodulation.

Interest in the new variety PBA Rana continues given its

seed size, quality and premium prices paid this last harvest. It has now provided access into the medium sized faba bean markets.

Irrigated and dryland faba bean area in southern New South Wales is increasing with the availability of irrigation water. This area is small by comparison to the large scale plantings of northern New South Wales.

Northern New South Wales

The dry condition have severally limited the area planted to faba bean, with the planting window (April) now virtually closed it is unlikely that here will be any significant change in the area of production this year.

Broad bean

Broad bean area in the lower South-East of South Australia is likely to remain similar to last year, despite some unsold beans being stored. There will however be an increase on Kangaroo Island that has just started to successfully grow and market broad beans.

Broad beans have been a reliable crop in the traditional high rainfall areas in most years, and the grazing value of the stubble adds to their attraction.

Faba bean

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2013 Sown area (ha)	4,000	61,000	62,000	11,000	134,000		25,100	25,100	163,100
Variation from 2012 (ha)	500	0	2,000	6,700	8,700		-25,000	-25,000	-15,800

Broad bean

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2013 Sown area (ha)		19,000	8,000		27,000				27,000
Variation from 2012 (ha)		2,000	1,000		3,000				3,000

Lupin

Western Australia

The total area in WA will fall this season as growers continue to chase better profits from canola as the break crop for wheat production. This is despite improved pricing through most of last year, being almost double the value realised in 2011.

The area to lupins will be similar in the Geraldton Port zone but markedly less in the west and east Kwinana zones.

Sowing of lupins commenced in mid April in most northern districts on or about April 15. Some area was sown into moisture but the majority is being sown dry.

Seasonal conditions are more promising than 2012 with some soil moisture at depth and optimistic climate forecast for the next 2 months.

South Australia, Victoria & southern New South Wales

The Lupin area in south eastern Australia is likely to be maintained or increase slightly depending on the break of the season.

They have lost favour in some of the traditional lupin districts. Major production areas like Lower Eyre Peninsula in South Australia and southern New South Wales are looking for alternative crops because of low profitability compared to alternatives.

Lupins tend to be restricted to the acid soils and sands where there are few alternatives.

Albus Lupin

The area of albus lupins will increase as prices have improved and demand by stock feed manufacturers has also increased. Lack of demand and over production in past years has limited recent production.

Albus lupin is predominantly grown in southern and central New South Wales in the medium to high rainfall regions.

The area may increase steadily again from this year.

Australian Sweet Lupin (*Angustifolius*)

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2013 Sown area (ha)	254,000	57,500	29,000	26,500	113,000		3,250	3,250	370,250
Variation from 2012 (ha)	-48,000	-3,000	0	0	-3,000		1,750	1,750	-49,250

Australian Albus Lupin (*Albus*)

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2013 Sown area (ha)	800		150	19,000	19,150		15,700	15,700	35,650
Variation from 2012 (ha)	0		-50	1,500	1,450		3,000	3,000	4,450

Lentil

South Australia and Victoria

Improved lentil prices since harvest have increased grower confidence in profitability of Lentils. Unsold grain and unattractive prices led to a decline in the lentil sown area in 2012 from a peak in 2011. The area sown in 2013 should be maintained at about 2012 levels.

Marketing issues are influencing lentil variety and even crop choice. Small seeded lentils had commanded a considerable price premium last season. The varieties Nipper and PBA Herald XT will likely increase in area this year.

Newer, better adapted varieties are helping spread the area and risk where lentils can be grown. There is some grower uncertainty as to which lentil variety or seed size

class to grow, but not as it was in 2012. Fears of limited market and delivery options for lentil varieties was a major issue last year.

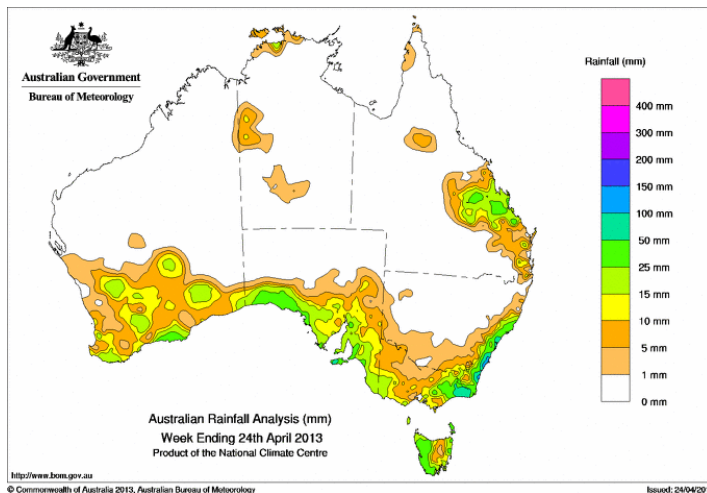
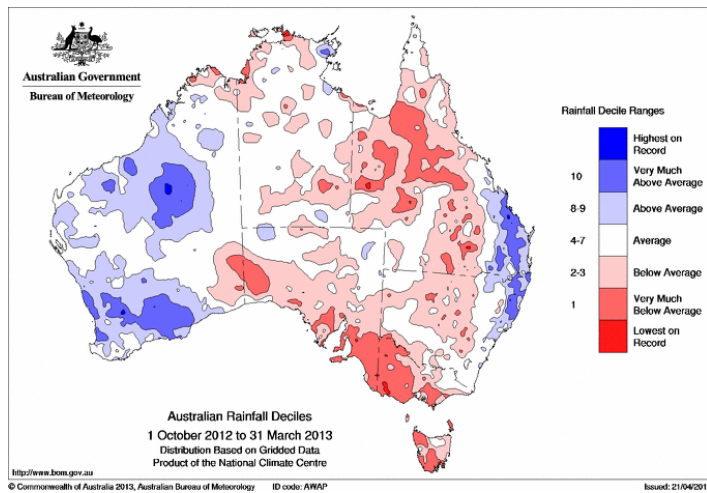
Newer, better adapted and reliable varieties like PBA Blitz and PBA Flash are now accepted in the market place and are being grown to replace older varieties that are less reliable and can have quality issues. PBA Herald XT is filling an increasing need for improved weed control options in lentils, and will keep lentils growing in traditional areas where weeds have become a major concern.

Early sowing will occur in the drier areas and with a substantial opening rain. This is needed for potential yield and crop harvest height. Traditional areas are able to withstand a delayed sowing date.

Red & green lentil

Region State	Western	Southern				Northern			Australia Total
	WA	SA	VIC	S/NSW	Subtotal	QLD	N/NSW	Subtotal	
2013 Sown area (ha)		86,700	77,000	700	164,400				164,400
Variation from 2012 (ha)		0	0	0	0				0

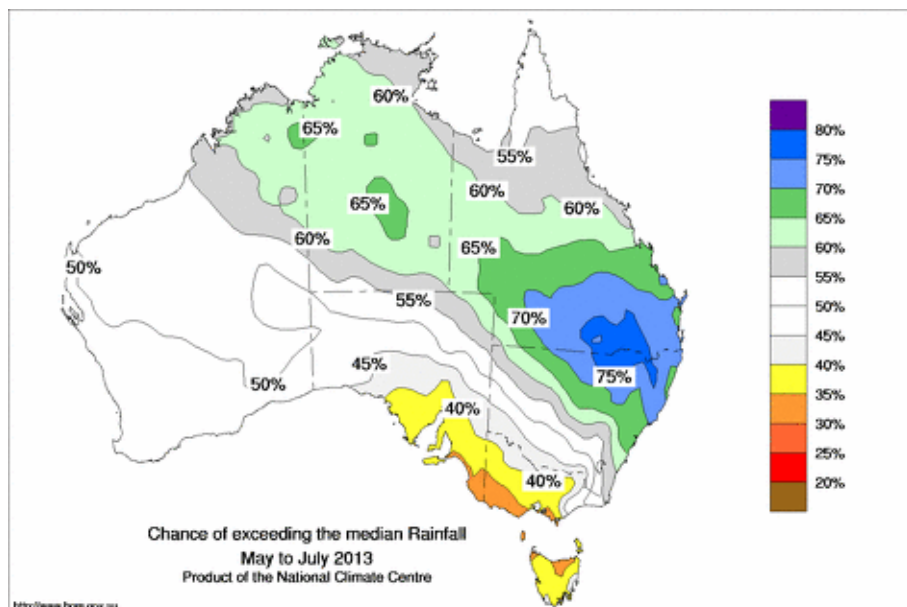
Australian Rainfall October 2012 to March 2013



Rainfall across Australia, October 12 to March 13, has been lower than that received in the same period in 2011-12. South Australia, Victoria, New South Wales and inland Queensland are mostly dry with very low levels of soil moisture.

Recent rainfall of up to 40mm was recorded in South Australia, Victoria and the south-east of Western Australia. Inland Victoria, New South Wales and Queensland and most of Western Australia remain dry.

Australian Rainfall Outlook to July 2013



The national outlook for May to July 2013 indicates that:

- a wetter than normal season is more likely for the southern half of Queensland and northern NSW
- a drier than normal season is more likely for Tasmania, most of Victoria and south-eastern SA..

The chances of receiving above **median rainfall** during the May to July period are between 60 and 80% across the southern half of Queensland and northern NSW. Odds increase to 70 to 80% over much of southeast Queensland and northeast NSW. The chances fall to between 30 and 40% across most of Victoria, south-eastern parts SA and Tasmania.

Over the rest of the country, the chances of above or below average rainfall are roughly equal. *Courtesy– Aust Bureau of Meteorology*

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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.

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