SASKATCHEWAN pulse Growers

Australia Market Update

Peter Semmler, Australian Global Brokerage

Since the last report, pulses have been on a real rollercoaster due to the very fickle weather Australia has experienced. The impact on the various states has been very different.

West Australia seems to have fared the best of all the states. Their season got off to a great start with adequate moisture for planting and everything progressed well through to harvest with all indications pointing to another close to record crop. Spring weather was cooler and wetter than normal, but this has not caused any major issues.

The season in South Australia got off to a later start than normal with less rainfall than most farmers would have liked. However, August rainfall was above average, the crops developed very well, and were looking excellent. A number of agronomists we contacted compared the current season to 2016, which was a record. While there were some storms and strong winds late in October, the crops were green enough to minimize damage. Higher than expected rainfall has brought its own problems with many farmers having to apply fungicide to their excellent lentil crops four times to keep foliar diseases under control. The cooler, wetter conditions mean desiccation of pulse crops has been delayed 2–3 weeks and harvest similarly.

Victoria's season started extremely well and crops progressed with expectations for an excellent harvest. However, the forecast La Niña weather pattern arrived and there has been considerable damage to crops as a result, especially lentils and faba beans. Harvest has been delayed by around 3–4 weeks.

New South Wales has endured a very wet season with extensive damage to planted crops due to flooding. At this time, it is very difficult to accurately predict production of pulses until harvesting has progressed further.

The season in Queensland has also been very wet which has impacted production. The area planted to chickpeas was lower than usual due to exports to India not happening and a large carryover from the previous year.

Lentil

Lentil exports for the October 2021 to September 2022 shipping year were a record 939,000 tonnes. This was due in part to the lower Canadian crop in 2021. Prior to the excessive rains in Victoria, lentil production forecasts ranged between 1 to 1.2 million tonnes. It is estimated somewhere between 20–30% of the Victorian lentil crop has turned yellow due to waterlogging. There are also serious concerns for lentil quality as the excessive rain and cool conditions are ideal for diseases like Ascochyta and Sclerotinia to thrive despite extensive spraying. Taking all the above factors into consideration, we are still estimating lentil production at around 800,000 tonnes with the excellent crops in South Australia compensating for the issues in Victoria.

Faba Bean

Faba bean exports for the shipping year were also a record coming in at close to 625,000 tonnes. Exports to Egypt for this period were just over 487,000 tonnes, also a record. The faba bean crop in South Australia is looking extremely good with some massive yields expected. In Victoria, the Bendoc variety has been ravaged by chocolate spot and the crops have turned black. While Egypt was the biggest buyer for faba beans this year, there are some concerns about their ability to stay the major importer due to serious shortage of hard currency. Container freights to Egypt remain very high. There were some trades of new crop faba beans in containers reported at around $470 USD cost and freight (CFR) Damietta in late November. Domestically, stockfeed demand for faba beans is expected to support the price.

Pea

Pea exports for the year were the second highest on record with China remaining the largest destination once again. While Canadian prices have eased which has forced down the price for Australian peas, it seems that Australian peas are now sought by Chinese buyers. The last reported trade we heard was around $435 USD CFR Tianjin.

Desi Chickpea

Due to the lower planted area and impact of the wet weather, production forecasts are coming in around 500,000–550,000 tonnes.

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December 2022 Australia Pulse Market Update

Estimated planted area, June 2022 (hectares)	**Desi Chickpeas**	**Faba Beans**	**Dun Field Peas**	**Red & Green Lentils**
New South Wales	180,000	70,000	50,000	10,000
Victoria	180,000	100,000	90,000	175,000
Queensland	285,000	12,000		
South Australia	11,000	90,000	90,000	130,000
Western Australia	8,000	8,000	10,000	20,000
Agrisemm Total Area Estimate (hectares), June 2022	521,000	280,000	240,000	335,000
Agrisemm Estimated Production (tonnes), June 2022	677,300	588,000	312,000	900,000
Agrisemm Estimated Production (tonnes), December 2022	*500,000*	*450,000*	*240,000*	*800,000*
Agrisemm Estimated Production (tonnes), November 2021	950,000	800,000	315,000	900,000
Export Data (tonnes)				
October 2016 to September 2017	2,269,864	414,692	253,035	858,954
October 2017 to September 2018	821,235	295,263	130,464	507,958
October 2018 to September 2019	334,296	283,125	79,415	361,072
October 2019 to September 2020	357,904	325,352	52,488	697,960
October 2020 to September 2021	876,155	568,606	120,309	864,403
October 2021 to September 2022	591,819	624,734	205,048	939,474

Source: Bureau of Statistics, Pulse Australia