



# Australian S&D update

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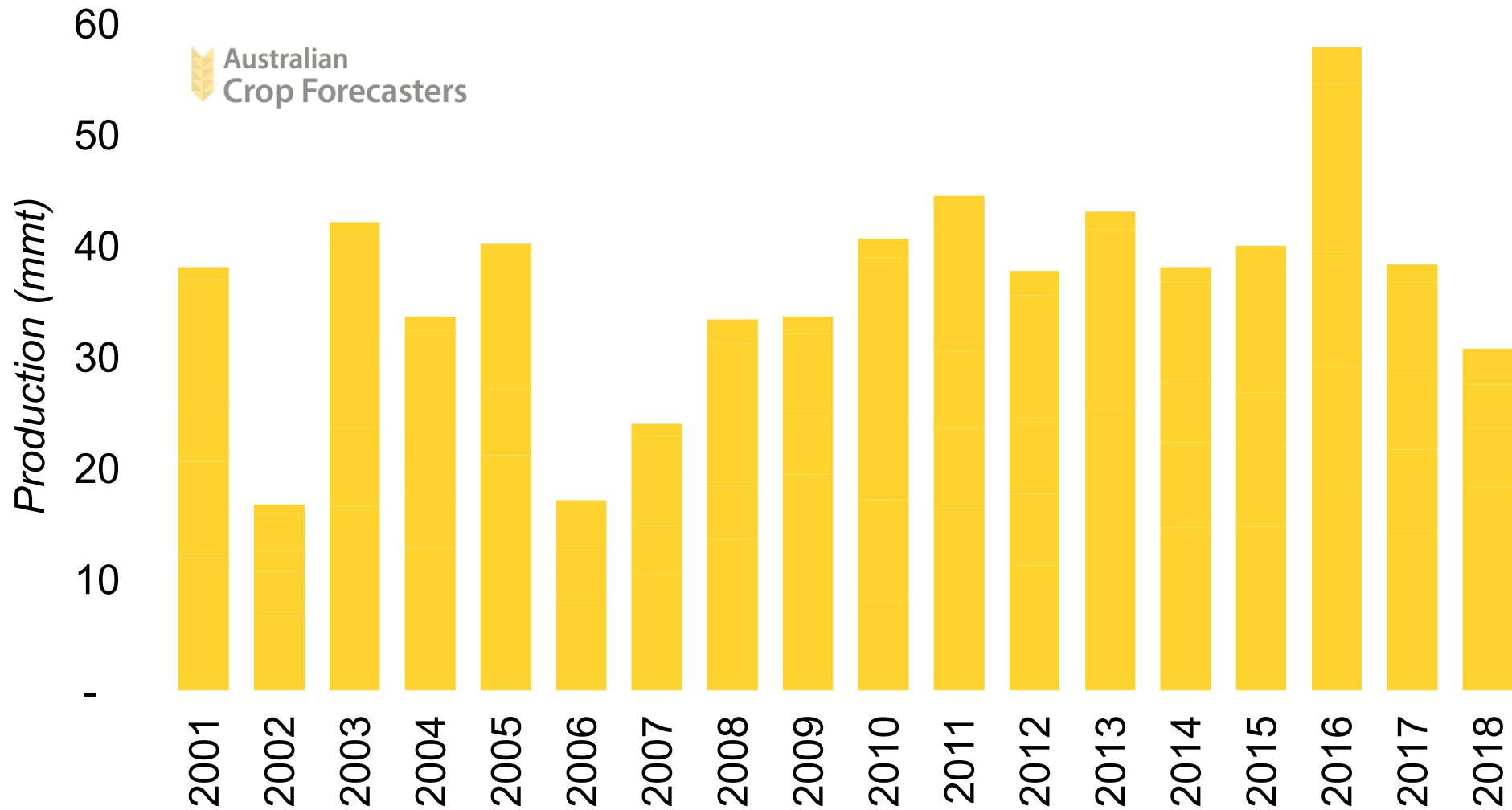




# One season – two outcomes

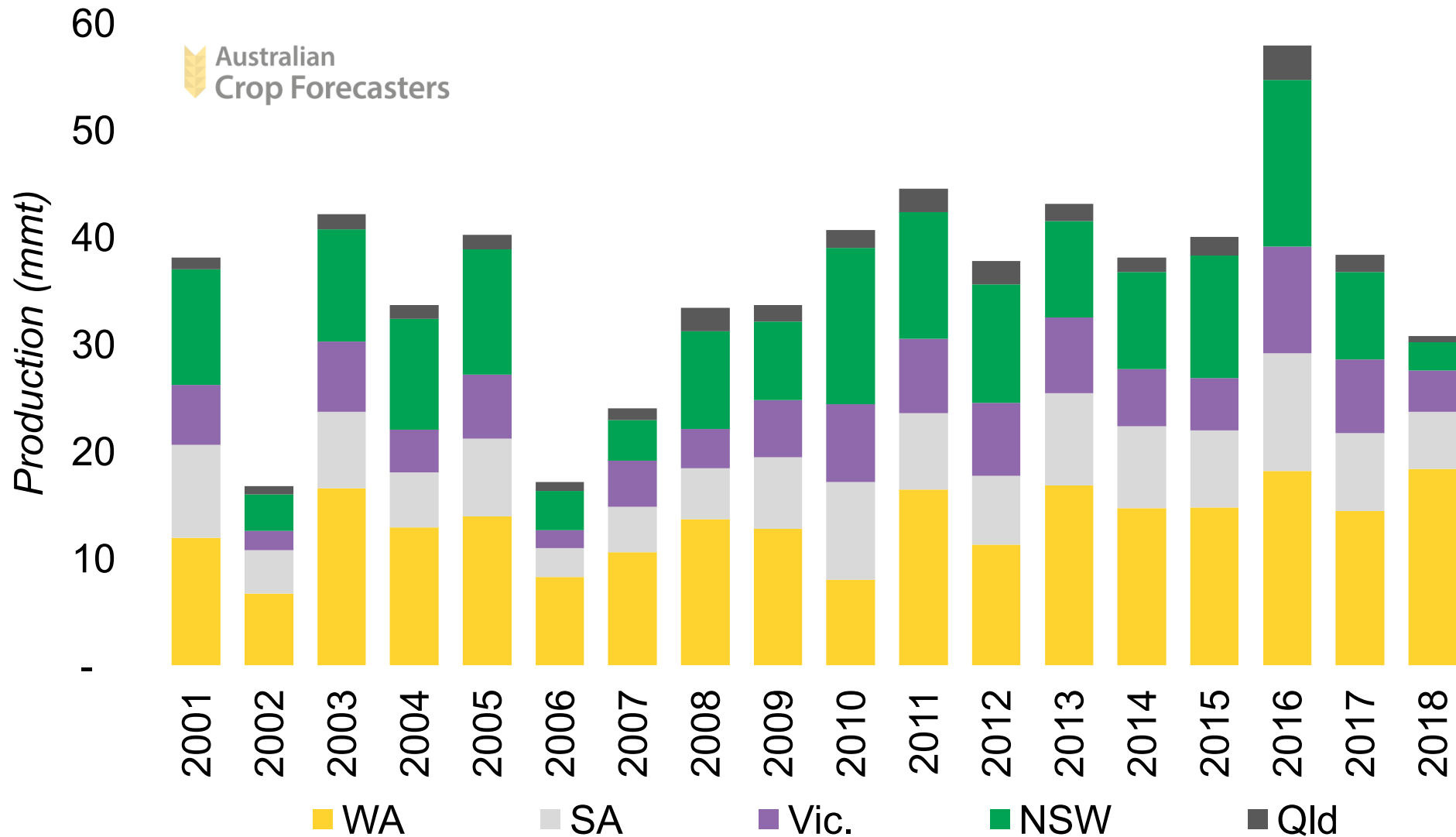
2018 SEASON IN REVIEW

# Australian winter crop production

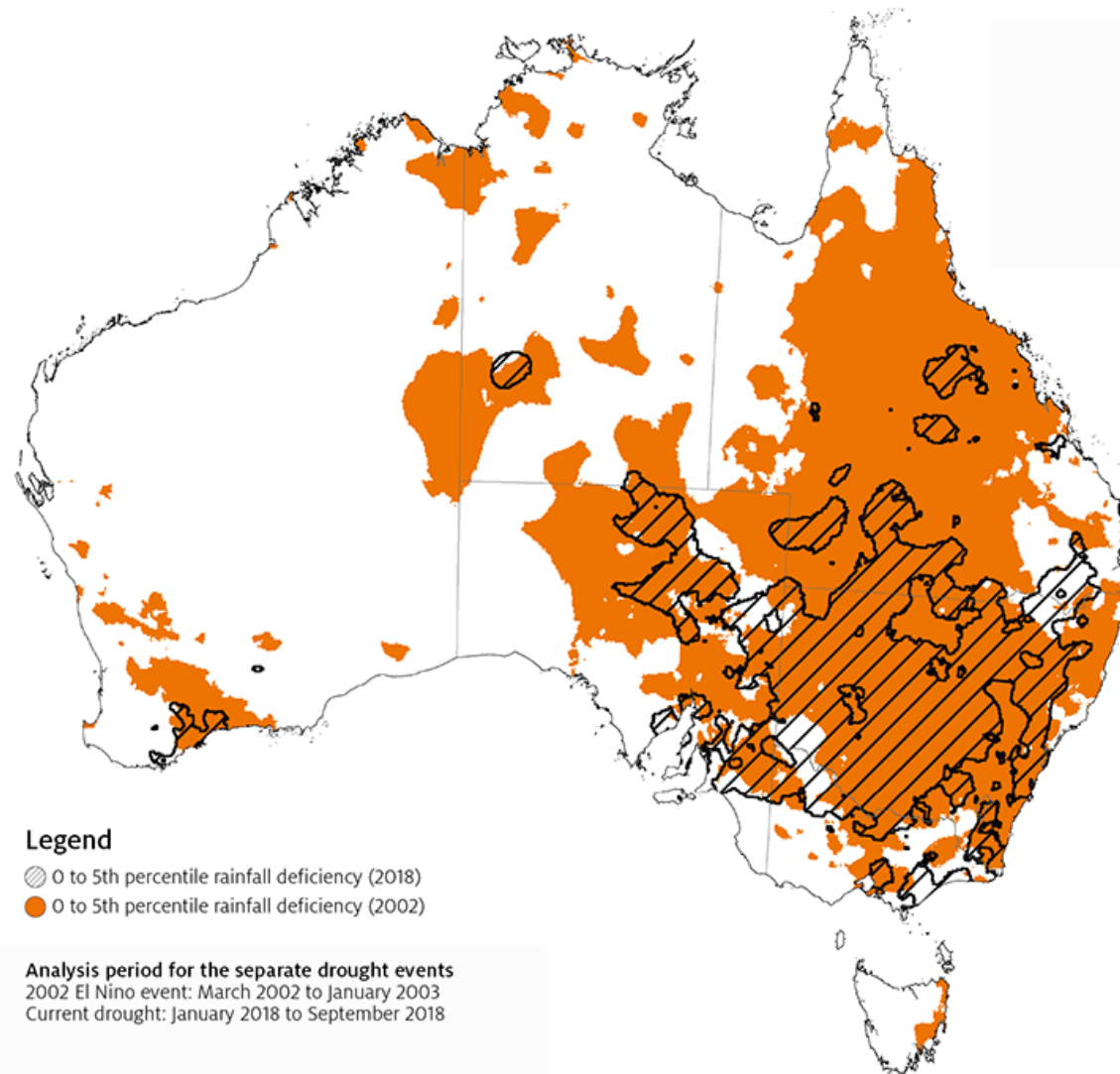




# Australian winter crop production



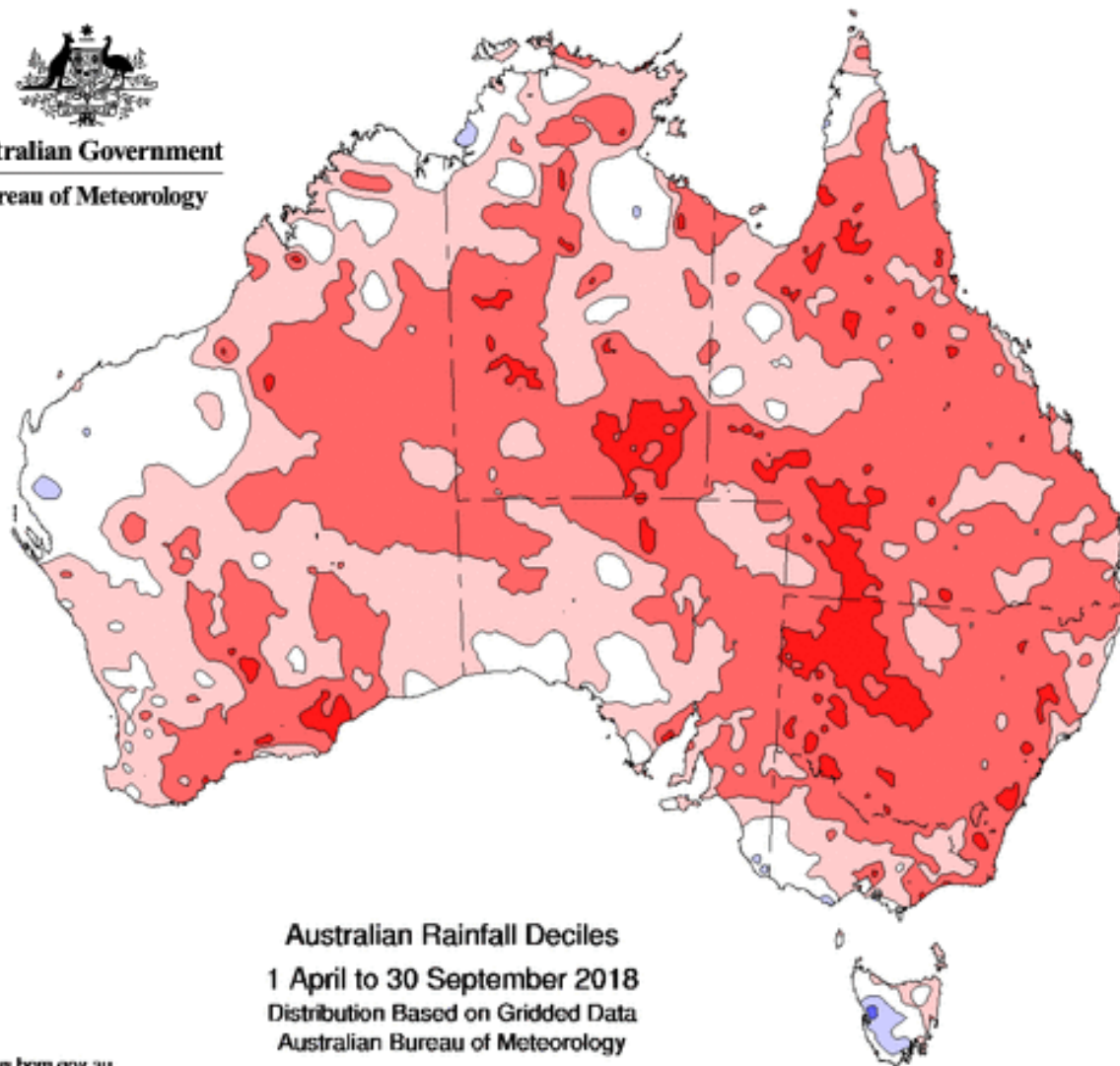
# Rainfall deficiency vs previous droughts



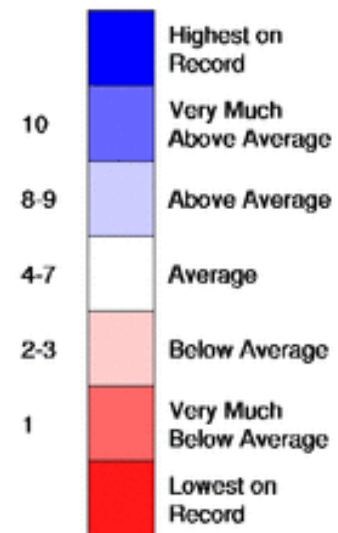


# Growing season rainfall deciles

  
Australian Government  
Bureau of Meteorology



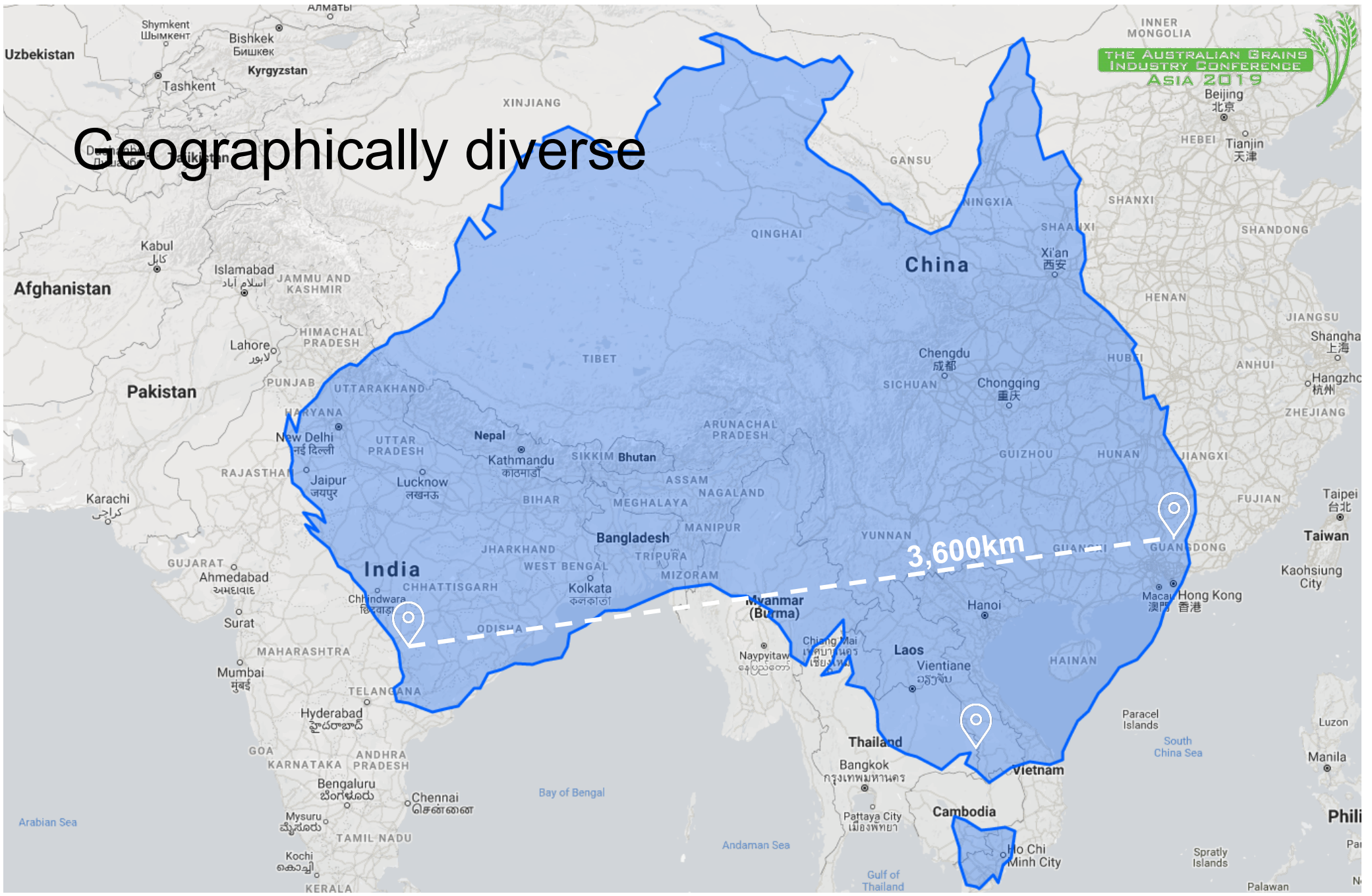
Rainfall Decile Ranges



Australian Rainfall Deciles  
1 April to 30 September 2018  
Distribution Based on Gridded Data  
Australian Bureau of Meteorology

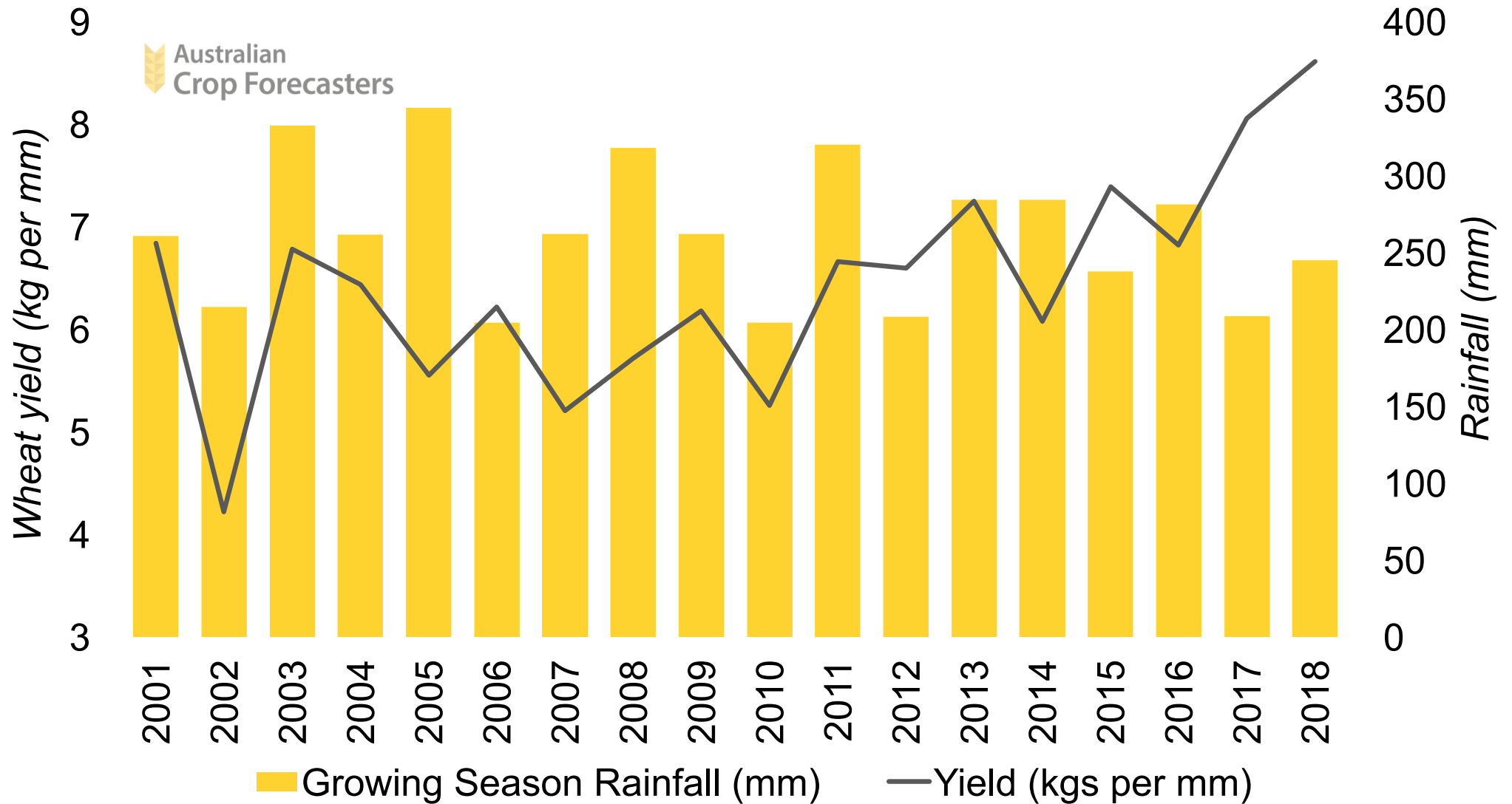
<http://www.bom.gov.au>

# Geographically diverse





# WA wheat yield



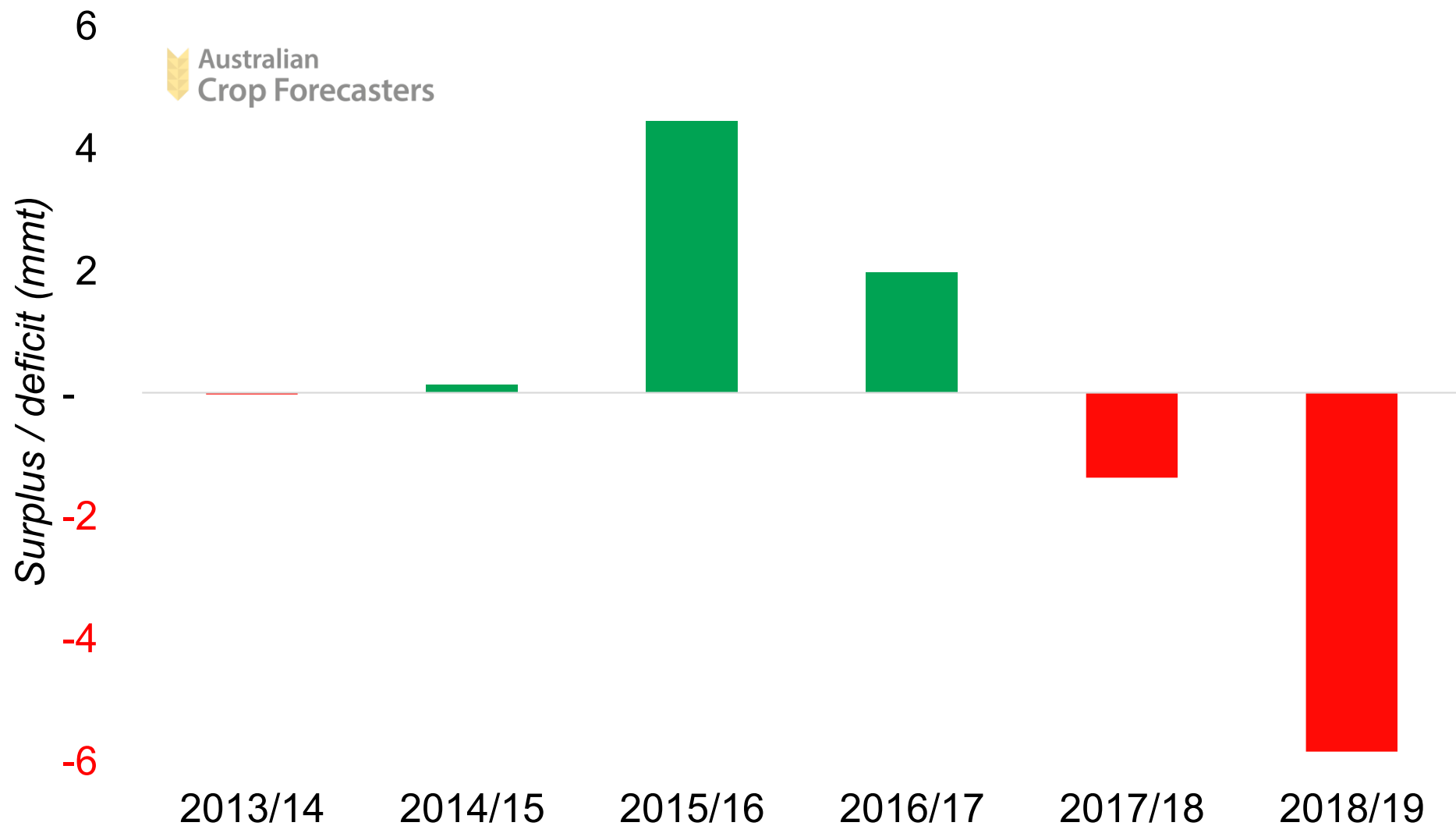




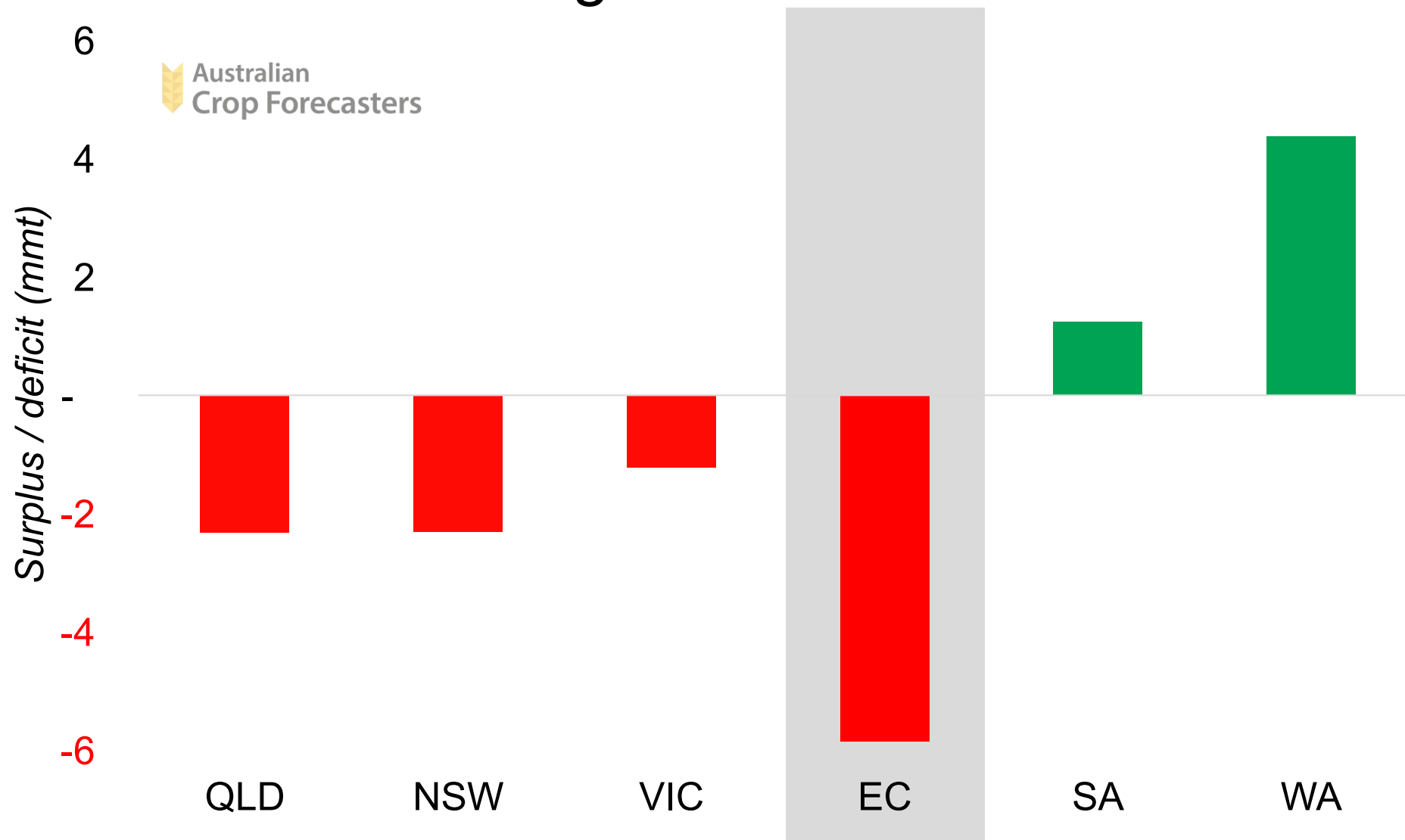
# Drought influence

CURRENT AUSTRALIAN PRICE INFLUENCES

# East Coast feed grains deficit

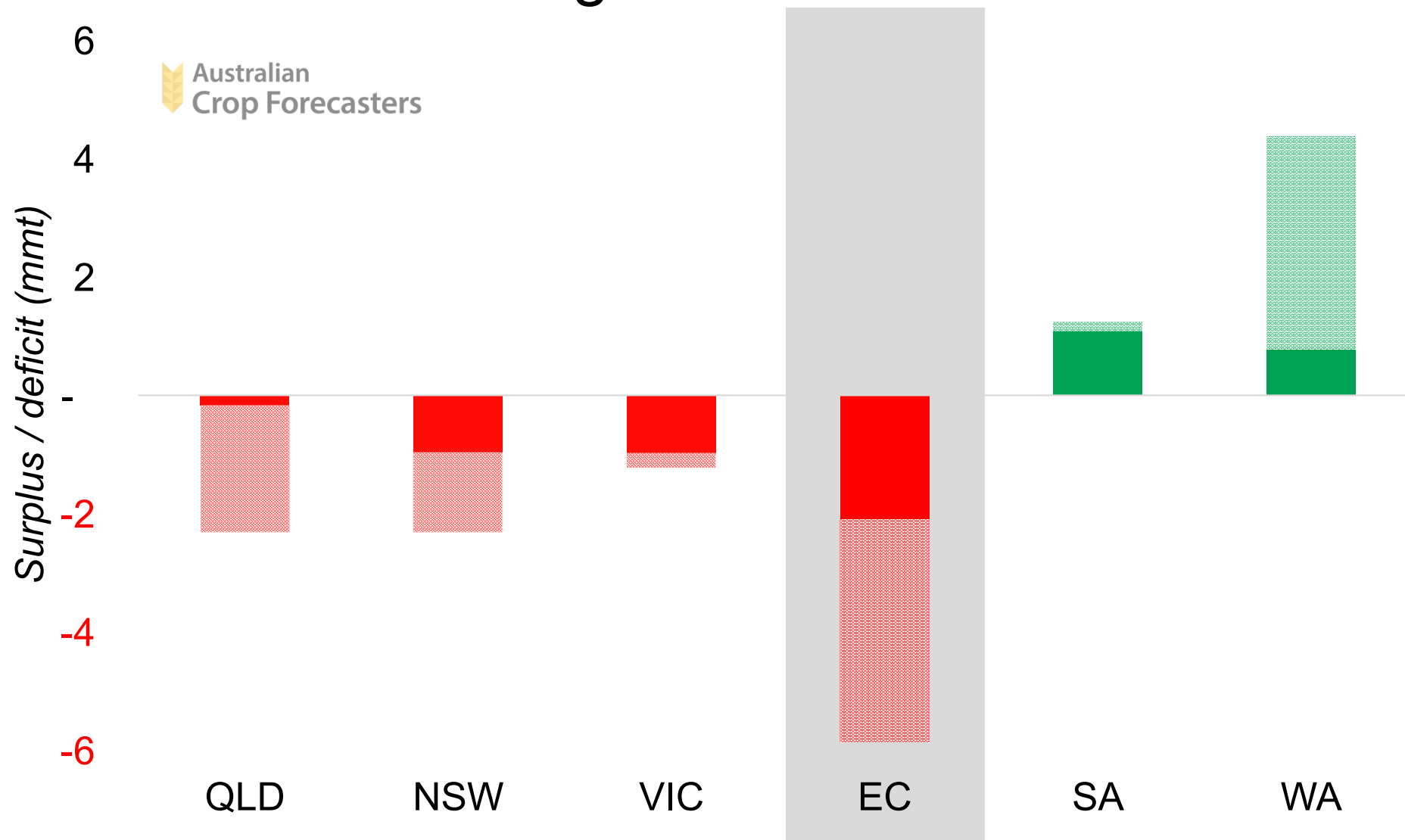


# 2018 season feed grains deficit

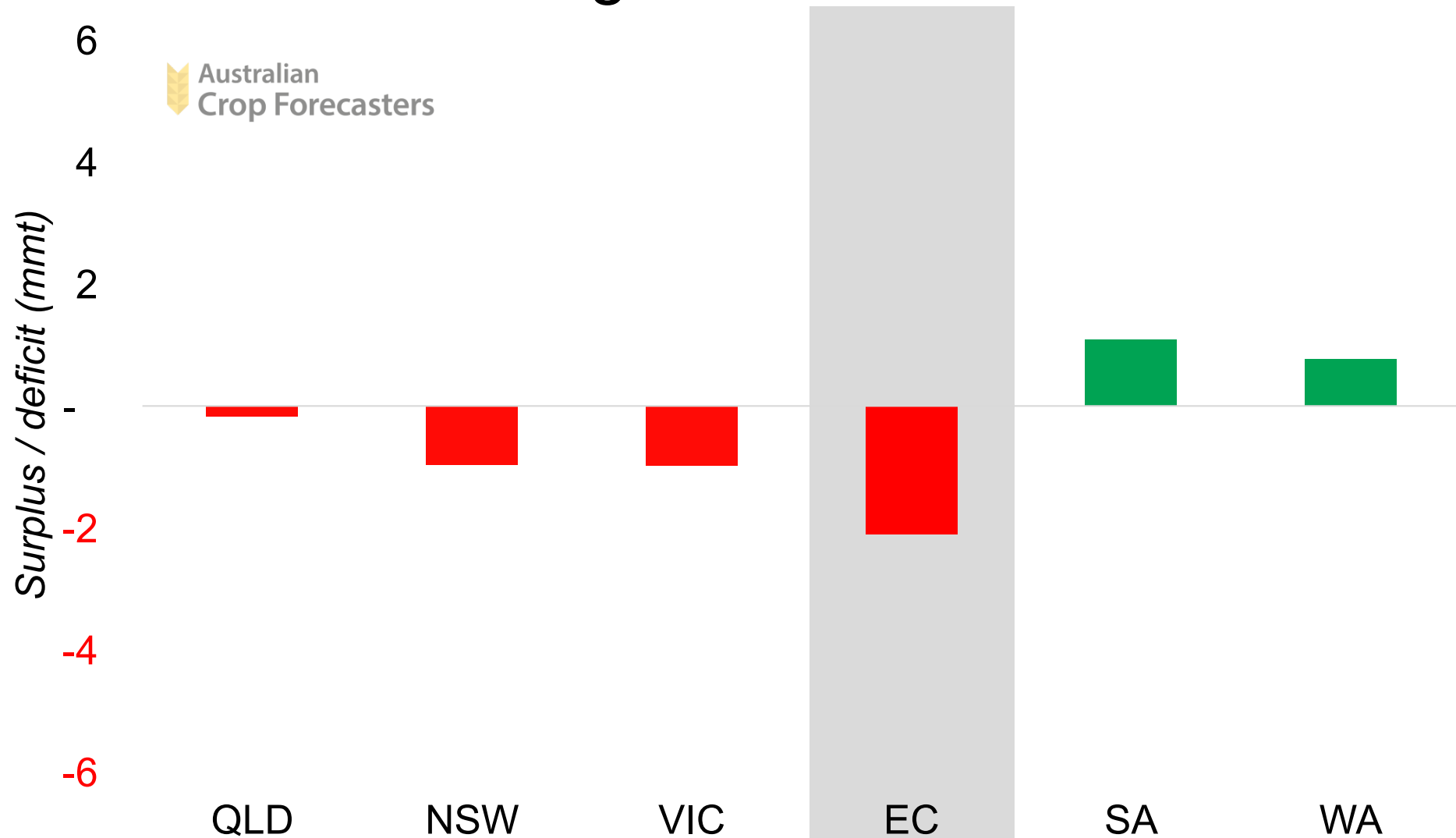




# 2018 season feed grains deficit



# 2018 season feed grains deficit



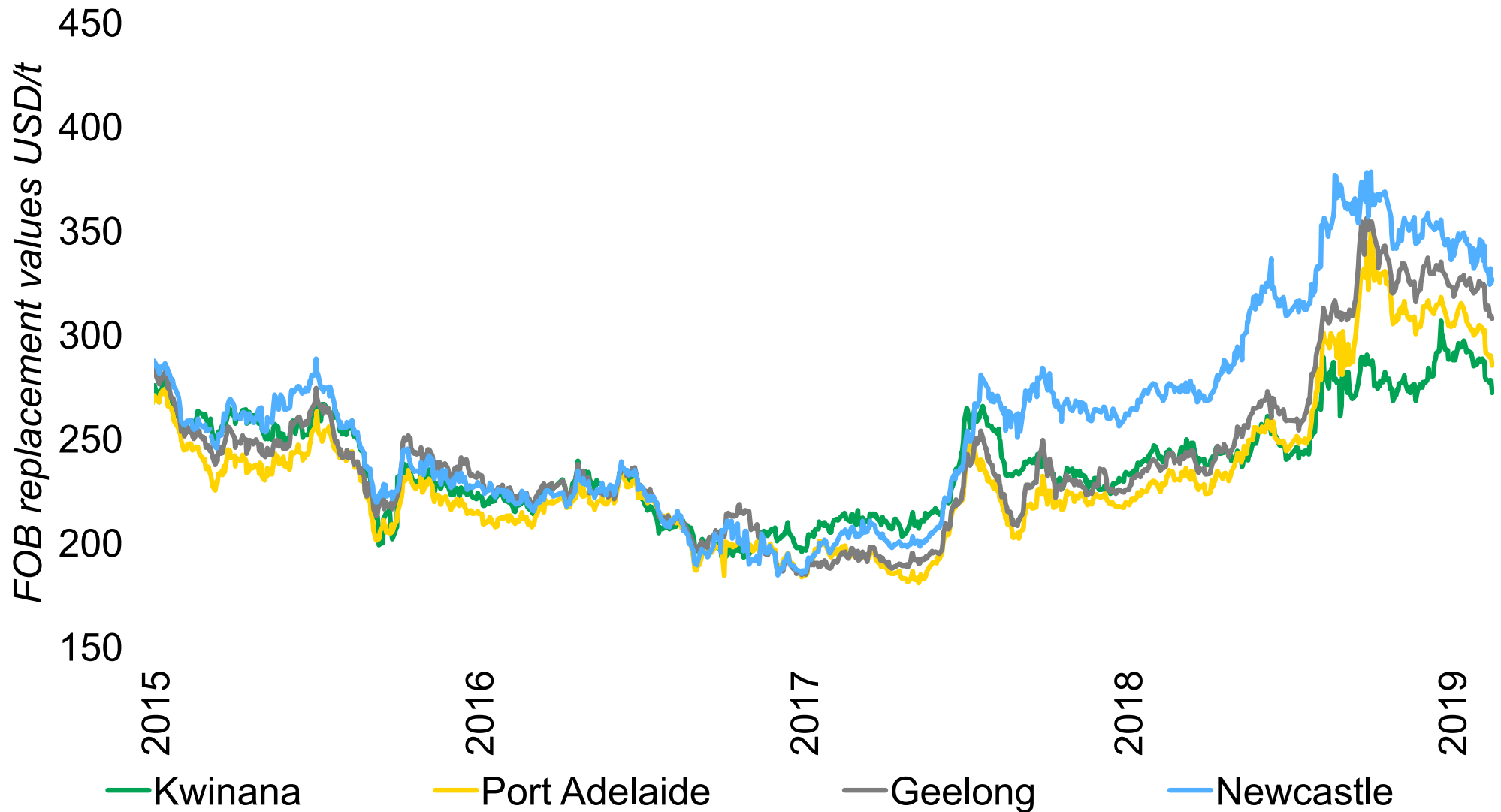
# Matrix of grain movements

'000t	Import (Export)	Qld	NSW	Vic	SA	WA
Qld	2,150		250		100	1,800
NSW	1,350	(250)		(150)	50	1,700
Vic	250	-	150		-	100
SA	(150)	(100)	(50)	-		-
WA	(3,600)	(1,800)	(1,700)	(100)	-	



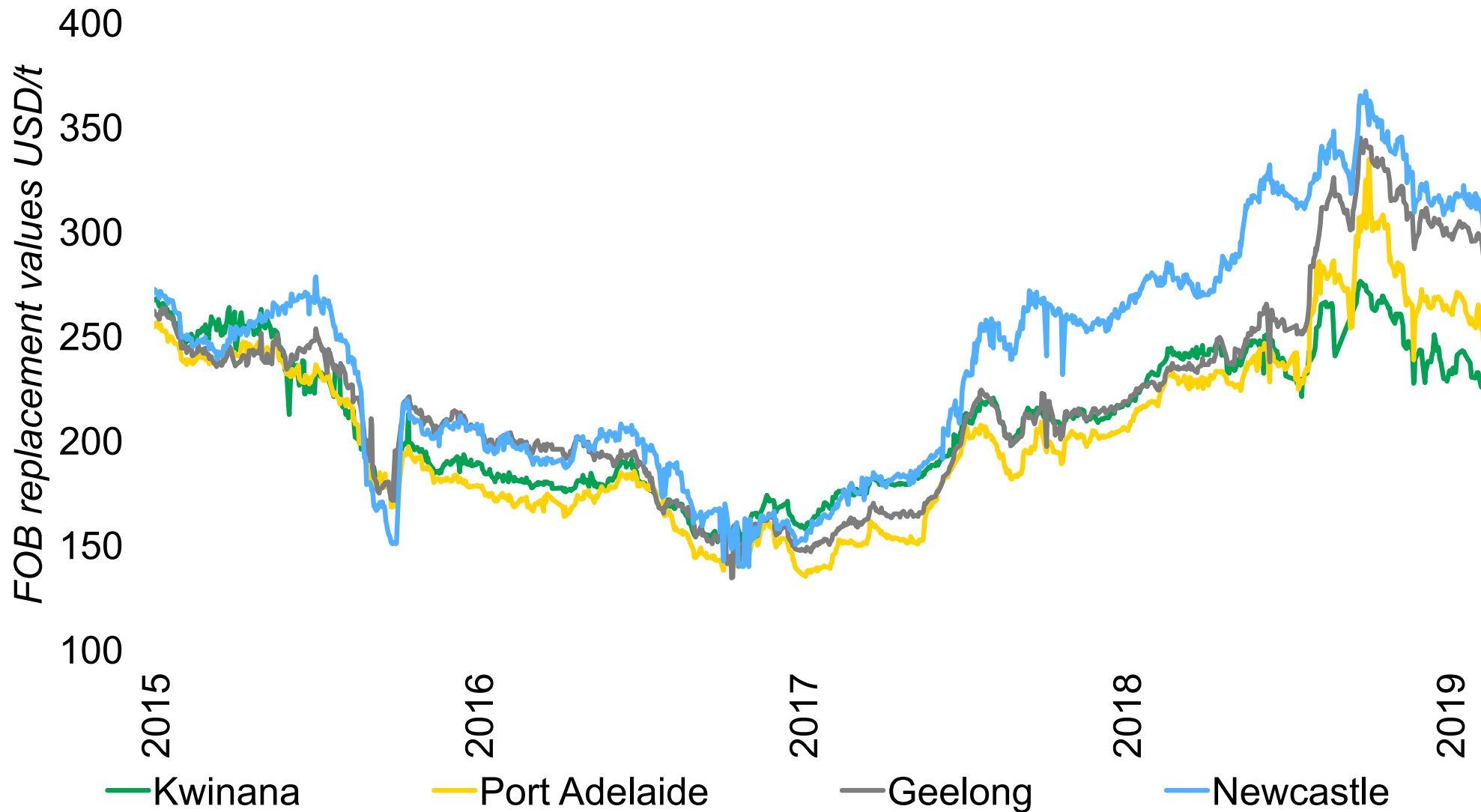


# APW Wheat FOB Values

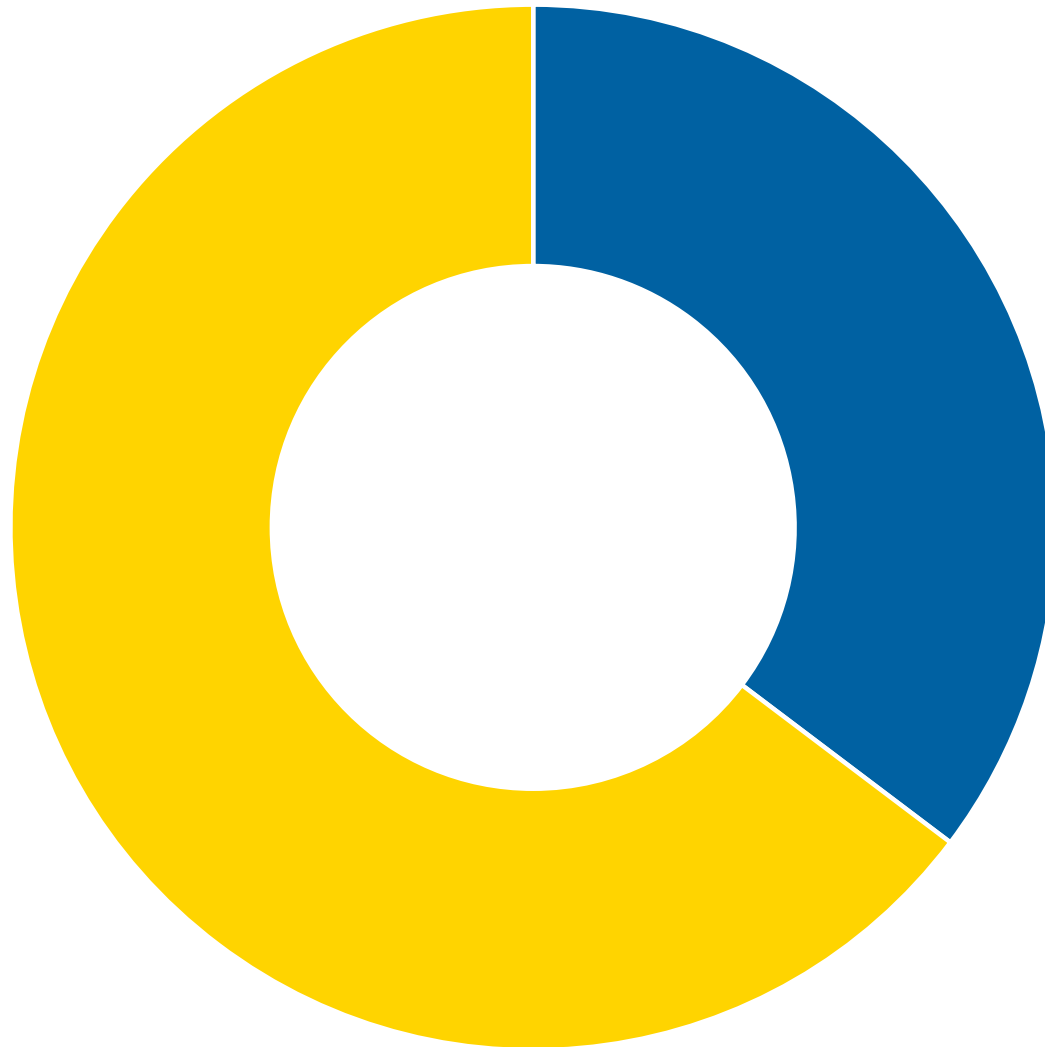




# Feed Barley FOB Values



# Domestic uses



- Domestic
- Remainder



# Domestic uses



- Red Meat
- Dairy
- Pigs/Poultry
- Milling/Malt

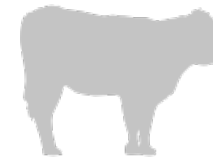
# Domestic uses



↑ **32%**  
Production



↓ **7%**  
Dairy



↓ **10%**  
Beef



↓ **3%**  
Pigs



↑ **3%**  
Poultry



↑ **1-2%**  
Food



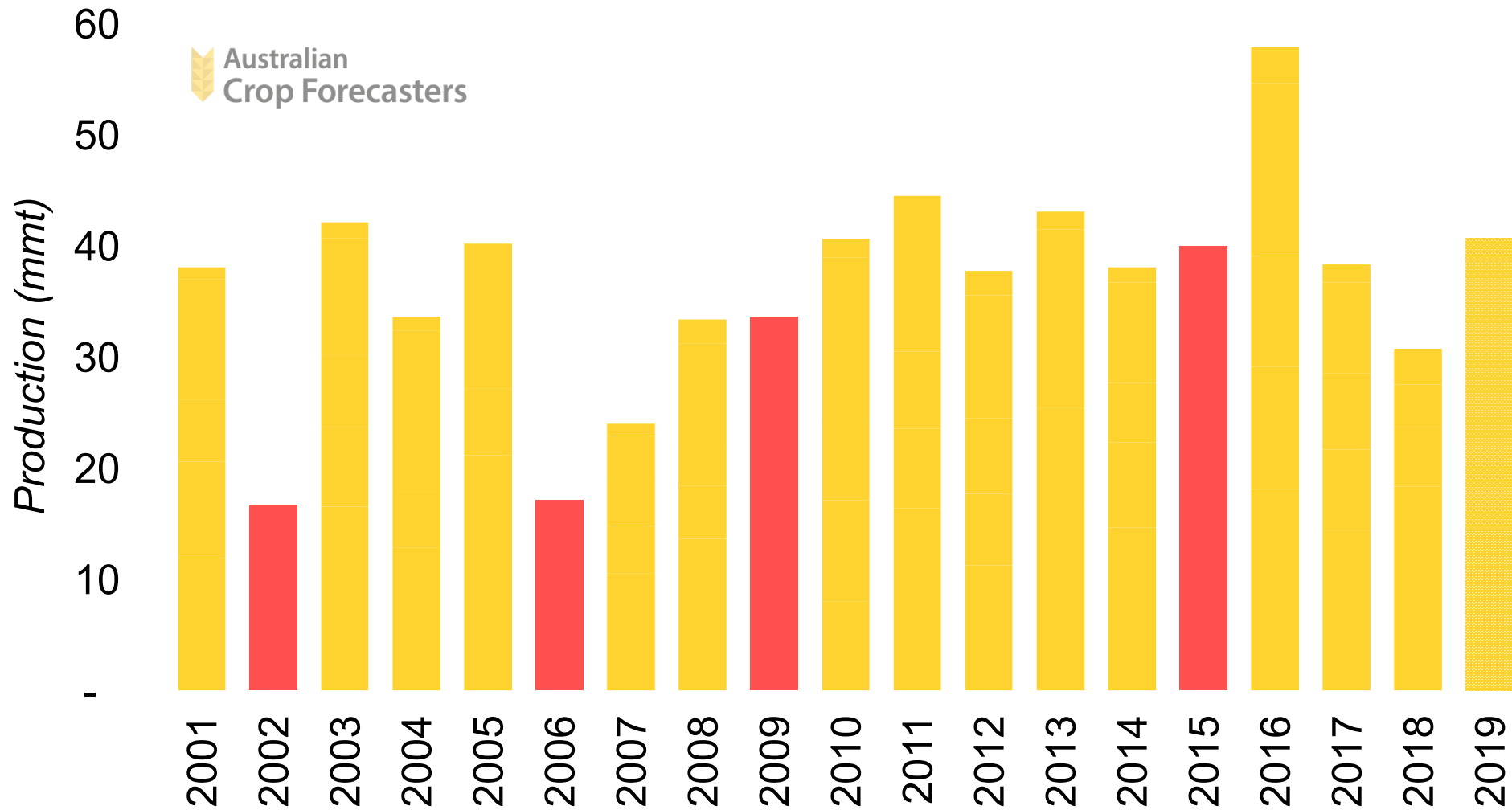
↑ **1%**  
Other



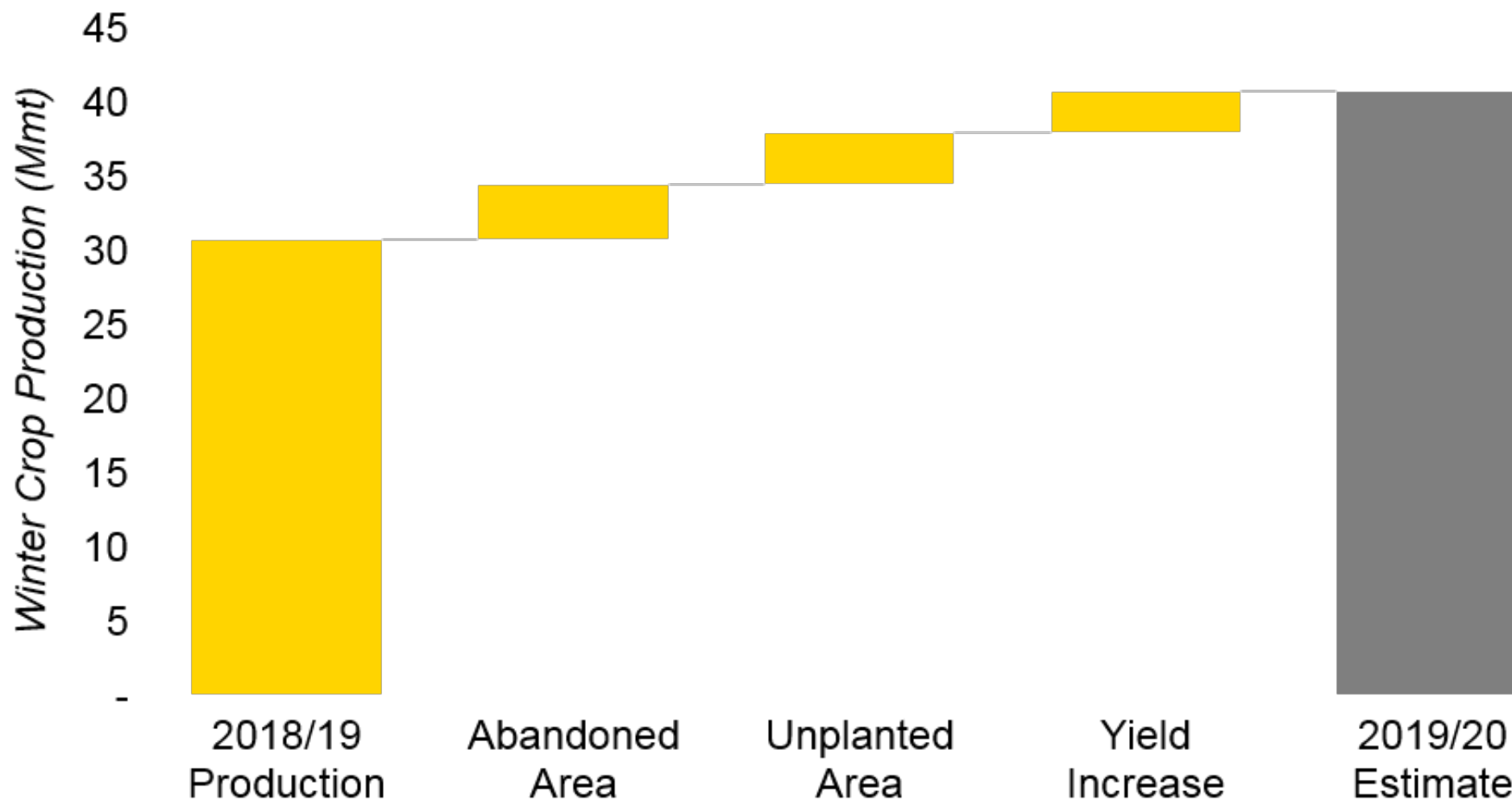
# The year ahead

OUTLOOK FOR 2019/20

# No two El Nino's are the same



# 2019/20 Season Increases

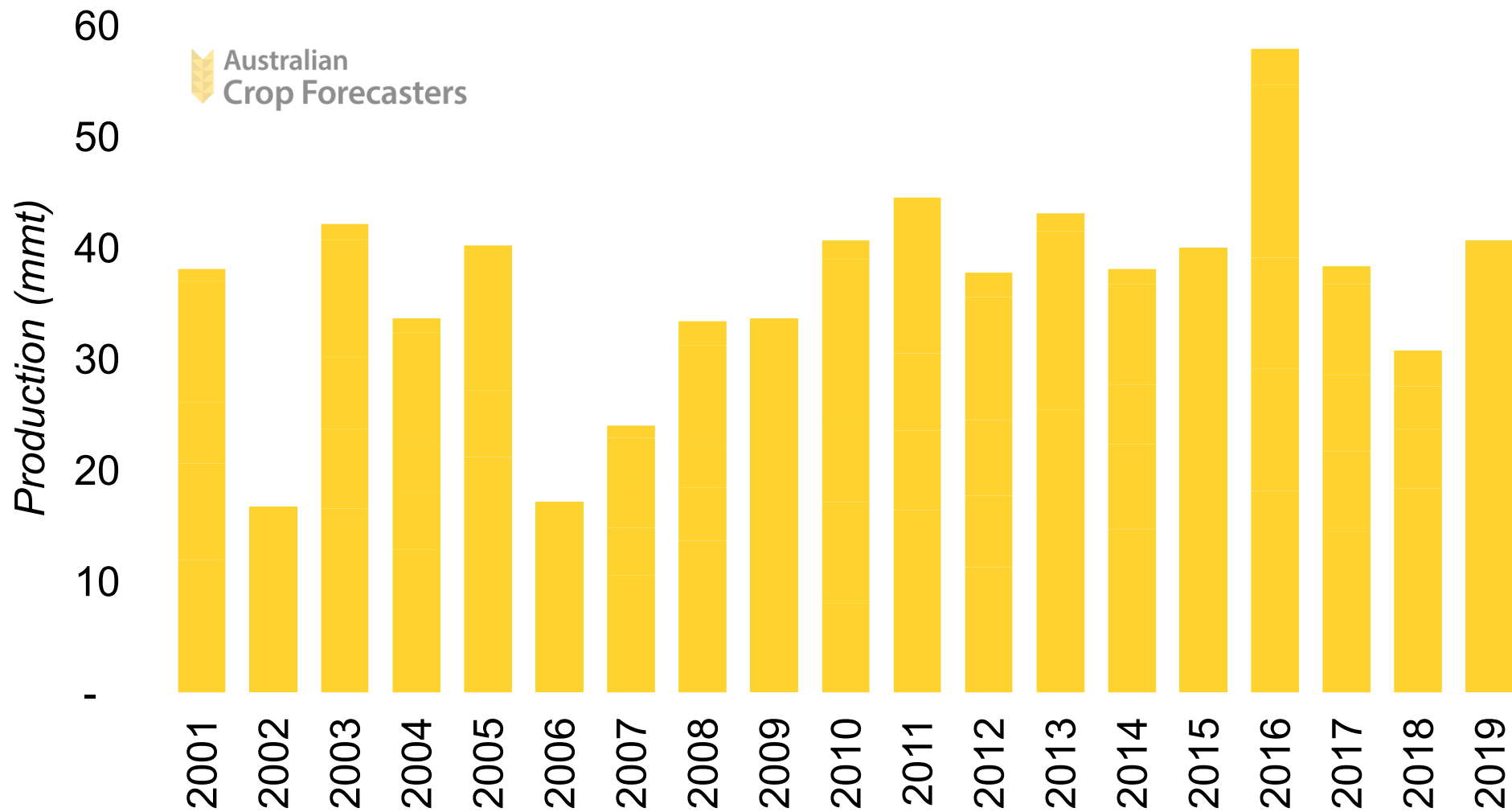




# 2019/20 Season Increases



# Considerations for 2019/20





Thank you