



Australian Grain Perspective

2008 / 2009

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Marketing Manager, AWB

MAP LEGEND

AVERAGE RAINFALL

MAY TO OCTOBER (MM)



GRAIN GROWING AREAS



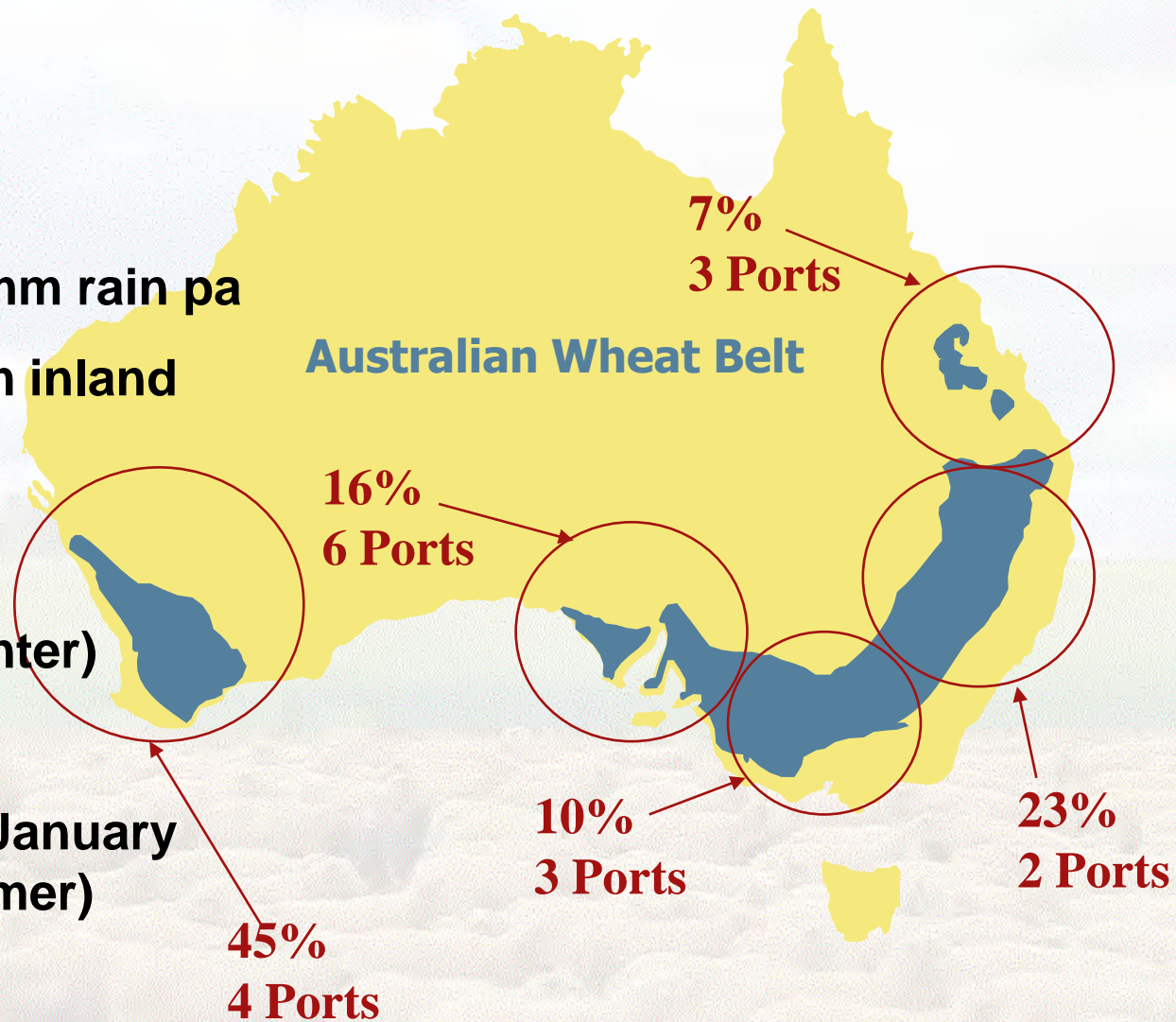
GRAIN EXPORT TERMINALS

1. GERALDTON
2. FREMANTLE (WYNNAMA)
3. ALBANY
4. ESPERANCE
5. THEVENARD
6. PORT LINCOLN
7. PORT PIRIE
8. WALLAROO
9. PORT GILES
10. PORT ADELAIDE
11. PORTLAND
12. GEELONG
13. PORT KIMBLA
14. NEWCASTLE
15. BRISBANE (TUGERAH ISLAND)
16. GLADSTONE
17. MACKAY



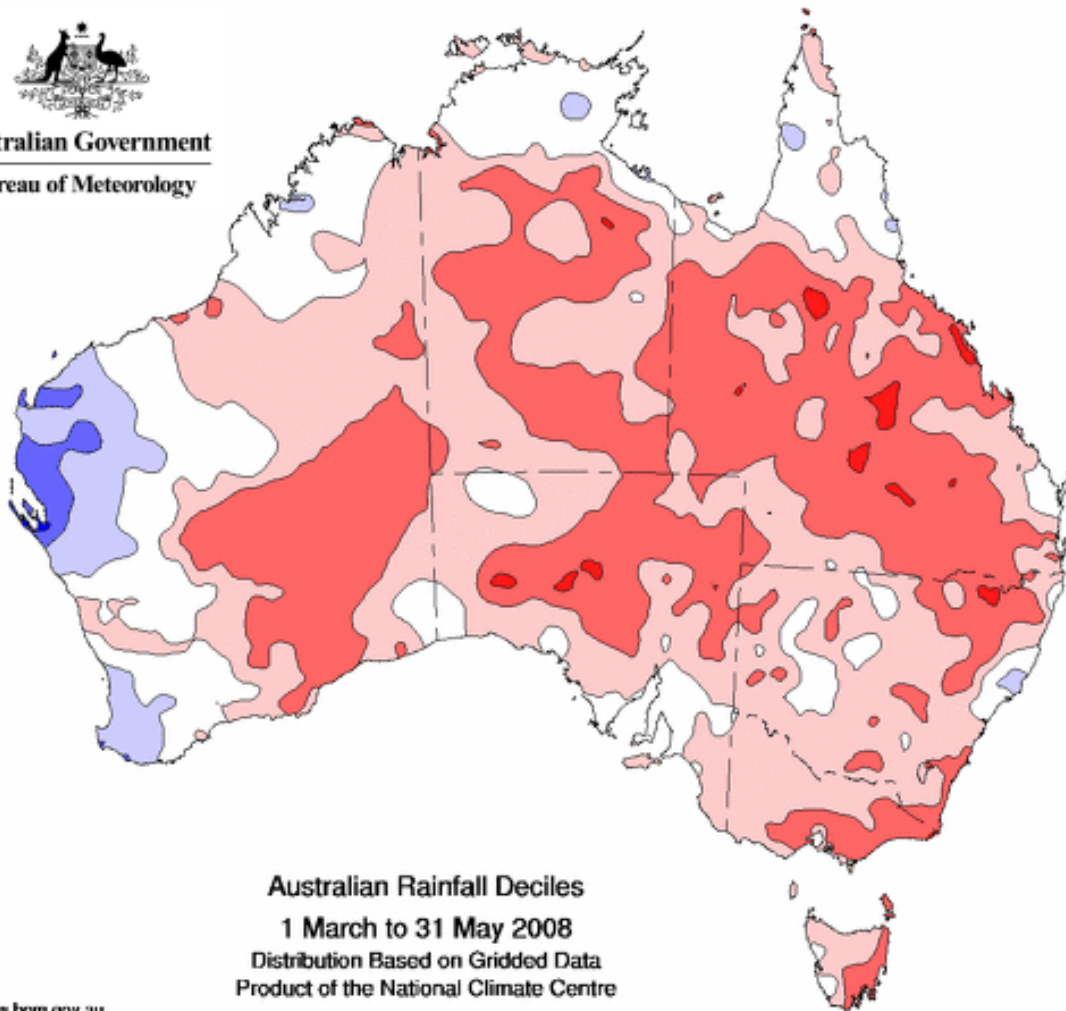


- 200 to 400 mm rain pa
- Up to 600km inland
- Planting
- May/June
- (Autumn/Winter)
- Harvesting
- October to January (Spring/Summer)

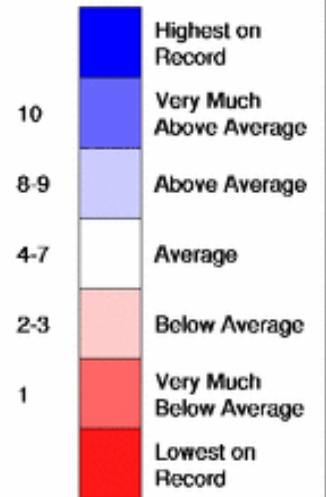




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Rainfall Decile Ranges



Australian Rainfall Deciles
1 March to 31 May 2008
Distribution Based on Gridded Data
Product of the National Climate Centre

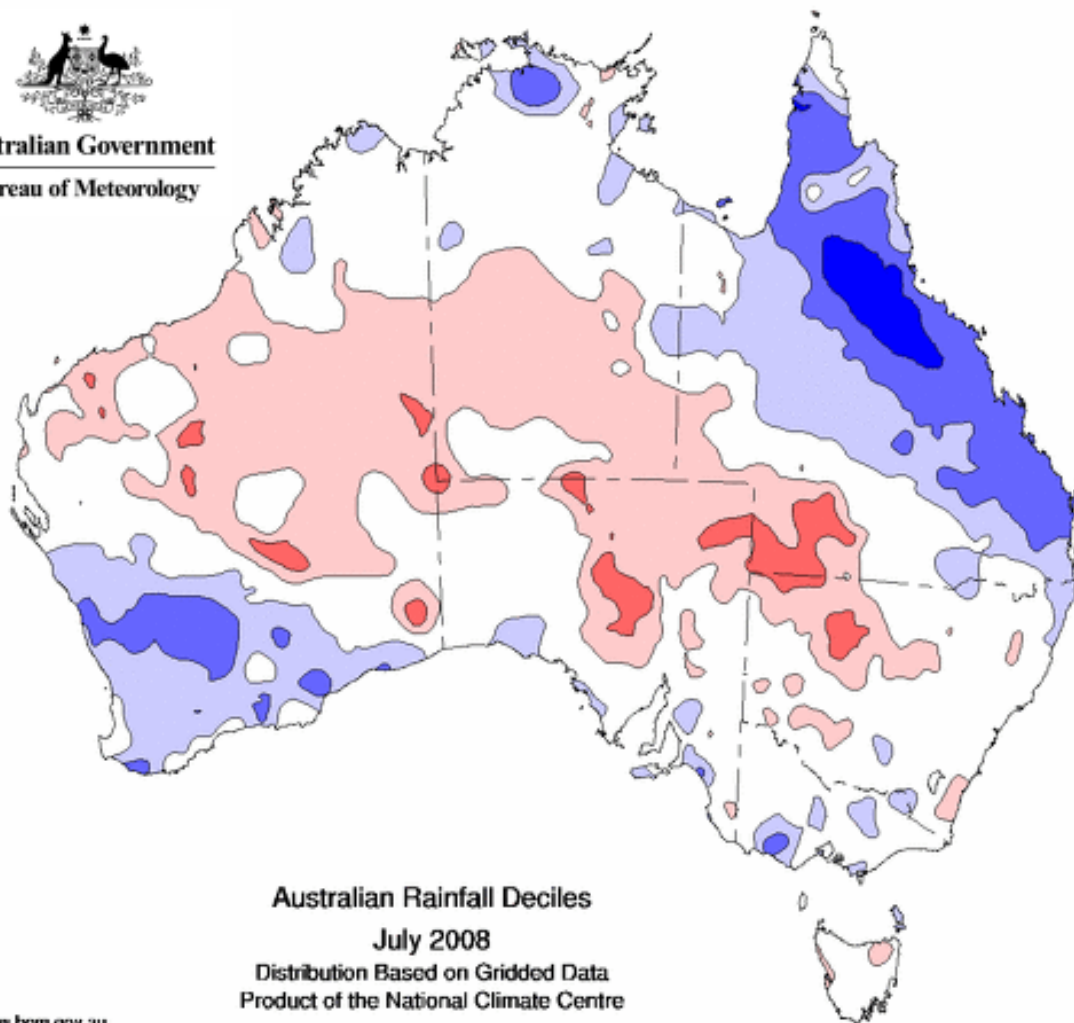
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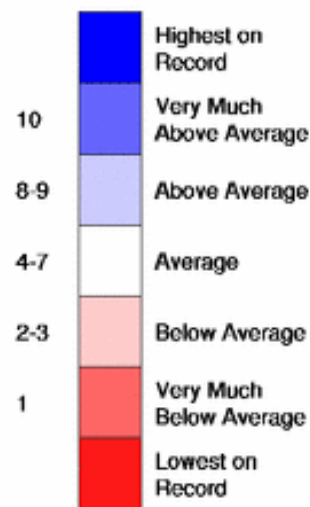
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Rainfall Decile Ranges



Australian Rainfall Deciles
July 2008
Distribution Based on Gridded Data
Product of the National Climate Centre

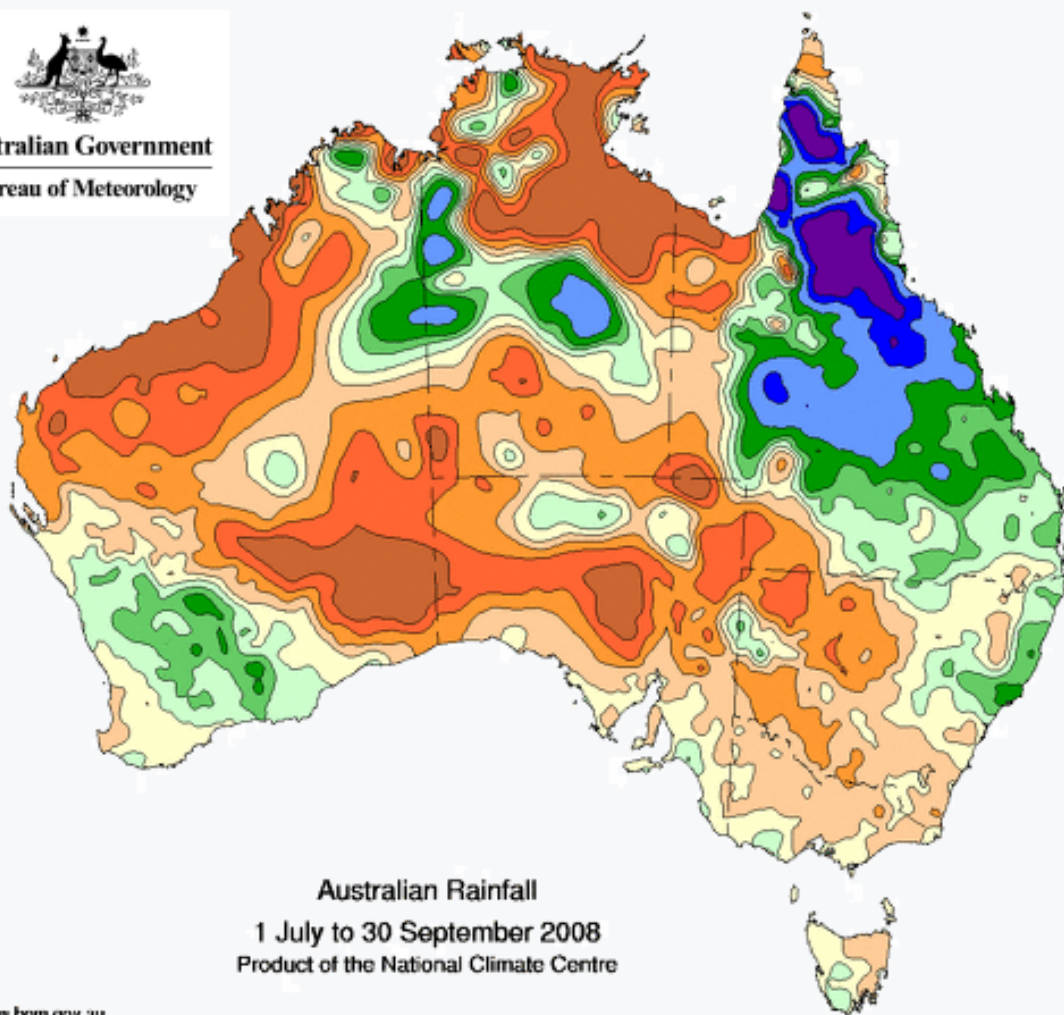
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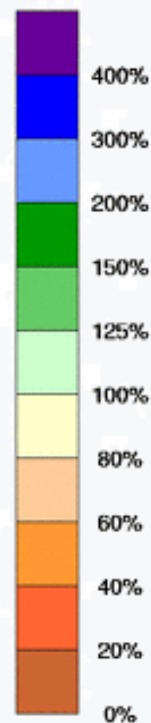
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Percentage of Mean



Australian Rainfall
1 July to 30 September 2008
Product of the National Climate Centre

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

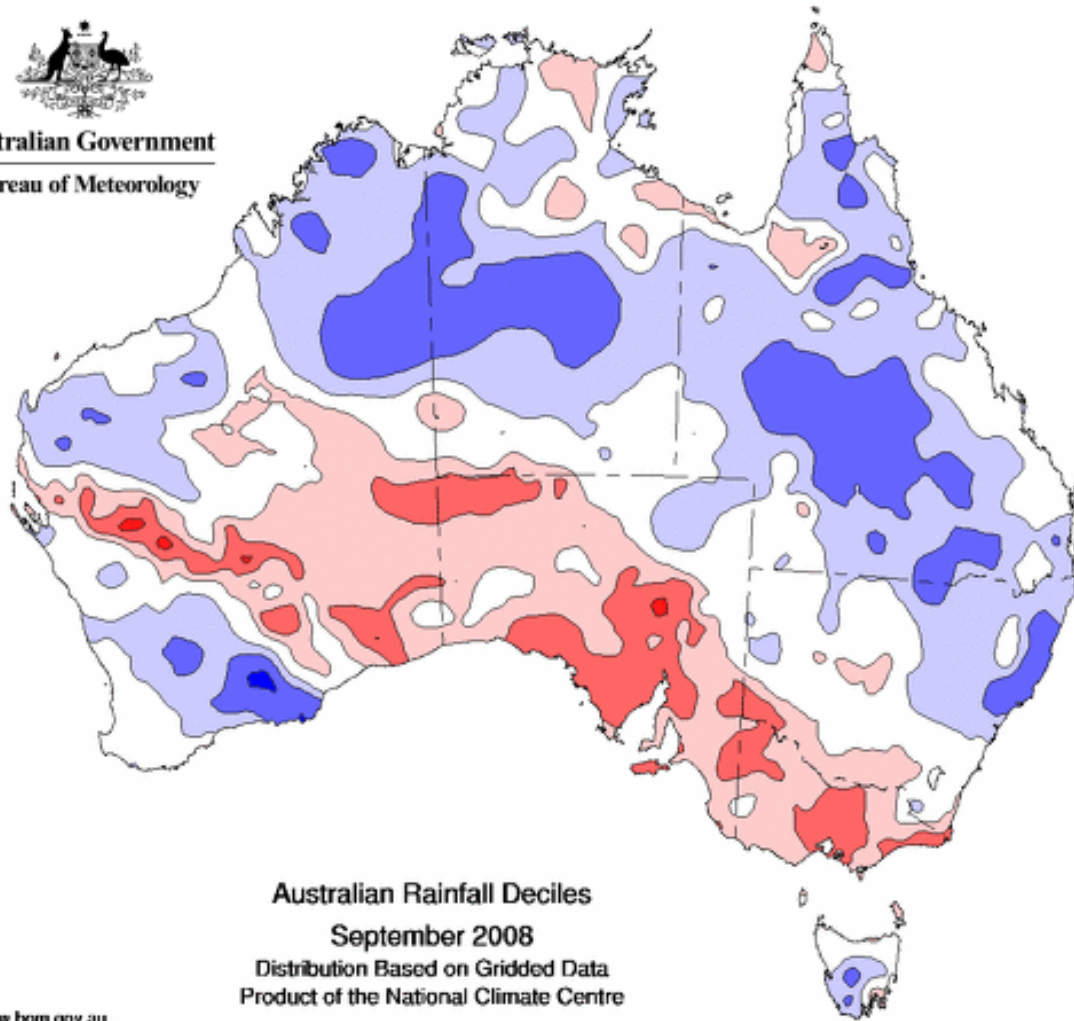
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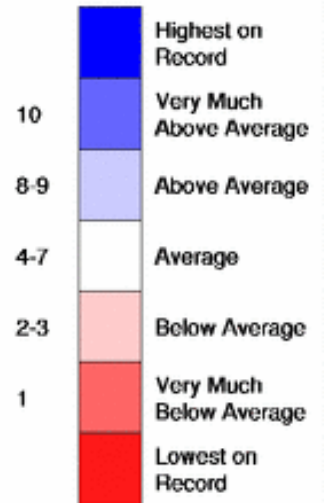




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Rainfall Decile Ranges



Australian Rainfall Deciles
September 2008
Distribution Based on Gridded Data
Product of the National Climate Centre

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

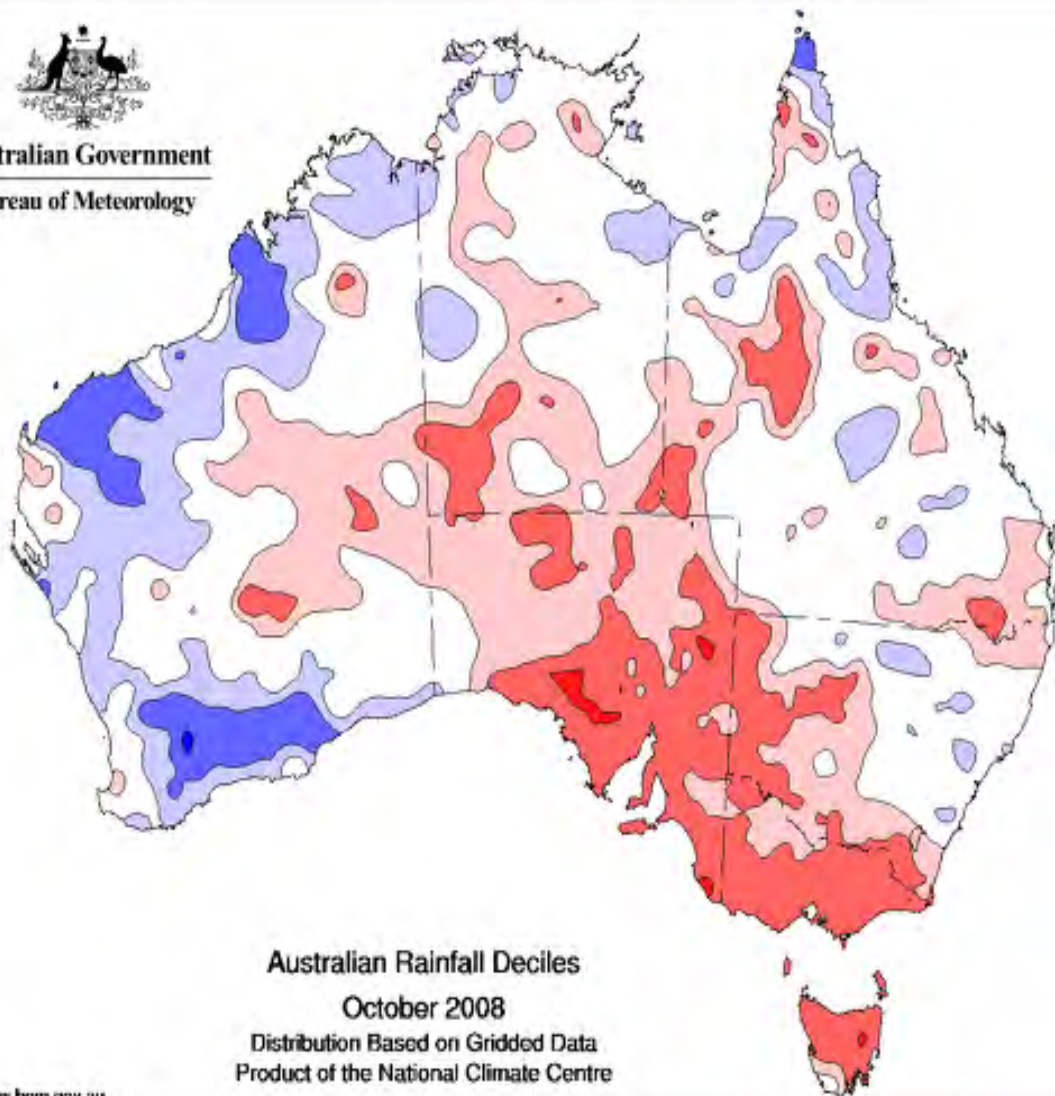
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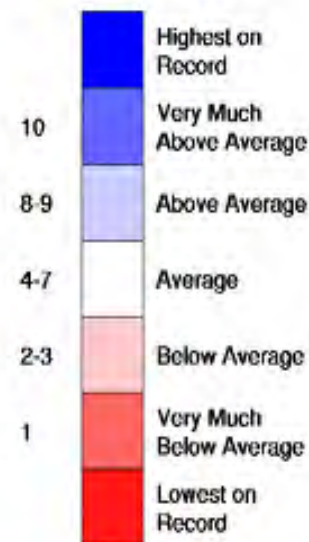




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Rainfall Decile Ranges



Australian Rainfall Deciles

October 2008

Distribution Based on Gridded Data
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2008 Crop Summary

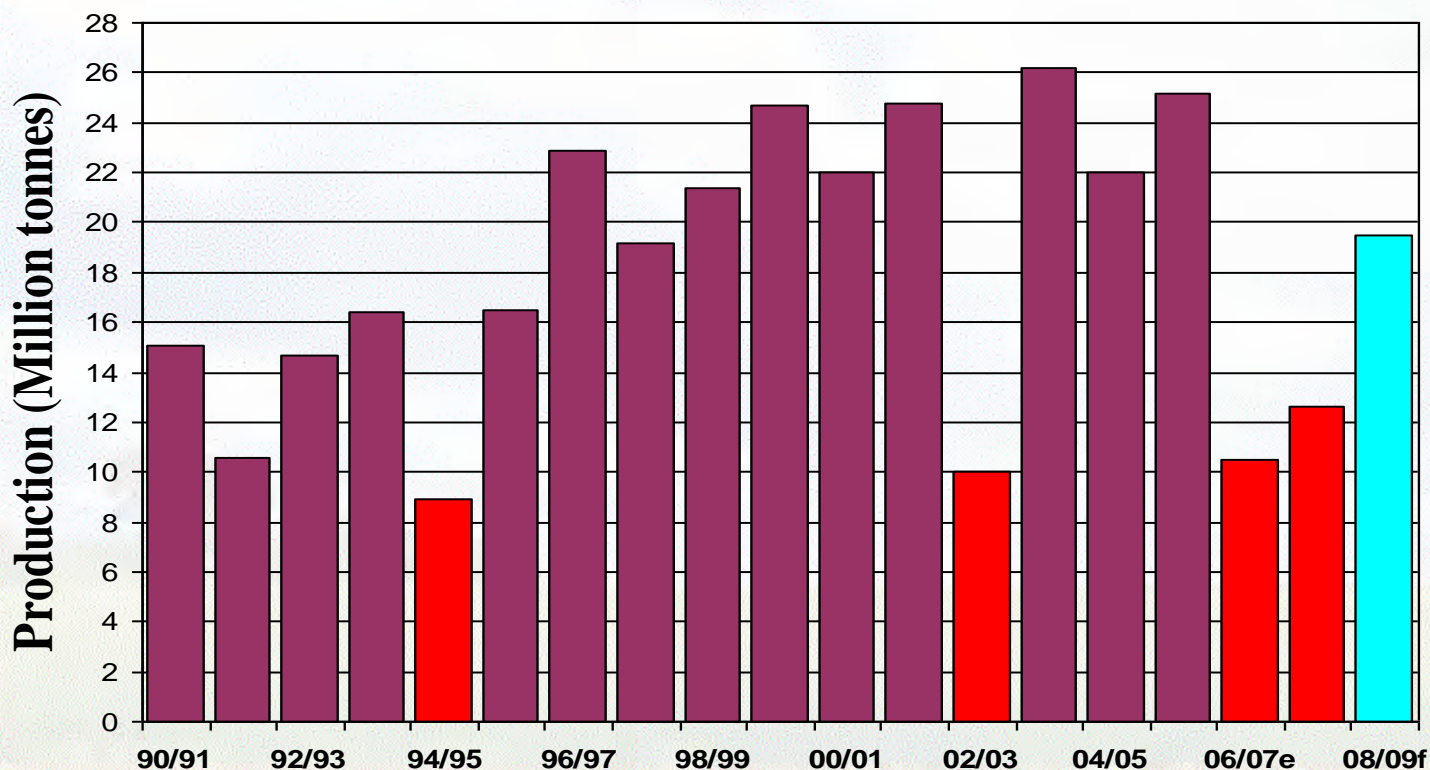
1. Low subsoil moisture at planting – continuation of 2007 drought
 2. Late planting compared to 2006 & 2007
 3. Increased area due to price, input costs and lower risk
 4. Wide spread rainfall late May followed by dry June
 5. Slow crop establishment – lower plant bio mass than 2007
 6. Good July rainfall established the crop potential
 7. August dry impacted WA (significant) VIC / SNSW / QLD
 8. August average rainfall SA / NW VIC / mixed NNSW
 9. September – Dry WA / VIC/ SNSW / SA – wet NNSW / QLD
 10. Significant WA frost followed by widespread WA rainfall (offset each other)
 11. October – frosts across VIC
 12. Oct – Nov : Dry SA / VIC / SNSW, Wet WA
- 



| NATIONAL | WHEAT | | | BARLEY | | | CANOLA | | |
|-----------------|------------|-------------|------------|-----------|-------------|------------|-----------|-------------|------------|
| | Area | Yield F/cst | Production | Area | Yield F/cst | Production | Area | Yield F/cst | Production |
| Queensland | 760,000 | 2.11 | 1,600,500 | 91,500 | 2.41 | 220,800 | 0 | 0.00 | 0 |
| New South Wales | 4,120,000 | 1.58 | 6,494,000 | 778,000 | 1.49 | 1,162,100 | 270,000 | 0.76 | 204,000 |
| Victoria | 1,422,000 | 0.95 | 1,354,000 | 801,000 | 1.14 | 912,500 | 192,000 | 1.03 | 197,600 |
| South Australia | 2,070,000 | 1.12 | 2,318,500 | 1,130,000 | 1.43 | 1,611,500 | 180,000 | 1.16 | 209,250 |
| West Australia | 4,640,000 | 1.75 | 8,126,250 | 1,160,000 | 1.85 | 2,142,500 | 460,000 | 1.22 | 560,500 |
| National Totals | 13,012,000 | 1.53 | 19,893,250 | 3,960,500 | 1.53 | 6,049,400 | 1,102,000 | 1.06 | 1,171,350 |



Australian Wheat Production



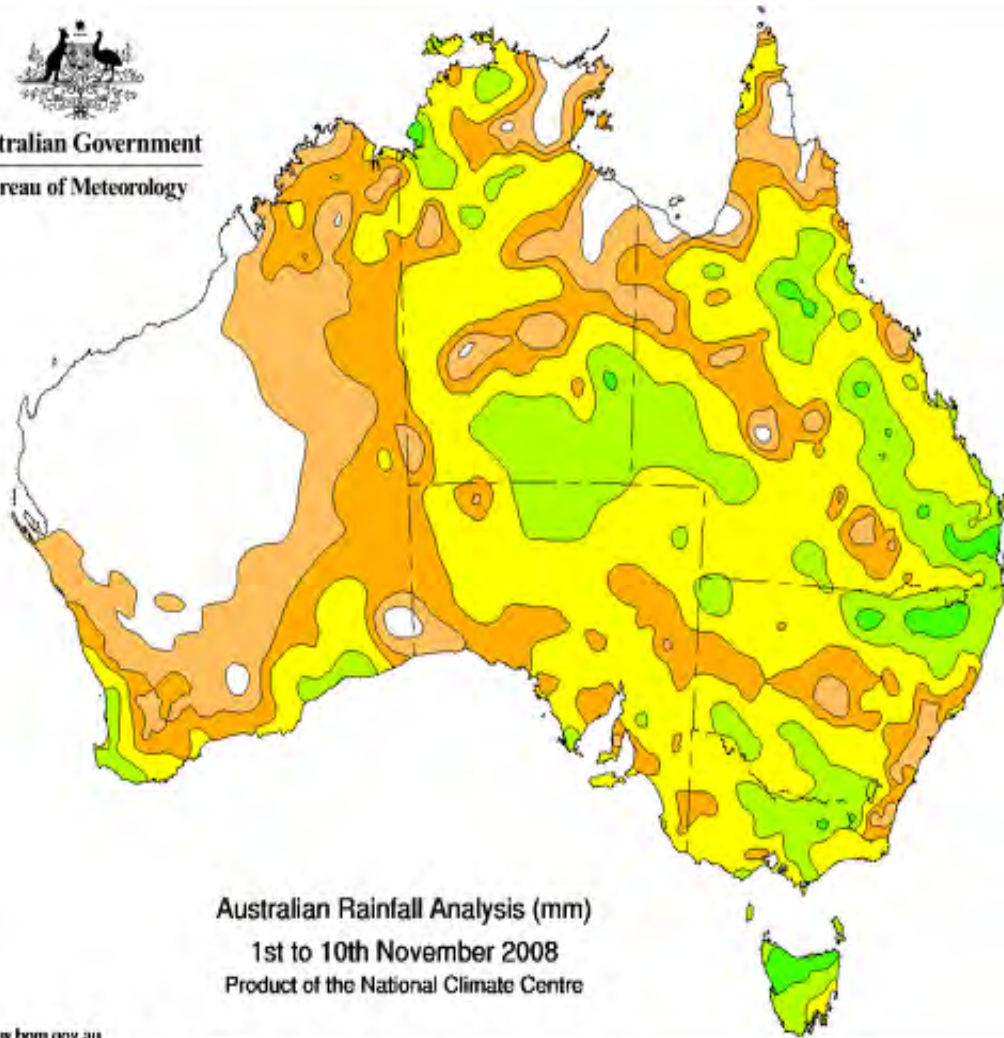
- average area sown up 15%
- average yield down by 10%
- 1995 - 2000 average 10.3 m/ha
- 1995 - 2000 average 1.79t/ha
- 2000 - 2006 average 12.1 m/ha
- 2000 - 2006 average 1.6 t/ha



| % Harvested | Area Sown | 14-Nov | 21-Nov | 28-Nov | 5-Dec | 12-Dec | 19-Dec | 26-Dec |
|-----------------------|------------------|---------------|---------------|---------------|--------------|---------------|---------------|---------------|
| QLD | 760,000 | 46% | 0% | 0% | 0% | 0% | 0% | 0% |
| NSW | 4,120,000 | 14% | 0% | 0% | 0% | 0% | 0% | 0% |
| VIC | 1,422,000 | 6% | 0% | 0% | 0% | 0% | 0% | 0% |
| SA | 2,070,000 | 8% | 0% | 0% | 0% | 0% | 0% | 0% |
| WA | 4,640,000 | 14% | 0% | 0% | 0% | 0% | 0% | 0% |
| Area / Harvest | 13,012,000 | 1,794,400 | 0 | 0 | 0 | 0 | 0 | 0 |
| National % | | 13.8% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |



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Australian Rainfall Analysis (mm)
1st to 10th November 2008
Product of the National Climate Centre

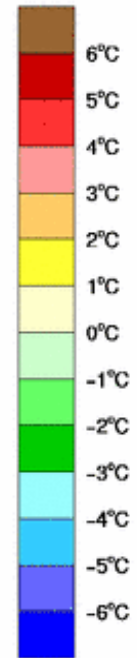
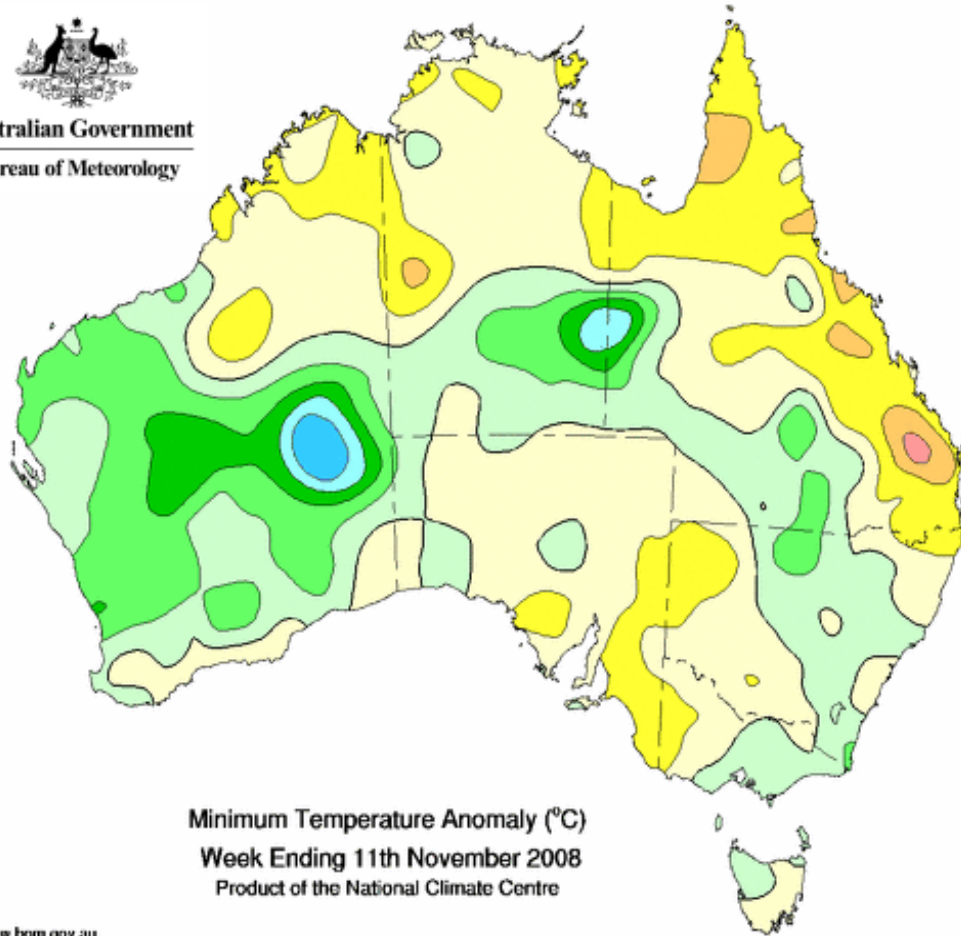
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Minimum Temperature Anomaly (°C)
Week Ending 11th November 2008
Product of the National Climate Centre

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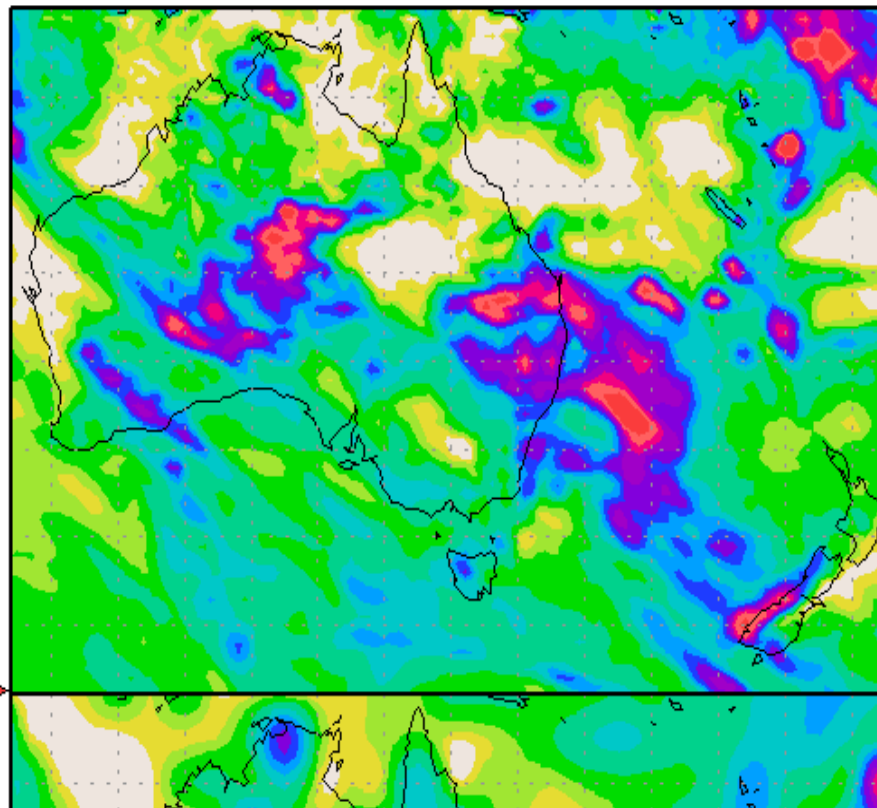
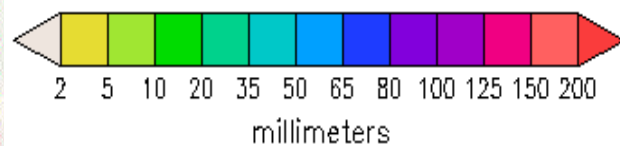
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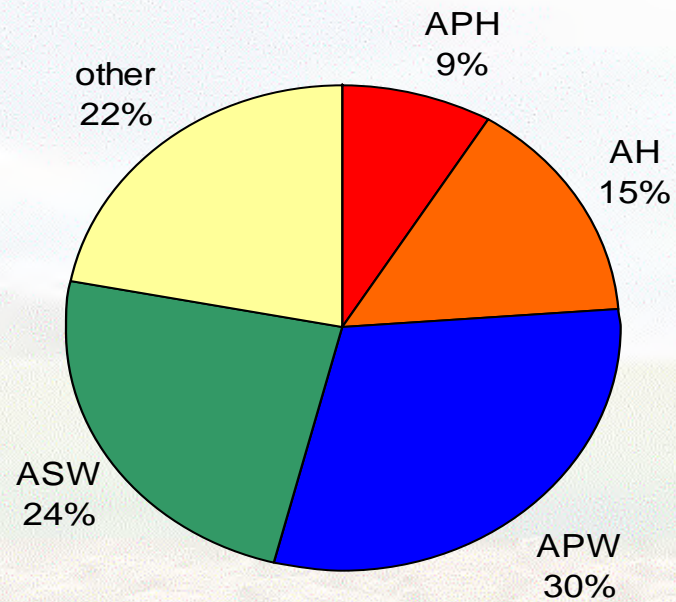
Precipitation (mm)
during the period:

Fri, 14 NOV 2008 at 12Z
-to-
Sat, 22 NOV 2008 at 00Z





Quality Profile – Major Grades (5 yr avge)





Marketing Arrangements

- New Government



- New Wheat Marketing Arrangements





New Marketing Arrangements

- Wheat Exports Australia (WEA) was established on July 1 2008 under the *Wheat Export Marketing Act 2008* to regulate the export of Bulk wheat from Australia
- Exporters wanting to export bulk wheat from Australia must be accredited by Wheat Exports Australia under the Wheat Exports Accreditation Scheme
- As at 28th October 2008, WEA had accredited 19 wheat exporters
- Under the Bulk Scheme, WEA has the power to grant, suspend, cancel or vary bulk wheat accreditations



Accredited Exporters

- **AWB Limited**
- **AWB Harvest Finance Limited**

- ABB Grain
- Bunge Agribusiness Australia Pty Ltd
- Cargill Australia Ltd
- Concordia Agritrading (Australia) Pty Ltd
- Elders Toepfer Grain Pty Ltd
- Emerald Group Australia Pty Ltd
- Glencore Grain Pty Ltd
- Graincorp Ltd
- Grain Pool Pty Ltd
- J.K International Pty Ltd
- Louis Dreyfus Australia Pty Ltd
- Marubeni Australia Ltd
- OzEpulse Pty Ltd
- Pentag Commodities Pty Ltd
- Queensland Cotton Corporation Pty Ltd
- Riverina (Australia) Pty Ltd



Quality Grain made to order!

