



Patrick Stephenson Ltd
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Arable bits from around the world

Despite the rumors that our self financed trips to the states are jolly's! We have made some very good friends and contacts, Allen has given a resume of GAIAC and as part of this we are hoping to share information around the world helping us all conduct our businesses better. With agricultural trade now global information on plantings, harvest prospects, and prices is vital. Information from like minded people on the ground will help us help our clients. I have e-mail addresses for all contributors if you want to correspond directly. Please give feedback as to the content and its use.

Here in the **western US** a cool early winter has given way to a warm mid-winter with lettuce and vegetable harvests about a week ahead of schedule. Durham wheat plantings are about completed with Arizona down 40,000 ac, and California also down. Total plantings are about 20% lower due to contracts only about 60 percent of the £275 plus a ton at the peak last year. Cotton plantings are also likely to be cut back, hard to get excited about 35 pence cotton when MAP is still the better part of £690 a ton.

Based on a 20 year average, between 3.1 and 3.5 million acres of cotton are planted on the **Texas High Plains** each year. Due to low cotton prices coupled with high production costs, there will be a slight shift away from cotton to the grain crops such as wheat, corn, and grain sorghum. Since approximately 45% of the acreage on the Texas High Plains is dryland, dryland growers have few planting alternatives other than cotton. Last year was a tough year financially for farmers on the Texas High Plains. budgets will be very tight this year and growers are looking for ways to cut expenses. In most areas of the Texas High Plains, we have not had rain in over 100 days; some growers are beginning to irrigate their fields in order to be able to conduct planting preparation operations.

West central **Minnesota** had been in a moderate drought for 3 years (3t/ac corn) with projections to be a more normal rainfall this coming year. North has been suffered heavy rain this past summer (50% of the sugar beet remains in the ground). To the south they had a perfect year (4.7 t/ac corn).

As of now growers are staying with their rotations as normal, with a few going all corn. My area consists of 45% corn, 40% soybeans, the rest a mix of winter wheat, beets, oats, barley, kidney beans sunflowers and alfalfa.

Our roundup generics are still high like last year £5.50/litre. The Monsanto brands Power Max is at £9/litre. Fertilizer as of today just went down some this week- Urea £330/ton, Dap £462/ton and Potash 62% £551/ton.

Canada

Winter wheat acreage on the Canadian prairies is down slightly from 1.5 million acres last year to 1.2 million acres. Despite late seeding due to later than normal canola harvesting, warm fall temperatures and late frost resulted in good



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establishment in most areas. The late canola harvests meant that some acres (mostly in Saskatchewan) were sown into field pea stubble which is not ideal. Southern Manitoba may have some losses due to high rainfall in the fall, but will benefit from good snow cover and moderate soil temperatures as a result. Areas of western Saskatchewan and eastern Alberta suffered from dry conditions last fall and have not received enough snow to date. These areas will be looking for more snow or spring rains to push through winter wheat crops.

Northern Victoria

A disappointing season – a season that started with a lot of promise with good winter rains. Unfortunately September and October were very dry causing many growers to cut at least some of their crops for hay. As there was hay left from the last season early prices this season were not as good as expected. Growers that harvested grain from crops on light ground or from crops sown with knife points and GPS received average to just below average yields. There are a lot positive things to be said about the value of research gone into precision sowing and new varieties. Paddocks that would have yielded nothing or very little with the same rain fall in previous years are now yielding quite well.

Southern NSW

Another year of drought and below average returns from farmers is placing pressure on the liquidity of farmers. This in turn is placing pressure on funding bodies. The high price of fertilizer and fuel has renewed interest in biological fertilizers and biofuels respectively. GM canola was grown on a larger scale in 08 and is slowly gaining acceptance. Areas will increase substantially next year. Bad year for grapes

South Australia

A terrible year from a cropping perspective, essentially due to the drought. Bad year for grapes!

Western Australia

The winter season began with a staggered start with huge differences in moisture across regions. Farmer optimism was reduced in many areas with early rains not followed up by further moisture. Conditions were relatively warm until early July, providing unusual conditions for pests, weeds and diseases. .