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Contrasting regional results point to shifting patterns in Australia's grain production

ANZ's latest Agri InFocus report shows that while Australia's 2024/25 winter crop delivered a large national harvest, sharp regional differences are shaping expectations for the year ahead.

Total winter crop production reached 59.8 million tonnes – a 26 per cent lift on the previous season and the third largest crop on record.

Michael Whitehead, ANZ Executive Director of Food, Beverage and Agriculture Business Insights, says that while the national figure is a standout result, it masks significant contrasts across the regions.

"It was a strong headline result, but the underlying regional contrasts point to a broader shift in how the industry is evolving.

"Regional cropping performance is diverging – and strategic decision-making is now as important as overall scale. Looking ahead, success will depend on adaptability over scope.

"We will continue to see growers refine their strategies, adjusting crop choices in response to logistics, conditions, and global demand."

New South Wales and Western Australia led the recovery, producing 20.3 and 23 million tonnes respectively, driven by well-timed rainfall and good growing conditions.

Queensland more than doubled its crop to 3.8 million tonnes, supported by favourable early moisture and a sharp increase in chickpea plantings.

In contrast, Victoria's crop fell 31 per cent and South Australia's dropped 40 per cent, with both states hit by spring frosts and prolonged dry spells.

Wheat production rose 31 per cent to 34.1 million tonnes, with strong yields and good protein levels in key regions. Barley rose 13 per cent, while canola fell 8 per cent – with southern crops particularly impacted.

The report highlights pulses as the growth story of the season – national production climbed 34 per cent to 4.7 million tonnes.

Chickpea production surged 171 per cent on the back of rising Indian demand, while lentils rose 7 per cent, helped by strong plantings in South Australia and western Victoria.

As the 2025/26 season progresses, a two-speed sowing pattern is emerging.

This planting season has seen growers in northern regions moving early, while the south have remained relatively cautious, reducing canola area or switching to lower-risk cereals and lentils.

"In today's environment, the ability to adjust plans in real time is becoming essential for cropping businesses. Adaptability is becoming one of Australian cropping's most valuable strengths.

"Success will increasingly depend on growers effectively responding to climate, markets and sowing conditions – rather than simply the scale of their operation – leading to a two-speed sowing pattern across the nation," Mr Whitehead said.

Further insights can be found in the 2025 winter edition of ANZ's [Agri InFocus Commodity Insights](#) report.

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