

# Annual Report 2019-20



## Membership Listing (Financial as at 30 June 2020)

### Corporate Members:

100% Bottling Company	MSM Milling Pty Ltd
Advanta Seeds Pty Ltd	NPZ Australia Pty Ltd NuSeed Pty Ltd
BASF Australia Limited Braid Logistics	Peerless Holdings Pty Ltd Perten Instruments Australia Pty Ltd
Cargill Australia Ltd Centre State Exports Corteva Agriscience	Riverina Oils Pty Ltd  Seednet
GenTech Seeds GO Resources Pty Ltd	Upfield Foods
Intertek Testing Services (Australia) Pty Ltd	Windermere Oilseeds Pty Ltd

### Association Members:

Stockfeed Manufacturers Council of Australia (SFMCA)

### Producer Members:

Grain Growers Limited

### Honorary Members:

CSIRO Plant Industry Department of Agriculture and Fisheries (Qld) Grains Research and Development Corporation (GRDC)	NSW Department of Primary Industries (NSW DPI) SA Research and Development Institute (SARDI)
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### Life Members:

Don Bacon-Hall (Dec)	Bob Colton	Alan Leadley	Phillip Salisbury
Bryce Bell (Dec)	Robert Green	Rod Mailer	Phillip Stanton
John Bostock	John Lamont (Dec)	Allan McCallum	
Ron Bowrey	Barry Lathlean	Julie McMinn (Dec)	
Warren Burden	Owen Laws	Rosemary Richards	

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### AOF Executive

President	- Rosemary Richards
Vice President	- Rob Wilson
Vice President	- Dan Morgan
Treasurer	- Lachlan Herbert
Public Officer	- Michael Tighe
Consumer sector representative	- Vacant
Crushing sector representative	- Cameron Pratt (GrainCorp Oils)
GIWA representative	- Michael Lamond
Production sector representative	- Vacant
Refining sector representative	- Michael Tighe (Peerless Foods)
Seed sector representative	- David Strong (BASF)
Stockfeed sector representative	- Duncan Rowland (SFMCA)
Canola sector representative	- Don McCaffery (NSW DPI)
Safflower sector representative	- Rosemary Richards (GO Resources)
Soybean sector representative	- Simon Crane (Seednet)
Chair, Sunflower sub-committee	- Kevin Charlesworth (ASA)
Chair, Technical sub-committee	- Neil Bowman (GrainCorp)
CEO	- Nick Goddard
Administration	- Elle Hardcastle

### Acknowledgments

The Australian Oilseeds Federation sincerely thanks the following contributors to the Oilseed Development Fund for their ongoing support:

Cargill	Ridley Stockfeeds
MSM Milling	Riverina Oils Pty Ltd
Peerless Foods	Upfield Foods



## President's Report 2020

### Rosemary Richards

It was a privilege to be elected President of the AOF at last year's AGM. As many of you would know, I have had a long involvement with AOF - firstly as a consultant who facilitated the industry's first strategic plan, then in the CEO chair until the organisation was able to sustain a full time resource and now back as your President. So it was with a great sense of familiarity that I continue that involvement with AOF.

It was great to see that the industry, under the leadership of AOF, has continued to advance. Strong capital investment in crush and refining plants has been a notable development, with facilities seeing ongoing significant investment aimed at improving efficiencies and productivity. From additional expelling capacity to expanded refining capacity, to greenfield investment, this is a strong indicator of the overall confidence in the future of the Australian oilseed industry.

The other significant development has been the change in crop sizes, with canola expanding in volume by 140%, while sunflower and soybean have reduced by around 50% due to impact of drought and the relative profitability of competing crops. We have also seen the re-emergence of former oilseed crops such as safflower and linseed.

Innovation lies at the heart of the industry's growth, with new herbicide technologies and stronger disease resistant breeding underpinning the canola growth, while GM technology has effectively 're-invented' safflower for a new market opportunity, and long chain 'fish oil' omega 3 canola holding great promise. Ongoing breeding in soybeans for the culinary market, and new herbicide

tolerant and long-seeded varieties of sunflower hold promise for those industries.

It is timely that 2020 is the year for the ongoing development of the AOF Strategic Plan, planning an industry roadmap to 2025 and beyond. The AOF has been unique in the grain industry by regularly preparing industry strategic plans since the mid '90's. This has given the whole industry visibility on the issues and opportunities faced by all sectors of the value chain, and through consultation, enabled the industry to agree on how to address these issues and opportunities for the future growth of the industry.

Glancing back through the 2002 Strategic Plan, it's pleasing to see so many of the industry priorities having been met over the nearly 20 years, such as expanding export markets for seed and oil; establishment of the high oleic canola sector; replacing palm oil with locally produced oils; expanded meal usage, particularly in dairy; and the development of the industrial oils sector. For the industry to continue to grow and prosper, the aspirations have to be continually raised.

This year's plan, the 2020 Oilseed Industry Strategic Plan, aims to look at the industry through the consumer's and society's eyes, and consider the changing environment that the oilseed sector needs to adjust to.

**Consumer demand** is firmly at the centre of this plan, evermore important as the Australian oilseed industry expands its footprint from oil for food, fuel and industrial uses; to feed whether as meal or wholeseed to food markets from traditional soyfoods to the fast growing plant protein market.

**Market Access** remains a core theme, and one that is ever more critical, as Australia has become so reliant on just one export market (EU) for the much larger canola crop. While issues such as Importing country controls around breeding technologies and chemical residues require close and ongoing industry leadership and liaison with Government to ensure trade pathways remain open, fair and provide a reasonable return.

**Sustainability** is another core theme of the 2020 Plan. Community expectations around how food, fuel and fibre are produced have escalated in recent years and will continue to significantly shape the way the industry operates. The Australian oilseed industry is well ahead in terms of sustainability, underpinned by the ISCC certification scheme for canola to Europe. However, we can't rest on our laurels, but rather need to continue to raise the bar to ensure the Australian industry's supply of seed, oil and meal continues to meet, and exceed, our customer's sustainability requirements.

**Innovation** has long underpinned the Australian industry's productivity and competitiveness, and will continue to do so in the future. As such it is a core theme of the latest Strategic Plan, in particular, ensuring access to innovation. Continued Innovation in breeding, agricultural practices, processing and distribution will provide a solid base for the growth of the oilseed industry.

This year AOF turns 50, which is a significant milestone. Founded in 1970 to develop trading standards and provide a forum for technical advice and discussions, the collaborative nature of the AOF membership

has been enduring over this time. The AOF has continued to be the voice of the industry, advocating to Government and other sectors of the grains industry for the betterment of the Australian oilseed industry.

COVID restrictions have prevented the AOF from celebrating this milestone, however we won't let the moment pass without recognition in due course. Once the COVID situation improves, we will organise an event appropriate for such an important achievement and the current times.

I would like to thank the Executive for their input over the year, and in particular, the leadership team of Rob Wilson, Dan Morgan, Lachy Herbert and Michael Tighe.

I would also like to personally, and on behalf of the industry, thank Nick for his hard work and passion for our industry. It was clear through the strategic plan consultation that the technical expertise of AOF is highly regarded and that is due, in no small part, to Nick's leadership and knowledge.

Finally in such a challenging year it is great to be facing a much more positive spring and crop outlook. While recognising that some areas are better than others, it is a much more positive outlook than last year. It is disappointing that COVID has not allowed me to get around the industry as much as I would've liked in the past year, but the industry and AOF has demonstrated its agility and resilience to adapt to the changed times and continues to prosper and deliver outcomes for members.

Rosemary Richards  
President

## CEO's Report

Nick Goddard

The AOF intended for 2020 to be a memorable year, celebrating the 50th Year of the Association. However, it was memorable for other reasons, as two significant events shaped the outcome of the oilseed industry. The first was the third year of east coast drought, severely impacting both summer and winter cropping area and yields. The second, and more significant event was the outbreak of the global COVID-19 pandemic.

Both events demonstrated the resilience and flexibility of the Australian oilseed industry, as participants throughout the value chain- from growers through to food manufacturers and processors adapted to the changing circumstances.

With low east coast canola production, domestic crushers accessed grain from SA and WA to ensure end-user customer demand could be satisfied, while the soybean and sunflower processors and packers had to resort to imported seed to supplement the short domestic supply to meet their needs.

Then, in April 2020, domestic supply chains were tested like never before with the country in effective 'lockdown', and the hotel, restaurant and catering industries (major users of Australian canola oil) either closed or severely restricted. Conversely, the retail cooking oil and spreads and bakery segments experienced solid growth, requiring flexibility amongst the oil processors to meet the changing demand landscape.

Through this period, the AOF continued to represent the Australian oilseed industry, working with the Federal Government to ensure the totality of the oilseed value chain was recognised as an essential industry, and not incumbered with any State or Federal COVID-related restrictions.

### Highlights for 2019/20

- China returns as a major buyer of Australian canola seed, representing a third of all exports
- Largest volume of exported canola oil on record
- Sustainable Grain Australia established to facilitate trade in sustainable canola and other grains
- Three new varieties of soybean successfully trialled as winter crops
- First large-scale commercial plantings of super high oleic safflower
- AOF secures over \$165,000 in grants for targeted projects

### Industry performance

The winter cropping season was very mixed across the four main canola producing states, with severe drought conditions continuing to deteriorate throughout the season in NSW. Rainfall for the first half of the season was decile 1-6 (very much below average to average) across south-eastern Australia, but decile 1-3 across most of New South Wales. The seasonal break was very patchy and generally late in NSW, early May across South Australia and Victoria, and very late, arriving in early June in Western Australia. Yield potential nationally was reduced by drought and lack of spring rainfall, and in Western Australia was exacerbated by spring frosts.

The summer cropping season was characterised by very dry conditions in traditional sunflower growing and inland

soybean areas, with even the North Coast of NSW experiencing very dry conditions. Once again, the high cost of water in the Riverina resulted in only a small area of seed production being the extent of soybean production. The Riverina soybean industry is effectively 'mothballed' with competing crops of cotton and maize pushing soybeans down the grower-preference list.

The unexpectedly large WA canola crop enabled exports to grow on the low of the prior year, despite the poor east coast production. China returned as a strong buyer of canola seed, as supplies of Canadian canola became restricted. This reduced the reliance on EU as a destination, with that market accounting for only 58% of total exports (versus in excess of 80% for the past 4 years). Exports of canola oil reached an all-time high at 160,600t with China, Taiwan, the US and New Zealand constituting the major destination markets. The demand for canola oil from verified non-GM seed is proving a strong attraction to the Chinese and Taiwanese markets, avoiding the need for GM labelling. The strong domestic demand for canola meal due to the drought continued for the second consecutive year, resulting in the smallest meal exports on record.

Winter production commenced with three new varieties of herbicide tolerant soybeans in the Burdekin, with sufficient seed produced for strong summer plantings of these varieties. The first commercial crop of the Super High Oleic Safflower was planted in mid-late 2019, with the production extending from Central NSW to the Western District of Victoria. Aspirations are that the Super High Oleic Safflower could reach 100,000 Ha as growers

come to appreciate the agronomic advantages of safflower and as demand for bio base engine and lubricant oil grows.

### Achievements by Strategic Themes:

#### Market Access Theme: *Expanding into new markets while protecting existing*

Maintaining access to the EU market, in an environment of tightening regulations and chemical use restrictions, has been a priority over the past year. The AOF works closely with the Australian Embassy in Brussels to ensure any possible changes to EU legislation that might impact oilseed trade are quickly identified and a strategy developed to minimise any impact. Over the years, the AOF has established a close working relationship with the agricultural and trade team in Brussels.

Ensuring continued access to China for oilseeds remains a priority, particularly for canola. Australia is in the privileged position to be able to competitively supply non-GM canola seed, and canola oil from non-GM seed, which negates the need for any GM labelling on the finished retail oil products. The AOF maintains close and ongoing working relationships with the federal Department of Agriculture, Water and the Environment to ensure the trade flow with China remains open.

Market access also includes domestic markets, and the AOF has been a strong advocate for the Market Choice principle to be applied in South Australia, where growers have to date been denied access to choose GM canola. The AOF provided two strong submissions to two enquiries in SA, and by

## CEO's Report continued

June 2020, the outlook was positive that SA growers would soon have the ability to choose which technology they require for optimal farm management.

The AOF was the beneficiary of a grant from the Export Market Development Grant program run by the Federal Department of Foreign Affairs and Trade. This grant recognises the expenses incurred by the AOF in promoting Australian oilseeds overseas, providing a grant to the value of approximately 50% of the cost incurred.

### Sustainability Theme: *Proactively supporting license to operate*

The establishment of Sustainable Grain Australia (SGA) during the year was a significant achievement under this strategic thrust. SGA was established to provide a single and unified process for growers trading certified sustainable canola with multiple traders. During the year, the founding members of SGA (ADM, Bunge, Cargill, Centre State, GrainCorp and Glencore) were joined by CHS Broadbent and an oilseed crusher to bring participating companies to eight. Since the end of the financial year, BoortMalt and Riordan Grain have also come on board, as the program extends to barley for this coming harvest.



The benefits of SGA are realised by growers through a simplified and single on-line grower

declaration, combined with the full support of SGA up to and including the audit process, while traders benefit by having the workload of program coordination managed by SGA.

Through SGA's adoption of the ISCC-EU scheme for grain certification, Australian grain growers and traders have access to the global cohort of food and beverage companies that have signed up to the Sustainable Agriculture Initiative (SAI), as ISCC-EU is recognised by SAI as meeting its silver level of sustainability.



Examples of the companies participating in the SAI

With the extension of the program from canola to barley in 2020, and to other grains in 2021, SGA provides a number of key metrics to enable the Australian grains industry to measure and track its sustainability credentials.

The AOF was very fortunate to receive a grant from the Federal Department of Agriculture, under the Program Assisting Small Exporters scheme, to extend the SGA program to more

grains, enabling smaller-medium sized exporters to more easily access and trade certified sustainable grain.

Throughout the year, the AOF continued to work closely with the National Working Party on Grain Protection on chemical residue issues to ensure Australian oilseeds remain within the residue tolerances set by importing countries.

Importantly, the AOF led the process to develop the 'Canola Volunteer Guide', an essential guide to effective management of canola volunteers with new herbicide tolerant technologies now being used. The AOF will continue to lead the updating of this document as new HT technologies become available. Thanks go to Pioneer Seeds, Pacific Seeds, Nufarm, Bayer, Syngenta, NSW DPI and Yeruga Crop Research for collaborating on the production of this resource.

### Influencing Demand Theme: *Growing value by continually addressing end-user needs*

Providing end-users of oilseed products the information they need to make informed decisions is an important role for AOF.

One area of opportunity identified during the year was the role canola meal can play in rations for red meat, in particular, beef cattle. This opportunity became particularly evident during the recent drought. AOF has partnered with Charles Sturt University to begin an analysis of the opportunity, with a goal of developing an authoritative, science-based, set of nutritional data highlighting the role canola meal can play in bovine nutrition. The first phase of the work is a literature review, which will be concluded late in 2020, and will set the agenda for the next phase of the project.

Building on the success of the AOF 'Schools Kit' developed some 15 years ago, the AOF is working with the Primary Industries Education Foundation Australia (PIEFA) to update the valuable material and produce a comprehensive oilseeds resource kit for schools, targeting late primary school/early high school years.

The annual publication, 'The Quality of Australian Canola' report, a joint publication by NSW DPI and AOF, provides the only state and national database of the quality of Australian canola, detailing key quality attributes such as oil levels in seed, fatty acid and protein profiles and glucosinolate and chlorophyll levels. This year was the 18th year of publication, and becomes the 'bible' on canola quality for both the domestic and the international markets.



## CEO's Report continued

### Leadership Theme: *Taking the lead in shaping Industry's environment*

The AOF continued to demonstrate its leadership of the industry through a broad range of initiatives throughout the year.

The major event for the year, some 3 years in the planning, was the hosting of the World Congress on Oils and Fats in February this year. In total, 253 delegates registered; 8 major sponsors supported, and 18 exhibitors were present. Three full or half day pre-congress workshops were held on the preceding weekend, and 139 scientific papers presented over the course of the three-day Congress. High quality science was presented within a very strong technical program.

**World Congress on  
Oils & Fats 2020**  
10-12 February 2020  
International Convention Centre  
Sydney | Australia



Recognised as the lead organisation for the oilseed, industry, the AOF has been funded by GRDC to undertake a comprehensive review of the soybean industry to identify the opportunities for future growth, and the challenges the industry might face in addressing the opportunities. With the global growth in plant protein demand and Australia's position as a grower of non-GM soybeans, the future market opportunities are bright and will require considerable investment in variety development and agronomic research and extension to enable Australia to capitalise on the opportunity.

The AOF reinforced its leadership position by quickly adapting to the changing environment brought about by COVID 19 restrictions, moving the quarterly member meetings to an on-line environment. While this may not have satisfied the networking opportunities the AOF meetings typically provide, it did give the opportunity to progress and report on important projects and to continue to deliver value to members.

The AOF also presented (on-line) at the International Grains Council annual conference as part of a global panel on the prospects and challenges for the global canola trade. This presentation is available on the AOF YouTube channel.

Along with GTA and Pulse Australia, the AOF co-hosted the Australian Grains Industry Conference (AGIC) in July. This event was a great success and demonstrated one of the upsides on on-line conferences, that being the ability to attract high quality international speakers who are more readily able and willing to contribute in an on-line environment.

The AOF CEO also met with the Hon Angus Taylor, Minister for Energy and Emissions Reduction, to highlight the challenges faced by the oilseed processing sector in remaining globally competitive in an environment of uncertain government policy. Energy policy remains fluid and evolving, with recent announcements providing a little more surety. The AOF will continue to advocate on behalf of members with the aim ensuring policy makers are aware of the challenges the oilseed industry faces.

As much as 50% of the secretariat's time is allocated to ensuring the AOF provides the

leadership expected of it by its members. This includes liaising with other peak industry bodies on matters of common interest; dealing with government departments, state and federal; providing informed media commentary on issues and crop conditions; and providing regular and relevant communication to members.

The AOF continued to maintain its role on the GTA Trade and Market Access Committee, and on the Committee for Plant Breeding Innovation; provided active involvement in the Australian Grain Industry Discussion Group (AGIDG) and GIMAF; consulted regularly with DAWR, both directly and through the Grains and Plant Products Export Industry Consultative Committee (GPPEICC); and participated in the GIWA Oils Council and Agricultural Biotechnology Council of Australia (ABCA).

Membership liaison and communication is another aspect where AOF has consistently

demonstrated leadership. Crop Reports and ad-hoc member communications, combined with addressing member queries throughout the year has provided direct and immediate value back to members.

The AOF Secretariat is once again extremely grateful to the support and guidance it receives from the AOF Executive, in particular, from Rosemary Richards and involved members in developing and executing plans designed to build value, resilience and sustainability into the Australian oilseed industry.

Finally, my personal thanks to Elle Hardcastle, who provides tireless administrative support for the AOF, ensuring the 'wheels keep turning' and maintaining the professional image of the AOF.

Nick Goddard  
CEO



## Canola – Drought driven feed opportunities

Growing conditions in 2019 were very mixed across the four main canola producing states, with severe drought conditions persisting in NSW. Rainfall for the first half of the season was average to very much below average across south-eastern Australia, but well below average (decile 1-3) across most of New South Wales.

The seasonal break was very patchy and generally late in NSW, early May across South Australia and Victoria, and very late, arriving in early June in Western Australia. From July through to the end of September, rainfall was very low (lowest 10% of years) for most of NSW for the second consecutive year, and low for Victoria and most of South Australia (Figure 2). Western Australia experienced dry conditions for the same period and was also very dry during this period. A feature of the 2019 season was that rain-bearing weather systems were continually pushed south by intense and slow-moving high-pressure systems, meaning the further inland the less rain.

Yield potential nationally was reduced by drought and lack of spring rainfall, and in Western Australia was exacerbated by spring frosts. Production of just under 2.3 million metric tonnes was the lowest since 2010, with the east coast deficit opening supply lines from SA and WA to meet crushers' requirements.

Growers became adept at changing their programs and being able to deliver some return from drought-affected canola by either direct grazing or through cutting for hay. Combined with high lamb prices during the year, the otherwise failed canola crop was able to help maximise the farm's returns, despite the drought conditions.

The grower experiences with grazing canola, particularly during drought years, has seen a noticeable shift towards early planting in the 2020 season of canola varieties suited for early season grazing as growers come to appreciate the dual benefit of this practice.

The 2020 season has started well, with early estimates that the production will be around 3 million tonnes, slightly below the five- and ten-year averages, with east coast production well restored to long term averages. WA conditions have not been as favourable, with potentially one of the lowest canola production levels in a decade at around 1 million tonnes. However, WA does have a history of pleasant upside surprises once harvest starts.



## Safflower – New horizons for an old crop

Safflower is making a comeback, through a new high grade specialty oil for the industrial market known as Super High Oleic Safflower, which was developed by CSIRO with funding from GRDC.

As the world becomes more environmentally aware, there is a growing demand for biobase raw materials such as Super High Oleic Safflower oil to replace mineral oils derived from fossil fuels. Plant-derived oils with high levels of oleic acid are in high demand as a precursor element in the production of lubricants, bioplastics, biochemicals, cosmetics and pharmaceuticals. Super High Oleic Safflower oil contains over 92% oleic acid - the highest level of purity of an individual fatty acid present in any currently available plant oils. The major strategic advantages of Super High Oleic Safflower oil, derived from its oleic content and fatty acid profile, are its high oxidative and thermal stability resulting in suitability to a large versatility of industrial applications. This could see the Super High Oleic Safflower oil used in a range of products, from lubricant for motor vehicles to cosmetics.



2019 saw the first commercial crop of the Super High Oleic Safflower, with the production footprint extending from Queensland border to the Western District of Victoria. Go Resources, the company behind the Super High Oleic Safflower, is targeting 100,000 hectares in coming years.

While traditionally grown as an opportunity crop in years when too wet for a winter crop, or for its drought tolerance, the emerging agronomic opportunity for safflower is its ability to thrive in salty and sodic soils, a problem across much of Australia's temperate cropping zone.

Super High Oleic Safflower is an exciting new opportunity for growers and the oilseed sector.



## Soy – New varieties and growing demand

Slim Dusty wrote the immortal words, "Things are bad, but they could be worse. So we'll see how we go with it mate." in describing the typical Australian bush optimism. It is this optimism and determination that has seen the Australian soybean industry weather one of the toughest years on record. In the past 12 months, the industry has had to contend with the impact of the second consecutive summer drought, with limited production in most areas, and no production in some areas such as the Riverina.

However, for farmers fortunate enough to be able to produce a viable crop, the limited supply has driven prices up to record levels and demonstrated to current and future growers the upside potential of soybeans. The demand for locally sourced, non-GM, high protein, and in some cases, organic, soybeans continues to grow, and this is serving to further buoy the industry, despite the recent seasonal challenges.

New varieties released by the breeding program with a herbicide tolerant trait stands to be a game-changer in the industry, as these varieties have demonstrated good yield potential, with the benefit of better weed control. These varieties of Kuranda, New Bunya and Mossman join recently released varieties of Hayman and Richmond, to provide growers with a suite of varieties that have

improved disease resistance, higher yields and well targeted to end-user requirements.

Recent winter production trials in the Burdekin have also provided the confidence for growers in this region to adopt soybeans more readily in their cane and horticulture rotations, and this region is expected to continue to grow its share of soybean production in the future. The counter-cyclical nature of the winter production in this region also helps provide the market with year-round supply of beans, as well as an opportunity for seed-production crops of specific varieties.

The commissioning of an industry strategic review by GRDC is also another positive move for the industry. This review is being conducted by AOF on behalf of the industry and will provide both the industry and GRDC a clear roadmap of the way forward, with the major roadblocks to growth being clearly articulated. This review will be concluded in the second half of 2020.

In conclusion, despite a tough couple of years, the prospects of the soybean industry remain strong and positive, with new varieties, new production regions and growing domestic demand. With the emergence of the La Niña pattern, the prospects for the 2020/21 summer production is looking positive and the industry is looking forward to productive, cyclone and disease-free season.



## Sunflower – IMI sunflowers a game changer

The Australian Sunflower Association (ASA) has had a busy 12 months starting with the Australian Summer Grains Conference in July 2019. As one of the five Joint Venture parties, the ASA was well represented throughout the conference. Our session concluded with the ASA AGM, with Kevin Charlesworth retaining the position of Chair and Chris Haire coming on as Vice-Chair. We thank Loretta Serafin for her time as Vice-Chair and for still remaining on the committee! There are a few newer faces involved in the committee this time around and we look forward to working with them all.

The growing popularity of photo sharing apps such as Instagram and the potential impacts on farm biosecurity continue to be ongoing issues within the Sunflower industry. Following a series of events in early 2019 during flowering along the New England Highway south of Toowoomba, the ASA teamed up with the Grains Research and Development Corporation, Agforce Queensland, Toowoomba Regional Council and Southern Downs Regional Council in early 2020 to develop a plan to inform potential visitors to sunflower fields of their responsibilities and the risks involved with entering fields.

The website [www.australiansunflowers.com.au](http://www.australiansunflowers.com.au) was developed as a resource that can be shared and promoted leading up to and during the flowering season, along with a supporting Facebook page and Instagram account. An infographic is also available for sharing and further resources will be developed to support this initiative.

In a very positive outcome GRDC has agreed to provide support for Sunflower Workshops to occur once face to face events are again

allowed to happen, hopefully by the end of 2020. ASA committee members are currently rewriting The Big Yellow Sunflower Pack in the lead up to these workshops. The Better Sunflowers website will also undergo a refresh prior to the end of the year. The ASA Committee have also been working behind the scenes on making long-seeded (confectionary) sunflowers a commercial option for growers and the industry to ensure they are a viable export option for growers.

2020 has also seen the release of the first IMI (imidazolinone) tolerant sunflower variety in Australia, which has been 11 years in development. Ausiclear®20 by Barenbrug is now available to Australian growers and provides a significant benefit for growers in the control of control broadleaf weeds in-crop.

Like all involved in cropping, we hope that the 2020/2021 season brings more rain and confidence in our industry.





## Statistics

**Table 1: Australian Oilseed Production**

Source: AOF

'000 tonnes	2015/16	2016/17	2017/18	2018/19	2019/20
Canola	3,098	4,200	3,645	2,310	2,290
Sunflowers	25	29	19	23	15
Soybeans	50	40	37	41	25
Cottonseed	890	1,260	1,497	686	191
Other	10	10	15	10	10
<b>Total</b>	<b>4,073</b>	<b>5,539</b>	<b>5,211</b>	<b>3,070</b>	<b>2,530</b>

**Table 2: Area and Production by State (Key Crops)**

Source: AOF

		2019/20		5 year average	
		Area '000 ha	Production '000 tonnes	Area '000 ha	Production '000 tonnes
<b>Canola</b>	NSW	360	180	440	556
	Vic	370	670	356	585
	SA	210	320	216	328
	WA	1,110	1,120	1,210	1,640
	<b>Total</b>	<b>2,050</b>	<b>2,290</b>	<b>2,222</b>	<b>3,108</b>
<b>Sunflower</b>	Qld	5	5	8	8
	NSW + Vic	7	10	11	14
	<b>Total</b>	<b>17</b>	<b>15</b>	<b>20</b>	<b>22</b>
<b>Soybean</b>	Qld	5	8	8	14
	NSW	10	17	12	24
	Vic	15	-	3	0
	<b>Total</b>	<b>30</b>	<b>25</b>	<b>24</b>	<b>38</b>

**Table 3: Primary Exports**

Source: ABS

'000 tonnes	2019/20	Av 5 years to 2019/20
Canola	1,718	2,216
Cottonseed	5	156
Canola Oil	161	152



**Table 4: Canola Exports by Destination**

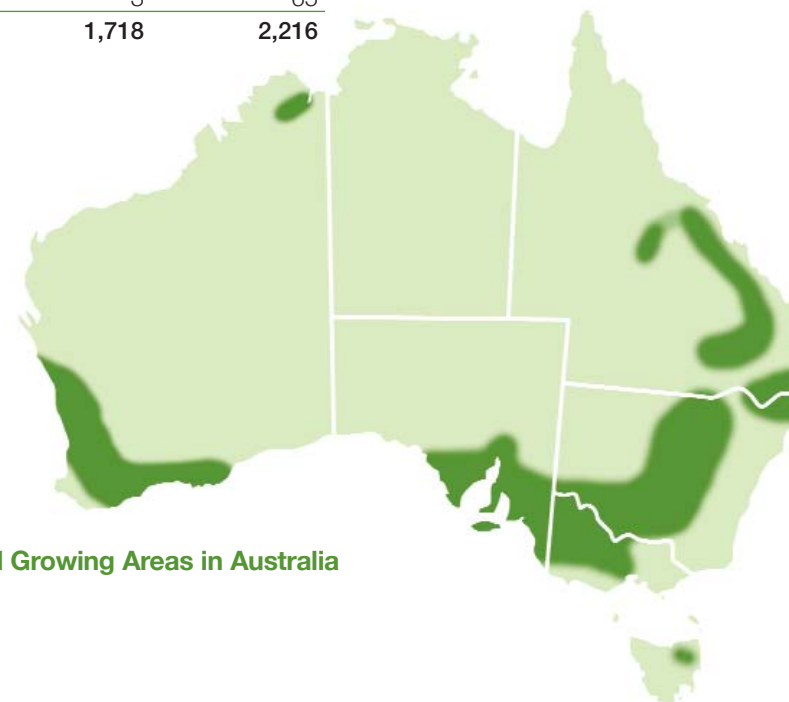
Source: ABS

'000 tonnes	2019/20	Av 5 years to 2019/20
Europe	995	1,815
China	545	141
Japan	96	120
Malaysia	40	29
Nepal	23	31
Thailand	10	2
New Zealand	5	7
Bangladesh	0	7
UAE	0	34
Pakistan	0	10
Other	3	65
<b>Total</b>	<b>1,718</b>	<b>2,216</b>

**Table 5: Oil and Meal Imports**

Source: ABS

'000 tonnes	2019/20	Av 5 years to 2019/20
Canola Oil	14	17
Coconut Oil	12	12
Cottonseed Oil	33	20
Olive Oil	36	31
Palm Oil	84	125
Soy Oil	19	25
Sunflower & Safflower Oil	73	65
Palm kernel meal	250	104
Soybean meal	994	856



Oilseed Growing Areas in Australia