

Annual Report 2015-16



Australian Oilseeds Federation



Membership Listing (Financial as at June 30, 2016)

Association Members:

Stockfeed Manufacturers Council of Australia Grain Industry of Western Australia

Producer Members:

Grain Growers Association Limited Victorian Farmers Federation
NSW Farmers Association

Corporate Members:

100% Bottling Company	Louis Dreyfus Australia Pty Ltd
Adams Australia Pty Ltd	Merricks Capital
ADM Australia	Monsanto Australia
Alba Edible Oils	MSM Milling Pty Ltd
AusOils Pty Ltd	Natura Holdings Pty Ltd
Australian Superintendence Company	NPZ Australia
Bayer Crop Science	NuFarm
BEC Feedsolutions	Pacific Seeds Pty Ltd/Advanta
Braid Logistics Australia Pty Ltd	Peerless Holdings Pty Ltd
Bunge Agribusiness Australia Pty Ltd	Perten Instruments
Cargill Oilseeds Australia Ltd	Plumgrove
Cootamundra Oilseeds Pty Ltd	Riverina Oils and Bioenergy
Dow AgroSciences Australia Ltd	Rivalea
DuPont Pioneer	Seednet
Emerald Grain	Simplot
Foss Pacific	Sucrogen Foods
Glencore	Sumitomo Australia Pty Ltd
Go Resources	Unilever Australasia
Grain Corp	Wilmar
HyFeeds	Wilmar Gavilon
Itochu Australia Ltd	Windermere Oilseeds Pty Ltd

Honorary Members:

CSIRO Plant Industry	GRDC
Department of Primary Industries and Fisheries (Qld)	NSW Department of Primary Industry
	SARDI

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AOF Office Bearers

Jon Slee	- President	Trent Potter	- Vice President
Robert Wilson	- Vice President	Charles Aldersey	- Treasurer
Lachlan Herbert	- Vice President	Adam Davis	- Public Officer

AOF Executive

Jon Slee	- President	Peter Brodie	- soybean industry sector
Robert Wilson	- Vice President	JS Rao	- crushing sector
Trent Potter	- Vice President	Brendan Farrer	- stockfeed sector
Lachlan Herbert	- Vice President	Michael Tighe	- refining sector
Charles Aldersey	- Treasurer	Moira Rowland	- consumer sector
Adam Davis	- trading sector	Justin Kudnig	- seed sector
Dan Morgan	- export sector	Jon Slee	- Grains Industry WA
Vacant	- production sector/ NSW Farmers	Nick Goddard	- Executive Director
Don McCaffery	- canola sub-committee	Elle Hardcastle	- Administration
Kevin Charlesworth	- sunflower sub- committee/ASA		

Acknowledgments

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

Alba Edible Oils
Cargill Australia
Goodman Fielder
MacSmith Milling

Peerless Foods
Grain Corp Oils
Ridley Stockfeeds
Unilever Australasia

President's Report 2016

Jon Slee

The Australian oilseeds industry continues on its trajectory towards being a sustainable profitable contributor to Australian agriculture and food processing, as well as being a major export earner for Australia. With the 2015/16 oilseed crop one of the smallest for a number of years, the contribution of the industry to the Australian economy cannot be underestimated. With close to a record 1 million tonnes of oilseeds crushed domestically over the past 12 months, and 2.3 million tonnes of oil, meal and seed exported, the contribution to the country's GDP is around \$2 billion.

The prospects for the industry remain very positive, with both local and multinational companies continuing to invest in the Australian oilseeds industry, whether this is in breeding and genetic technology, processing and value-adding technology, or in other areas across the value chain. This ongoing investment is a very concrete recognition by these organisations of the potential for ongoing growth and profitability for this oilseeds industry.

However, these positive trends within the industry do not eventuate by chance. They require strong leadership by both industry and their representative bodies. Fortunately, within the oilseed sector, the industry is able to benefit from both strong industry leadership from all players, as well as having a strong and proactive representative body within the AOF.

The AOF, now in its 46th year, has championed the cause of the industry since its inception- focussing on the core activities of **advocacy, information dissemination, promotion and education.**

The focus within these fields of activity has changed over time, according to the needs of industry. Today, providing the industry with a voice to speak on behalf of the industry (advocacy) is taking increasing prominence, while information dissemination remains an important function, despite the ready availability of information on the internet.



The AOF remains active, providing a strong industry voice in a number of fora, including the International Oilseed Producer's Dialogue (IOPD), the Grains Industry Market Access Forum (GIMAF), the Agricultural Biotechnology Council of Australia (ABCA), as well as with relevant government departments and bodies such as the Department of Agriculture and Water Resources (DAWR), Department of Foreign Affairs and Trade (DFAT), the Agricultural Pesticides and Veterinary Medicines Authority (APVMA) and relevant state departments of agriculture.

The AOF is also active within, and a founding member of, the Australian Grains Industry Discussion Group (AGIDG). This group has all the grain representative bodies as members, and aims to identify areas of common interest where a collective, united and singular voice on industry issues can be formulated to present a 'whole of industry' view where and when required. One of the common views held within AGIDG is that where there are common 'industry good' functions across different groups, there could be efficiencies and synergies by combining the activities under a common umbrella.

Towards this end, during the year, the AOF began discussions with Pulse Australia with a view to determine if there were areas of common interest and activities that could be consolidated and more effectively undertaken. This follows a number of years of both organisations already having worked together on shared GRDC projects.

Both organisations agreed that there could be significant amplification of their respective activities and efficiencies in their operations if they both worked more closely together. This

resulted in both organisations agreeing to share a common secretariat, and that the AOF secretariat was deemed the most appropriate to lead both organisations.



President's Report 2016 continued

This is a significant 'first step' by both organisations on a path towards a more widely executed strategy of improving representative body efficiency and effectiveness in the grains industry.

Over the coming twelve months the focus will be on ensuring an effective secretariat for both organisations that can serve both organisations exceptionally well, while extracting the maximum synergies and opportunities from the arrangement.

Operationally, much of the AOF focus remains on maintaining and developing export markets, with a focus on Asia and Europe. During the year, the AOF hosted a delegation of representatives from the Japanese Oilseed Processors Association (JOPA) and the Japanese Oils and Fats Importers and Exporters Association (JOFIEA), following a request made by them to the Australian Embassy to strengthen ties with the Australian oilseed industry. AOF also conducted a trade mission to Taiwan, with the assistance of



Austrade, focussing on Australian canola oil. This was in addition to promoting the benefits of canola seed through presentations at the Australian Grains Industry Conference in China.

The AOF continues to play an important role at the roundtable of the "International Oilseed Producers Dialogue" (IOPD). Our Executive Director Mr Nick Goddard was at the table for this year's meeting which was held in Berlin. The meeting focused on issues of common interest to the global industry on matters such as stewardship, chemical usage, trade liberalisation, 'right to farm' and GM and plant breeding innovation policy. Australia was awarded the privilege of hosting this event in 2017, which will include the opportunity for AOF members to be involved.

The AOF was also instrumental in commissioning an extensive piece of work establishing greenhouse gas values for Australian canola production. The work, conducted by CSIRO and project managed by AEGIC, is designed to establish the values required for ongoing market access to the EU post January 1, 2018. The report was submitted to the EU in July 2016.

As the AOF moves into its 47th year, the Executive team continues to review the effectiveness of the organisation, ensuring that as a representative industry body, it remain relevant and of value to members. With a low membership fee, the AOF has been able to encourage most of the Australian oilseed industry to become and remain a member of the AOF, and this is a strong quality of the AOF. However, the Executive is also acutely aware that those companies contributing to

the Oilseeds Development Fund (ODF) carry a disproportionate share of the funding burden, and that a more equitable funding model is required. Over the coming twelve months, the AOF will be exploring new and more equitable funding models that will ensure greater equity for members, while delivering strong member value in return for membership contributions.

I would like to thank my colleagues on the AOF Executive for their commitment and support during my tenure, in particular Rob Wilson, Trent Potter, Charles Aldersey and Lachlan Herbert, who interact regularly with me and the Executive Director, ensuring both day-to-day activities and longer term strategic actions are effectively developed and implemented.

I would like to make a special mention of the contribution Charles Aldersey has put in as Treasurer of the AOF which he has done for over 7 years and has assisted in keeping the organisation financial secure during this period. Charles has indicated that he will be stepping down as Treasurer this year, but leaves the organisation in a healthy financial position which we look to build onto into the future.

Lastly and most importantly, thanks must go to our Executive Director Nick Goddard for his day-to-day management of the AOF. We are extremely fortunate to be in such good hands.

Jon Slee
President



Executive Director's Report

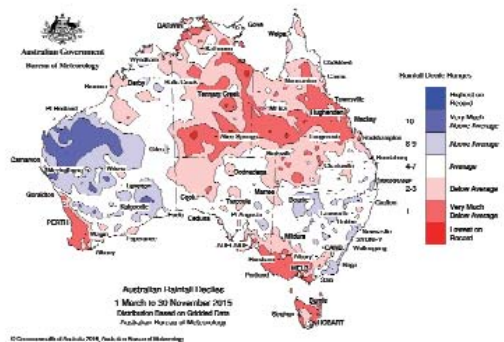
Nick Goddard

Highlights for 2015/16

- Total crop production at 3.8 mln tonnes across the 4 primary oilseeds.
- Continued strong canola trade with the EU, with third largest year for EU exports at 1.765 mln tonnes valued at \$980 mln.
- Strong re-engagement with Japan, with the visit of 14 delegates building stronger ties between the AOF and JOPA.
- Conducting a canola oil trade mission to Taiwan, with over 30 leading oil buyers and users attending a seminar on the benefits of Australian canola oil.
- Presenting the benefits of Australian canola seed to Chinese buyers and processors through presentations at the Australian Grains Industry Conference sessions in China.
- Completing the detailed analysis of greenhouse gas emissions attributed to canola production;
- Strategic partnership developed with Pulse Australia to maximise synergies by having a shared secretariat.

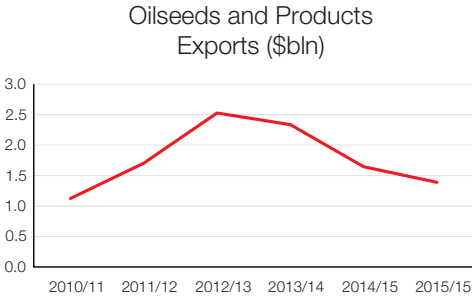
Industry performance

The 2015 season was one of relatively low canola planting, with the lowest area sown to canola in 4 years, at close to 2.2mln Ha. The season can best be described as one of high variability in rainfall and temperature. Crop yield overall was aided by early sowing in all states except Victoria and combined with subsoil moisture in states such as New South Wales provided the necessary buffer against a very dry September and a very dry October with record high temperatures. Victoria and SA had particularly low area sown to canola, being the smallest area sown in 5 years in Victoria and 4 years for SA, because of the low soil moisture conditions early in the year and the threat of El Nino conditions for the season ahead. This proved to be a wise decision by growers in these states, as the dry conditions continued through the season, lowering yields in both states.



Consequently, the national canola production volume was low at just under 3.1mln tonnes, the lowest in 5 years, with a resultant low volume export program. The value of exports fell from \$1.6bln to \$1.4bln, reflecting over a

half a million tonnes less being shipped across all oilseed based commodities and products.



Achievements by Strategic Themes:

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

Despite a seasonal softening in export activity, maintaining and securing access to export markets is critical for the growth and profitability of the Australian oilseed industry. Consequently, the AOF devoted a significant portion of its resources to activities designed to secure and improve market access.

Representatives from the Japanese oilseed industry, as represented through JOPA (Japanese Oilseed Producer's Association) and JOFIEA (Japanese Oils and Fats Importers and Exporters Association) visited Australia at the invitation of AOF to discuss how trade between the two countries can be improved. The delegation visited Grain Corp at Port Kembla to gain an appreciation of bulk grain handling at loading, and in particular, how risks for chemical cross-contamination are managed. The delegation then visited

ROBE at Wagga Wagga for a tour of Australia's newest crushing facility, and then to the NSW DPI oils laboratory at Wagga Wagga to gain a deeper understanding of measuring quality parameters related to oil and seed.



The AOF was invited to present to Chinese traders and processors on the quality of Australian canola at the Australian Grains Industry Conference sessions in China. The presentation outlined the role the AOF plays in ensuring China's import requirements are met, while also outlining the trade flows for canola to China and the potential for Australia to grow its share of trade.

Executive Director's Report continued



An example of the Australian products showcased at the Taiwan workshop.



Food using canola oil is prepared in front of attendees at the Taiwan workshop.



Andrew Puckeridge, Cootamundra Oilseeds, having one-on-one discussions with a local Taiwanese importer.

This visit continued to Taiwan where a second canola workshop was held with influential buyers and processors of canola oil. This included a delegation of five Australian exporters who, at the conclusion of the workshop, were invited to meet one-on-one with local buyers to discuss opportunities. This workshop was held in conjunction with Austrade Taiwan, who ensured a solid representation from the Taiwan trade, as well as providing local logistical support. To dramatise the quality and functionality of Australian canola oil, a cooking demonstration was also organised in the seminar room utilising one of Taiwan's leading chefs.

With Europe being the major destination for canola seed, ensuring ongoing trade with this region is imperative. Regulations under the EU Renewable Energy Directive (RED) will require country or region specific greenhouse gas values to be applied to renewable energy inputs, such as canola oil used for biodiesel. These regulations come into force on January 1, 2018. To this end, the AOF initiated a project in conjunction with the Australian Export Grains Innovation Centre (AEGIC) to determine the greenhouse gas values for canola production in Australia. This project was awarded to CSIRO, who in turn worked with local and international partners to undertake the work required. This project could not have been made possible without the financial contribution from AEGIC (50% funding) and from the exporting companies, ADM, Cargill, CBH and Glencore. The project was completed in June 2016, and the report submitted to the EU Regulators in August of this year and is currently being assessed.

The regaining of access to China in 2013

provided a great boost to the industry in that year, and ensuring this market remains open is a priority to enable exporters to have the marketing options they require. China, with import demand of 4-5 million tonnes of canola per annum is a key market for Australia. The AOF continues to work with the Federal Government (Department of Agriculture and Water Resources) and the Grains Industry Market Access Forum (GIMAF) to secure a canola trade protocol with China that will enable all ports in Australia to be able to export canola, with no undue phytosanitary requirements applied.

Sustainability Theme: *Proactively supporting licence to operate*

The primary initiative undertaken by the AOF under this theme has been the industry consultation and information sharing in relation to terminology about the unintended presence of GM canola in non-GM canola. While the industry has been effectively using the term 'adventitious presence' for the unintended presence of GM canola in non-GM canola since the introduction of GM canola, international defining of this term has meant that it is no longer relevant to use this term in this way. Following industry consultation, the AOF adopted the term Low Level Presence (LLP) to describe the unintended presence of GM canola in non-GM canola. This was reflected in changes to the Trading Standards issued for the 2016/17 crop year.

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

Keeping close to customers and building a strong understanding of their needs is an

essential aspect to any successful business. While AOF members fully appreciate this, and have enduring and trusted relationships with their customers, there are some end-user needs that are best managed at an industry level. Consequently, AOF has a number of projects in place in order for industry to better meet end-user needs.

Providing customers with the oil type and fatty acid make up to meet their purposes is essential. While some customers require oil suitable for deep frying (lower levels of alpha-linolenic/higher oleic), other customers may require oil more suitable for infant formula or polyunsaturated margarines (higher iodine value). While no one oil will serve both needs, varietal variations in traditional canola, as well as the purposefully bred high oleic canola, enable the oilseed industry to differentiate the products they market according to fatty acid profile. To aid this, the AOF initiated the first year of what is likely to be a three-year project identifying the 'typical' fatty acid profile of each canola variety, which at the conclusion of the project, will provide industry with a classification of canola type according to fatty acid breakdown. This will enable crushers and processors to identify preferred varieties for specific end user purposes. The 'top line' results from year 1 were presented at the April AOF General Meeting.

This year also saw AOF awarded the oilseed component of a major GRDC project related to establishing the market needs for various grains in numerous markets, For canola, the markets are Australia, Japan and China. The aim of this three-year project is to quantify and prioritise the end user requirements, and aim to put a monetary value on the parameters of

Executive Director's Report continued

most importance. This will enable much clearer and value based direction to breeders and pre-breeders. The first milestone of the project was completed this year, which involved a comprehensive analysis of the markets under review.

Finally, under this theme, the AOF is working to develop a strong knowledge and database of the needs of the dairy sector, and the role increased proportions of canola meal in the rations can play. To broaden members knowledge of the dairy opportunity, a guest speaker at the April AOF meeting provided a high level overview of the demand drivers, locally and internationally, for dairy products. Ultimately, it is these demand drivers that determine the value of the dairy products which in turn influences the producers' willingness to include/increase canola meal in the rations.

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

AOF, as the peak industry body for the oilseeds industry, has the responsibility to take the leadership role for the industry.

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.

During the past year, the AOF maintained its role on the GTA Trade and Market Access Committee, and on the Committee for Plant Breeding Innovation; Provided active involvement in the 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. The AOF Weekly News, Crop Reports and ad-hoc member communication, combined with addressing member queries throughout the year has provided direct and immediate value back to members.

Maintaining and developing international connections has also been a priority, with membership of and participation at the annual International Oilseeds Producer's Dialogue (IOPD), as well as regular contact with the Canola Council of Canada, particularly in relation to market access issues of common interest.

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

Committee Reports

Technical Committee: Jon Slee (Chair)

The Technical Committee met three times throughout the year to explore and address matters of technical relevance to the oilseed industry, while the Standards Committee met once.

Major projects undertaken during the year included the following:

1. The ongoing oversight of the analysis of green seed to establish NIR calibrations for chlorophyll. This project aims to establish robust NIR calibrations to enable a more accurate assessment of chlorophyll levels in samples of seed. Ironically, this project has been running for two dry years, and gaining a wide distribution of green seed samples has been challenging.
2. Review of the Dangerous Goods Code for transportation of oilseed cake/meal to provide greater clarity as to the requirements. The first phase of the project successfully had the competent authority formally approve grain 'tip trucks' for the transportation of oilseed cake/meal. Next step is to gain industry consensus on a position to put to the Competent Authorities Panel in relation to aligning canola meal with the current soybean meal exemption.
3. A project team was established to determine whether a standardised method could be derived for the testing of meal. Led by John Spragg of SFMCA, the team identified two possible solutions that could be applied as the recommended method.

4. Establishing an agreed fatty acid profile for 'regular' canola, and then analysing all canola from 2015 NVT sites to establish their fatty acid profile, and consequently, their alignment or otherwise to the 'standard'. This will be an ongoing project, and will require at least three years of data to be able to establish an effective canola classification system.

In addition, through the Technical Committee, an ongoing Issues Register is maintained which details the key actual and potential issues the industry may face, and appropriate strategies. The Committee was briefed through the year of changes to issues or strategies.

The Technical Committee also reviewed a number of actual or proposed chemical uses, and provided the necessary responses back to APVMA, or the relevant chemical company.

The Technical Committee, overseeing the annual review of trading standards, aligned the review process to that of GTA process, to provide more industry alignment and consistency in approach.

I would like to thank members of the Technical Committee, and related sub committees for their ongoing support of the AOF Technical Committee and processes. All members participate on a voluntary basis, with the support of their companies, and this in-kind contribution by both the individuals and the company is greatly appreciated.

The Technical Committee meets before each General Meeting, and new members are always welcome to attend.

Committee Reports continued

Sunflower Committee (Australian Sunflower Association):

Kevin Charlesworth (Chair)

The Sunflower committee continued to be very active throughout the year, meeting regularly via teleconference to progress matters aimed at improving the sunflower industry, with a particular focus on agronomic issues. The 'Better Sunflowers' newsletter was issued in the lead up to and throughout the season, providing growers and the wider industry with topical, relevant and timely information about improving sunflower production together with broader aspects related to the sunflower industry.

The El Nino conditions impacted grower planting decisions, with the summer 2015/16 area planted being one of the smallest in recent years at only 22,000 Ha planted. This increasingly places the sunflower industry in a precarious position, with seed sales at or below the marginal threshold that warrant further investment in breeding. There are only three commercial varieties of sunflowers now available, down from four the year before. The introduction of 'imi' tolerant sunflowers, providing growers with a significant weed management option, is one of the very few impending innovations that may serve to provide the necessary 'good news' the industry needs to encourage growers to revisit sunflowers as a viable summer cropping option.

Soy Australia: Lloyd Nielsen (Chair)

Soy Australia continued to promote the varieties for which it holds the licence, however the crop was small this summer due to the high cost of water in the Riverina making soybeans unprofitable, while elsewhere, yields were down or crops lost due to dry conditions through El Nino. Consequently, EPR revenue and voluntary levies were well below that required to keep Soy Australia viable.

Following grower representation, Soy Australia was able to work with the management Committee of the National Soybean Breeding Program (NSBP) to reduce the EPR on licensed varieties from \$12/tonne to \$7/tonne. This is a significant outcome, and will be in place for the 2016 buying season.

Soy Australia was a co-host of the Summer Grains Conference, which once again proved a success and providing Soy Australia with a modest return from the conference surplus.

Soy Australia continued to be supported by AOF by way of AOF providing secretarial support on a commercial basis.

Oilseed Industry Strategic Plan 2016-2025

Every five years the AOF prepares the industry Strategic Plan, outlining the focus areas for the organisation for the coming five years, with a longer term horizon out to ten years.

The Plan outlines the common industry - good initiatives that ensure the industry is placed in the best possible position to achieve its Vision. While the plan builds on the strong foundations of the past, it recognises the need to proactively shift focus to take advantage of changing opportunities in order to optimise profitability through the value chain.

The Plan will be used to guide AOF's strategic direction and industry co-investment activities in meeting the AOF's Mission.

The Plan intentionally focuses on addressing post-farmgate issues and opportunities while recognising that some end user needs will directly influence on-farm activities and require AOF involvement.



Oilseeds – the 5-10 year outlook

Major features of the global outlook for demand and supply of oilseeds are:

- Supply and demand will be tighter, supporting firmer trends in prices.
- The main demand driver will be the demand for feed, particularly servicing developing regions.
- Supply growth will be limited due to limits on arable land, water access and productivity gains.
- Long term outlooks favour agronomic returns from oilseed crops over coarse grains.
- A reducing role for oilseeds as a biofuel feedstock due to economic and social pressures.
- Production will be dominated by Brazil, US, Argentina and China.
- Exports will be dominated by Brazil, US, Canada and Argentina, with emerging strength from the Black Sea region. Australia will remain a strong exporter of Canola and Cottonseed.

Industry Volume Projections

Million tonnes by 2025

Crop	Minimum	Median	Target	Peak
Canola	2.6	5.3	6.1	6.9
Cottonseed	0.9	1.1	1.4	1.7
Sunflower	0.03	0.11	0.17	0.23
Soybean	0.05	0.25	0.28	0.3
Safflower	0.05	0.09	0.11	0.12
Total Volume	3.63	6.85	8.05	9.25
\$/t	622	622	622	622
Value (\$'000)	2257	4260	5006	5752

Strategic Plan 2015-2025 Summary

Vision:

A \$5 billion industry, sustainable, internationally competitive, well respected and cohesive where all participants add value through meeting market demand

Priority areas of focus

Leadership

Taking the lead in shaping industry's environment

Sustainability

Proactively supporting licence to operate

Key strategies

- | | |
|---|---|
| <ul style="list-style-type: none">• Retain recognition as the leader on post-farmgate credentials• Facilitate and, where appropriate, initiate the flow of industry R&D funds to address end-user and supply chain needs• Maintain vigilance on industry risks, responding as appropriate• Strengthen global networks• Facilitate cohesion on industry-good agendas | <ul style="list-style-type: none">• Identify and articulate end user sustainability/stewardship requirements along the supply chain• Support implementation of end-user certification & measurement schemes• Promote good stewardship throughout the supply chain |
|---|---|

Outcomes

- | | |
|---|--|
| <ul style="list-style-type: none">• AOF well-respected; seen as go-to oilseeds body | <ul style="list-style-type: none">• Oilseeds known for proactive and responsible stewardship |
|---|--|

Mission:

Through AOF, provide leadership to the Australian Oilseeds Industry and coordinate activities that will optimize profitability through the value chain

Priority areas of focus

Market access

Expanding into new markets while protecting existing

Influencing demand

Growing value by continually addressing end-user needs

Key strategies

- | | |
|---|--|
| <ul style="list-style-type: none"> • Monitor, articulate and address technical trade barriers • Engage with and influence bilateral and multilateral trade negotiations • Build stronger Government and Agency (state and federal) engagement • Foster strong engagement with related industry bodies • Maintain vigilance on development of industrial oil uses | <ul style="list-style-type: none"> • Actively promote benefits of oil and meal • Proactive management of demand-threat issues • Facilitate market choice on use of GM technologies • Ensure path to market for new beneficial technologies |
|---|--|

Outcomes

- | | |
|--|---|
| <ul style="list-style-type: none"> • More diverse and secure market options | <ul style="list-style-type: none"> • More profitable oilseeds supply chain |
|--|---|

Statistics

Table 1: Australian Oilseed Production

Source: AOF

'000 tonnes	2015/16	2014/15	2013/14	2012/13	2011/12
Canola	3098	3431	3900	4269	3185
Sunflowers	25	40	21	46	81
Soybeans	50	69	50	87	86
Cottonseed	650	500	988	1410	1690
Other	10	20	10	10	10
Total	3833	4060	4969	5823	5052

Table 2: Area and Production by State – Key Crops

Source: AOF

		2015/16		5 year average	
		Area '000 ha	Production '000 tonnes	Area '000 ha	Production '000 tonnes
Canola	NSW	525	890	586	991
	Vic	300	387	427	703
	SA	210	293	274	389
	WA	1153	1528	1069	1493
	Total	2188	3098	2355	3577
Sunflower	Qld	12	13	17	18
	NSW + Vic	10	12	17	25
	Total	22	25	34	43
Soybean	Qld	12	18	12	22
	NSW	12	30	19	45
	Vic	1	1	1	2
	Total	24	49	32	69

Table 3: Primary Exports

Source: ABS

'000 tonnes	2015/16	Av 5 years to
		2015/16
Canola	1,946	2,674
Cottonseed	148	439
Canola Oil	154	138

Table 4: Canola Exports by Destination

Source: ABS

'000 tonnes	2015/16	Av 5 years to
		2015/16
Europe	1,766	1,647
Pakistan	0	209
Japan	90	153
Bangladesh	11	35
China	0	372
Other	78	257
Total	1,946	2,674

Table 5: Oil and Meal Imports by year

Source: ABS

'000 tonnes	2015/16	Av 5 years to to 2015/16
Canola Oil	22	20
Coconut Oil	13	13
Cottonseed Oil	13	8
Olive Oil	24	28
Palm Oil	134	31
Soy Oil	28	23
Sun & Saff Oil	60	50
Palm kernal Meal	71	31
Soybean Meal	706	648



Oilseed Growing Areas in Australia



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