

# **Market Choice in the Canola Industry 2010/11 Season Performance Report October 2011**



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## **Executive Summary:**

This report details the key details during the growing season for the 2010/11 season.<sup>1</sup>, and outlines the value chain performance of the Australian oilseeds industry in meeting the 'Market Choice' goal during the season. The 'Market Choice' goal has underpinned the introduction and subsequent adoption of GM canola in Australia.

Information for this report was sourced primarily from AOF and Monsanto.

The approval in January 2010 of an exemption order under the *Genetically Modified Crops Free Areas Act 2003 (W.A.)* to permit the cultivation of GM canola in Western Australia has lead to a significant step-change in national figures for grower accreditation and adoption, lifting the national area under GM canola cultivation from slightly over 41,000 Ha in 1999 to 133,333 Ha in 2010.

Abnormal seasonal conditions in both the eastern states and the western states could impact the final areas of GM canola that are harvested, although at the time of preparing this report, it was unclear what the impact may be.

No significant issues have arisen with the GM canola crop this season to date, although the larger biomass produced in the NSW/Vic and particularly, the high risk situation in the west mid-season, (due to lack of rain) did produce enquiries regarding grazing options.

## **Grower Adoption:**

971 growers undertook the required education and became accredited growers in during 2010, bring the total accredited growers to 1907. For this season, 631 growers signed planting declarations, some of whom would have achieved accreditation in prior years. Half the growers who signed planting declarations were from WA, with this season under review being the first season of commercially cultivated GM canola in that state. While the number of growers increased by a factor of 2, the area under cultivation increased three fold,

The result was a planted area of 133,333 Ha, broken down by State as per Table 1.

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<sup>1</sup> Defined as crop season commencing with planting in Autumn 2010, to be harvested in Spring/Summer 2010.

State	Growers Accredited	LSA Signed	Planting Declarations	Areas Planted (Ha)	Planted but not Harvested*	Tonnes Delivered
NSW	132	93	199	24043	n/a	32879
Vic	96	71	115	36497	n/a	58713
WA	743	553	317	72793	n/a	47491
Total	971	717	631	133333	n/a	139083

\* Meaning crops that either failed, or were cut for hay.

**Table 1:** Key measures for GM canola for 2009/10

Within each State, the larger plantings were concentrated around the shires with the more reliable medium to higher rainfall.

Within NSW, the Urana/Lockhart/Corowa areas accounted for third of the State's plantings, while the Forbes/Parkes/Temora areas accounted for slightly over a fifth of all the States plantings. With reports of some crop losses in NSW due to the wet conditions, inevitably this will impact the final GM areas reaching harvest. At the time of preparing this interim report, much of the crop in these areas had been windrowed, but yet to be harvested, with the heavy and consistent rains during much of November hampering harvesting efforts. Notwithstanding the highly unusual seasonal conditions, where crops have been harvested, overall yields, oil content and quality has been reported as being very good. At this stage, it is too early to report on any variances between GM and non GM crops in terms of harvesting stages, yields or oil quantity or quality.

In Victoria, the single largest GM plantings, accounting for 20% of the total, were in the Ararat shire, while further west in the Wimmera, Horsham area accounted for close to 13%. The next most significant region was along the Murray, around Strathmerton/Yarrawonga at around 10%. Mid season crop losses in the Western District area, south of Ararat, may impact the final harvested area for GM canola.

In WA, GM canola plantings were concentrated in the Merriken and Esperence shires, which alone accounted for over 30% of total state plantings. The remaining shires all accounted for less than 5% of the total GM plantings, with most having a few hundred hectares only being grown. Despite below average rainfall for the season, the overall canola crop in WA is regarded as average, so overall harvested GM canola hectares is not expected to be significantly impacted.