

Annual Report 2021-22



Australian Oilseeds Federation Inc.
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Membership Listing (Financial as at 30 June 2022)

Corporate Members:

Advanta Seeds Pty Ltd	Emerald Grain
Alba Edible Oils	GenTech Seeds Pty Ltd
Australian Grain Technologies Pty Ltd	GO Resources Pty Ltd
Australian Superintendence Company	Hillebrand Australia
BASF Australia Limited	Intertek Testing Services (Australia) Pty Ltd
Bayer CropScience Pty Ltd	MSM Milling Pty Ltd
BEC Feed Solutions Pty Ltd	NuSeed Pty Ltd
Cargill Australia Ltd	Nutrien Ag Solutions
Centre State Exports	Peerless Holdings Pty Ltd
CMP Oilseeds	Rivalea Pty Ltd
Commodity Inspection Services	Riverina Oils Pty Ltd
Cootamundra Oilseeds Pty Ltd	v2food Pty Ltd
Corteva Agriscience	Windermere Oilseeds Pty Ltd

Association Members:

Stockfeed Manufacturers Council of Australia (SFMCA)	Grain Industry Association of Western Australia (GIWA)
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Honorary Members:

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

Life Members:

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

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AOF Executive

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

President's Report 2022

Rosemary Richards

After decades of relative stability in geopolitics, global health, the global economy and seasonal predictability, the past 12 months have reminded us that as businesses and as a society as a whole, we need to remain nimble, adaptable, flexible, and forward looking. Fortunately, Australia has weathered this period relatively well, rebuilding as we emerged from the COVID 19 restrictions, economically strong, boosted by high household savings and resource export income, watching the events in Ukraine from a safe distance, and benefiting from seasonal conditions that have favoured agriculture, particularly broad acre farming.

The global oilseed complex has been directly impacted by the confluence of these events with record prices experienced in all soft oils, driven by supply shortages from Canada in the first half of the year and uncertainty of supplies from Ukraine in the second. Continued strengthening of demand for biodiesel, particularly in the US and EU, combined with the hospitality industry re-emerging from COVID have bolstered demand for soft oils. These impacts have coincided with positive winter seasonal conditions domestically that are nothing short of outstanding. Consequently, the Australian oilseed production has risen in value, driven by both price and quantity, to close to \$8.5 billion, delivering \$6.4 billion in export value across all oilseeds.

The year ahead continues to look buoyant for oilseeds, with another near-record crop expected for both cotton and canola, although prices had already begun to retreat to more realistic levels by the end of the Financial Year, and the continued wet

conditions may temper cotton plantings and yields. Crush margins remain strong, and the ability for Australian farmers to grow and deliver certified sustainable canola to the EU market continues to underpin the strong demand for Australian canola.

The **Sustainable Grain Australia (SGA)** program developed and run by AOF goes from strength to strength, as consumer preferences lead to demand for sustainability across the value chain. Australia is certainly fortunate in that Australian grain growers in the main already practice sustainable farming and achieving ISCC certification is viewed by most as being external validation of their already good farming practices, rather than a certification system that demands significant changes to the way they farm. Over 4500 growers traded their 2021/22 harvest as ISCC certified through SGA amounting to 3.5mmt.



I noted last year that community expectations around how food, fuel and fibre are produced have escalated in recent years and continue to significantly shape the way the industry operates. This has continued throughout the current year and shows no sign of abating. The canola industry has been delivering sustainable grain for over a decade and Sustainable Grain Australia has delivered significant process and cost improvements to the sustainability accreditation process for growers and traders by providing a single centralised, standardised and consistent approach to the process, while also significantly reducing the number of grower audits undertaken.

Trade and Market Access remains a strong focus for the industry, particularly during the current period of high production. With the EU such a dominant buyer of Australian canola, diversifying markets is more important than ever. The global shortages triggered from the Canadian drought provided some tactical market opportunities, with Japan buying heavily from Australia, the largest volume of canola purchased in well over a decade at 654,000 tonnes. This was supported by a joint information sharing webinar between the AOF and Japanese Oilseed Processors Association (JOPA) and the Japanese Oils and Fats Imports Association (JOFIA). In a 'Coals to Newcastle' situation, the Canadian shortage also saw a large shipment of canola to the West Coast USA. Bangladesh emerged as a significant buyer at around 300,000 tonnes, while trade resumed with long-standing customer, Pakistan, after a successful resolution of a fumigation issue which had halted trade for a few years.



It is very exciting that Australia will again host the **International Rapeseed Congress (IRC)** in Sydney in September 2023. This global event was last hosted by Australia in 1999, and planning is well underway for the 2023 event. The Congress will centre on 6 themes, being Genetics, Genomics and Breeding; Crop Protection; Agronomy, Physiology and Crop Management; Products and Quality; End Uses; and Economy and Markets. The Congress will also include a field component visiting canola crops and related facilities in and around Wagga Wagga. Industry support for the Congress is very strong with a number of global and local companies already committing their support. This will be a great opportunity to showcase the Australian canola industry and present a forward-looking 'Vision' statement and investment commitment for the industry, with buy-in from key stakeholders.

President's Report 2021 continued

It has certainly been pleasing to return to face-to-face meetings for the quarterly member's meetings and provide the ability for members to exchange views within the meetings and network with each other. AOF continues to enjoy strong membership support with good meeting attendance and ongoing engagement throughout the year. Indeed, it is the collaborative nature of the AOF membership that underpins the values of AOF. The AOF has continued to be the voice of the oilseed industry, advocating to Government and other sectors of the grains industry for the betterment of the Australian oilseed industry.

Grains Australia is now well established, having fully absorbed GIMAF and leading the grains industry on Market Access issues. In addition, Grains Australia has established the Wheat Council and the Barley Council and managing classification for those commodities. AOF and Grains Australia have agreed to form a working group to explore review options and opportunities for alignment between the two organisations.

I would like to thank the Executive for their input over a very busy year, and in particular, the leadership team of Rob Wilson, Dan Morgan, Lachy Herbert and Michael Tighe. I would particularly like to acknowledge and thank Don McCaffery for his many years of service to the industry on the AOF Executive, and the many more years supporting the industry through his role with NSW DPI. Don retired this year from NSW DPI and while his role will be replaced, his knowledge and expertise will be greatly missed within the AOF and the broader industry. In recognition of his service, Don was granted Life Membership of

the AOF at the April meeting. On a sad note, I would also like to acknowledge the passing of Alan Leadley, former oils buyer for Unilever, and life member of the AOF.

I would also like to personally, and on behalf of the industry, thank Nick Goddard for his hard work and passion for our industry. It is in no small part due to Nick's leadership and knowledge that AOF is so highly regarded by everyone who interacts with it, both domestically and internationally.

I have enjoyed the opportunity of leading such a vibrant and committed organisation and look forward to continuing working with everyone to ensure that we continue to deliver positive outcomes and impact for all.

Thank you all for your continued support of AOF.

Rosemary Richards
President



CEO's Report

Nick Goddard

The past year has been nothing short of exceptional for oilseeds, no matter how you choose to look at it. On the demand front, continued demand for biodiesel feedstocks plays an ever-increasing role in the oilseed complex, while supply shortages from Canada, South America and Ukraine have pushed the price of soft oils to unprecedented levels. Australian canola producers were ideally placed to capitalise on these global dynamics, with consecutive years of extremely favourable seasonal conditions delivering record production levels at record prices. For processors and handlers, strong crush and elevator margins have also produced strong returns.

Highlights for 2021/22

- Record canola crop
- Establishment of the ISCC Technical Working Group
- Sustainable Grain Australia certifies over 4,500 farms
- Completion of the second Greenhouse Gas Country Report for the European Union.
- Global engagement builds with Japan and extends to Mexico
- International Rapeseed Congress 2023 planning well underway

Industry performance

The second year of La Niña was both a triumph and a tragedy for the Australian oilseeds sector. For canola, the seasonal conditions overall were excellent for canola production delivering high yields in nearly all growing regions. The weighted average national yield was 2.13t/ha, well above the 5 and 10-year average of 1.53 and 1.44 t/ha respectively, while tonnage amounted to a record 6.7 million tonnes.

The replenishment of the northern water storage systems enabled one of the largest cotton plantings in many years which delivered over 1.5mmt of cottonseed to local and overseas markets. Where the seasonal conditions prevented some alternate winter crops being sown, this opened the door for early plant of safflower, providing an opportunity for some of the affected growers to be able to 'farm' their excess moisture, rather than lose it.

However, the conditions were unkind to the soybean crop with extensive flooding in the Northern Rivers area of NSW impacting all soybean crops, with many of the impacted crops lost altogether. This was doubly disappointing as the summer soybean season was shaping up to deliver one of the largest production volumes in many years.

The sudden anticipated global shortage of sunflower oil brought about by the war in Ukraine saw a quick response in interest from growers wanting to capitalise on the opportunity. However, the time until planting (Sept/Oct) and the inability to establish an interested crushing party diminished interest, particularly in the Riverina. Nevertheless, the

CEO's Report continued

20 Year Oilseed Production



expectation is that this summer's sunflower plant will be one of the largest seen for many years. A new crush facility planned for Emerald Central Queensland for 2023 has renewed sunflower interest in that region.

Canola oil exports, both crude and refined, remained at a high level with around 420,000 tonnes of seed processed onshore to yield 190,000 tonnes of oil being exported. China remains the single largest destination for Australian exports of canola oil, accounting for over a third of exports.

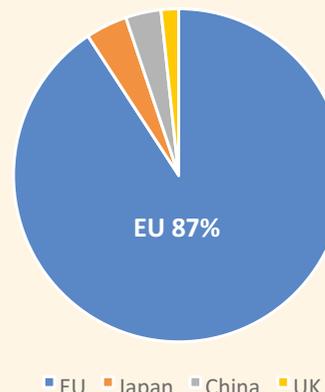
Outcomes by Strategic Themes

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

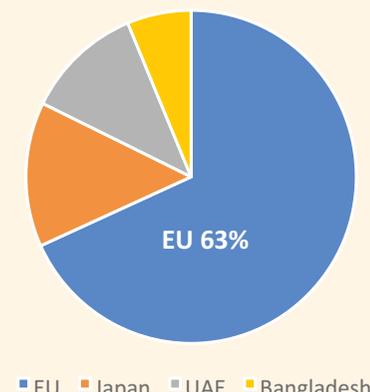
Maintaining access to the **EU market for canola remains a priority**, with 63% of all exported canola seed shipped to this market this year.

While a record 3.2mmt was shipped to the EU this year, it is encouraging that as a proportion of total exports, the EU is not as dominant as it has been, falling from a peak share of 90% to the current level. The return of access to Pakistan was welcomed now that the fumigation requirements have been resolved, while the lack of supply from Canada presented an opportunity for Australian canola to broaden its footprint into markets such as

Top 4 Export Markets (% of total Exports - 2016-17)



Top 4 Export Markets (% of total Exports - 2020-21)



Japan, Bangladesh and UAE. These three markets alone accounted for 29% of all exports. Declining rapeseed area in the UK has also diversified Australian export markets for canola seed to that market, such that over the past 2 years, Australia has supplied around 8% of UK's rapeseed/canola needs.

During the year, the AOF co-hosted with AEGIC an **introductory webinar for Mexican oilseed buyers**. Mexico consumes around 700,000 tonnes of canola oil p.a. and currently imports around 1.3mmt of canola seed (mostly from Canada) and 190,000t of canola oil (again mostly from Canada, but around a third from the US).

The interest from Mexico in Australian canola exemplifies the shift in global oilseed trade that is occurring due to both climate variability (Canada/US supplies limited) as well as the changing demand structure with US demand for biodiesel growing rapidly. While no trade eventuated this year, the Mexican oilseed

industry is now far more familiar with Australia's ability to meet their needs for canola seed and oil.

The AOF also worked with the **Japanese Oilseed Processors Association (JOPA)** and the Japanese Oils and Fats Importers and Exporters Association (JOFIEA) to co-host an information sharing webinar for the benefit of all members of the 3 participating industry associations. The AOF and our Japanese counterparty associations have a long and productive history of collaboration and information exchange dating back over 20 years. Driven by supply shortages from Canada this year, Japan purchased a record amount of Australian canola, at over 650,000 tonnes.

The Interim Agreement for the **Australia-India Economic Cooperation and Trade Agreement (AI-ECTA)**, which was signed in March, included a favourable concession for crude canola oil and sunflower seed being

CEO's Report continued

exported for Australia to India, with the elimination of tariffs over seven years from commencement.

With the transition of the Grains Industry Market Access Forum (GIMAF) to the market access function of Grains Australia, the AOF now works in partnership with Grains Australia in relation to market access activities, particularly where constraints or barriers are imposed. The AOF is also a member of the GTA Trade and Market Access Committee.

Sustainability Theme: Australian oilseed industry globally recognised as environmentally, socially and economically sustainable.

The **Sustainable Grain Australia** (SGA) program, established and run by the AOF, continues to grow and develop as market demand for certified sustainable grain expands. With canola, barley and oats now traded as ISCC certified sustainable, the program had 4750 farms fully certified to supply certified sustainable grain from last harvest. Over 3.5 million tonnes across the three commodities were traded from the 2021/22 season. To assist with grower and trader education, SGA had an exhibition booth at the Australian Grains Industry Conference which enabled good engagement



Andrew Weiderman and Colin Bettles of GPA discuss with Nick Goddard and James Saunders (SGA) the merits of certifying grain under ISCC through SGA.

with both trade and production sectors about the benefit of SGA as a means for certifying grain under the ISCC scheme.

The AOF held an **ISCC Industry Roundtable** in March with all stakeholders with an interest in ISCC, including growers, grower's representative bodies, traders and ISCC certificate holders. One of the primary outcomes from the roundtable was the recognition that a forum was needed to better explore the issues and opportunities associated with ISCC Certification, particularly at farm level. To this end, the AOF established the ISCC Technical Working Group inviting all those with a stake in ISCC Certification to come together to form the working group with the aim of identifying issues and opportunities with the scheme and then identify and owning the solutions. Where issues are insurmountable, the AOF, representing the Technical Working Group raises these direct with ISCC. Numerous meetings were held with ISCC throughout the year to clarify key points and/or to resolve issues.

The CSIRO completed the second **Greenhouse Gas Country Report** in May, which was subsequently supplied to the Directorate-General of Energy for the European Union. EU Legislation requires updated GHG values to enable bioenergy feedstocks to be accounted for in the overall EU bioenergy targets, so completion of this report was essential for canola trade to continue post 31 December 2022. The AOF led this process, working with CSIRO, AEGIC and GRDC in order to ensure the report was completed on time, providing the DG Energy with sufficient time to evaluate the report before the 31 December deadline.

Consumer Focus Theme: Actively promote the benefits of oil and meal in domestic and international markets

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

The AOF continues to develop a strategy to improve the role of **canola meal in the New Zealand dairy market** as this opportunity remains largely untapped. The inclusion of canola meal in the diet of the NZ herd is expected to improve the nutritional intake and productivity of the cattle, while also improving the quality of the milk. NZ currently imports around 1.8 million tonnes of low-quality palm kernel meal which is used as a feed supplement for the NZ herd, but is very sub-optimal in terms of milk productivity, milk quality and animal nutrition.

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 20th year of publication and becomes the 'bible' on canola quality for both the domestic and the international markets. This year's publication is available to members only, and can be accessed via the AOF website.



CEO's Report continued

Innovation Theme: *Shaping the Industry's environment and identifying and communicating industry priorities.*

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

Interest in oilseed meal as a domestic source of **protein isolate** continues to grow with the announcement of a \$4.4 million joint research project involving GrainCorp, V2Foods and CSIRO. The partnership will work towards building Australian processing and manufacturing expertise to reduce reliance on imported ingredients and to add more value to grains and oilseeds so they can be used in new products. The AOF and Soy Australia have been assisting the partnership with sharing data, knowledge and insights on production opportunity and constraints, particularly in relation to soybeans.



The AOF continued with planning for the **International Rapeseed Congress** being held in Sydney in September 2023. The Congress is held every four years and provides a forum for the international canola/rapeseed community to share their latest research and innovations and is a 'must attend' for the global canola research, development and processing industry. During the year, the venue was secured, website initiated, the six program theme committees were formed, and the program layout

completed. The Congress includes a pre-Congress visit to Wagga Wagga to inspect trial sites and other canola related activities in and around Wagga Wagga. Visit www.IRCSydney2023 for more details.

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 provided the keynote address at the Australian Brassica Conference (formally ARAB), and this presentation is still available on the AOF YouTube channel, while also representing the interests of the industry (virtually) at the International Oilseeds Producer's Dialogue. It is also the role of the AOF to brief incoming DFAT staff prior to them assuming their roles in overseas countries. Consequently, briefings were provided to the incoming High Commissioners to Pakistan and Sri Lanka, and the Agricultural Counsellor to India.

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 GIMAF and Grains Australia; consulted regularly with the Department of Agriculture, Fisheries and Forestry, both directly and through the Grains and Plant Products Export Industry Consultative Committee (GPPEICO); 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 and ready and easy access to the CEO 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 Report

Seasonal conditions overall were excellent with fallow rainfall for the three months prior to April sowing well above average (decile 8-10) across the cropping zones of New South Wales, central and north-east Victoria and Western Australia. Rainfall in the Mallee region of Victoria, and most of South Australia, was average to below average (decile 2-6). Rainfall for the crop establishment and vegetative growth period of 1 April to 30 June was average (decile 4-7) across most of New South Wales and parts of Victoria but the Mallee of Victoria and South Australia was much drier at decile 1-3. Other areas of South Australia received average to below average rainfall whilst Western Australia received average to above average rainfall across most regions.

Most regions of all states received average to above average rainfall (decile 5-9) for the second half of the growing season. A feature of the 2021 season were the mild temperatures. The mild spring temperatures, without any significant heat stress that commonly occurs, extended the flowering and pod set period, as well as seed and pod filling that combined to produce record yields and record high oil contents.

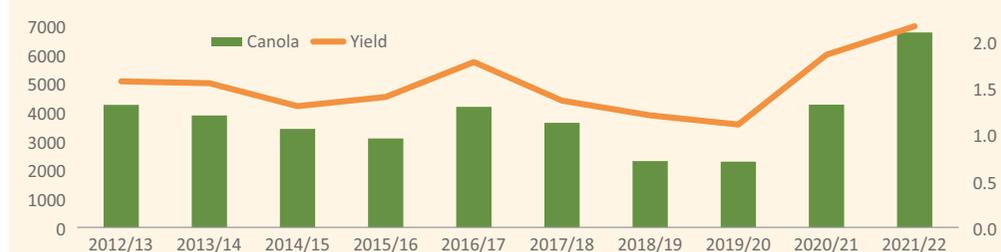
The very good soil moisture levels in the early part of the year encouraged a greater uptake

of long season “graze and grain” or “dual purpose” canola varieties, enabling growers to gain good establishment in the warmer conditions. The uptake is strongest in NSW, where it is estimated that approximately 11% of NSW canola area is sown to these varieties (vs 3% in Victoria and SA and negligible in WA).

The rapid expansion in area from trend (up 33% on prior year and the 5-year average) led to supply shortages of seed, with many growers who had not planned ahead unable to seed the area they had intended. The AOF was involved in a number of industry meetings designed to better understand the canola seed production supply line and outline the inability of the industry to respond rapidly to sudden increases in demand.

The Australian canola research industry had the opportunity to connect face to face, both in person in assorted locations, as well as virtually, for the Australian Brassica Conference held in September. This event, formally called the Australian Research Assembly on Brassica (ARAB), was the first time the industry has met since 2018, as the usual biennial meeting due in 2020 was postponed due to COVID. Over 30 papers were presented with 104 delegates registered, including delegates from USA, Japan and Poland.

10 Year Canola Production and Yield



Safflower Report

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 (SHO) Safflower, which was developed by CSIRO with funding from GRDC. The SHO Safflower is marketed by a Melbourne based company - GO Resources.

Super High Oleic Safflower oil contains approximately 92% oleic acid - the highest level of purity of an individual fatty acid present in any currently available plant oils. This level of oleic acid is stable, irrespective of the climatic conditions in which the crop is grown. The major strategic advantages of Super High Oleic Safflower oil, derived from its oleic content and fatty acid profile, is its high oxidative and thermal stability resulting in suitability to a large range of industrial applications including Bioliquid formulations, Transformer (bioelectric) oils, Food oils and Personal care.

As the world becomes more environmentally aware and shifts towards sustainability, there is a growing demand for environmentally friendly options and products. Super high oleic safflower provides an opportunity for sustainable and environmentally friendly solutions in biobased industrial formulations, transformer oils, food oils and personal care. The biobased industrial formulations is the key target market including for biobased lubricants, greases and hydraulic fluids, where super high oleic safflower oil provides better performance, is renewable and fully biodegradable. These superior lubricating properties, when used as an engine oil, can result in lower emissions and better fuel economy.

From the first commercial crop of the Super High Oleic Safflower in 2019, there was over 4,000 hectares planted in 2021 with the

production footprint extending from Queensland border to the Mallee of Victoria and the mid North of South Australia. 2021 also saw the first trials of Super high oleic safflower in WA, with the first commercial planting of 2,000 ha occurring in 2022. Go Resources is looking to expand these plantings in the years ahead to meet the increasing demand from customers in Europe, Asia, USA and domestic customers in Australia.

In 2022 the loss of access to high oleic sunflowers from the Ukraine has accelerated the level of interest and adoption of SHO Safflower Oleic Oil by customers in the EU.

To support farmers in growing the crop, in 2021/22 GO Resources has provided data to the AOF and AVPMA for the granting of Minor Use Permits for a range of herbicides including Diflufenican, Propyzamide, Boxer Gold, Dual Gold and Ally.

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 in 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.



Soybean Report

Following a La Niña-induced wet winter season, good soil moisture levels in the north, and abundant, affordable irrigation water in the south, the 2021/22 soybean season started with a very optimistic outlook. De-stocking on the Northern Tablelands of NSW also encouraged soybeans as a cash crop in unused pastures.

Initial estimates were that up to 30,000ha were planted with a possible harvest volume of just under 60,000 tonnes, which would have easily satisfied domestic demand of 40-45,000 tonnes and provided a surplus for a strong export program. Unfortunately, the La Niña conditions that provided the optimism at the start of the season progressed into the New Year and led to flooding coastal rain in Northern NSW and Qld. Crops in many areas suffered badly, particularly in the Northern Rivers where large areas of soybean crops were lost, including valuable seed crops, due to flooding. Nevertheless, the resilience of the industry was once again demonstrated with an estimated 20,000 Ha harvested to deliver around 45,000t. Pleasingly, 22,713 tonnes or 50% of the total harvest were from varieties from the breeding program.

GRDC confirmed during the year that the current breeding program would come to an end on 30 September 2022. During its existence, this program delivered a dozen new varieties to the industry, with a number of them meeting and exceeding expectations from both an agronomy and market acceptance perspective. Two of the newest varieties, Burrinjuck commercialised in 2020/21 and Gwydir, being commercialised in 2022/23, hold great promise as new varieties for the southern and northern regions respectively.

In light of the impending cessation of the soybean breeding program, the GRDC convened an all-of-industry meeting in Brisbane in May, bringing stakeholders from across the industry with representatives from all mainland states. The stakeholders reaffirmed the critical importance of a domestic soybean industry, both as a domestic supply source for the local food industry, as well as a core element in grain, sugar and livestock farming systems. This highlighted that a domestic breeding program was essential to ensure that varieties were agronomically and end-use market acceptable. The GRDC confirmed at the meeting that there will be continued support for a future breeding program.

As a further demonstration of GRDC support, additional funding was provided to the current project designed to expand soybean area in the high rainfall zones in coastal NSW and Qld, in order that additional extension work can be undertaken. The additional funding also provides for updating of the Soybean Manual which can then be made available in planned training sessions.

The Australian soybean industry remains on the cusp of potentially significant expansion, with industry players, Soy Australia and GRDC continually assessing and addressing the barriers to expansion, recognising the role soybeans play as an important rotation crop in many farming systems.

Sunflower Report

The 2021/22 sunflower season saw one of the largest areas planted to sunflowers in many years, as growers took advantage of the favourable sub soil moisture levels to exploit over summer. ABARES report an area of 25,000 ha planted with a harvest of 37,000t. With no large-scale domestic crushing industry, the bulk of this production was for birdseed and equine industries. This season saw the introduction of Ausclear 20, the first imi tolerant sunflower, providing growers with an additional weed management option in their system.

The fear of global sunflower shortage following the Russian invasion in Ukraine in February drove global crude sunflower oil prices to unprecedented levels, reaching over AUD \$3,400 tonne. On the expectation this would translate to strong seed price domestically, grower interest in sunflowers climbed rapidly in the second half of the year. However, prices soon retreated to more typical levels and the interest in crushing sunflowers quickly waned, followed by a drop in grower interest. Notwithstanding this, however, the expectation is that the coming season will again see a strong sunflower plant, as growers seek to capitalise on stored moisture, particularly if their winter cropping program failed or was dropped due to waterlogging.

Supporting the returning interest in sunflowers is the intention of a well-established industry player to commence construction of a cotton and sunflower crushing operation on the outskirts of Emerald in Central Queensland. When this operation is fully commissioned, it provides the opportunity for the CQ region to once again be a major sunflower producing region for Australia.

The ASA supported information sessions at Emerald and Clermont about the proposed

crush facility in March, 2022. Four members of the committee gave presentations and contributed to the discussions about sunflower production in Central Queensland.

The ASA had a presence at the Agrow Field Days in Emerald on 23-25 June, 2022 courtesy of Barenbrug and S&W Seeds. New pull-up banners were designed and printed to promote the ASA and the sunflower industry and a new brochure was produced highlighting the success of sunflower variety tolerance of TSV.

The breeding pipeline is progressing well with successful trials of long-seeded varieties underway. The ASA in conjunction with the seed company breeding this variety will be working to introduce the domestic food market to the early trial samples of the Australian long-seeded varieties to ascertain to what degree they may meet market needs. If successful, the long-seeded varieties will provide a new domestic, and potentially export, market for Australian sunflowers, while offering the opportunity to replace imported long seeded varieties.

The Better Sunflowers Agronomy Manual was updated and converted to a secure, online format to support both face-to-face courses and courses delivered fully online. Online delivery was trialled with a group of six participants (2 growers and 4 agronomists) in North Queensland with five online meetings held over five weeks in November and December 2021. ASA committee members and DAF entomologist Hugh Brier delivered the course material via Zoom. The recordings of the online sessions were added to the group's learning portal for future reference.

ASA members have been active in the planning phases of the next Australian Summer Grains Conference.

Statistics

Table 1: Australian Oilseed Production

Source: AOF

'000 tonnes	2017/18	2018/19	2019/20	2020/21	2021/22
Canola	3,643	2,310	2,290	4,276	6,680
Sunflowers	19	10	11	27	19
Soybeans	37	15	17	44	56
Cottonseed	1,497	686	155	728	1,529
Other	15	10	10	15	15
Total	5,211	3,031	2,483	5,090	8,299

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

Source: AOF

		2021/22		5 year average	
		Area '000 ha	Production '000 tonnes	Area '000 ha	Production '000 tonnes
Canola	NSW	700	1,750	470	780
	Vic	560	1,300	426	830
	SA	250	450	227	358
	WA	1,540	3,180	1,260	1,872
	Total	3,050	6,680	2,383	3,840
Sunflower	Qld	8	8	6	6
	NSW + Vic	22	11	10	11
	Total	30	19	16	17
Soybean	Qld	9	15	6	11
	NSW	11	30	12	23
	Vic	-	-	0	1
	Total	20	45	18	34

Table 3: Primary Exports

Source: ABS

'000 tonnes	2021/22	Av 5 years to 2021/22
Canola	5,081	2,749
Cottonseed	305	131
Canola Oil	190	169



Table 4: Canola Exports by Destination

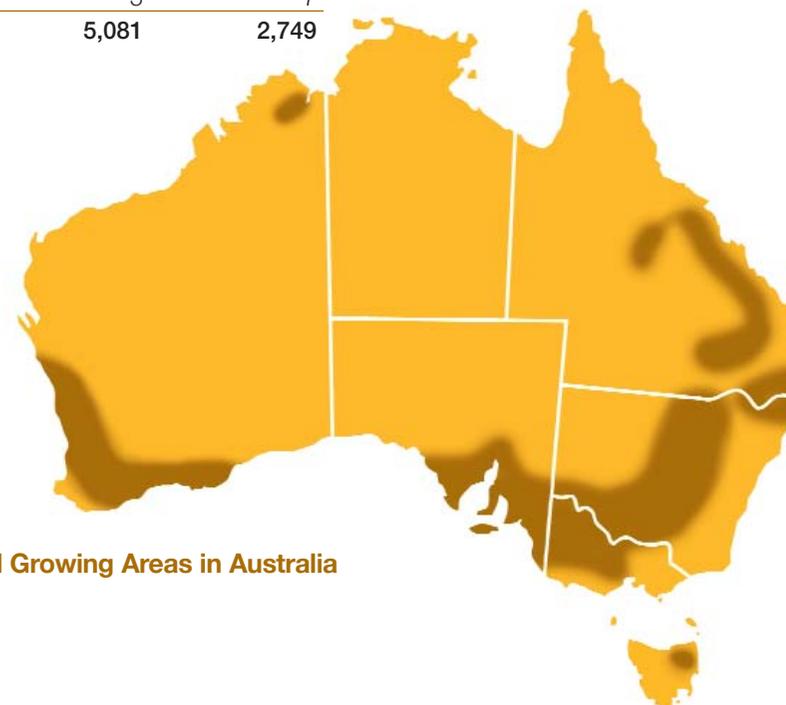
Source: ABS

'000 tonnes	2021/22	Av 5 years to 2021/22
Europe	3,177	1,965
Japan	654	215
UAE	534	149
Bangladesh	292	81
UK	155	61
Pakistan	120	34
Nepal	53	42
Malaysia	46	31
China	0	136
Ukraine	0	13
Other	5	7
Total	5,081	2,749

Table 5: Oil and Meal Imports

Source: ABS

'000 tonnes	2021/22	Av 5 years to 2021/22
Canola Oil	10	15
Coconut Oil	12	12
Cottonseed Oil	23	25
Olive Oil	17	30
Palm Oil	78	103
Soy Oil	24	24
Sunflower & Safflower Oil	56	65
Palm kernel meal	8	94
Soybean meal	723	857



Oilseed Growing Areas in Australia