

Australian Oilseeds Federation Crop Report

June 2014

Canola 2013/14

('000t)	2013/14 Final		2014/15 June Estimate	
	Harvested Area (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
	NSW	600	900	550
Vic	400	700	440	770
SA	300	500	300	490
WA	1180	1800	1225	1775
TOTAL	2480	3900	2515	3860

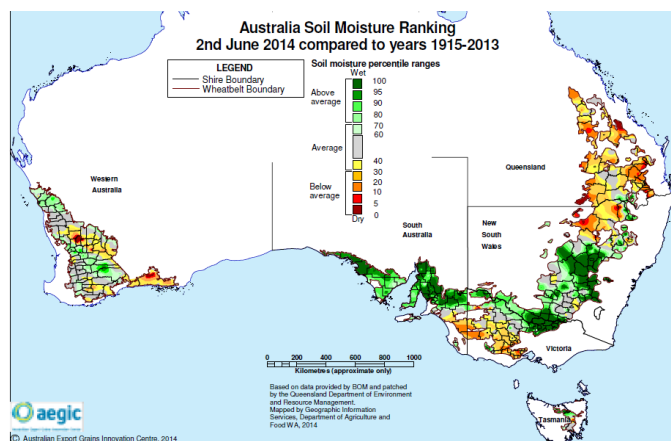
Source: Industry Estimates

The start to the 2014 canola season has been described as the best in a generation, with a full moisture profile available at planting time in many regions, and good follow-up rain and warmer than average temperatures in the weeks after seeding. Despite cereal price relativity to canola favouring cereals more this year than in the past few years, canola area is still strong, with the second highest area on record being sown to canola.

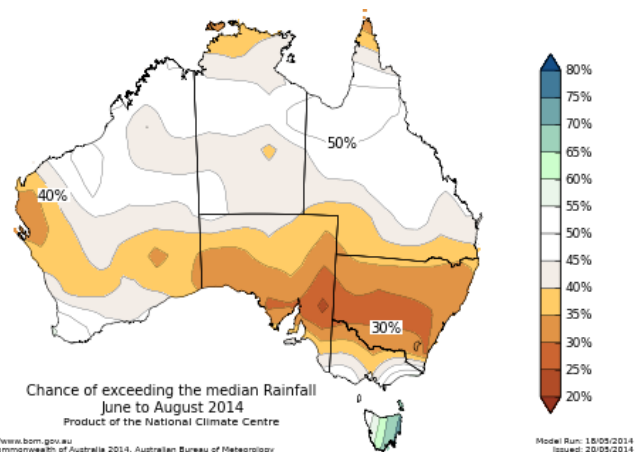
areas due to above average temperatures during May.

However, the AOF projected yields for NSW, Victoria and South Australia are below the long term average because of the growing likelihood of an El Niño event becoming established by spring.

The crops are well established, with good moisture reserves at this time, however the projections are for a drier than average winter. The Australian Bureau of Meteorology is forecasting average or below average chance of most canola growing regions exceeding median rainfall over winter, with a 70% chance of El Niño, resulting in below average winter & spring rainfall.



The Soil Moisture map, (courtesy of AEGIC) indicates the average to above average soil moisture profile as at the start of June in most growing regions. The exception is Western Districts and part of the Wimmera in Victoria and some patches in WA, although there has been adequate rain in these areas since seeding. This has resulted in good establishment, with growth accelerated in many



These conditions could lead growers to under-invest in their crops through the season, (e.g. less application of N), which could further impact yield.

The east coast conditions are in contrast with projected conditions in WA, where average to above average rainfall could be experienced. AOF yield estimates for WA are consequently above the long term average.

In NSW, the conditions have been described as 'excellent' and 'ideal' in the southern growing regions, although, unlike previous years, there is little canola sown in the north of the state due to the very dry autumn, and very modest moisture reserves. The presence of ideal conditions in late March and early April, tempered with the risk of an impending El Niño saw a number of growers plant early (late March/early April) with early maturing varieties.

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The above average temperature throughout the state during April and May, combined with no moisture stress, has resulted in plants being in a more mature state than usual going into winter, with reports of plants in some areas approaching budding stage. The impact of premature maturing on final yield is yet to be determined.

In Victoria, the season has also started very well, with good steady rainfall events prior to and since planting. Most areas have seen similar planting levels to last year, with an increase in area in Western Districts while in the Mallee, estimates are that area planted could be up by 10%.

Mid-April rain in many areas of South Australia has also resulted in an early start to the season, with ideal conditions being experienced in the lead up to and since seeding. The area sown to canola is expected to mirror that of last year, which at 300,00Ha was the largest area on record for the state.

Western Australia has also experienced a very strong start to the season, with consistent rain over 2 weeks across most of the growing regions post seeding, leading to good establishment. Grower confidence in canola in WA goes from strength to strength, on the back of record volumes last year, and very strong prices. Unlike in the eastern states, grower sentiment is not tempered with the threat of El Niño, so ongoing investment in the crop during the season is expected.

Sunflowers 2013/14

('000)	2012/13 Final		2013/14 Estimate	
	Harvested Area (Ha)	Production (tonnes)	Area Planted (Ha)	Production (tonnes)
NSW + Vic	21	11	7	9
Qld	9	35	11	12
Total	30	46	18	21

The very dry conditions in the lead up to and during summer, combined with feed shortages bolstering sorghum prices, resulted in a very low sunflower plant. These conditions were unexpected in the lead up to the season with strong industry activity by seed sellers, buyers and handlers in place to encourage and support additional sunflower area. The 2013/14 season was the lowest production on AOF records for Australia

Soybeans 2013/14

('000)	2012/13 Final		2013/14 Estimate	
	Harvested Area (Ha)	Production (tonnes)	Area Planted (Ha)	Production (tonnes)
NSW + Vic	16	60	25	51
Qld	13	28	13	11
Total	29	87	38	62

The hot, dry summer took its toll on the soybean crop, with yields below average, although on the positive side, there were no crop losses due to flooding. Southern NSW had an unusually large area devoted to soybeans, while much of the crop in central/northern coastal Queensland was used as green manure, effectively deflating average yields.

Upcoming Events



28–29 July, 2014

Details: <http://www.ausgrainsconf.com/australia>



29 September – 2 October 2014

Details: http://www.australianoilseeds.com/conferences_workshops/ARAB/arab_2014

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