

Australian Oilseeds Federation Crop Report



July 2018

Canola 2018/19

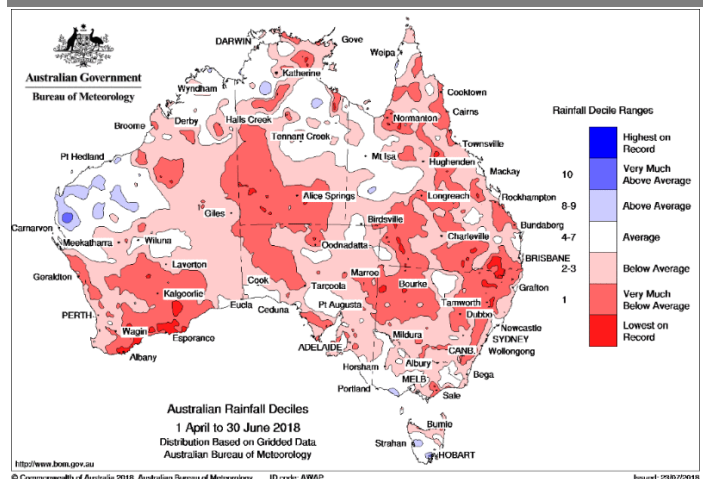
('000t)	2017/18 Final		July 2018 Month Estimate	
	Harvested Area (hectares)	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
	NSW	600	618	425
Vic	450	750	405	505
SA	250	375	230	265
WA	1,347	1,900	1,090	1,400
TOTAL	2,647	3,643	2,150	2,660

Source: Industry Estimates, GIWA; PIRSA; NSW DPI

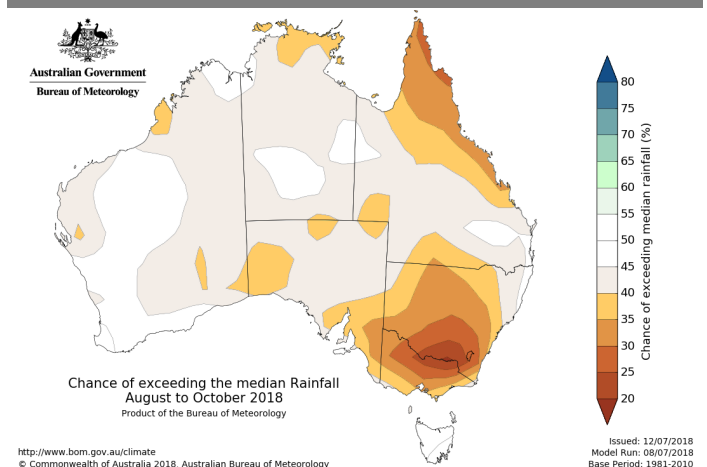
The first 3–4 months of season 2018 has proved highly challenging for canola growers nationally. The patchy seasonal break arrived late for most of the major canola growing regions, around mid-late May and even into early June. Lack of seedbed moisture and warm conditions resulted in patchy emergence in many areas, and repeated strong winds caused sandblasting and establishment failure in areas of Western Australia, which has subsequently been sown to barley. Late sowing, well below average rainfall, followed by severe frosts in mid-July in parts of Victoria and southern and central NSW, has delayed growth in most crops. Crop growth is 2–3 weeks behind normal across all states, primarily due to the late sowing. Growers who were able to conserve moisture have a better chance to bring a crop through to harvest, but in many areas the root system is yet to reach the stored moisture. The dry season has reduced insect and disease pressure in all eastern states this season. Average to above average rainfall and mild temperatures through August to October will be required to achieve break-even to profitable yields this season, but the rainfall outlook only looks favourable for WA. Our estimates at this stage are unlikely to have any upside, with forecast conditions likely to impact the higher yielding areas of NSW and Victoria.

Rainfall

Three months April–June rainfall deciles



Spring Rainfall Prospects



NSW

The NSW crop is down about 30% overall on 2017 sowings, with little reduction in area in the South West Slopes but to up to 70% on the western plains. Regions most affected by the dry season are the central west, the north and areas west of the Newell Highway in the south. Much of the traditional canola zone of southern NSW has recorded only 20–50% of average autumn rainfall (see also rainfall deciles map), ranging from 50–120 mm growing season rainfall-to-date. Following slightly below average June rainfall,

conditions have again turned dry in July. Many late-April-May sown crops had patchy and staggered emergence over a 4–5 week period and current crop growth is well behind normal due to a combination of late crop emergence, low soil moisture, cold dry weather and recent severe frosts (–4°C to –6.5°C). There is some deep subsoil moisture conserved from early December rainfall in 2017, but 25–50 mm is needed for crops to be able to tap into that moisture. Yield potential is currently below average but highly variable depending on location. There is potential downside risk depending on amount of rain in August/September. Grazing will be an option on crops with poor prospects, as will spray-fallowing. There is currently little biomass for spring haymaking to be considered.

Victoria

The Victorian canola crop is a similar story to NSW. Multiple light rainfalls of 5–10 mm through May and early June have led to staggered and patchy establishment in many areas. The crop is currently running late for the same reasons as NSW and yield potential is rated as below average. At this stage the district with best yield potential is the South West where average yields could be expected. The southern portion of the Wimmera has reasonable crops considering the late start to the season, but with little subsoil moisture reserves for spring. Other areas such as the Mallee and the North and North East have patchy crops with a wide range of growth stages— one to 6–8 leaf. Crops in the NE are the poorest in the state. Pests have not been an issue this season and disease levels are very low.

South Australia

Following the seasonal break in early May that aided an earlier establishment than Victoria and NSW, conditions have been generally dry since. Currently the most favourable areas of the state are the South East and Lower Eyre Peninsula, where crops have average yield potential. Crops in the Upper Eyre Peninsula have very poor yield potential and are currently suffering moisture stress. The Mallee is also moisture deficient, while also being impacted by severe frosts, which has significantly impacted growth. Whilst crops in the Yorke Peninsula and the Mid-North are reasonable there are no subsoil moisture reserves, so are heavily reliant on adequate rainfall leading into spring and as the temperature begin rise. Recent useful rainfall will maintain current potential for only a few weeks.

Western Australia

(Some comments from GIWA Crop Report July 2018)

The canola area is down about 20% or 250,000 ha on last season. The seasonal break arrived in late May and as a result crops were slow to emerge. Wind damage has reduced plant stands in the Midlands and the Albany and Esperance Port Zones, so this might limit yield potential in those areas. Badly damaged crops were resown to barley. Canola crops are currently behind in development compared with last year. Subsoil moisture is generally lower than this time last year, except for Kwinana West, where crops have average yield potential. Most other areas have average to below average yield potential at this stage and will require at least an average August–October rainfall with mild temperatures. A series of cold fronts over the past week has brought much needed rain (5–30 mm) across most the cropping zone with further rain forecast this week. This rain will serve to assist crop potential.

Upcoming Events

AGIC 2018:	1-2 August 2018 Melbourne
AusCanola 2018 (ARAB):	4-6 September 2018 Perth
AOF Annual Dinner:	24 October 2018 Melbourne
AOF Forum 2018:	25 October 2018 Melbourne

AOF Crop Report is provided free due to the support of the following Oilseed Development Fund (ODF) contributors

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