

Australian Oilseeds Federation

Crop Report



November 2005

Canola 2005/06

Canola production forecast to be higher on soft finish.

	2004/05 production (tonnes)	2005/06 Estimates	
		Area (hectares)	Production (tonnes)
NSW	420,000	125,000	187,500
VIC	395,000	225,000	371,250
SA	226,000	150,000	210,000
WA	490,000	440,000	580,800
Total	1,531,000	940,000	1,349,550

Source: Industry Estimates, 11/11/05

Cool conditions during October resulting in improved yield prospects and a slight increase in the estimated area sown has seen **NSW** production estimates increase by 19,500 to 187,500 compared to last month. Unsettled weather is slowing the harvest progress of a small northern NSW canola crop, but it has been beneficial for most southern areas. Heavy rains in the central west of the state has caused some lodging problems and isolated flooding. Insect activity has increased noticeably in the last month but it is not expected to decrease production. Whilst there are reports of blackleg and sclerotinia diseases becoming evident in crops in the upper slopes areas in the south these are not expected to affect yields. Due to the late sowing and mild weather, windrowing and harvest are running 10-14 days behind average but this will assist oil contents.

Favourable conditions in the Wimmera and central regions have assisted canola crops in **Victoria**. Mild temperatures will be conducive to higher oil contents. The late planting and above average spring rainfalls has windrowing 1-2 weeks later than average. Yield forecasts remain at 1.65t/ha for a production of 371,200.

Yield expectations for **South Australia** have been raised by 0.1t/ha to 1.4t/ha following cool temperatures and above average spring rainfall. Unseasonably heavy rain during October and early November has been beneficial for canola production although there has been isolated flooding. Harvest is expected to be 1-2 weeks behind normal because of the weather and late planting.

Western Australia is on track for one of the best canola seasons in recent years. Harvest is underway in the northern canola areas of WA with 80kt already delivered. Early oil contents have been around 44% and this pattern is expected to continue as harvest moves south. Showers have delayed the start of harvest in the central and southern regions. WA canola production estimates are unchanged on last month at 580,800.

Market Comment

Large canola and soybean crops are weighing on the global oilseed complex. Slow canola exports from Canada have resulted in large carry over stocks in addition to the record 9.0mmt crop that has just been harvested. Harvest selling has seen WCE move lower and this trend is expected to continue with a significant amount of grower marketing yet to occur.

The USDA increased their soybean crop forecast by 2.1mmt to 82.8mmt but lowered the Brazilian crop by 1.5mmt to 58.5mmt as a result of dry conditions and production economics. Chinese soybean imports are lagging behind market forecasts.

Sunflowers 2005/06

As reported last month, around 60,000 hectares of early plant sunflowers has occurred in northern NSW, with this being predominantly mono sunflower. The conditions since sowing have been excellent and the crop is progressing very well. Conditions have been stormy and rain has been very patchy, with some growers benefiting while others have missed out. However, the areas where the majority of sunflowers are planted have received good rain. The recent rain will help the eastern crop and it is expected that yields have the potential to average around 2 tonnes per hectare. The wet conditions have caused some incidence of leaf disease (White Blister) in some areas from Narrabri to Moree. At this stage, and if there is now warm sunny weather, this is not expected to impact yields, however, continued wet overcast cooler conditions could cause some yield penalty. There has been some incidence of bugs, with growers spraying for mirids and rutherghlen bugs.

Currently all the very early planted sunflower crops on the Liverpool Plains are between 10-12 leaf (almost budding), but the majority of the crop is at the 6-8 leaf stage. There are few issues at this stage with white blister, but some incidence of Rutherghlen bugs. There has been excellent rain and it is estimated that 12,000 hectares have been planted.

Overall, the sunflower industry is looking at brighter prospects than seen for some years, with over 70,000 hectares planted.

There is little poly sunflower planted yet. The major proportion of poly production will come from the late plant in Central Queensland.

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