

Australian Oilseeds Federation

Crop Report



December 2006

Canola 2006/07

With the canola harvest virtually complete, Australia continues to face a shortfall in requirements.

	2005/06 Production (tonnes)	2006/07 Estimates		Production (tonnes)
		Area Planted (hectares)	Area Harvested (hectares)	
NSW	253,750	180,000	40,000	30,000
VIC	337,500	213,000	75,000	42,000
SA	217,500	150,000	110,000	75,000
WA	630,000	400,000	300,000	320,000
Total	1,438,750	943,000	525,000	467,000

Source: Industry Estimates, 8/21/06

Harvest is virtually complete in **NSW**, with conditions pushing harvest 2-3 weeks earlier than normal. The crop in the north finished on a reasonable note for the season with yields between 0.6 and 1.4 t/ha, although some early crops performed significantly better than this. However, oil contents were below average at 34-39%. In the central region, a large proportion of the crop was grazed and what was harvested showed poor yields and poor oil contents. In the south, a large proportion of the harvested crop was from irrigation areas and this, combined with the northern crop, has held up yields for the state. A large proportion of the dryland crop was grazed or cut for hay. It has been difficult to obtain an accurate estimate of the area harvested. Production is estimated at 30,000 tonnes.

Harvest is well underway in **Victoria**, but has been hampered by the very windy conditions adding further yield losses. Yields have been very variable, with early crops on fallow yielding significantly better. It is still somewhat difficult to get an accurate estimate of what has been cut for hay in the western district, however, estimates for harvested area have been revised downwards. Victoria is expected to produce only 42,000 tonnes.

The crop in **South Australia** has fared a little better although there has still been area lost to grazing or hay production. Oil contents for the SA crop are only around 3-3.5% lower than average, due to most of the crop being sown in May. Estimates have been left unchanged.

Final production for **Western Australia** looks like being a 20% upside surprise compared to production estimates to the beginning of November. Oil contents have been reasonably good given the season, averaging above 40%. Yields in the eastern wheatbelt have ranged from 0.7-1.0 t/ha and in the southern/Albany region from 1-1.7t/ha. The latter has benefited from regular showers throughout spring. There may still be a bit of upside from the Albany region. At this stage, we estimate production of around 320,000 tonnes, but there could be some upside on this.

The 2006/07 season has been very difficult for growers with combined effects of drought and major frost events. The table below shows the progress of the season, with the east coast numbers reflecting firstly the major impact of the drought and then the frost through Victoria, southern NSW and south east SA.

2006/07 Production Estimates (tonnes)

Month	East Coast	West Coast	Total
Aug	729,000	290,000	1,019,000
Sept	522,600	250,000	772,600
Oct	301,000	260,000	561,000
Nov	161,000	260,000	421,000
Dec	147,000	320,000	467,000

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

Meadow Lea Foods	Unilever Australasia	Peerless Foods
Cargill Australia	Atlantic Pacific Foods	Alba Edible Oils
Riverland Oilseeds	MSM Milling	Cootamundra Oilseed
Bartter Enterprises	Ridley Agriproducts	Milmaster
Grain Pool WA	GrainCorp	Louis Dreyfus
ABB Grain	AWB Limited	

Copyright© Information has been obtained from sources believed to be reliable, however, AOF is not responsible for the accuracy or completeness of any information contained herein and is not responsible for, nor liable for, the results incurred from their use.

Australian Oilseeds Federation PO Box R1826 Royal Exchange NSW 1225 Tel: 02 9427 6999 Fax: 02 9427 6888 Email: aof@australianoilseeds.com

Sunflowers 2006/07

Prospects for the sunflower crop are well below last year due to the continuing dry conditions. The early crop is primarily in northern NSW with small areas planted in southern Queensland and the Liverpool Plains. Currently the early or planted crop is estimated at 13,000 hectares to produce 17,000 tonnes. Around 85-90% of crop is mono type and the remainder split between poly and confectionary types.

	2005/06	2006/07 Estimates	
	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
QLD	2,400	17,300	14,100
NSW	92,500	17,500	16,150
Total	94,900	34,800	30,250

Source: Industry Estimates, 8/12/06

Conditions have continued to remain hot and dry generally in northern NSW. There was some minor storm activity over the weekend (2/3 Dec), but only small falls were recorded. Isolated events yielded up to 2 inches around Moree. Crops around Moree are flowering to petal drop stage.

The southern end of northern NSW crops are generally in mid – late budding or start of flower stage. Moisture is still limited, the hot conditions unfavourable and thus, yields could be reduced if rain is not received in the next few weeks.

There has been reasonable to high Rutherglen Bug pressure which has seen some growers spray, however, this is not expected to have a significant impact on yield at this stage. Heliothis have also been a problem.

Significant rainfall is required to see a reasonable late plant, as the lack of moisture is not encouraging growers to take a chance with sunflowers despite current prices.

Soybeans 2006/07

The soybean crop will require rain over the next couple of weeks to see potential/intended plantings occur.

	2005/06	2006/07 Estimates	
	Production (tonnes)	Area Planted (hectares)	Production (tonnes)
QLD	14,710	5,950	15,565
NSW	40,688	13,050	34,150
VIC	900	0	0
Total	56,298	19,000	49,715

Source: Industry Estimates, 8/12/06

The **Queensland** coastal area is expecting a reasonable plant, although water availability is down on last year. This area is about 75% sown. Central Queensland is not yet planted and will depend on rain in the next few weeks. There is no irrigation water in the Burnett and thus, requires good rain in the next few weeks to see intended area planted. At this stage, the Burnett is only about a third planted. On the Darling Downs, soybeans have lost area to sorghum and, at this stage, only a small area is planted. There would appear to be little upside in this region even if there is good rain due to the prospects for soybeans relative to other crops. Over all area is down significantly on last year and is still dependent on rain to see estimates realised.

The **NSW** crop could potentially be in excess of 34,000 tonnes, but will depend on rain. The north coast will again be the major production region, although only around 40% of the estimated area is planted at this stage. The coast has received good rain in most parts. Progress with the sugar harvest and beef prices will influence plantings. The area in the state that is least secure is the northern irrigation region which will depend on rainfall rather than irrigation water this year. Currently less than 5% of the area is planted. The northern slopes and tablelands is pretty much planted. In the Lachlan and Macquarie none of the intended area is yet planted and will depend on rain. The Riverina has been severely reduced due to lack of water availability. Thus, estimates are very much intended or potential at this stage.

There is not expected to be any commercial production of soybeans in **Victoria** this year.

Cottonseed 2006/07

The area planted to cotton in Australia is forecast to fall significantly in 2006-07 due to low levels in dam storages across key cotton growing regions and low cotton prices. It is estimated that the cotton crop will be around one million bales to produce around 350-370,000 tonnes of cottonseed.