

Annual Report 2020-21



Membership Listing (Financial as at 30 June 2021)

Corporate Members:

Advanta Seeds Pty Ltd	GenTech Seeds Pty Ltd
Alba Edible Oils	GO Resources Pty Ltd
Aus-Oils Pty Ltd	GrainCorp Oilseeds
Australian Superintendence Company	Intertek Testing Services (Australia) Pty Ltd
BASF Australia Limited	Louis Dreyfus Australia Pty Ltd
Bayer CropScience Pty Ltd	NuSeed Pty Ltd
BEC Feed Solutions Pty Ltd	Nutrien Ag Solutions
Braid Logistics	Peerless Holdings Pty Ltd
Cargill Australia Ltd	Perten Instruments Australia Pty Ltd
Centre State Exports	Riverina Oils Pty Ltd
Commodity Inspection Services	SGS Australia Pty Ltd
Cootamundra Oilseeds Pty Ltd	v2food Pty Ltd
Emerald Grain	Windermere Oilseeds Pty Ltd

Association Members:

Stockfeed Manufacturers Council of Australia (SFMCA)	Grain Industry Association of Western Australia (GIWA)
--	--

Producer Members:

Grain Growers Limited

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	
Don Bacon-Hall (Dec)	Owen Laws	Allan McCallum	

Contents

Membership Listing	Inside Front Cover
AOF Executive	1
President's Report	2-4
CEO's Report	5-9
Strategies - "the what"	10-11
Canola Report	12
Safflower Report	13
Soybean Report	14
Sunflower Report	15
Statistics	16-17

AOF Executive

President	Rosemary Richards
Vice President	Dan Morgan
Treasurer	Lachlan Herbert
Public Officer	Michael Tighe
Consumer sector representative	Michael Tighe
Crushing sector representative	Cameron Pratt (GrainCorp)
Exporting sector representative	Vacant
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	Mike Lamond
Canola sector representative	Don McCaffery (NSW DPI)
Safflower sector representative	Rosemary Richards (GO Resources)
Soybean sector representative	Simon Crane (Seednet)
Chair, Sunflower sub-committee	Kevin Charlesworth (ASA)
Chair, Technical sub-committee	Neil Bowman (GrainCorp)
CEO	Nick Goddard
Administration	Elle Hardcastle

President's Report 2021

Rosemary Richards

It has been a pleasure to serve as your President over the past year, and while unfortunate that we once again need to meet virtually, it is an opportunity to take stock of the year and the important role that the AOF continues to play in the oilseed and broader grains industry.

I noted with pleasure the improved prospects for the industry at last year's AGM with the season progressing to see a very strong result for canola, with exceptional yields and favourable prices. Pleasingly we are again standing on the edge of another strong outlook across the oilseed crops, and particularly canola, with again the prospect of good yields and prices. Rainfall has overall been very good across the growing regions during planting and growing seasons. With harvest commencing in the northern winter crop producing regions, canola crops are now set up to achieve well above average yields. The large canola crop will allow for another year of robust exports as global demand is expected to remain high.

The industry continues to demonstrate its resilience and agility to adapt to the ongoing challenges from COVID and flow-on effects to labour, supply chain logistics and freight prices. Last year's report noted the strong investment support in the processing (crush and refining) sector which has positioned the industry positively for the increased crush opportunities over the past couple of seasons. With the oilseed sector leading the way, a lasting impact of the pandemic may be greater opportunity for and investment in building local capacity, as global supply chains adjust their priorities.

This time last year we released the new industry strategic plan which was centred around the consumer. The plan also challenged the

industry to consider the broader oilseed complex and new sources of demand.

For canola, we have seen global markets characterised by a record-breaking run due to the Canadian supply situation and concerns around European energy shortages. The industry is watching the **renewable energy** space closely to see whether demand will fundamentally change the oilseed complex. Renewable diesel (RD) demand has been pivotal in pushing hydrotreated vegetable oil (HVO) and waste feedstock prices higher. Renewable diesel is growing in importance globally, with perhaps greater potential than conventional biodiesel as it is also seen as a key product for manufacturing other products such as sustainable aviation fuel. Europe currently has the largest production capacity (about 4 million tonnes annually), but the growth over coming years is expected to come from the United States and Asia. Global renewable diesel capacity is expected to reach 24 million tonnes by 2024, with US capacity expected to be almost half of this at 10 million tonnes. The feedstock mix varies considerably between producers, with canola being one of the primary feedstocks representing 42% of production in the EU in 2020, and 9% in the US. However risks exist with biodiesel demand and production supported by various mandatory government renewable fuel policies, and the industry needs to be maintaining a watching brief on policy developments and implications.

Consumer preferences are continuing to evolve and **sustainability** is becoming increasingly important for the sector. Community expectations around how food, fuel and fibre are produced have escalated in

recent years and will continue to significantly shape the way the industry operates. The canola industry has been delivering sustainable grain for over a decade now and since Sustainable Grain Australia (SGA) was established in 2019, growers and the industry have gained significant efficiencies from the single sustainability-accreditation system. The 2020/21 year saw around 4000 growers certified sustainable, a considerable jump on previous years, and saw the scheme expanded to other grains. SGA continues to build support from across the trade demonstrating the value delivered across market access, promoting best practices and supporting Australia's value proposition. While the Australian oilseed industry is well ahead in terms of sustainability, we need to continue to raise the bar to ensure the Australian industry's supply of seed, oil and meal continues to meet, and exceed, our customer's sustainability requirements.

The **International Oilseeds Producers Dialogue** (IOPD) group met in June 2021 with representatives from across the globe (Argentina, Australia, Brazil, Canada, England, France, Germany, Paraguay, United States and Uruguay). The IOPD is an opportunity for like-minded oilseed producers, exporters, consumers and importers to come together to discuss issues of common interest. The meeting occurred as the United Nations is convening a Food Systems Summit; consumers and companies are increasingly placing emphasis on climate impacts and the environment; and governments are considering how best to address food security in a sustainable manner. IOPD members adopted a declaration that reconfirmed the central role that science and innovation plays in meeting global food and

climate change goals, acknowledging that existing environmental practices provide a strong base to leverage and build on, and highlighting the importance of continued comprehensive trade liberalisation to meet global food and renewable energy demand.

Improving value of meal remains an important issue for the industry. We will continue to seek ways to add value to meal in traditional markets/uses such as animal, while also seeking new opportunities. The growing prevalence of plant-based diets, and a dietary transition to increased consumption of protein and Western staples in Asian markets are important factors in shaping opportunity for the oilseed industry in this rapidly growing market. The plant-based protein market has been among the fastest growing segments of the food industry globally. While soy protein is a cornerstone of the plant protein market, canola protein has potential given its established supply chain, desirable nutritional profile and comparative functional properties. Australia's oilseed industry is well placed to develop differentiated protein products that meet the requirements and changing dietary patterns of the modern health conscious consumer. This aligns with the AOF strategic plan, and a recent strategy for Australian soy industry, and is an opportunity that we will continue to monitor, and identify where oilseeds can play.

Market Access remains a core activity for the AOF, and one that is ever more critical, as Australia has become so reliant on just one export market (EU) for the much larger canola crop. Issues such as importing country controls around breeding technologies and chemical residues require ongoing industry

President's Report 2021 continued

leadership and liaison with Government to ensure trade pathways provide a reasonable return and remain open and fair.

Grains Australia has during the year with Jonathan Wilson appointed as the inaugural CEO in November 2020. Grains Australia seeks to consolidate a range of industry-good functions under one roof, including trade and market access, commodity variety classification, market information and export and domestic education. The first step towards this occurred mid-year with the integration of Wheat Quality Australia and followed in October with the integration of the Grains Industry Market Access Forum (GIMAF) of which the AOF was a founding member. The AOF will continue to maintain a dialogue with Grains Australia and review options as it becomes more established and has dealt with some of the more urgent functions that need a home.

The AOF is set to host the **International Rapeseed Congress** (IRC) in 2023. This is a very important conference for the global canola industry and occurs every four years. The AOF last hosted the event in 1999 and it is timely that we are again hosting it during a period where our canola industry's domestic and global footprint has significantly increased. Planning has commenced, albeit under the difficult COVID disrupted environment. This will be a great opportunity to showcase the Australian canola industry and potentially develop a forward-looking statement and investment commitment for the industry. I encourage you all to get involved and support this important event.

It has been another incredibly busy year for the AOF and I encourage you read the Annual Report which summarises our activities across

the oilseed family. While AOF was founded to develop trading standards and provide a forum for technical advice and discussions, the remit has increased and the AOF footprint is significant. However, the collaborative nature of the AOF membership remains and underpins the values of the AOF. The AOF has continued to be the voice of the industry, advocating to Government and other sectors of the grains industry for the betterment of the Australian oilseed industry.

I would like to thank the Executive for their input over the year, and in particular, the leadership team of Rob Wilson, Dan Morgan, Lachy Herbert and Michael Tighe.

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

Finally with the continued challenging times, it is great to be facing a second positive season and outlook. I said last year that it was disappointing that COVID had not allowed me to get around the industry as much as I would have liked and that has been the case for this year also. 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 the AOF

Rosemary Richards
President

CEO's Report

Nick Goddard

Oilseeds have certainly taken the spotlight over the past 12 months, with increased planting across all oilseed types, and prices for canola reaching unprecedented levels. This has lifted industry value close to \$4 billion, well on the way towards the Industry Strategic Plan Vision of a \$5 billion industry. Pleasingly, grower returns and crush margins have been strong over the past 12 months, driving overall industry profitability throughout the value chain.

The AOF throughout the year has continued to service the industry, providing information and undertaking actions that deliver on the Strategic Plan. With the face-to-face meetings a core part of the AOF's role in building and maintaining links across the value chain, COVID has certainly made this challenging, with only one face to face meeting able to be held during the past 12 months. While the on-line meeting format has served its core purpose of enabling discussion and information exchange, it has not enabled the 'water cooler' chat and networking that we all value so much.

Highlights for 2020/21

- Record canola crop
- Canola oil exports continue to grow, reaching another record
- Sustainable Grain Australia certifies nearly 4000 farms
- First large-scale commercial plantings of super high oleic safflower
- Soybean Industry Review paves the way forward
- Wednesday Webinars serve to connect, communicate and create

Industry performance

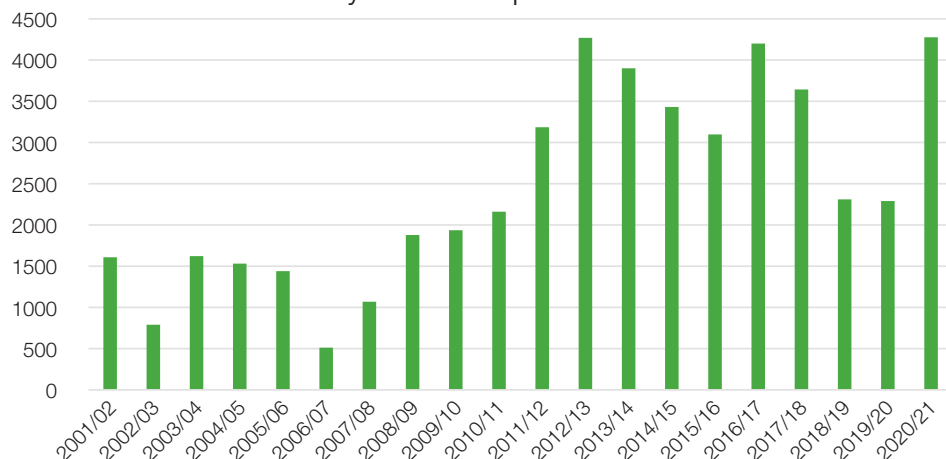
The 2020 growing season was a major turnaround from the 2019 drought year, especially in the eastern states which recorded average to above average growing season rainfall (April-October) following early season rain in late February and March. In Western Australia, the season was characterised by below average rainfall and well below average in some regions, in contrast with New South Wales and northern Victoria which experienced well above average rainfall, the seasonal break for New South Wales and Victoria arriving very early in autumn with good rain through March and April.

Consequently, canola production was very strong, achieving record yields with a national average of just under 1.9t/Ha. (2.3t/Ha in NSW and Vic). As a result, the production was a record, at 4.3mmt, despite not being a record area sown.

The summer cropping season saw a return to soybeans in Northern NSW, from the coast inland to the tablelands, while the depressed sugar pricing saw a good uptake on soybeans in the sugar coastal regions of NSW and Qld. At 44,000 tonnes (Source: ABARES) the summer harvest was the largest for 6 years, and adequately catered for domestic demand. Safflower, particularly the new super high oleic safflower (SHOS), saw solid plantings with over 5000 Ha of SHOS, being a record for this variety. The lack of summer rain in key sunflower growing regions, however, held back the area planted in northern NSW, southern and central Queensland.

CEO's Report continued

20 year canola production



Canola oil exports, both crude and refined, reached record levels with around 450,000 tonnes of seed processed onshore to yield 193,000 tonnes of oil being exported. China remains the single largest destination for Australian exports of canola oil, accounting for over a third of exports, followed by New Zealand, Taiwan and USA.

Outcomes by Strategic Themes

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

Maintaining access to the EU market, in an environment of tightening regulations and chemical use restrictions, has been a priority over the past year. The AOF continues to work closely with the Australian Embassy in Brussels to ensure any possible changes to EU legislation that might impact oilseed trade are quickly identified and a strategy developed

to minimise any impact. Over the years, the AOF has established a close working relationship with the agricultural and trade team in Brussels. The immediate priority for the EU access is to undertake the revision of the **Greenhouse Gas Country Report**, which needs to be adopted by the EU Commission by January 2023 to ensure ongoing trade to this critical market. The AOF is leading this process, and at the time of writing, is working with CSIRO, AEGIC and GRDC in order to secure the funding to undertake this work.

With the China market effectively closed to Australian canola seed due to strict import regulations, it is particularly pleasing to see **growth in alternate and emerging markets** such as Nepal, Bangladesh; a return to trade with Pakistan and UAE, and trade to rapeseed supplying markets such as the UK and Ukraine. 60% of exports, excluding the EU, were directed to these six markets.

Market access also includes domestic markets, and the AOF has been a strong advocate for the Market Choice principle to be applied in South Australia. Consequently, it was very pleasing to see legislation passed late last year to enable **GM canola and safflower to be grown in South Australia**, placing SA oilseed growers on equal footing with the East Coast and WA colleagues in being able to access GM canola and safflower should they wish.

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

The AOF, through its **Sustainable Grain Australia** program, facilitated the certification of 3,988 farms as sustainable under the ISCC certification scheme. This has served to reinforce the sustainable nature of Australian grain growers, providing global and local buyers access to certified sustainable grain. Over 2 million tonnes of grain, including canola, oats and barley were able to be traded as ISCC sustainable grain facilitated through SGA.



By achieving ISCC certification, Australian farms are complying with rigid and globally accepted sustainability criteria in relation to the stewardship of land and water on which they farm; complying with set standards in

regards to chemical application, use and storage; adhering to internationally recognised standards in regards to OHS and employment requirements; and being able to demonstrate that the farming operation is being undertaken in a manner to ensure the ongoing sustainability of the farm through measures like appropriate crop rotations, managing soil nutrients and good record keeping.

The benefits of SGA are realised by growers through a simplified and single on-line grower declaration, combined with the full support of SGA up to and including the audit process, while traders benefit by having the workload of program coordination managed by SGA.

Through SGA's adoption of the ISCC-EU scheme for grain certification, Australian grain growers and traders have access to the global cohort of food and beverage companies that have signed up to the Sustainable Agriculture Initiative (SAI), as ISCC-EU is recognised by SAI as meeting its silver level of sustainability.

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

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

The AOF is actively exploring opportunities to better establish the role of **canola meal in the New Zealand dairy** market as this opportunity remains largely untapped. Similarly, the AOF is commissioning a review of the global oilseed protein market, with a focus on canola meal, for the Australian oilseed industry to fully appreciate the new and emerging opportunities for canola meal.

CEO's Report continued

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 19th 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.



The AOF was commissioned and funded by GRDC to undertake an **extensive review of the soybean market**, exploring the domestic and international market opportunities for culinary soybeans. The review outlined the growing trend towards plant-based foods, the

predominance of soy in this new food space, and recommended a number of actions for both GRDC and the industry to consider if the true potential of soybeans in Australia is to be realised. The final report has been made available to Soy Australia and is available for AOF members on request.

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.

The AOF introduced the '**Wednesday Webinar**' series mid-way through the year to keep members informed, engaged and educated. The webinars covered a broad range of topics as diverse as human nutrition, the NZ dairy feed market, grain sustainability, nuclear magnetic resonance for oil analysis and MICoR.

These webinars are available for viewing on the AOF YouTube channel.

With the support of NSW DPI and Grain Corp, the AOF was able to return to running the regular **Test Check** program. This program enables participating laboratories to 'benchmark' their proficiency against their peers on measuring key analytical attributes. The program runs four times per year and is coordinated by NSW DPI Oils Lab with homogeneous samples of seed supplied by Grain Corp. Twelve laboratories participated in the first round of testing, and members who have laboratories or even single NIRs are invited to join the program. Please contact the AOF secretariat 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 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; consulted regularly with DAWR, both directly and through the Grains and Plant Products Export Industry Consultative Committee (GPPEICC); and participated in the GIWA Oils Council and Agricultural Biotechnology Council of Australia (ABCA).

Membership liaison and communication is another aspect where the AOF has consistently

demonstrated leadership. Crop Reports and ad-hoc member communications, combined with addressing member queries throughout the year 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



strategies

“the what”

consumer focus

- Actively promote benefits of Australian oil and meal in domestic and international markets
- Proactive management of demand-threat issues
- Developing/ improving quality and products to meet changing consumer demands
- Identify new or expanded opportunities across food, feed and industrial sectors, and provide support as required

market access

- Actively explore and support new market opportunities
- Identify and communicate non-tariff measures/market access priorities for the oilseed sector
- Work collaboratively as an industry with Government to address non-tariff measures
- Engage with and influence bilateral and multilateral trade negotiations
- Ensure path to market for new beneficial technologies/innovation
- Build stronger engagement with Government and agencies (state and federal)
- Work with other grain industry sectors/industry bodies to ensure an open and competitive trade environment

sustainability

- Extend SGA scheme to oil/meal end-users
- Establish oilseed industry as ‘best practice’ amongst Australian crops
- Maintain vigilance on changing end-user expectations
- Actively engage with accepted certification schemes
- Promote and deliver good stewardship throughout the supply chain

innovation

- Develop, communicate and facilitate alignment of industry R&D funds with industry needs
- Foster innovation pathways
- Strengthen global networks

leadership/enablers

- Provide effective leadership
- Deliver targeted communication
- Facilitate industry collaboration to drive/support Plan actions
- Monitor changes in the broader grains industry operating models and consider options for AOF involvement

Canola Report

After 2 years of drought-impacted harvests, the 2020 harvest saw a reversal of fortunes for most growers and the industry at large. With a typical total area and proportion of the rotation devoted to canola, the exceptional yields, particularly in NSW and Victoria, delivered a record crop at 4.3 million tonnes, just slightly ahead of the previous record set in 2016/17. The large volume was easily absorbed by the market, with strong demand from Europe and from domestic crushers ensuring seed carry-over into the next season was minimised. Crush and elevator margins were also strong, ensuring overall good returns throughout the industry, from farm gate through to the refinery and ports.

The strength of the season, bolstered by firm prices, encouraged growers to increase the area devoted to canola for 2021, creating pressure on seed supplies, particularly for hybrid seed. However, the industry is still experiencing a high level of use of farmer-saved seed which can only be expected to carry through to the 2022 planting season, on the back of what looks to be another record harvest in 2022.

Global canola/rape shortages have driven prices in 2021 to unprecedented levels, with prices nudging \$1,000 by the end of June. These prices are expected to be maintained through and beyond harvest, ensuring the canola industry will once again have strong returns throughout the value chain. The low carbon fuel standard in North America creating strong demand for canola as a feedstock, combined with declining harvest volumes in Europe, will see continued firmness in canola prices for the foreseeable

future. However, the exceptional prices experienced this year cannot be expected to remain at this level.

On the technology front, the lifting of the moratorium on GM crops by the South Australian government has enabled SA growers (with the exception of those on Kangaroo Island) to access GM canola, providing them with another option in the tool box for weed management. This positive move by the SA government means SA canola growers can now operate on equal terms with their east coast and west coast farmer colleagues.

The effective closure of China to Australian canola seed due to challenges in meeting the now-enforced Chinese phytosanitary requirements has created the opportunity to find new and further develop existing markets, such as Bangladesh and Nepal. This situation, augmented with an abundance of seed close to east coast crushers, has also created the opportunity to increase exports of canola oil, particularly to China, keeping the value-creation on-shore.

In all likelihood, the 2022 harvest will be close to 5 million tonnes, up 16% on the previous record, and 60% up on the 5 year average. With changing climatic conditions, with less predictable autumn breaks, it is hard to say whether the last few years have created a new plateau for Australian canola at circa 4 million tonnes. However, what is clear is that success breeds success and current industry profitability and value creation produces an environment where industry investment is made with more confidence and predictability. The future remains very positive for canola.

Safflower Report

The safflower industry continued its resurgence on the back of the introduction of the Super High Oleic (SHO) safflower variety commercialised by the AOF member, Go Resources. The oil from the SHO safflower is destined for the biobase market (lubricants, and engine, hydraulic and electrical transformer oils, etc), and is a product for its time as traditional users of mineral oil-based products look for 'greener' alternatives.

This was the second commercial year of SHO safflower, with crops in NSW and Victoria harvested last year, and expanding into South Australia this year, since the lifting of the GM moratorium in that state late last year. There are also trials being undertaken this year in WA.

Oil from the first SHO safflower crush has been exported to India for use in by one of the world's largest producers of transformer oil products; is being used as a base oil with outstanding shelf life for the global personal care category; and is also being sold as a premium omega-9 cooking oil by Australian supermarket giant, Woolworths.

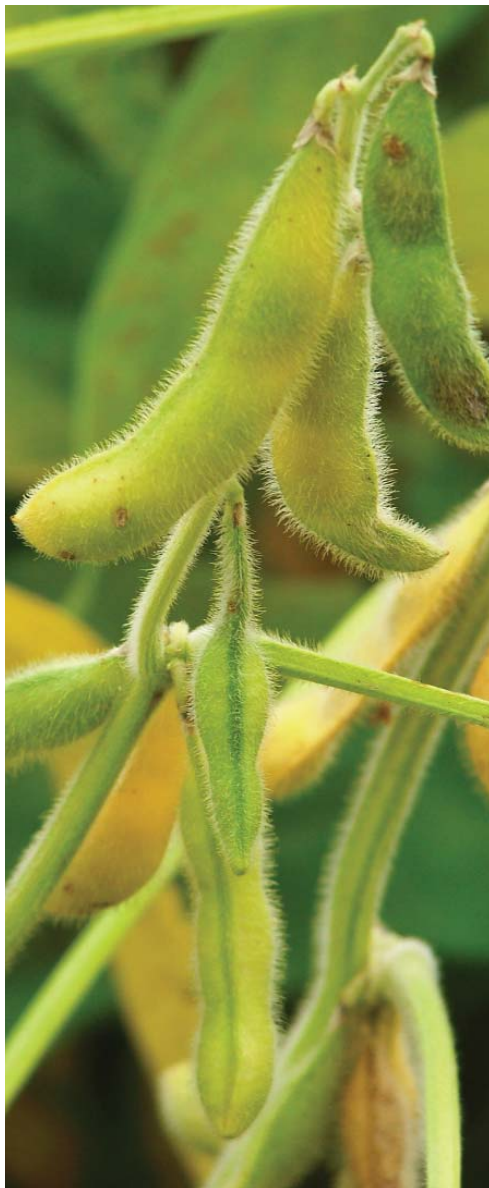


Soybean Report

The soybean industry returned to a situation of full supply this year after a number of years where drought conditions severely limited summer crop production. The depressed sugar prices ensured ongoing winter production for selected varieties in the Burdekin, which served to bolster the supplies. Pleasingly, the Riverina saw a return to soybeans after a number of years as irrigation water became far more affordable for soybeans.

The newer varieties from the Australian National Soybean Breeding program now constitute over 70% of the harvested crop, with the new varieties delivering over \$150,000 in royalties back to CSIRO. This has been the year of greatest return to the breeding program, as the EPR funding model begins to reap the long-planned-for returns.

Over the past year, GRDC initiated a thorough review of the soybean breeding program, which identified an investment of \$16.7 million over the 13 years of the program had been undertaken to deliver 8 new varieties. The key recommendations of the review included a shift of the breeding program from the public to the private sector; Channelling GRDC investment from breeding to industry development activities, while CSIRO focus on investment in pre-breeding; and for Soy Australia to play a stronger leadership role in developing the industry.



Sunflower Report

The summer of 2020/21 that favoured the soybean industry was not so kind to the sunflower industry, with dry conditions in Central Queensland and much of the Darling Downs continuing to limit production. The industry is almost entirely oriented towards the bird seed industry, with the seed packers having to import and de-nature seed in order to maintain supplies.

The opportunity presented by the introduction of the imi tolerant sunflowers last season will hopefully be realised this coming season as the prospects for sunflowers are looking more favourable this coming summer.

Despite the low production over recent years, the industry continues to be led by an enthusiastic committee, members of whom devote countless hours and kilometres each year to ensure the opportunities for the industry can be realised. The ASA Committee was revitalised this year, with a new secretariat engaged who ensures the website www.australiansunflowers.com.au is fully maintained, that the marketing guides are up-to-date and training resources are current.

The ASA held two grower workshops mid-year to continue to promote the agronomic and commercial opportunities for sunflowers, with the workshop resources now available for a wider audience on the website.



Statistics

Table 1: Australian Oilseed Production

Source: AOF

'000 tonnes	2016/17	2017/18	2018/19	2019/20	2020/21
Canola	4,200	3,643	2,310	2,290	4,276
Sunflowers	29	19	19	15	12
Soybeans	40	37	15	25	44
Cottonseed	1,260	1,497	686	191	860
Other	10	15	10	10	15
Total	5,539	5,211	3,040	2,530	5,207

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

Source: AOF

		2020/21		5 year average	
		Area '000 ha	Production '000 tonnes	Area '000 ha	Production '000 tonnes
Canola	NSW	500	1,150	435	556
	Vic	450	1,030	386	585
	SA	225	386	219	328
	WA	1,105	1,710	1,200	1,640
	Total	2,280	4,276	2,240	3,108
Sunflower	Qld	7	7	7	7
	NSW + Vic	4	5	9	12
	Total	11	12	18	19
Soybean	Qld	8	12	7	11
	NSW	16	31	11	19
	Vic	1	1	0	1
	Total	24	44	18	31

Table 3: Primary Exports

Source: ABS

'000 tonnes	2020/21	Av 5 years to 2020/21
Canola	3,132	2,454
Cottonseed	43	135
Canola Oil	193	160



Australian Oilseeds Federation Inc.

Table 4: Canola Exports by Destination

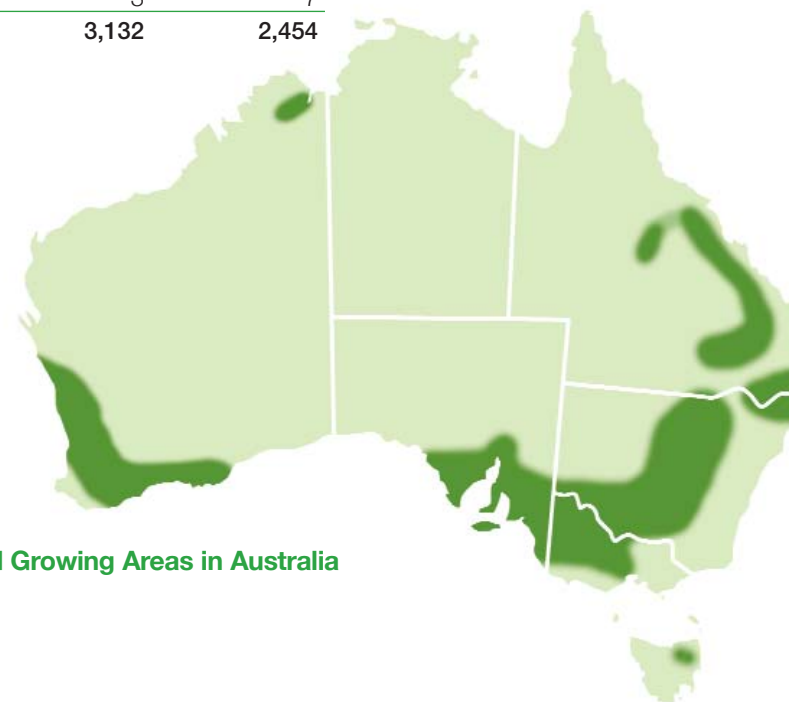
Source: ABS

'000 tonnes	2020/21	Av 5 years to 2020/21
Europe	2,456	1,953
China	93	159
Japan	52	112
UAE	61	46
UK	148	41
Nepal	79	38
Malaysia	30	30
Bangladesh	93	23
Pakistan	50	20
Ukraine	65	13
Other	3	7
Total	3,132	2,454

Table 5: Oil and Meal Imports

Source: ABS

'000 tonnes	2020/21	Av 5 years to 2020/21
Canola Oil	14	16
Coconut Oil	12	12
Cottonseed Oil	29	23
Olive Oil	37	33
Palm Oil	73	112
Soy Oil	24	24
Sunflower & Safflower Oil	66	66
Palm kernel meal	23	95
Soybean meal	808	876



Oilseed Growing Areas in Australia