

Annual Report 2014-15



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Australian Oilseeds Federation 

Membership Listing (Financial as at June 30, 2015)

Association Members:

Stockfeed Manufacturers Council of Australia Grain Industry of Western Australia

Producer Members:

Grain Growers Association Limited Victorian Farmers Federation
NSW Farmers Association

Corporate Members:

100% Bottling Company	Merricks Capital
Adams Australia Pty Ltd	Monsanto Australia
Alba Edible Oils	MSM Milling Pty Ltd
AusOils Pty Ltd	Natura Holdings Pty Ltd
Australian Superintendence Company	Noble Resources Aust
Bayer Crop Sciences	NPZ Australia
BEC Feedsolutions	Pacific Seeds Pty Ltd
Braid Logistics Australia Pty Ltd	Peerless Holdings Pty Ltd
Bunge Agribusiness Australia Pty Ltd	Perten Instruments
Cargill Oilseeds Australia Ltd	Riverina Oils and Bioenergy
CBH Grain	Riverlea
Cootamundra Oilseeds Pty Ltd	SGS Australia
Dow AgroSciences Australia Ltd	Simplot
DuPont Pioneer	Sucrogen Foods
Emerald Grain	Sumitomo Australia Pty Ltd
Glencore	Toepfer International/ADM
Grain Corp	Unilever Australasia
Itochu Australia Ltd	Wilmar Gaviola
Louis Dreyfus Australia Pty Ltd	Windermere Oilseeds Pty Ltd

Honorary Members:

CSIRO Plant Industry	Kevin Charlesworth
Department of Primary Industries and Fisheries (Qld)	NSW Department of Primary Industry
Dr Rod Mailer	Trent Potter
GRDC	

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AOF Office Bearers

Robert Wilson	- President	Lachlan Herbert	- Vice President
Trent Potter	- Vice President	Charles Aldersey	- Treasurer
Jon Slee	- Vice President	Adam Davis	- Public Officer

AOF Executive

Robert Wilson	- President	Kevin Charlesworth	- Sunflower Sub-committee/ASA
Trent Potter	- Vice President	JS Rao	- Crushing Sector
Jon Slee	- Vice President	Brendan Farrer	- Stockfeed Sector
Lachlan Herbert	- Vice President	Ashley Palmer	- Refining Sector
Charles Aldersey	- Treasurer	Justin Kudnig	- Seed Sector
Adam Davis	- Trading Sector		
Dane Robertson	- Export Sector	Nick Goddard	- Executive Director
Mike O'Hare	- Production Sector/ NSW Farmers	Elle Hardcastle	- Administration
Don McCaffery	- Canola Sub-committee		

Acknowledgments

The Australian Oilseeds Federation sincerely thanks the following contributors to the Oilseed Development Fund for their ongoing support:

Alba Edible Oils	Peerless Foods
Cargill Australia	Ridley Stockfeeds
Goodman Fielder	Grain Corp Oils.
MacSmith Milling	Unilever Australasia

President's Report 2015

Robert Wilson

I am firmly convinced that Australia punches well above its weight on the global stage when it comes to oilseeds. Although ranked 13th last year in global oilseed production, Australia consistently ranks as the world's second largest canola exporter and the largest cottonseed exporter. Added to this is our world class research capability in oilseeds with CSIRO commercialised initiatives such as the long-chain omega three canola and super high oleic safflower. Our expertise in pathology is also world class, where our researchers are internationally recognised for their breakthrough work in the understanding and management of blackleg in canola and phomopsis stem canker in sunflower.

Earlier this year I had the opportunity to see first-hand how well regarded the Australian oilseeds industry is globally by attending the International Oilseeds Producer's Dialogue (IOPD) in Chicago and the International Rapeseed Congress in Saskatoon. The IOPD is an annual meeting of the peak oilseed industry bodies from all the major oilseed

producing nations, and provides an opportunity to share and understand the issues and opportunities facing each country, and provides a platform for a united voice on matters such as trade liberalisation, chemical use and stewardship and protecting the industry's licence to operate. At this meeting it was clear that the Australian industry has strong standing and respect amongst its peers. The International Rapeseed Congress (IRC) is a 4 yearly meeting of rapeseed researchers from around the world, and once again Australia was well represented, with 37 of Australia's best and brightest attending as delegates, with a number also delivering scientific papers to the wider audience.

It was also at the 2015 IRC that Australia was confirmed as the winning bid to host the 2023 International Rapeseed Congress. This will be the second time Australia has hosted the IRC, and is affirmation once again that Australia is held high in the eyes of the rest of the world when it comes to research and development for oilseeds.

The past year has also seen continued confidence and investment in the Australian oilseeds industry, as the total production for the fourth year running has continued to remain above four million tonnes. This has served to bolster confidence in the industry, with industry investment either underway or announced during the year amounting to just under \$200 million. This strong level of investment is testament to the confidence the industry has in being able to grow both the volume and value of the oilseed industry. Much of this investment has been in processes and technology aimed at increasing the value of oil and the meal, increasing amounts of seed processed domestically into higher value products for both the domestic and export markets. The year has also seen investment in acquisitions and joint ventures by existing operators which, while reducing AOF membership through consolidation, does create larger, more sustainable and more efficient operators which in the longer term benefits the whole industry.

Exports of value added products (oil, meal and processed fats) for the 2014/15 year was one of the highest levels on record at \$207 million, with significant lifts in exports of canola oil to China, Indonesia, Taiwan, Brazil and USA, offset to some degree by a drop in oil exports to Malaysia, Korea and the Philippines, while exports of higher value processed fats increased by nearly \$2million, with strong gains in exports to South Korea and the USA.

Despite the benefits offered to growers by the adoption of GM canola, it is the proven ability of Australia to effectively segregate non-GM canola that underpins much of the export

growth, with strong markets emerging for oil from non-GM seed, while Europe continues to be our single largest market for canola seed, almost all of which is non-GM.



President's Report 2015 continued

The value of the Australian oilseeds market is projected to grow from its 2014/15 level of just over \$2.2 billion to \$5 billion over the next decade. This will be driven by growth in total oilseed production combined with strong growth in value added exports (oil and meal) and through the growth of specialty oilseeds, such as the super high oleic safflower, and the long chain omega three canola, and through our ability to continually effectively segregate non-GM canola.

During the year, the AOF completed its 2025 Strategic Plan which prepares a roadmap for the industry for the decade ahead. Developed through industry consultation, the plan articulates the major global and local trends which face the industry today, and will likely face the industry tomorrow. Macro trends, such as the changing world order, community and consumer trends and evolving business models serve as a framework within which oilseed specific trends and drivers will operate and shape the industry future for the decade ahead. The four key strategic themes of the Plan - **Leadership, Sustainability, Market Access** and **Influencing Demand** provide the

priority areas of focus for the AOF to undertake actions which will better enable the industry to grow and adapt to the changes that can be expected in the years ahead.

The AOF prepares a strategic plan every 5 years, with a 5 and 10 year horizon, and the current plan sets the path forward for the association, and the industry at large, for the decade ahead. Thanks to those members who became actively involved in the development of the plan, and for the Executive Director and my fellow members of the Executive for their strong involvement in developing this plan.

The AOF continued to strengthen its position with key stakeholders, such as government, in particular DAFF and DFAT, while representing the oilseeds industry within strategic industry groups such as Agricultural Biotechnology Council of Australia (ABCA), Grain Trade Australia (GTA), the Grains Industry Market Access Forum (GIMAF) and the Australian Grains Industry Discussion Group (AGIDG).

The grains industry is continuing to reform, reshape and reorganise following wheat deregulation, with industry consolidation and the rising strength and investment of global players in the domestic market. The oilseed industry is not immune to these changes, with only a handful of AOF members now being solely oilseed focussed; most have a larger footprint across the broader grains industry. One implication of this for the AOF is the challenge to maintain strong member engagement as the resources of many members are now stretched across more commodities, and invariably funding industry bodies, such as the AOF, comes under

greater scrutiny. The AOF has to ensure the value proposition to its members remains strong and relevant, and that two-way engagement with member organisations remains a priority.

These industry dynamics will drive a change to the funding model of the AOF, and while financial resources of the association are strong, over the coming 12-18 months an alternative funding model for the AOF will emerge which will better reflect the changing membership base, and provide for a sustainable and equitable funding base for the association.

Notwithstanding the industry dynamics, the AOF continues to enjoy very strong support from member companies, in particular, Alba Edible Oils, Goodman Fielder, MSM Milling, Peerless Foods, Grain Corp Oils and Unilever Australasia through continued contribution to the Oilseed Development Fund. Member companies also made staff available to attend meetings, sit on committees and on working groups. It is only through support of members that AOF is able to deliver for industry in the manner that it does, and I would like to

express my gratitude to those members companies and their representatives who continue to support the AOF.

This will be my last Annual Report, as I will not be standing for President of the AOF at the upcoming AGM, having been privileged to preside over this association for the past 3 years.

I would like to thank my colleagues on the AOF Executive for their commitment and support during my tenure, in particular Jon Slee, Trent Potter, Charlie Aldersey and Lachlan Herbert, who interact regularly with me and the Executive Director, ensuring both day-to-day activities and longer term strategic actions are effectively developed and implemented.

Lastly and most importantly, thanks must go to our Executive Director, Nick Goddard for his day-to-day management of the AOF. We are extremely fortunate to be in such good hands.

Robert Wilson
President



Executive Director's Report

Nick Goddard

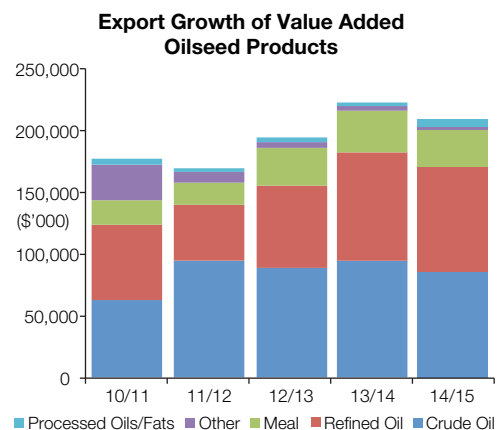
Highlights for 2014/15

- Total crop production at 4 million tonnes across the 4 primary oilseeds, being the fourth largest oilseed crop on record;
- Strong re-engagement with Japan, with the largest value and volume of exports since 2005/6, across seed, oil and meal;
- The EU remained the single largest customer at \$551 million, or one third of all export value and volume, while China remained the number two destination for all Australian oilseed products, valued at \$353 million.
- 7th successful year of GM canola harvest, with a 25% increase in area in 2015, to bring the total canola area under GM cultivation to 19%, and in WA to 30%
- Completion of the 2025 Strategic Plan, projecting an industry growth to a value of \$5 billion and 8 million tonnes.
- Fourth successful year partnering with Pulse Australia in delivering the Better Break Crop Program.

Industry performance

The 2014 winter crop was sown early to take advantage of early rainfall, and combined with a generally warmer than average winter, developed well. Despite the impact of a drier finish, frosts in the eastern states and very hot weather in WA, the canola harvest yielded 3.4 million tonnes, the third largest harvest on record. The summer cropping program, impacted by drier conditions in the north, combined with the cost of water in the MIA, severely impacted the crop production, with cotton production the lowest in many years, and sun and soy around the 5 year average.

Consequently, the export program was down on previous years, with the value of exports back from \$2.2billion to \$1.6billion, reflecting over a million tonnes less being shipped across all commodities and products.



Trade in value added products (oil, meal and flours) also slipped back, after a 5 years of year-on-year growth.

The value added components provide the ability to open and grow new markets, such as India, Nepal, Egypt, and Vietnam for refined and crude oils, while building on existing strong markets for meal such as New Zealand, and South Korea.

Significant capital investment was announced during the year, with Grain Corp Oils announcing an additional \$50 million investment to the Grain Corp Oilseed Numurkah plant to increase crush capacity by 40% (in addition to the \$125 million announced the previous year across the total oils business); Both Aus Oils Kojanup and Cootamundra Oilseeds commissioned new, cold pressed crush plants during the year, representing investment in excess of \$10 million, and significantly adding to crush capacity of these operators, and providing the capability to exploit this emerging high value segment. The 100% Bottling Company acquired the crush/refine and processing business formally known as Atlantic Pacific Foods, while Riverina Oils and Bioenergy increased its Riverina footprint with the purchase of a cottonseed crushing facility at Hillston.

The ongoing investment in the industry both demonstrates and underpins positive future prospects for oilseeds in Australia. Aggregation and consolidation leading to more efficient oilseed crushing, processing and handling capability improves the overall industry profitability and sustainability. This in turn supports and encourages broader investments by contiguous industries such as seed and chemical companies in new technology aimed at improving grower productivity.

With the 2014 harvest being the 7th year of commercial GM canola production in Australia, the AOF continued to foster the 'market choice' principle underlying the introduction of GM technology in 2008. Since then, Australia has produced and handled through the supply chain in excess of 20 million tonnes of canola, of which approximately 1.6 million tonnes was GM canola. During this time there has not been a reported incident of a customer, internationally or domestically, purchasing non-GM seed, oil or meal which did not meet their 'non-GM status' requirements. This result is testament to the ability of the Australian oilseeds supply chain to effectively segregate non-GM canola seed, oil and meal, and in doing so, meeting the market requirements. In 2015, the proportion of total canola planted to GM canola has lifted to 19% nationally, with WA reaching 30%.

Sadly, during the year, the industry farewelled one of the forefathers of the canola industry with the passing of John Lamont, Junee NSW. A former grazier and wheat farmer, John saw the light with the benefit of crop rotations, and in 1966, planted one of the country's first rapeseed crops. Despite almost complete decimation of rapeseed in the 1970's due to blackleg, John persisted and with variety improvement and disease resistance through the 70's and early 80's, John became one of the leading canola growers in the country. As the AOF noted at the time of his passing, "...he has left his mark in the countryside in bright yellow patches and planted the seeds for a multibillion dollar industry". Farewell and thank you, John.

Executive Director's Report continued

AOF performance

The AOF completed another busy year, working with members and other stakeholders with the aim of driving overall industry value growth and efficiency. This involves both day-to-day activities, being the 'go to' organisation for the industry and external stakeholders, as well proactively driving industry-wide common-good agendas such as market access, trading standards review and maintenance and industry advocacy.

Market access activities continue to take a greater share of AOF time, with a focus on developing and growing international markets for value added products of oil and meal. To this end, the AOF partnered with the Australian Renderer's Association to run a workshop in conjunction with Austrade in Taiwan to re-enforce the quality and supply chain integrity of Australian fats and oils. The AOF was also successful in being granted the oilseed component of a multi-million dollar GRDC project awarded to the Australian Grain Export Innovation Centre (AEGIC). This will involve the AOF undertaking extensive in-market research in the core markets of China and Japan to fully understand, prioritise and monetise the quality attributes for seed, oil and meal which underlie the purchasing decisions in each country.

The project to establish greenhouse gas values for production of Australian canola commenced during the year. This AOF initiated a project, run by the CSIRO and managed and part funded by the AEGIC, will produce outcomes that will be essential if Australia wishes to continue to access the EU biodiesel market after 2017. Exporting

members of AOF that have a strong interest in exporting to the EU have united to provide the balance of the funding for this project, for which the AOF is greatly appreciative.

Market access to China remains challenging, with ongoing supply contingent upon agreeing a trade protocol by the end of 2015. To initiate this project, the AOF, in conjunction with GIMAF, co-hosted a visit of senior scientists from AQSIQ in early 2015 where on-farm practices for weed and disease management (particularly Blackleg) were closely reviewed together with in-depth briefings from Australian experts in the field of blackleg research and management. With the assistance of a small number of AOF members, a blackleg management plan will be developed in the second half of 2015, and supplied to China as a pre-cursor to commencing negotiations towards a trade protocol.

The AOF was again a co-host of the Asian Australian Grains Industry Conference, held in Singapore and Hong Kong in March. The conference targeted key buyers and processors in the Region, and with the Hong Kong meeting including a specific oilseed session, highlighting the quality characteristics from the 2014 harvest.

THE AUSTRALIAN GRAINS
INDUSTRY CONFERENCE
ASIA 2015



The AOF was also represented at the International Oilseed Producer's Dialogue, held in France. This is an annual event of

country based oilseed industry associations and operates to establish harmonised positions on global matters such as trade, stewardship, new technologies and sustainability.

The 10 year 2025 Strategic Plan was also produced during this year. The 5 yearly production of the AOF Strategic Plan provides a sound opportunity for the AOF to take stock of where the industry is today, where it will be in the future, and the role the AOF will play in the decade ahead. A summary of the Plan is included in this Annual Report on pages 12-13, and the full documents is available on the AOF website. Thanks to all those members and other stakeholders who provided input and feedback during the development of the 2025 Strategic Plan.

Although only a relatively small organisation, now in its 45th year, the AOF continues to strengthen and broaden its footprint, with both the Association and the Australian industry 'punching well above its weight', as Rob

Wilson referred to in his commentary in this Report. No more was this more clearly demonstrated than in the awarding to Australia of the 2023 International Rapeseed Congress by the The Groupe Consultatif International de Recherche sur le Colza (GCIRC). This event draws scientist and researchers in the field of canola genetics, pathology, disease management, agronomy and human and animal nutrition from around the world and it is a great coup for Australia to be awarded this prestigious event. Thanks go to those AOF members, and in particular, Dr Rod Mailer and Business Events Sydney, for their involvement and commitment to developing a 'winning' bid prospectus.

The AOF Secretariat is yet again extremely grateful to the support and guidance it receives from the AOF Executive and involved members in developing and executing plans designed to build value, resilience and sustainability into the Australian oilseed industry.



Committee Reports

Technical Committee: Jon Slee (Chair)

The Technical Committee met 3 times throughout the year to explore and address matters of technical relevance to the oilseed industry. Major projects undertaken during the year were the thorough 'root and branch' review of the trading standards for oil, meal and seed. The seed review was completed and adopted by July 2014; the oil and meal by October 2014. My thanks go to all those member representatives who volunteered their time and knowledge to this project. Work towards establishing robust NIR calibrations for chlorophyll on canola continued throughout the year, led by Geoff Masters, and with the support of NSW DPI Oils Research Laboratory and Foss. Ongoing briefings on 3MCPDE and Glycidyl esters continued to keep members informed on developments locally and internationally in relation to these issues. Encouragingly, as member knowledge has deepened with these compounds, so to have implementation of appropriate mitigation strategies in refining.

With the assistance of CBH, the AOF held a technical workshop on the oil extraction method, which included a practical benchtop review of methods and equipment. This was attended by a number of members who participate in the AOF Test Check program, and thanks to CBH for hosting the workshop. The committee also began considering a sliding scale for protein levels in canola meal, which will be progressed further in the coming year.

The Technical Committee also addressed a number of operational issues, such as formulating responses to APVMA Trade Advice Notices, overseeing the annual publication 'Quality of Australian Canola', reviewing conditions that may trigger MRL breaches and assisting with visits of international visits, such as the AOSIQ delegation in February.

The Technical Committee meets before each General Meeting, and new members are always welcome to attend.

Sunflower Committee (Australian Sunflower Association): Kevin Charlesworth (Chair)

The Sunflower committee continued to be very active throughout the year, meeting regularly via teleconference to progress matters aimed at improving the sunflower industry, with a particular focus on agronomic issues. Regular communication through the 'Better Sunflowers' newsletter provides growers and the wider industry with topical, relevant and timely information about improving sunflower production together with broader aspects related to the sunflower industry.

Two 'Better Sunflower' workshops were held in the year, both of which were well attended, reaffirming the strong interest in the crop. Both workshops included the option of an additional half day to tour Cargill sunflower crush plants at either Narrabri or Newcastle, and thanks are due to Cargill for their hospitality at both plants.

With seasonal weather conditions and pricing relativities to other summer cropping options always the key determinant of the size of the sunflower crop in any one year, I am greatly encouraged by the commitment and dedication of committee members to continually ensure that growers are not left 'wanting' if and when they chose to include sunflowers in the rotation.

The committee made significant progress towards a core strategic goal of introducing 'imi' tolerant sunflowers, which will provide growers with a significant weed management option with sunflowers.

Oilseed Industry Strategic Plan 2015-2025

Every five years the AOF prepares the industry Strategic Plan, outlining the focus areas for the organisation for the coming five years, with a longer term horizon out to ten years.

The Plan outlines the common industry- good initiatives that ensure the industry is placed in the best possible position to achieve its Vision. While the plan builds on the strong foundations of the past, it recognises the need to proactively shift focus to take advantage of changing opportunities in order to optimise profitability through the value chain.

The Plan will be used to guide AOF's strategic direction and industry co-investment activities in meeting the AOF's Mission.

The Plan intentionally focuses on addressing post-farmgate issues and opportunities while recognising that some end user needs will directly influence on-farm activities and require AOF involvement.



Oilseeds – the 5-10 year outlook

Major features of the global outlook for demand and supply of oilseeds are:

- Supply and demand will be tighter, supporting firmer trends in prices.
- The main demand driver will be the demand for feed, particularly servicing developing regions.
- Supply growth will be limited due to limits on arable land, water access and productivity gains.
- Long term outlooks favour agronomic returns from oilseed crops over coarse grains.
- A reducing role for oilseeds as a biofuel feedstock due to economic and social pressures.
- Production will be dominated by Brazil, US, Argentina and China.
- Exports will be dominated by Brazil, US, Canada and Argentina, with emerging strength from the Black Sea region. Australia will remain a strong exporter of Canola and Cottonseed.

Industry Volume Projections

Million tonnes by 2025

Crop	Minimum	Median	Target	Peak
Canola	2.6	5.3	6.1	6.9
Cottonseed	0.9	1.1	1.4	1.7
Sunflower	0.03	0.11	0.17	0.23
Soybean	0.05	0.25	0.28	0.3
Safflower	0.05	0.09	0.11	0.12
Total Volume	3.63	6.85	8.05	9.25
\$/t	622	622	622	622
Value (\$'000)	2257	4260	5006	5752

Strategic Plan 2015-2025 Summary

Vision:	
A \$5 billion industry, sustainable, internationally competitive, well respected and cohesive where all participants add value through meeting market demand	
Priority areas of focus	
Leadership Taking the lead in shaping industry's environment	Sustainability Proactively supporting licence to operate
Key strategies	
<ul style="list-style-type: none"> Retain recognition as the leader on post-farmgate credentials Facilitate and, where appropriate, initiate the flow of industry R&D funds to address end-user and supply chain needs Maintain vigilance on industry risks, responding as appropriate Strengthen global networks Facilitate cohesion on industry-good agendas 	<ul style="list-style-type: none"> Identify and articulate end user sustainability/stewardship requirements along the supply chain Support implementation of end-user certification & measurement schemes Promote good stewardship throughout the supply chain
Outcomes	
<ul style="list-style-type: none"> AOF well-respected; seen as go-to oilseeds body 	<ul style="list-style-type: none"> Oilseeds known for proactive and responsible stewardship

Mission:	
Through AOF, provide leadership to the Australian Oilseeds Industry and coordinate activities that will optimize profitability through the value chain	
Priority areas of focus	
Market access Expanding into new markets while protecting existing	Influencing demand Growing value by continually addressing end-user needs
Key strategies	
<ul style="list-style-type: none"> Monitor, articulate and address technical trade barriers Engage with and influence bilateral and multilateral trade negotiations Build stronger Government and Agency (state and federal) engagement Foster strong engagement with related industry bodies Maintain vigilance on development of industrial oil uses 	<ul style="list-style-type: none"> Actively promote benefits of oil and meal Proactive management of demand-threat issues Facilitate market choice on use of GM technologies Ensure path to market for new beneficial technologies
Outcomes	
<ul style="list-style-type: none"> More diverse and secure market options 	<ul style="list-style-type: none"> More profitable oilseeds supply chain

Statistics

Table 1: Australian Oilseed Production

Source: AOF

'000 tonnes	2014/15	2013/14	2012/13	2011/12	2010/11
Canola	3431	3900	4269	3185	2161
Sunflowers	40	21	46	81	44
Soybeans	69	50	87	86	45
Cottonseed	500	988	1410	1690	1269
Other	20	10	10	10	10
Total	4060	4969	5823	5052	3529

Table 2: Area and Production by State – Key Crops

Source: AOF

		2014/15		5 year average	
		Area '000 ha	Production '000 tonnes	Area '000 ha	Production '000 tonnes
Canola	NSW	575	835	543	937
	Vic	483	647	415	716
	SA	302	314	271	407
	WA	1247	1635	1007	1329
	Total	2607	3431	2236	3389
Sunflower	Qld	24	29	17	18
	NSW	11	11	18	28
	Total	35	40	35	46
Soybean	Qld	12	20	11	22
	NSW	19	48	18	44
	Vic	1	1	1	2
	Total	32	69	31	67

Table 3: Primary Exports

Source: ABS

'000 tonnes	2014/15	Av 5 years to 2014/15
Canola	2,446	2,334
Cottonseed	167	452
Canola Oil	155	111

Table 4: Canola Exports by Destination

Source: ABS

'000 tonnes	2014/15	Av 5 years to 2014/15
Europe	967	1,411
Pakistan	146	291
Japan	308	130
Bangladesh	11	51
China	533	332
Other	481	118
Total	2,446	2,334

Table 5: Oil and Meal Imports by year

Source: ABS

'000 tonnes	2014/15	Av 5 years to to 2014/15
Canola Oil	27	18
Coconut Oil	13	13
Cottonseed Oil	12	4
Olive Oil	25	30
Palm Oil	109	109
Soy Oil	29	22
Sun & Saff Oil	47	48
Palmkernel Meal	23	32
Soybean Meal	728	568



Oilseed Growing Areas in Australia

