

Australian Oilseeds Federation

Crop Report



May 2024

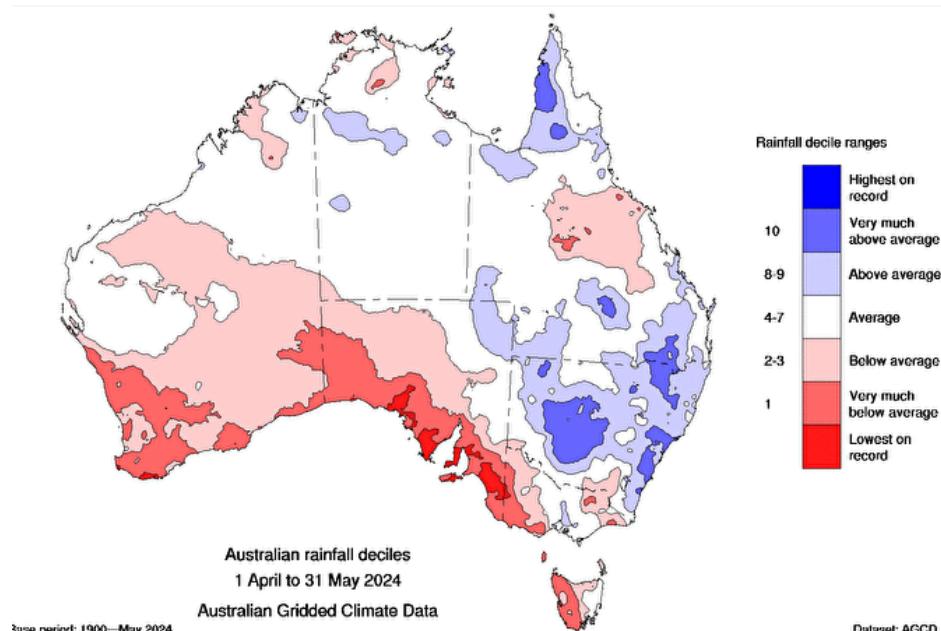
Canola 2024/25

	2023/24 Final		2024/25 May Estimate	
	Harvested Area (hectares)	Production (tonnes)	Harvest Area (hectares)	
NSW	866,000	1,340,000	820,000	
VIC	601,000	1,410,000	598,000	
SA	284,000	468,000	225,000	
WA	1,845,000	2,584,000	1,562,000	
Total	3,596,000	5,802,000	3,204,000	

Source: Industry Estimates, GIWA; NSW DPI, DEDJTR (Vic); Lachstock

The delay in the autumn break has taken its toll on canola forecasts for this season as some dry-sown crops are only now receiving moisture while in some areas, sown canola has been re-sown to cereals. Early planted, long-season varieties had the opportunity to benefit from stored moisture, but elsewhere, with the exception of NSW, canola crops have been in need of moisture replenishment, which has only occurred at the end of May. April/May rainfall in the key growing areas of Vic, SA and WA was either below, or well below average while temperatures in WA were a few degrees above the mean average, which served to further reduce available moisture.

The BOM is forecasting a dry to very dry remaining Autumn (June) with the chance of exceeding median temperatures greater than 80% across nearly all canola growing regions. This is likely to impact establishment of any crops that germinated on the May rainfall while limiting the vegetative stage of earlier planted and better established crops.



Canola pricing at the time of pre-planting was sub \$700/tonne which, combined with BOM forecast of drier conditions, led many growers to temper their canola planting area in favour of lentils, where possible, and/or cereals.

The AOF Crop Report will no longer estimate yields for the May Crop Report, but rather, will focus on area sown. Subsequent reports throughout the season will then include yield volume estimates as more season and crop information becomes available. However, applying average yields, discounted for the drier conditions, national harvest estimates at this early stage are +/- 5 million tonnes.

NSW had a very strong start to the season with long-season varieties planted in March benefiting from the February rain, while the spring varieties benefited from the heavy rain in early April. Warm soil temperatures and favourable seedbed moisture favoured rapid germination & emergence (4–5 days after sowing). By the end of April, nearly all the State's canola had been sown. Northern and Central NSW continued to progress well during May, benefiting from a near-full soil moisture profile. In the south of the State, crops in the south west that missed the April rain have struggled to maintain good establishment growth. The late May front delivered a well-needed ~25mm to this region which will sustain the crops until the next front passes through. The only concern in NSW is the rapid crop growth in the central to northern regions, producing large biomass increasing the risk of fungal disease and moisture loss through transpiration.

In **Victoria** most regions did not have the sub-soil moisture stores that NSW did and relied on the brief rain in early April to provide sowing moisture. Western Districts had below average rainfall, while the Wimmera scraped through with average rainfall into fairly dry soil. This continued through May, with the 'Autumn Break' effectively only occurring in the last few days of May which will aid what in many areas has been patchy germination. Most models are predicting 'neutral' rainfall conditions for Victoria for Autumn, with most predicting warmer conditions. This will hamper canola crops that did not get a good start as the warmer conditions are likely to deplete already tight stored soil moisture through biomass production and transpiration. Mouse presence is reported to be moderate to high.

South Australia held the unenviable position of breaking low rainfall records during April and May in a number of areas, with traditional strong areas for canola such as the South East and Eyre Peninsula recording well below average rainfall, and in some cases, lowest on record. Some growers have moved to double crop lentils with canola to mitigate their risk. As a result, area in SA is expected to come back by around 20% this season to 250,000Ha, broadly in line with the 5 year average.

On the back of a very hot and dry summer in **Western Australia**, the low soil moisture levels, combined with continuing dry, above average temperatures and seasonal forecast has resulted in reduction in the dry sown canola area. More recently, there are reports of growers abandoning their canola crop and re-sowing with wheat. In Geraldton zone, despite some isolated reasonable falls, even dry sown area has come back off prior years. Kwinana South and Midlands is extremely dry with the N.E. of the zone holding more promise, after March storms delivered some moisture for seeding. Albany and Esperance zones are both very dry, with canola area reduction due to risk aversion. Overall, WA canola area could be back as much as 15% to more typical areas. (1500-1600 Ha).

SOYBEANS

The 2023/24 soybean season was characterised by a series of challenges and opportunities, impacting planting, growth, and harvest across various regions. These included weather conditions, market dynamics, agronomic challenges, and varietal performance.

Despite strong intentions for planting in traditional soybean-growing regions, widespread high rainfall impeded progress in many areas. Notably, wet weather conditions, combined with increased sugar prices in the northern regions of Queensland led to reduced planting in coastal sugar zones. Of the area that was planted, a significant proportion of planted area was allocated to green manure crops, resulting in lower-than-expected grain

volumes. On the Northern Rivers, the area sown to soybeans was in line with prior years. Riverina/Northern Victoria plantings , while small, had very good growing conditions yielding good quality seed.

There continued to be good support for the newer varieties, with notable increases in plantings of Hayman, Richmond, and Kuranda as grower confidence grows with the new varieties

The season was marred by agronomic challenges, primarily driven by adverse weather conditions. High rainfall, humidity, increased the load for pest and diseases and increased weed pressure added to the production costs.

Uneven dry down and staggered maturity were prevalent across many growing regions, with feedback suggesting newer varieties were particularly susceptible to these issues in wetter seasons. Consequently, there was an increased reliance on desiccation methods, imposing additional costs and management burdens. Staggered maturity also heightened vulnerability to quality downgrades, further impacting crop value.

Ongoing rainfall during the harvest window may result in a small proportion of the season's crop remaining unharvested in certain regions. Despite reasonable yields, harvested crops tended to exhibit lower quality, with most volume either Edible Grade 2 or Crushing Grade. Disease symptoms, notably purple seed stain, were observed in harvested samples, necessitating careful quality assessment.

National Volume is projected to be in line with similar years, despite challenging conditions,