

# Australian Oilseeds Federation Crop Report



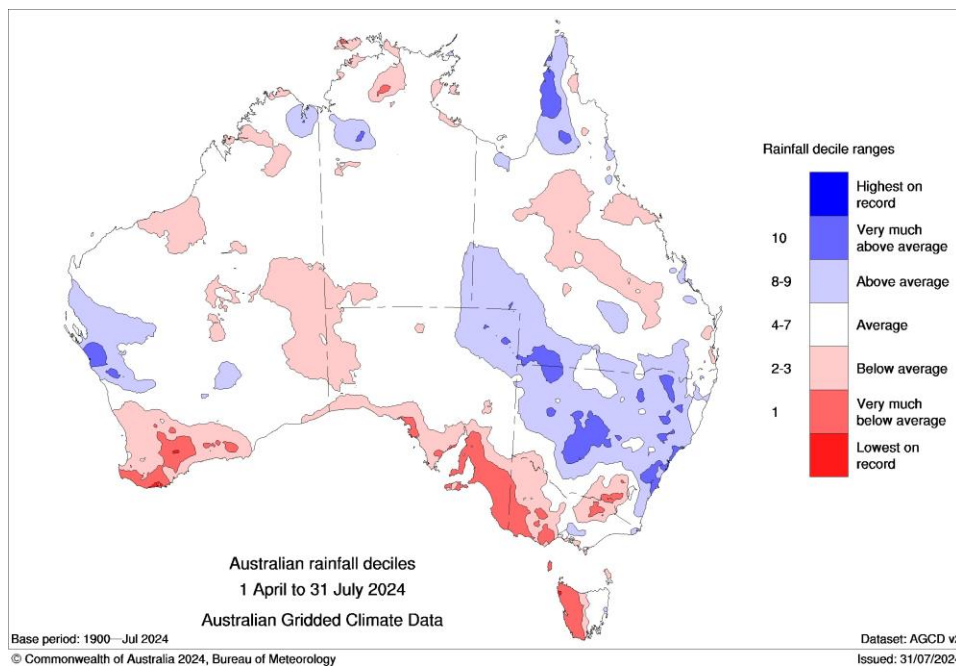
August 2024

## Canola 2024/25

	2023/24 Final		2024/25 August Estimate	
	Harvested Area (hectares)	Production (tonnes)	Harvest Area (hectares)	Est. Production (tonnes)
NSW	866,000	1,340,000	820,000	1,670,000
VIC	601,000	1,410,000	600,000	1,245,000
SA	284,000	468,000	260,000	400,000
WA	1,845,000	2,584,000	1,560,000	2,120,000
<b>Total</b>	<b>3,596,000</b>	<b>5,802,000</b>	<b>3,240,000</b>	<b>5,435,000</b>

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

The season to date has been somewhat unseasonal, with areas used to predictable and useful falls of rain experiencing very dry conditions while some of the drier regions have benefited from good rainfall. Specifically, the Wimmera, Southern NSW, Eyre Peninsula and Esperance have suffered from a dry start and below average rainfall throughout the season, while Central, Northern and Western NSW and Geraldton zone experienced above average rainfall. Despite the poor start in some key areas, the better areas have performed very well to date and are looking promising for high yields, offsetting to some degree the losses elsewhere.



The most recent BOM projections (August 8<sup>th</sup>) for the coming months is for typical rainfall through most canola growing regions, with the exception of Central Victoria. Canola pricing has climbed since planting, but has recently returned to mid-high \$600's (East Coast) and slightly more in WA as large US soybean crops have

impacted the oilseed complex negatively for canola. Potential canola shortfalls in Canada (export) and Europe, however, may provide a solid floor for Australian canola in the coming months.

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The early good start to the season in **NSW** was followed up with good widespread rain during May helping to build good soil moisture profiles. Crops commenced flowering in the far southwest in early July followed by crops in the north and central NSW later in the month. Crops are generally on track to achieve average to above average yields fueled by very good soil moisture levels, although frost is a significant risk to the more advance crops. The late and highly variable seasonal break in the southern and south-western districts, followed by intermittent rainfall has been damaging to these crops. Uneven crops are well behind typical growth stages so ongoing favourable seasonal conditions are essential to even achieve below average yield potential in these areas. Green peach aphid has been present and supported by the warmer winter, particularly in the Central West slopes, where turnip yellow virus has appeared. The promising outlook has encouraged growers to invest further in nutrition and disease protection.

**Victoria** commenced the season with a very dry May with sub-optimal moisture reserves. Many crops were sown dry with little if any decent rain in the ensuing months, particularly in the Western Districts. Some crops have been abandoned by July. The Wimmera and southern Mallee fared slightly better, with close to average June and July rainfall enabling well established crops to benefit. The cooler than average weather has provided some respite for crops with reduced transpiration. While crops in all areas, with the exception of Gippsland, are in need of replenishing rain, the BOM outlook for neutral to wetter conditions has boosted grower confidence and encouraged top-dressing where crops look promising. If the wetter conditions materialise, combined with the expected warmer than average temperatures, disease pressure may increase if there is a burst of biomass growth.

**South Australia** has experienced a very poor start to the season, with much drier than average conditions in all growing regions since before sowing. Despite a wetter than average summer, February onwards was very dry with less than 10mm in growing regions in each of April and May. Many growers reported a reduction in planned or actual area sown to canola, with most crops sown dry. Rain in June did trigger germination, albeit patchy and now running late, being at 4-6 leaf stage by end of July. The continued rain in July and into August has boosted crop biomass, and encouraged growers in selected areas to top-dress their crops. Yield projection has been pulled back to 1.5t/Ha from recent trend of 1.8-2.0 t/Ha.

Following a hot and dry summer in **Western Australia**, and the absence of any real autumn break in April/May, growers pulled back on their canola plans with an area reduction of 10%. This increased further as crops were abandoned and re-sown to alternate crops. Good rain in July and into August was too late for some crops, but for those that were able to establish, this provided a good opportunity to build biomass. Later sown crops in the Geraldton zone have benefited from the July/August rains. The warmer weather combined with the biomass boost has led to increased pest pressure, especially green peach aphid and diamond back moth, mostly in the Kwinana zone. Esperance continues to have unseasonally dry conditions, with the reduced canola crop area expected to yield well below average.

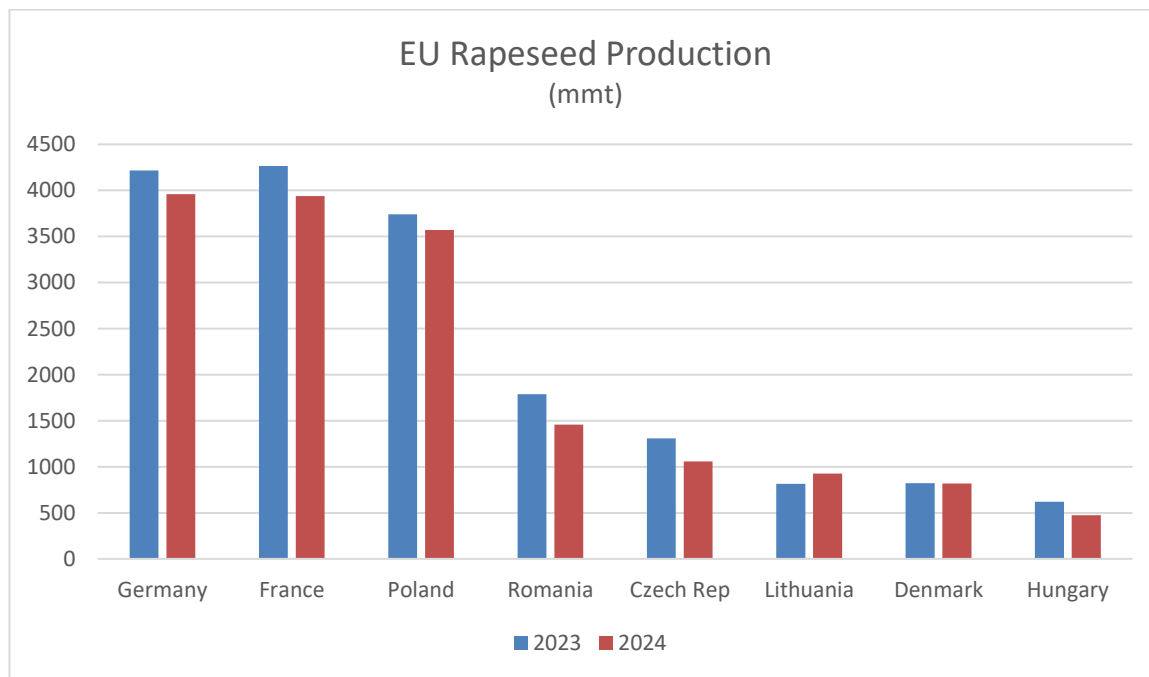
## INTERNATIONAL SCENE

Another hot and dry Summer in Europe, combined with flooding rain in cropping areas of France, has impacted canola yields, with harvest volumes down 1.3mmt to 18.5mmt on last year. France production is the major contributor to the decline, being down 0.4mmt as very wet weather early in the season impacted establishment

and subsequent yield. Hot weather at flowering knocked 200kt off German estimates (vs last year). Reduced production in the smaller production states of Romania, Hungary, Latvia and Czech Republic also contributed to the reduction in production, which was unable to be offset by slight increases in Slovakia, Ireland and Denmark.

European rapeseed production has been on a downward trend over the past decade as restrictions on chemical use and particularly hot summers have impacted yield.

Ukraine production is also down on last year, projected to be 3.5mmt, down 1mmt on last year.



Source: EU Commission, AMI- ex UFOP

Canadian production has had a reprieve with a late turnaround in production estimates, despite hotter and drier conditions during the summer. Projections vary, but consensus tend to cluster around 19.5-19.7 mmt, up by more than 1mmt on the last 2 years. Importantly, increased crushing capacity coming online in Canada has impacted the attraction of exports, such that Canda will tend to favour higher value destinations, including the EU.

