

Australian Oilseeds Federation Crop Report



Oct 2022

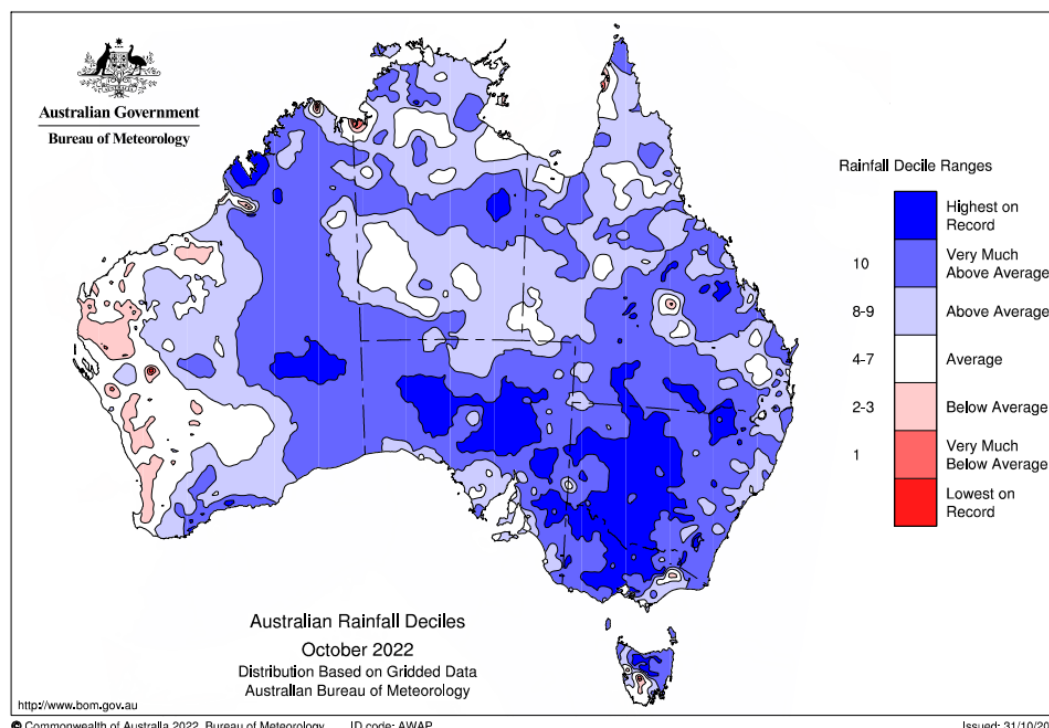
Canola 2022/23

	2021/22 Final		2022 Oct Estimate	
	Harvested Area (hectares)	Production (tonnes)	Harvest Area (hectares)	Production (tonnes)
NSW	700,000	1,637,000	760,000	1,250,000
VIC	500,000	1,144,000	570,000	1,150,000
SA	230,000	418,000	270,000	550,000
WA	1,540,000	3,130,000	1,750,000	3,800,000
Total	2,970,000	6,329,000	3,350,000	6,750,000

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

The very wet conditions in NSW and Victoria add an increased level of uncertainty with this crop forecast as the crops have generally withstood the wet conditions of recent months fairly well, but the ability to access paddocks for windrowing or harvesting will be limited in many cases. Crop conditions in SA and WA are very good and good yields are expected, with both states expecting to deliver all time record canola crops.

With the exception of WA, all canola growing regions had a very wet October with decile 10+ rainfall. In contrast, conditions in WA were near perfect, allowing crops to reach maturity with solid moisture stores, limited rainfall, and cooler than average temperatures.



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NSW has been subjected to the wettest growing season for decades, and possibly on record. Much of the canola-growing regions experienced decile 10 or more rainfall during the growing season. The exceptions were eastern Riverina and some northern sections of the SW slopes, which experienced decile 8-9. This presented challenges throughout the season, with some paddocks too wet to sow, staggered establishment or abandoned crops in some areas and a generally higher fungal disease pressure. However, on well drained areas, the crops performed extremely well through the season and despite not insignificant levels of crop losses towards the end of the season, the overall state production is still expected to be one of the highest on record. An average yield of 1.6t/ha has been applied to the area to be harvested as crops that have done well, have done very well, offsetting the crops that have fared poorly.

In the North and North West of the state, windrowing has commenced where paddocks could be accessed, but over-wet paddocks in many areas will prevent access for windrowing and, subject to drier conditions in November, growers will harvest via direct heading. The unusual seasonal conditions have prolonged the season, with harvest expected to be prolonged. In the Central West, most recent flooding in the Lachlan valley has led to crop losses, while crops off the flood plains, but on heavier soils have also not fared well. Trafficability is an issue, with direct heading likely to be the major approach for harvesting. Further south in the Riverina, waterlogging in some areas remains an issue, with reports of lodging occurring, driven as much by poor and shallow root structure as it is by larger than normal biomass.

In **Victoria**, the season has been more kind than in NSW, at least up until late October. Despite starting the season with lower than optimal soil moisture, regular passing fronts were able to provide more than enough moisture for the crops to establish well and progress through the season. Fortunately, when the unseasonal heavy rain came in October, most canola crops were well enough developed to withstand the moisture. The Mallee was the standout region this season, with decile 10+ rainfall averaged over the growing season expecting to deliver exceptional yields (for the Mallee). Resulting from the October rain and floods, up to 10% of the crop may have been lost, but as with NSW, where the crop performed well, it performed very well. Trafficability will be an issue in many areas with the recent heavy rain, which will drive growers to direct head. With generally little experience in direct heading and a particularly large biomass this season, harvest is likely to be problematic for many growers. Blackleg seed pod infection has also been triggered by the recent rain, while the incidence of alternaria has also been higher.

SA has experienced a near-perfect season and is likely to result in a record production level, with a yield just over 2t/ha. Unlike NSW and Vic, there is not expected to be any issues accessing paddocks for windrowing or harvest, with the exception of the southern Eyre Peninsula. All major canola-growing areas are expected to produce excellent results, with the October rains giving crops in the Mallee a final push to deliver strong yields with harvest now underway. Elsewhere, crops are looking very good in the South East, although large biomass may present a challenge for windrowing and harvest with lodging already beginning to occur in some places. On the Eyre Peninsula, crops are also in excellent condition, although in the southern EP there is a presence of alternaria and sclerotinia which may impact yield in those crops. While windrowing is underway in the northern EP, further south, the very wet topsoil may restrict access for windrowing, and if drying conditions persist, growers will direct head their crops.

WA, like SA, has had an excellent finish to the canola season, with average to cooler temperatures during September and October, minimal frosts and rainfall at or close to average throughout most of the wheat belt. WA is likely to produce another record canola crop, with some industry opinions being that total production may exceed 4 million tonnes as the ideal finishing conditions have produced more pods than usual with larger seed size. Applying a more conservative yield of 2.17t/ha (much greater than the WA average of 1.5t/ha) will still deliver a record crop of 3.8mtn tonnes. Harvesting is well underway in the north, with the first million tonnes of canola already delivered to CBH (as of 2nd week November). Yields are higher than expected with oil levels also expected to be well above average in many cases.

Soybeans 2021/22

	2020/21 Final		2021/22 Estimate	
	Harvested Area (hectares)	Production (tonnes)	Harvested Area (hectares)	Production (tonnes)
NSW	15,600	31,200	17,000	26,000
VIC	500	1,000	500	1,100
QLD	7,500	11,500	8,000	14,700
Total	23,600	43,700	25,500	41,800

Source: ABARES/AOF

The season started strongly with solid planting in the traditional Northern Rivers and Queensland cane district and expanded planting into the NSW Tablelands, MIA and northern Victorian irrigated areas. In total, around 25,000 Ha is estimated to have been planted for the season.

Unfortunately, the 'rain bomb' events and resultant extensive flooding during March on the Northern Rivers severely impacted many soybean crops, with significant crop losses and quality downgrades. Heavy rain in May on the Atherton Tablelands and particularly in the Burdekin/Mackay area also impacted crops and ability to harvest.

Consequently, from what was projected to be possibly a 60,000t soybean crop has been reduced to 40-45,000t which will be sufficient for domestic demand, but leave little surplus for export markets.

Sunflowers 2021/22

The Ukraine war has continued to maintain a strong interest in growing sunflowers in relevant areas. Seed production companies (Barenbrug and S&W) have advised that all seed has now been all sold/contracted for the coming season, with hybrid seed production being increased for subsequent seasons.

To support the strong interest in sunflowers the Sunflower Committee of the AOF is organising grower workshops in the the Riverina for August-September aimed at building capability among growers and advisors.

However, crushing capacity for non-canola is limited and AOF is working with the relevant crushers to ensure crushing capacity is available ahead of growers commencing seeding.

Safflower 2021/22

Interest in super high oleic safflower continues to grow, with expansion into WA this season following positive trials last season. Around 1.5-2,000 Ha is expected to be planted. The wet conditions in Northern NSW has also provided an opportunity for a spring safflower plant in cases where ground was too wet and growers were unable to sow a winter crop. There is also expected to be a reasonable spring plant in Victoria.

In total, up to 20,000 Ha of safflower could be planted for the 2022/23 season.