

Australian Oilseeds Federation

Crop Report



December 2005

Canola 2005/06

Canola estimates have been revised up slightly (by 3%) from last month due to the milder finish.

	2004/05 production (tonnes)	2005/06 Estimates	
		Area (hectares)	Production (tonnes)
NSW	420,000	125,000	206,250
VIC	395,000	225,000	371,250
SA	226,000	150,000	217,500
WA	490,000	440,000	600,600
Total	1,531,000	940,000	1,395,600

Source: Industry Estimates, 9/12/05

The finishing conditions (mild temperatures and above average rainfall) for the **NSW** crop have been extremely good and this has seen yields across the state come in better than expected. There have been some isolated instances of damage from heavy rain and hail, but generally yields have been good, with some crops achieving as high as 2.5 tonnes per hectare. Harvest is complete in the north, while in the south some crops are still to be windrowed and harvest is expected to continue until late December. Oil contents have been variable, ranging from high 30's to 45%. However, the average appears to be around 40-42%.

Estimates for **Victoria** have been left unchanged. Yields are generally good. A lot of canola is still at the windrow stage and heavy winds are likely to cause some yield loss. Like NSW, oils are somewhat disappointing in the mid 30s to 40% range and although some of the more favoured areas are showing good oil levels, these are still below what would be expected in an average year. This is due to the late planting, the dry conditions during much of the growing season and the higher proportion of TT and IT canola.

Yields for **South Australia** have been revised up due to the good finishing conditions and yields in excess of 2 tonnes per hectare have been achieved despite the late break to the season. Similarly to NSW and Victoria, oil levels are likely to be a bit below average.

The harvest in **Western Australia** is progressing well, despite rain disruptions. The Geraldton zone is complete, while the Albany zone is only 25% harvested. There has been some frost damage but this has had minimal impact overall. Oil quality is very good, averaging 45%. Yields have been increased and the state is expected to produce in excess of 600,000 tonnes.

Sunflowers 2005/06

	2005/06 Estimates Early Crop Only	
	Area (hectares)	Production (tonnes)
QLD	1,700	1,875
NSW	70,000	111,100
Total	71,700	112,975

Source: Industry Estimates, 8/12/05

The early crop is looking excellent. The make up is approximately 85% monounsaturated type, 10% polyunsaturated and 5% confectionary. There is potential for an additional late plant of 25000 hectares, with 60% of this in Queensland. The Queensland plant would be predominantly polyunsaturated type, while NSW would be a mix of poly, mono and confectionary. However, there is still considerable uncertainty over the late plant, particularly in Central Queensland, given current price levels.

Some industry estimates have the NSW mono crop as high as 120,000 tonnes however, our estimates are for average yields of 1.5 t/ha in northern NSW and 1.8 t/ha for the Liverpool Plains (see crop comments below). Early crops will start to be harvested late January/early February.

The crops around Moree were planted generally on 3/4 to a full profile of moisture and have benefited from reasonably mild conditions and good rain throughout spring until now. However high temperatures this week could be detrimental to seed yield and oil quality if they continue. The majority of crops are late flowering to mid grain fill and have good yield potential. Further rain and cooler conditions would be advantageous to meet yield potential with this heat stress coming at a crucial time of grain fill. We estimate an average yield of 1.5t/ha for the northern region and 1.8 t/ha for the Liverpool. There is potential for higher yields, but this will depend on the weather from now until maturity. Insect pressure has been very high all season, particularly in the Gunnedah region.

AOF Crop Report is provided free due to the support of the Oilseed Development Fund (ODF).

Meadow Lea Foods	Unilever Australasia	Peerless Foods
Cargill Australia	Atlantic Pacific Foods	Riverland Oilseed Proc.
Bartter Enterprises	Ridley Agriproducts	Millmaster
Grain Pool WA	GrainCorp	Louis Dreyfus
ABB Grain		

Soybeans 2005/06

Soybean planting intentions indicate a similar crop to last year, although there is upside potential.

	2005/06 Estimates	
	Area (hectares)	Production (tonnes)
QLD	8,130	19,060
NSW	16,000	36,455
VIC	295	740
Total	24,425	56,255

Source: *Industry Estimates*, 16/12/05

Area planted in north Queensland is a bit lower than expected due to the late cane season and better cane prices forecast for 2006. However, some upside is possible. At this stage, only around half the potential area for the Burnett is planted and with further rain, area could increase above present estimates. Similarly the Darling Downs is only 50-70% planted and rain in the coming week will help secure estimated area.

The NSW north coast region is around 50% planted and is expected to be down slightly on last year due to the late cane season, mill disruptions to the sugar harvest and wet conditions on the coast. Planting intentions for the northern tablelands and slopes are for a slightly lower area than last year, with this about 60% planted. The Lachlan and Macquarie regions are expected to see small plantings this year with improved water allocations and area planted is expected to recover in the south.