Canola 2009/10

Despite a reduction in overall state yield of around 13%, if the current estimate of 390,000 tonnes comes to fruition, it will be the highest yield in 6 years, and tonnage which has only been exceeded twice in the last decade.

The South Australian situation is not significantly changed from last month, with much of the canola harvested before the heat-wave conditions arrived. Good yields have been reported, with oils content ranging from 38-49%.

In Western Australia, the harvest is nearly complete, with the last of the grain still being shipped in the Albany zone. Despite the impact of frost and moisture shortages in some isolated areas, overall the result is stronger than anticipated last month, with another 50,000 t added to the projection.

### Soybean 2008/09

This month’s crop estimates are marginally up on last month’s, and are dependent on good rainfall in all areas over the next three to four weeks, and water allocation/availability in all areas. The sowing windows for other commercial crops such as sugarcane, cotton and rice are closing and this still bodes well for soybeans as planting can still occur in most regions until early January.

The final area in Queensland that will be sown to soybeans is completely reliant on good rainfall, with a requirement of at least 40-60mm in the next two to three weeks in all growing areas.

In the north of the state, predictions are still confident for up to 7,000 hectares to be planted and as per November, dependent upon the market price for soybeans during the crop growing season it is possible up to 5,000 hectares could be ploughed back in as green manure. The production estimates for this reason have taken this into consideration.

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Australian Oilseeds Federation PO Box H236 Australia Square NSW 1215 Tel: 02 80077553 Fax: 02 80077549 Email: aof@australianoilseeds.com
Current forecast for all other regions are down slightly on the 2008 planting figures. Lack of rain and the continuing dry weather conditions are hampering soil preparation and sowing. However, good rains in the second half of December could see the area planted to soybeans meet current predictions.

In New South Wales, the North Coast is experiencing a very dry start to the season with many inland areas prepared for planting but awaiting rainfall to replenish soil moisture. The prediction is for a similar area to recent seasons. To date 1,600 hectares have been sown in the coastal areas but these are under heavy pressure from Heliothis, and it is too early to predict if this will affect crop yields. The situation in all other regions in north and central of the State is similar to Queensland, awaiting good rainfall in next few weeks with planting window still open until end of December.

The current forecast for both Riverina and Victoria is for a crop area at least equivalent to last year. The sowing window has only just opened in these areas and there is still a good opportunity if market and weather conditions prove favourable in the lead up to Christmas.

### Sunflowers 2008/9

<table>
<thead>
<tr>
<th></th>
<th>2008/09 Production (tonnes)</th>
<th>2008/09 Estimates Area Planted (hectares)</th>
<th>2008/09 Estimates Production (tonnes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSW</td>
<td>48,600</td>
<td>22,800</td>
<td>28,200</td>
</tr>
<tr>
<td>Qld</td>
<td>31,700</td>
<td>14,200</td>
<td>14,800</td>
</tr>
<tr>
<td>Total</td>
<td>80,300</td>
<td>37,000</td>
<td>43,000</td>
</tr>
</tbody>
</table>

Source: Industry Estimates 11/12/09

In NSW, early planted sunflowers on the Liverpool Plains are hanging on despite the hot, dry and windy conditions which have been experienced over the last month. The majority of the crop is budding but the youngest of the early plant crop is only approximately 6-8 leaf stage.

Rutherglen bug and heliothis have increased in numbers over the last month to the point that many crops have received one insecticide application to date. There has also been very high numbers of beneficials, particularly lady beetles in crops recently.

Generally there is an obvious difference between long fallow sunflowers which are holding on and short fallow sunflowers which are very moisture stressed in the current conditions. Prospects for late plant sunflowers are largely dependent on significant rainfall within the next 2-3 weeks. If sufficient rain is not received it is expected the estimates for late plant sunflowers will be significantly reduced in this area. To the North West around Moree, there are only a few crops but are reported to be withstanding the very hot weather conditions and lack of rain. Crops are generally at petal drop stage and have received little to rain since planting. Heliothis and Rutherglen bugs pressure has been low at this stage. Given the conditions, a yield of only 0.8-1t/ha yield can be expected.

In Queensland, the expected early plant of monos on the Darling Downs did not eventuate due to insufficient rainfall. Only 500Ha was planted from an expected 2800Ha. This crop is in urgent need of follow-up rain as temperatures remain 6-8 Degrees above average for this time of the year. Sunflowers are priced favourably compared to sorghum which should see a minor swing into sunflowers if conditions improve.

### Global Snapshot

Sunflower estimates out of South American for 1H 09 have been revised downwards, with delayed harvest and drought in Russia also expected to limit supplies (off last year’s record crop). This has served to provide a solid base for canola/rape for the first half of 2010. Meanwhile, Canada is well on its way towards its goal of 15 mln tonnes by 2015, with the current harvest estimated to yield 11.8 mln tonnes(above initial expectations, though down from last season’s 12.6 mln tonnes.) Prices firmed on Canadian canola once the US FDA eased restrictions on imports of meal, following the detection of salmonella in a number of shipments over recent weeks.

Latest USDA forecasts have reduced projected stocks of soybeans due to very strong export sales. US Soybean exports are reported to have been a record for November.

Source: Subscribed services and on-line sources.

### What’s Ahead…

**2010 Australasian Milling Conference**

The emphasis of the conference will be to challenge existing industry practices and gain a better insight into our Australian industries in a global context. Participants will be challenged to benchmark their companies performance by industry leaders through examining a range of areas to determine “Australia’s Edge – Are We Sharp Enough?” Both international and local speakers will contribute to the program addressing a range of topics relating to the feed and flour industries.

*Melbourne’s Etihad Stadium April 13-15, 2010.*
“Australian Summer Grains - Opportunity through Unity”
This inaugural summer grains conference brings together the 5 primary summer crops (maize, sunflower, sorghum, soybean and mungbean) in one event to provide growers and scientists a forum to exchange tailored information for improved farming systems.

Christmas Greetings

AOF Crop Report is provided free due to the support of the Oilseed Development Fund (ODF).
Meadow Lea Foods Peerless Foods ABB Grain
Cargill Australia Atlantic Pacific Foods Alba Edible Oils
Riverland Oilseeds MSM Milling Cootamundra Oilseeds
Grain Pool WA