

Annual Report 2016-17



Australian Oilseeds Federation Inc.
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Membership Listing (Financial as at June 30, 2017)

Association Members:

Stockfeed Manufacturers Council of Australia Grain Industry of Western Australia

Producer Members:

Grain Growers Association Limited Grain Producers Australia

Corporate Members (financial as at June 30, 2017):

| | |
|--|--|
| 100% Bottling Company | Natura Holdings Pty Ltd |
| Adams Australia Pty Ltd | NPZ Australia Pty Ltd |
| Bayer CropScience Pty Ltd | NuSeed Pty Ltd |
| BEC Feed Solutions Pty Ltd | Ottevanger Milling Engineers |
| Braid Australia Pty Ltd | Pacific Seeds Pty Ltd |
| Bunge Agribusiness Australia Pty Ltd | Peerless Holdings Pty Ltd |
| Commodity Inspection Services | Perten Instruments Australia Pty Ltd |
| Cootamundra Oilseeds Pty Ltd | Plumgrove |
| Dow AgroSciences Australia Ltd | Rivalea Pty Ltd |
| GenTech Seeds | SANWA |
| Glencore Agriculture | Seednet |
| GO Resources Pty Ltd | Simplot Australia Pty Ltd |
| Grain Growers Association Limited | Stockfeed Manufacturers Council of Australia |
| Grain Industry Association of Western Australia (GIWA) | (SFMCA) |
| Grain Producers Australia (GPA) | Sumitomo Australia Pty Ltd |
| Hyfeed Holdings T/A Hyfeed | Unilever Australasia |
| Merricks Capital Pty Ltd | Victorian Farmers Federation |
| MSM Milling Pty Ltd | Wilmar Gavilon Pty Ltd |
| | Windermere Oilseeds Pty Ltd |

Honorary Members:

| | |
|--|--------------------------------------|
| CSIRO Plant Industry | GRDC |
| Department of Primary Industries and Fisheries (Qld) | NSW Department of Primary Industries |
| | SARDI |

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AOF Office Bearers

| | |
|--|--------------------------------------|
| Jon Slee - President | Trent Potter - Vice President |
| Robert Wilson - Vice President | Lachlan Herbert - Treasurer |
| Charles Aldersey - Vice President | Adam Davis - Public Officer |

AOF Executive

| | |
|--|--|
| Jon Slee - President | Moira Rowland - Consumer Representative |
| Robert Wilson - Vice President | Don McCaffery - Canola Sub-committee |
| Charles Aldersey - Vice President | Kevin Charlesworth - Sunflower Representative |
| Trent Potter - Vice President | Peter Brodie - Soy Australia Representative |
| Lachlan Herbert - Treasurer | Jon Slee - GIWA Representative |
| Adam Davis - Trading Representative | Vacant - Production Representative |
| Kevin Morthorpe - Seed Representative | Jon Slee - Chair Technical Committee |
| JS Rao/ | |
| Cameron Pratt - Crusher Representative | Nick Goddard - Executive Director |
| Michael Tighe - Refining Representative | Elle Hardcastle - Administration |
| Dan Morgan - Exporters Representative | |
| Brendan Farrer - Stockfeed Representative | |

Acknowledgments

The Australian Oilseeds Federation sincerely thanks the following contributors to the Oilseed Development Fund for their ongoing support:

| | |
|------------------|-----------------------------|
| Alba Edible Oils | Peerless Foods |
| Goodman Fielder | Ridley Stockfeeds |
| Grain Corp Oils | Riverina Oils and Bioenergy |
| MacSmith Milling | Unilever Australasia |



President's Report 2017

Jon Slee

2016/17 heralded a period of industry change and development that will shape the roles and functions of the AOF for the future.

Firstly, the Federal Government has supported the dispersal of funds remaining from the Wheat Export Charge to be used to establish an entity to manage the industry-good functions of Australia's grain market access and market development functions as well as the industry's grain classification needs.

The past year also saw the combining of the secretariat function of both the Australian Oilseeds Federation and Pulse Australia, under the one CEO and administrative support.

Combined, these two events signal the opportunities that lie ahead for the oilseed industry to have stronger, better resourced industry representation. While AOF will continue to represent members' interests in the medium term, particularly for the domestic crushing and processing sectors, functions such as international market access and



development and classification will be divested to the new industry good company. At the same time, AOF is also working with other industry representative bodies to look towards a consolidated model for broader industry representation. We see the move with Pulse Australia as just the first step towards a broader consolidated industry representational body.

Notwithstanding these ongoing industry development initiatives, the AOF has been very focused over the past twelve months to continue to deliver high value for its members with a number of significant projects and activities undertaken during the year to ensure that the Australian oilseed industry is in the best possible position to maximise the value creation potential, both domesticity and in our international markets.

While a project such as establishing an exemption for dangerous goods classification for canola meal benefits the domestic industry, other projects such as the fatty acid profiling of varieties and the establishment of greenhouse gas emissions values benefit both the domestic and international markets. Other activities, such as the trade mission to Japan and presenting at the Australian Grains Industry Conference in Shanghai, are more focused on international trade.

As an industry body largely funded by the domestic crushing and refining industry through contributions to the ODF (Oilseeds Development Fund), AOF is very conscious that these funds are, in the main, deployed to projects geared towards benefiting the domestic crush/refine industry. The AOF Executive is also conscious that more often than not, shoring up and developing

international markets underpins and drives a vibrant, flexible and responsive domestic market. The Australian canola market, at 3-4 million tonnes, is a viable and attractive market that enables domestic and international corporations to invest in R&D in breeding technology, chemistry and processing in the confidence that the Australian canola market has a strong and growing future. International market access is critical for this future.

One of the events I was most proud of during the year was AOF hosting of the twentieth International Oilseed Producers' Dialogue. This meeting brings together the major oilseed representative bodies to discuss issues and

opportunities impacting the global oilseeds production industry to ensure we are as aligned as possible on issues such as trade liberalisation, dealing with respective country's regulatory authorities on issues such as innovative plant breeding technology, food regulation, and importing country MRL changes, etc. While all participants are fiercely competitive in the global marketplace, it is encouraging to see the likes of the US and Brazilian soybean industry; and the Australian and Canadian canola industry so collaborative on the macro issues that affect us all. My particular thanks to ODF contributors MSM and Grain Corp for their support, and in particular, MSM who opened their plant at Manildra for the delegation of over 35 people.

This has been my final year as President of the AOF, and I feel very privileged to have led this organisation over the past 2 years. I would like to thank the AOF Executive for their ongoing support, and in particular, the leadership team of Rob Wilson, Trent Potter and Lachy Herbert. I would also like to recognise the efforts of our CEO, Nick Goddard, whose dedication to the role has ensured that the AOF continues to deliver for its members, and for the industry at large.

Jon Slee
President



Jon Slee addressing the IOPD XX delegates.

CEO's Report

Nick Goddard

Highlights for 2016/17

- Total crop production at 5.6 million tonnes across the 4 primary oilseeds.
- Completed the second year of fatty acid analysis of canola varieties selected from the National Variety Trials;
- Continued with the AEGIC Market Intelligence work, surveying Australian crushers as to their specific quality requirements for canola.
- Continued strong canola trade with the EU, with the largest year for EU exports at just over 3.1 million tonnes at a value of over \$1.8 billion.
- Continued engagement with Japan, with the Australian Trade Mission conducted in November 2016 hosted by JOPA and JOFIEA.
- Presenting the benefits of Australian canola seed to Chinese buyers and processors through presentation at the Australian Grains Industry Conference session in China.
- Submitted the Country Report to the Director General of Energy of the European Commission detailing Australian greenhouse gas emissions for canola production.

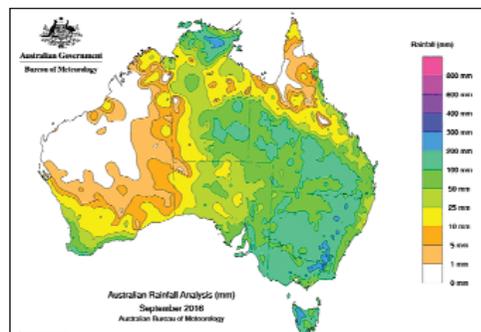
The 2016/17 season saw the largest canola crop ever produced in Australia, at over 4.2 million tonnes. This resulted in the largest export program executed by Australian exporters at over 3.5 million tonnes, valued at over \$2.2 billion.

With ample supplies in both the East and West coast, seed was not in short supply, with yields and oil content exceeding everyone's expectations. While the season can rightly be regarded as 'one out of the box' it clearly demonstrates the canola industry's ability to respond to unusual circumstances, particularly in relation to the logistics in moving the crop in an environment of extraordinary yields experienced across all winter crops.

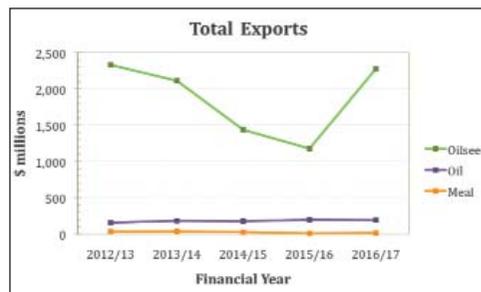
The 2025 AOF Strategic Plan has a long-term goal of being able to achieve a production level of 6.1 mmt, and the ability to handle the 2016/17 harvest provides confidence and valuable lessons in being able to produce and handle a larger crop.

Industry performance

The 2016/17 season produced the largest canola harvest on record, despite concerns of crop losses following flooded paddocks throughout much of NSW and Victoria. Oil content was also at record levels, with a national average of over 47% and WA over 48%. Cottonseed also had a very strong year, bolstered by the residual moisture from the wet winter and the top-up effects of Cyclone Debbie. In contrast, soybean crops suffered from a very dry summer, delivering one of the lowest production levels in many years, while the sunflowers had what is becoming a customary production level of around 30,000t.



With such a large production base, exports were correspondingly high with total oilseed, oil and meal exports value at just under \$2.5 billion.



Achievements by Strategic Themes:

Market Access Theme: Expanding into new markets while protecting existing

The primary project under this theme has been the determination of greenhouse gas values for the cultivation of canola. These values are essential if Australia is to retain its access to Europe for canola. Regulations under the EU Renewable Energy Directive (RED) require country or region-specific

greenhouse gas values to be applied to renewable energy inputs, such as canola oil used for biodiesel. These regulations come into force on 1 January 2018. To this end, the AOF initiated a project in conjunction with the Australian Export Grains Innovation Centre (AEGIC) to determine the greenhouse gas values for canola production in Australia. This project was awarded to CSIRO, who in turn worked with local and international partners to undertake the work required. This project could not have been made possible without the financial contribution from AEGIC (50% funding) and from the exporting companies, ADM, Bunge, Cargill, CBH and Glencore.

The values, and the methodology used to derive them, were submitted to the Director General Energy in August 2016 in the Australian Country Report. At the time of writing this CEO's report, the Australian Country Report is yet to be accepted, although we are confident that an appropriate arrangement will be made with DG Energy to enable trade with the EU to be undertaken for the 2017 Australian crop.

The AOF also led a trade mission to Japan, at the invitation of the Japanese Oilseed Processors Association (JOPA) and the Japanese Oils and Fats Importers and Exporters Association. While only two Australian companies chose to participate in the mission, Alba Edible Oils and Grain Corp, the relationship between the Australian canola industry and the Japanese processing industry continued to strengthen. Both industries completed the mission with a deeper understanding of both what the Japanese market requires, as well as the issues and opportunities inherent in the

CEO's Report continued

Australian crop. The Japanese oil seed industry, through their representational bodies, has been quite vocal with the Australian Government in terms of the need to engage deeper with Australia for the supply of canola. We expect to continue ongoing biennial trade missions between Japan and Australia.

The AOF once again represented and promoted the Australian oilseed industry at this year's Australian Grains Industry Conference in Asia. The conference, this year held in Shanghai, attracted over 180 Chinese delegates, a significant number of whom had strong interest in canola.

Sustainability Theme: Proactively supporting licence to operate

The major project undertaken under this theme has been working with domestic crushers over the past year to formulate a submission to the Australian Dangerous Goods (ADG) Competent Authorities Panel (CAP) for an exemption for canola meal to be regarded as a dangerous good under the Code. A submission was made to CAP in May and was considered, but not ruled upon, pending the submission of additional data. This data has now been sought, and will be provided, along with an amended submission, to the November CAP meeting.

Influencing Demand Theme: Growing value by continually addressing end-user needs

Over the past year we commenced an analysis of two years of data detailing the fatty acid profile of commercial varieties of canola in the NVT trials. The result of this work is aimed at realising additional value throughout the value chain by identifying canola varieties with distinct and differentiated fatty acid profiles better tailored to specific end market needs. For example, there may be value for processors supplying the infant formula market in certain varieties that exhibit consistently higher levels of linolenic acid;

while varieties with consistently lower levels may offer value for processors supplying the deep frying market.

The AOF this year also continued with the GRDC funded, AEGIC Market Intelligence project, completing phase one, which involved administering an extensive questionnaire to crushers on their quality requirements for canola seed, depending on the intended use. The AOF acknowledges and thanks those members who took time out to participate in this important piece of work. The preliminary results of the work will be shared with members at the AOF Forum in October.

The second phase of the Australian project is well underway, and is expected to be completed by October 2017, after which the project will begin in China, aiming to more fully appreciate Chinese quality parameters in relation to canola seed purchases.

Leadership Theme: Taking the lead in shaping Industry's environment

AOF, as the peak industry body for the oilseeds industry, has the responsibility to take the leadership role for the industry.

As much as 50% of the secretariat's time is allocated to ensuring the AOF provides the leadership expected of it by its members. This includes liaising with other peak industry bodies on matters of common interest; dealing with government departments, state and federal; providing informed media commentary on issues and crop conditions; and providing regular and relevant communication to members.

This also includes representing the Australian oilseed and processing industry on the global

stage, and ensuring that Australia is not only seen to punch above its weight, but indeed does so.

In June 2017, the AOF hosted the International Oilseed Producers Dialogue, an international meeting of international oilseed producing bodies. While Australia regularly attends and contributes to these annual meetings, this is the first time the meeting has been held in Australia. The content discussed at the meeting, supported by informative presentations from the likes of the OGTR, CSIRO, NRS, GRDC and NFF, clearly demonstrated that Australia holds a commanding place in the global oilseeds world, not only in innovation but also in policy. More details on this meeting are contained in a separate report in this Annual Report.

The CEO represented the AOF at the International Society for Fat Research (ISF) meeting held in conjunction with the American Oil Chemists Society (AOCS) meeting in the US in May. The primary outcome was the awarding to AOF, and Australia, the privilege to host the ISF Lectureship Series in 2020. This will be held in conjunction with 2020 World Congress on Oils and Fats being held in Sydney in February 2020. The 2020 World Congress will build on the success of the 2009 World Congress held in Sydney, and is co-hosted by AOF, the Australian Olive Association and the Australian chapter of the AOCS.



Joint Meeting of AOF, JOPA and JOFIEA, Tokyo, November 2016



AOF President, Jon Slee, addressing the delegates from industry and the Australian Embassy, Tokyo, following the Japan/Australia industry meeting.

CEO's Report continued

The AOF, in conjunction with Cootamundra Oilseeds, hosted a productive roundtable session in March on the challenges of increasing canola meal in the rations, with a strong commitment from attendees to actively work through AOF to improve the opportunities for canola meal research and promotion.

The AOF continued to maintain its role on the GTA Trade and Market Access Committee, and on the Committee for Plant Breeding Innovation; provided active involvement in the Australian Grain Industry Discussion Group (AGIDG) and GIMAF; consulted regularly with DAWR, both directly and through the Grains and Plant Products Export Industry Consultative Committee (GPPEICC); and participated in the GIWA Oils Council and Agricultural Biotechnology Council of Australia (ABCA).

Membership liaison and communication is another aspect where AOF has consistently

demonstrated leadership. The AOF Weekly News, Crop Reports and ad-hoc member communication, combined with addressing member queries throughout the year has provided direct and immediate value back to members.

The AOF Secretariat is once again extremely grateful to the support and guidance it receives from the AOF Executive and involved members in developing and executing plans designed to build value, resilience and sustainability into the Australian oilseed industry.

Finally, my personal thanks to Elle Hardcastle, administrative support for the AOF, who manages to keep the wheels turning and maintain the professional image of the AOF.

Nick Goddard
CEO



Oilseed Industry Strategic Plan 2016-2025

Every five years the AOF prepares the industry Strategic Plan, outlining the focus areas for the organisation for the coming five years, with a longer term horizon out to ten years.

The Plan outlines the common industry - good initiatives that ensure the industry is placed in the best possible position to achieve its Vision. While the plan builds on the strong foundations of the past, it recognises the need to proactively shift focus to take advantage of changing opportunities in order to optimise profitability through the value chain.

The Plan will be used to guide AOF's strategic direction and industry co-investment activities in meeting the AOF's Mission.

The Plan intentionally focuses on addressing post-farmgate issues and opportunities while recognising that some end user needs will directly influence on-farm activities and require AOF involvement.



Oilseeds – the 5-10 year outlook

Major features of the global outlook for demand and supply of oilseeds are:

- Supply and demand will be tighter, supporting firmer trends in prices.
- The main demand driver will be the demand for feed, particularly servicing developing regions.
- Supply growth will be limited due to limits on arable land, water access and productivity gains.
- Long term outlooks favour agronomic returns from oilseed crops over coarse grains.
- A reducing role for oilseeds as a biofuel feedstock due to economic and social pressures.
- Production will be dominated by Brazil, US, Argentina and China.
- Exports will be dominated by Brazil, US, Canada and Argentina, with emerging strength from the Black Sea region. Australia will remain a strong exporter of Canola and Cottonseed.

Industry Volume Projections

Million tonnes by 2025

| Crop | Minimum | Median | Target | Peak |
|-----------------------|-------------|-------------|-------------|-------------|
| Canola | 2.6 | 5.3 | 6.1 | 6.9 |
| Cottonseed | 0.9 | 1.1 | 1.4 | 1.7 |
| Sunflower | 0.03 | 0.11 | 0.17 | 0.23 |
| Soybean | 0.05 | 0.25 | 0.28 | 0.3 |
| Safflower | 0.05 | 0.09 | 0.11 | 0.12 |
| Total Volume | 3.63 | 6.85 | 8.05 | 9.25 |
| \$/t | 622 | 622 | 622 | 622 |
| Value (\$'000) | 2257 | 4260 | 5006 | 5752 |

Strategic Plan 2015-2025 Summary

Vision:

A \$5 billion industry, sustainable, internationally competitive, well respected and cohesive where all participants add value through meeting market demand

Priority areas of focus

Leadership

Taking the lead in shaping industry's environment

Sustainability

Proactively supporting licence to operate

Key strategies

- | | |
|---|---|
| <ul style="list-style-type: none"> • Retain recognition as the leader on post-farmgate credentials • Facilitate and, where appropriate, initiate the flow of industry R&D funds to address end-user and supply chain needs • Maintain vigilance on industry risks, responding as appropriate • Strengthen global networks • Facilitate cohesion on industry-good agendas | <ul style="list-style-type: none"> • Identify and articulate end user sustainability/stewardship requirements along the supply chain • Support implementation of end-user certification & measurement schemes • Promote good stewardship throughout the supply chain |
|---|---|

Outcomes

- | | |
|---|--|
| <ul style="list-style-type: none"> • AOF well-respected; seen as go-to oilseeds body | <ul style="list-style-type: none"> • Oilseeds known for proactive and responsible stewardship |
|---|--|

Mission:

Through AOF, provide leadership to the Australian Oilseeds Industry and coordinate activities that will optimize profitability through the value chain

Priority areas of focus

Market access

Expanding into new markets while protecting existing

Influencing demand

Growing value by continually addressing end-user needs

Key strategies

- | | |
|---|--|
| <ul style="list-style-type: none"> • Monitor, articulate and address technical trade barriers • Engage with and influence bilateral and multilateral trade negotiations • Build stronger Government and Agency (state and federal) engagement • Foster strong engagement with related industry bodies • Maintain vigilance on development of industrial oil uses | <ul style="list-style-type: none"> • Actively promote benefits of oil and meal • Proactive management of demand-threat issues • Facilitate market choice on use of GM technologies • Ensure path to market for new beneficial technologies |
|---|--|

Outcomes

- | | |
|--|---|
| <ul style="list-style-type: none"> • More diverse and secure market options | <ul style="list-style-type: none"> • More profitable oilseeds supply chain |
|--|---|



The AOF had privilege to host the International Oilseed Producers' Dialogue (IOPD) in June this year.

The IOPD was established in 1998 to develop and promote a sound business environment to allow oilseed producers around the world to remain viable for current and future generations. Members, comprising the peak oilseed producing bodies of each major oilseed producing country, meet annually to table and discuss issues of common interest which impede or risk impeding the production and trade of oilseeds. The aim of each gathering is to gain alignment on issues of common interest in order that advocacy actions taken at an individual country level can be consistent with those of other member countries. Typical issues of common interest include trade liberalisation, ensuring science-based systems for evaluation and regulation of new and emerging technologies, including biotechnology, and the preservation of producers' "right to farm".

This year's IOPD drew 40 participants from Australia, Europe and South and North America to Sydney for two days of intense discussions before heading on-farm in Central West New South Wales later in the week.

The sessions in Sydney included presentations from each participating country, and discussions on global markets, international trade, research and development, chemical residues, and new breeding techniques. Guest presenters from the Australian Government, CSIRO, NFF, GRDC and Rabobank outlined Australia's position on many of the issues, and served to reinforce Australia's leading position in addressing many of the issues affecting global oilseed producers.

Delegates then headed to Parkes, Forbes, and Orange in the NSW Central West for two days, where they visited several farms, the MSM oilseed processing facility, and other sights of interest.



IOPD XX in progress.



Delegates inspecting canola grown amongst cotton stubble.

Final Resolution

International Oilseed Producer's Dialogue (IOPD) XX 26-27 June 2017

The undersigned participants of the International Oilseed Producer's Dialogue (IOPD) from 26 June to 27 June 2017, in Sydney Australia, adopt the following declaration:

Overall

IOPD members will work together to develop and promote a sound business environment that will allow oilseed producers and their families to remain viable for current and future generations. We share an awareness of social responsibility and commit to being open and transparent with an aim to encourage and develop trust in order to build confidence in our products and the production processes that benefit customers and consumers. IOPD members recognize the need to supply the world with increasing quantities of oilseed and oilseed products in an environmentally sound and sustainable manner to nourish a growing world population. Toward that end, we support increased research and investment in agriculture to the benefit of developing and developed countries.

Sustainability and Public Trust

IOPD members are committed to sustainable farming systems and continuous advancement in agriculture. In order to produce healthy and affordable food, animal feedstuffs, and bio-based products, environmental assessments should be based on trusted and reliable science-based evidence. IOPD members will actively engage with stakeholders in the supply chain, including influencers and consumers, to ensure sustainable development addresses the shared values and needs of consumers, is science-based, market driven, and implemented through economic price signals.

Sustainable farming systems meet the needs of the present while improving the ability of future generations to meet their own requirements by:

- Increasing productivity while decreasing impacts on the environment.
- Improving access to safe food and feed and the production of fuel that improves air quality and reduces greenhouse gases.
- Improving the social and economic wellbeing of agricultural producers and the global community.

IOPD members commit to develop communication tools to promote our efforts to assure sustainable food security for the world. We agree to share these communications among IOPD members.

Innovation for Future Generations

IOPD members endorse and support full access to ever-changing innovations that can ensure the cost effective, safe, and sustainable production of all oilseeds. This includes the use of all kinds of innovation in plant breeding, crop protection products and fertilizers. The loss of active substances will inhibit our ability to meet the demands for a growing world population and will increase the development of pest resistance. Adoption of technology should be based on evidence from sound science and be available in all oilseed production areas.

IOPD members support timely, transparent, and science-based review and approval systems for all sustainable technologies, including biotechnology, of all oilseeds and oilseed products. The review of products should be risk based rather than hazard based.

IOPD members endorse the development of government policies that facilitate innovation and utilization of advanced breeding applications by plant breeders globally. Furthermore, plant varieties developed through the latest breeding methods should not be differentially regulated if they are similar or indistinguishable from varieties that could be produced through established breeding methods. To ensure continued innovation for the benefit of all, harmonized policies are essential for both research collaboration and marketing.

Renewable Energy and Bio-based Products

IOPD members appreciate the ongoing progress in the development of new areas of use for oilseeds -- including biofuels, vegetable oils, and protein products -- and support a sustainable development of environmentally friendly products. IOPD welcomes the continued development of these products and market stabilization for sustainable development.

Regarding Indirect Land Use Change (ILUC) assumptions, there is the need for much improved, robust science and international consensus before ILUC impacts are reflected in any renewable energy regulations. IOPD members recognize that where regulation requires greenhouse gas emissions for fossil and non-fossil feedstocks including wastes to be assessed, calculations must be science based and fully involve representatives of farmers and growers.

Trade

IOPD members support comprehensive trade liberalization and improved global market access. Both producers and consumers can benefit from a growing food and non-food market, resulting from increasing liberalization.

IOPD members oppose export tax and differential export tax structures because they negatively impact competitiveness and distort production, investment and trade.

The IOPD supports science-based, globally harmonized Maximum Residue Limits (MRL) that protect consumers and do not restrict trade. Disproportionate restrictions on necessary plant protection products have the potential for unintended consequences for international trade of arable crops, having an important impact on food availability and on farm business sustainability.

We strongly support the synchronous approval of new biotechnology events. To avoid trade disruptions, IOPD members encourage governments to implement CODEX approved assessments and to participate in the Global Low-Level Presence Initiative (GLI) towards the development of low level presence (LLP) policies for biotechnology events in internationally traded commodities and products, and that reasonable commercial thresholds be established. We urge that when a biotech event has an established history of safe-use, governments should extend the registration for longer periods of time or indefinitely.

Certifications

IOPD members recognize that some buyers may desire or some markets require certification of various methods of commodity production. We believe that any certification schemes should be developed by farmers or with substantial farmer involvement to ensure that such certifications are relevant and commercially feasible. We encourage buyers to accept schemes that certify substantially equivalent results so that producers are not subjected to multiple certifications.

International Oilseed Producers' Dialogue

Participating Members

| | |
|--|------------------|
| Association Argentina de Productores en Siembra Directa (Aapresid) | - Argentina |
| American Soybean Association (ASA) | - United States |
| Australian Oilseeds Federation (AOF) | - Australia |
| APS Soybean, Oilseeds and Cereals Producers of Paraguay Association (APS) | - Paraguay |
| Brazilian Soybean Growers Assoc. (APROSOJA) | - Brazil |
| Canadian Canola Growers Assoc. (CCGA) | - Canada |
| Soy Canada | - Canada |
| European Oilseed Alliance (EOA) | - European Union |
| Federation Francaise des Producteurs d'Oleagineux et de Proteagineux (FOP) | - France |
| International Soy Growers Alliance (ISGA) | |
| Uruguayan Board of Oilseed Crops (MTO) | - Uruguay |
| National Farmers Union (NFU) | - United Kingdom |
| Paraguayan Chamber of Traders and Exporters of Cereals and Oilseeds (CAPECO) | - Paraguay |
| Union zur Förderung von Oel- und Proteinpflanzen (UFOP) | - Germany |
| US Canola Association | - United States |
| United Soybean Board (USB) | - United States |
| US Soybean Export Council (USSEC) | - United States |



Statistics

Table 1: Australian Oilseed Production

Source: AOF

| '000 tonnes | 2016/17 | 2015/16 | 2014/15 | 2013/14 | 2012/13 |
|--------------|--------------|--------------|--------------|--------------|--------------|
| Canola | 4,200 | 3,098 | 3,431 | 3,900 | 4,269 |
| Sunflowers | 29 | 25 | 40 | 21 | 46 |
| Soybeans | 40 | 50 | 69 | 50 | 87 |
| Cottonseed | 1,322 | 650 | 500 | 988 | 1,410 |
| Other | 10 | 10 | 20 | 10 | 10 |
| Total | 5,601 | 3,833 | 4,060 | 4,969 | 5,823 |

Table 2: Area and Production by State – Key Crops

Source: AOF

| | | 2016/17 | | 5 year average | |
|------------------|--------------|--------------|------------------------|----------------|------------------------|
| | | Area '000 ha | Production '000 tonnes | Area '000 ha | Production '000 tonnes |
| Canola | NSW | 525 | 890 | 613 | 1,025 |
| | Vic | 360 | 720 | 425 | 693 |
| | SA | 210 | 390 | 265 | 376 |
| | WA | 1,240 | 2,200 | 1,157 | 1,685 |
| | Total | 2,335 | 4,200 | 2,459 | 3,780 |
| Sunflower | Qld | 11 | 9 | 13 | 15 |
| | NSW + Vic | 15 | 20 | 13 | 18 |
| | Total | 26 | 29 | 26 | 32 |
| Soybean | Qld | 13 | 18 | 12 | 19 |
| | NSW | 13 | 21 | 16 | 38 |
| | Vic | 1 | 1 | 1 | 2 |
| | Total | 26 | 40 | 30 | 59 |

Table 3: Primary Exports

Source: ABS

| '000 tonnes | 2016/17 | Av 5 years to 2016/17 |
|-------------|---------|-----------------------|
| Canola | 3,598 | 2,934 |
| Cottonseed | 322 | 370 |
| Canola Oil | 142 | 144 |



Australian Oilseeds Federation Inc.

Table 4: Canola Exports by Destination

Source: ABS

| '000 tonnes | 2016/17 | Av 5 years to 2016/17 |
|--------------|--------------|-----------------------|
| Europe | 3,117 | 1,866 |
| Pakistan | 51 | 193 |
| UAE | 17 | 199 |
| Japan | 140 | 166 |
| Bangladesh | 1 | 25 |
| China | 119 | 396 |
| Other | 154 | 89 |
| Total | 3,598 | 2,934 |

Table 5: Oil and Meal Imports by year

Source: ABS

| '000 tonnes | 2016/17 | Av 5 years to 2016/17 |
|------------------|---------|-----------------------|
| Canola Oil | 16 | 20 |
| Coconut Oil | 11 | 13 |
| Cottonseed Oil | 15 | 10 |
| Olive Oil | 30 | 28 |
| Palm Oil | 125 | 115 |
| Soy Oil | 25 | 25 |
| Sun & Saff Oil | 64 | 55 |
| Palm Kernel Meal | 11 | 31 |
| Soybean Meal | 819 | 691 |



Oilseed Growing Areas in Australia