United States Department of Agriculture

Foreign Agricultural Service
Global Market Analysis
International Production Assessment Division
Web: https://ipad.fas.usda.gov

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Commodity Intelligence Report

AUSTRALIA RAPESEED PRODUCTION NEAR RECORD

Australia's rapeseed (canola) production is essential to world supplies, which have declined from last year. Australia is the largest rapeseed producer in the Southern Hemisphere and the fifth largest producer on a five-year average basis. Rapeseed and Canola are the same species but differ in chemical composition and fatty acid profile.

USDA forecasts Australia marketing year (MY) 2022/23 rapeseed production at 6.7 million metric tons (mmt), down 1 percent from last year's record (Figure 1). If realized, this will be the second-highest national rapeseed harvest on record, second only to the 6.762 mmt crop produced last year (2021/22). The forecast production of 6.7 mmt is 67 percent above the 5-year average of 4.02 million metric tons.

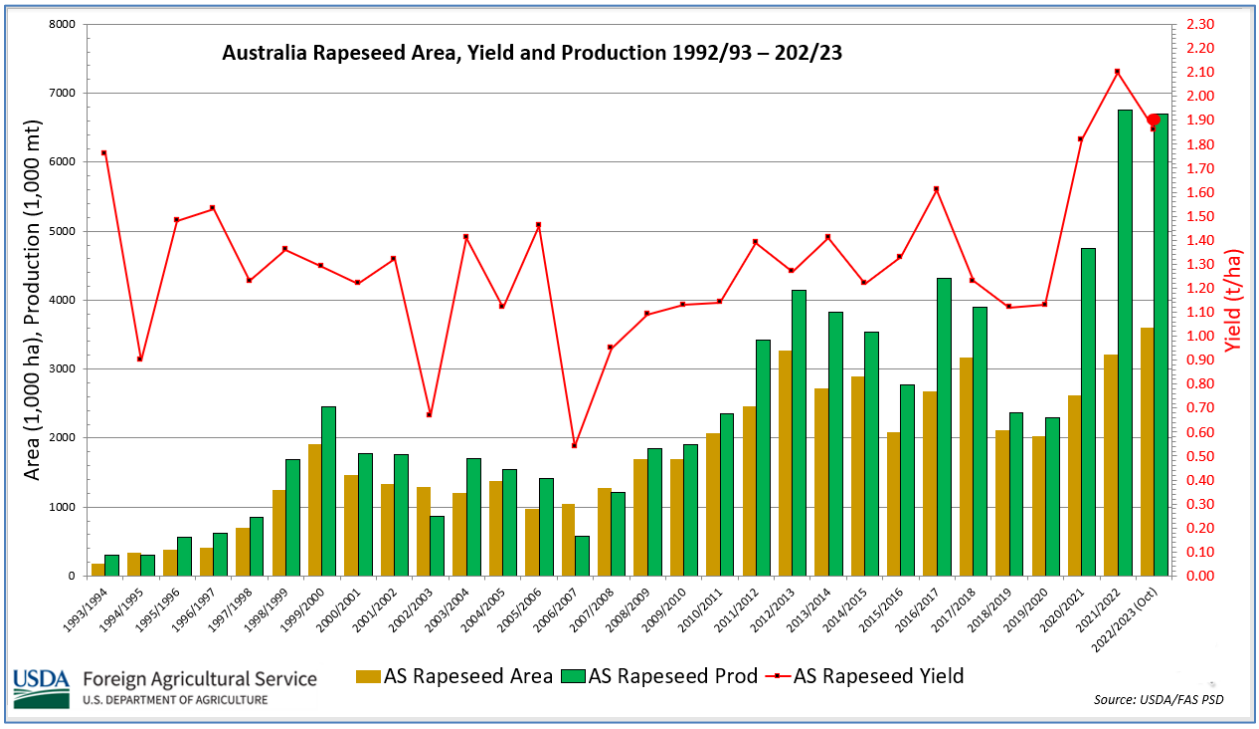

Figure 1. Chart of Australia Rapeseed Area, Yield, and Production 1993/94 - 2022/23. Source: USDA PSD Online

Harvested area is estimated at a record 3.6 million hectares (mha) and is 12 percent above last year. Yield is forecast at 1.86 tons per hectare (t/ha) which is 11 percent below last year's record. Driving the large estimated production is a record area planted

to rapeseed this season; particulary in the largest exporting state of Western Australia (Figure 2). The larger planted area is a response to favorable season conditions and strong prices at planting.

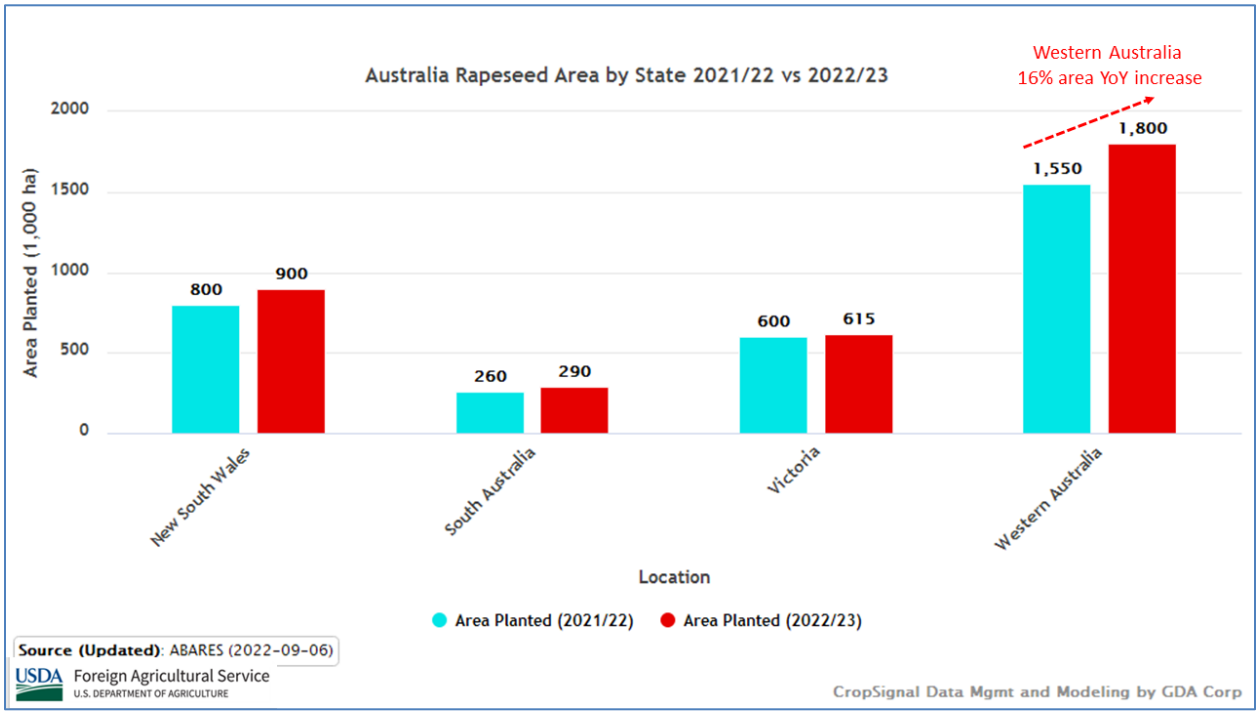

Figure 2. Rapeseed Area by State comparison 2021 versus 2022. Source: Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES)

The shift toward rapeseed can be observed in satellite imagery (Figure 3). During the crop reproduction stage, the satellite imagery band combination of Near Infrared (NIR) Shortwave Infrared (SWIR1) and Red depicts the yellow field of flowering rapeseed as purple in these images. There is an observable increase in rapeseed area in Western Australia, the largest producer.

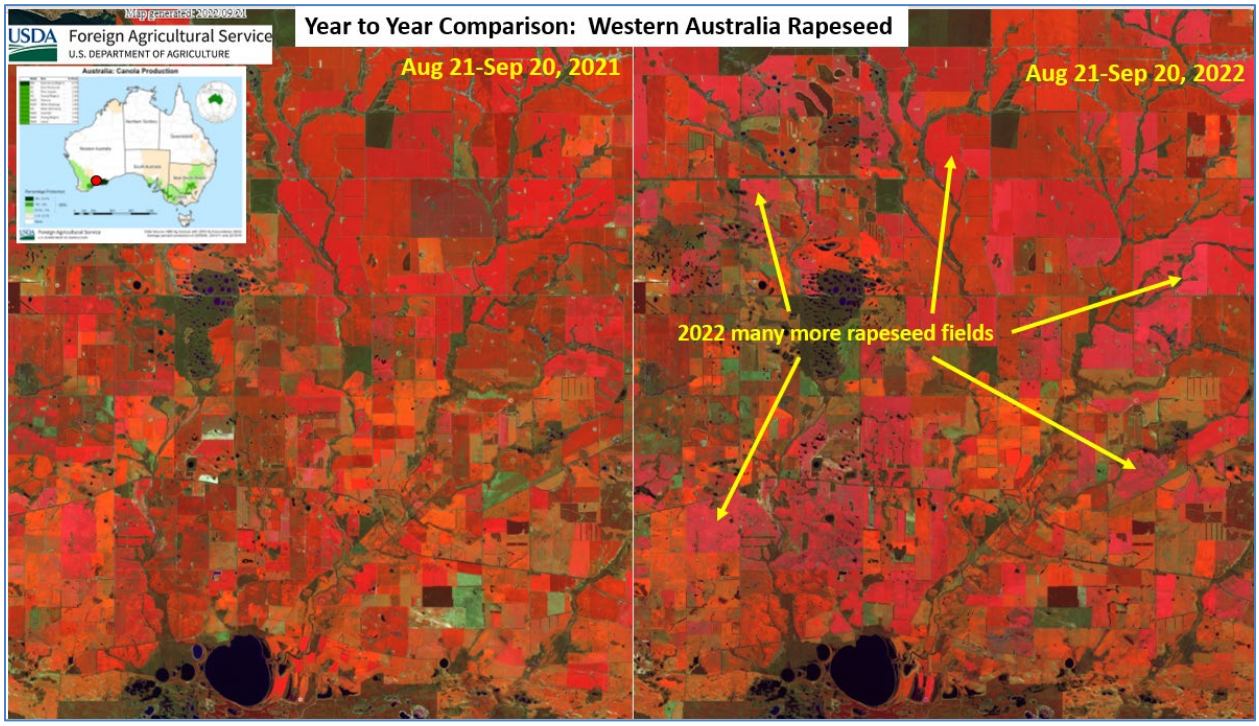

Figure 3. Satellite image comparison 2021 versus 2022 in central Esperance shire of Western Australia. This closeup shows a greater number of rapeseed fields in 2022. Source: ESA Sentinel-2 Satellite imagery / GDA GeoChronicle 10meter 30 day 3-band composite of Near Infrared (NIR) Shortwave Infrared (SWIR1) and Red.

The start of the Australia winter crop season was very favorable in most growing regions with February to April cumulative precipitation above average in eastern states and Western Australia, providing ample soil moisture profiles for planting and establishment. Conditions in South Australia were drier than normal and limited the early planting. Overall, in May, cooler temperatures and adequate rainfall permitted most producers to reach their robust planting intentions.

Rapeseed competes for area with other winter crops.The total area for major winter crops of wheat, barley, rapeseed, and oats is 21.7mha and is slightly below the record set in 2020/21 (Figure 4).

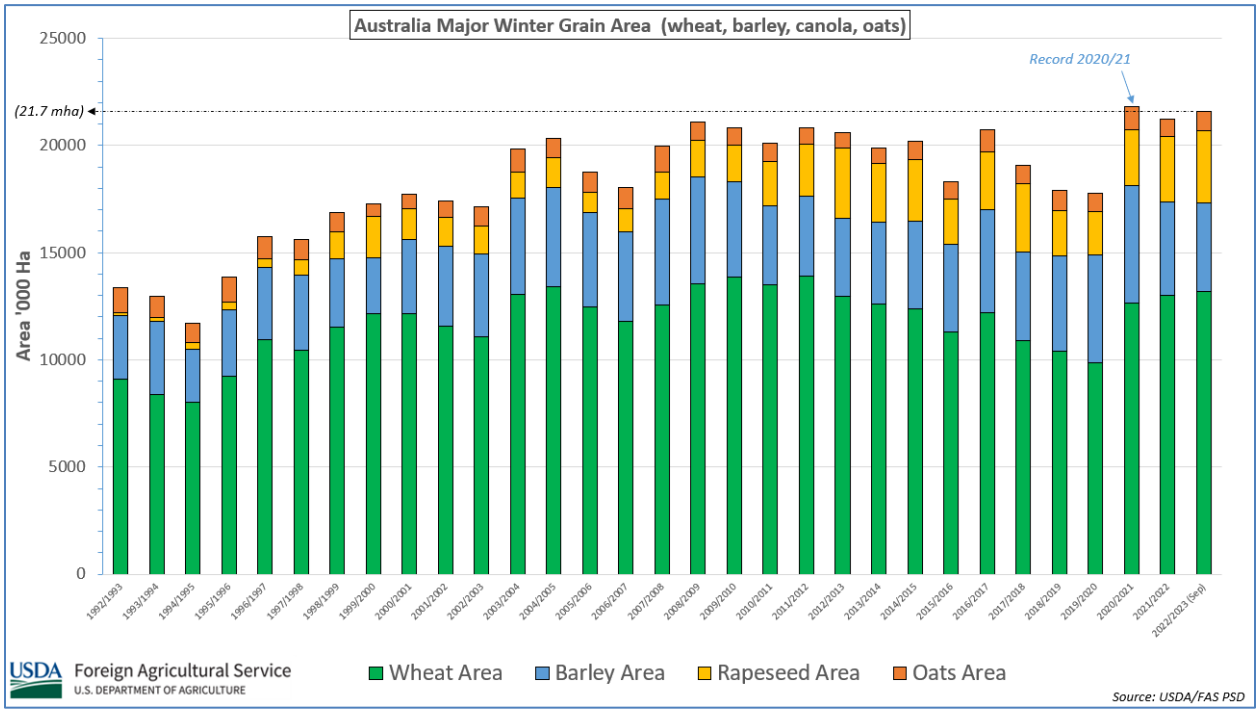

Figure 4. Australia Major Winter Grain Total Harvested Area (wheat, barley, rapeseed, oats). Source: USDA PSD Online

Nationally, July was drier than normal, but temperatures were cool resulting in low crop moisture requirements during mid-winter and as a result there was limited impact. In mid-August, rapeseed entered early flowering (reproduction) crop stage. Peak flowering is typically late-August to early-September. At present, root zone soil moisture is average to above-average for the major growing regions.

There are a few minor issues which may have impacted production in New South Wales. In the Central West of New South Wales a wetter-than-normal April and May limited sowing windows, while heavy rain events caused poor plant populations and compelled some growers to re-sow. However, overall, Australia rapeseed has very good yield potential heading into the Australian spring following the strong start to the winter cropping season.

Satellite-derived Normalized Difference Vegetation Index (NDVI) depicts above-average crop vigor, especially in the key rapeseed winter crop areas of Western Australia, Victoria and southern New South Wales (Figure 5).

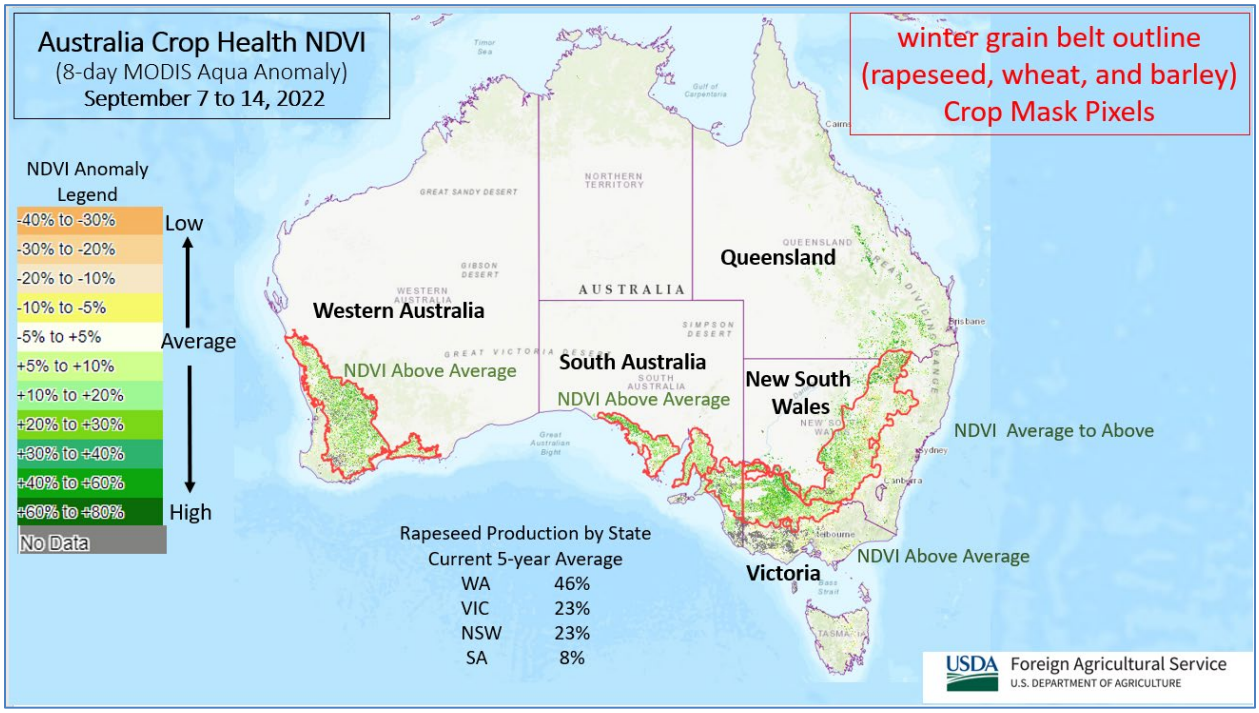

Figure 5. 8-Day MODIS NDVI Composite Terra Anomaly (GIMMS) from 2022-09-07 to 2022-09-14 Mask: GeoCover LandCover for Agriculture. Source: USDA/NASA NDVI Anomaly, Global Agricultural Monitoring (GLAM) System

Rapeseed production is distributed across the four major agricultural producing states. Western Australia produces the largest portion of Australia's rapeseed with 46 percent (5-year average) and the remaining production is split among New South Wales (23 percent), Victoria (23 percent) and South Australia (8 percent). The main harvest occurs in November.

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