

GRAINMatters



EDITION 89—SEPTEMBER 2024

UPCOMING EVENTS

- [Grain Trading Standards—10-11 September 2024—\(Adelaide SA\)](#)
- [Understanding Grain Markets—12 September 2024 \(Zoom\)](#)
- [Trade Rules & Contracts —26 September 2024 \(Zoom\)](#)
- [Grain Trading Standards—8-9 October 2024 \(Perth WA\)](#)
- [Grain Trading Standards - 21 October 2024 \(Zoom\)](#)

In this Issue:

- [Goyder's Line](#)
- [India Market Focus](#)
- [Nine Squared Container Landside Port Charge Index](#)
- [Time To Get Your Applications In](#)
- [House Committee on Agriculture](#)
- [5 Under 30](#)
- [East Coast Location Differential](#)
- [Field Trial GM Wheat](#)
- [One Set of Codes—CIVCML](#)
- [The Role of the National Measurement Institute](#)
- [New Members](#)
- [Training Workshops](#)



Member Event at Wagga-Wagga

August/September has been another busy period for GTA. Our Board travelled from across Australia for a face-to-face Board meeting in Wagga Wagga (Wagga), NSW, on the 27th of August 2024. On the Monday evening prior to the Board meeting we held a member function at the historic Victoria Hotel, Wagga. It was great to be back in a rural location to see and catch up with so many GTA members in NSW.

The Board also enjoyed a tour of the Wagga AgriPark. The AgriPark, located at Charles Sturt University campus, is the innovation ecosystem in the heart of the Riverina dedicated to agricultural research, curated collaboration and sustainable production.

GIAV AGM

GTA CEO, Pat O'Shannassy, also spoke and engaged with members at the annual GIAV AGM and lunch in Melbourne on the 13th of September. Pat spoke about the market access strategies to engage with the large China market, the emerging Indian market, issues around the Wheat Port Code, the Container supply chain and GTA's actions and advocacy with Government. The GIAV AGM and lunch is a great occasion each year, for the Victorian grain industry to get together, discuss industry issues, crop prospects and of course network. Our congratulations to Colin Peace and the GIAV Executive Committee on another great event.



India Australia Agri-Tech Forum

GTA CEO Pat O'Shannassy is travelling to India in September as part of an **India Australia Agri-Tech Forum** project that GTA has been asked to facilitate on behalf of the Department of Agriculture Fisheries and Forestry (DAFF) to support the Australia India CECA negotiations.

This project is in response to India identifying technology/knowledge transfer as a key area of interest in the trade negotiations, while Australia's desire is for improved, and mutually beneficial agricultural market access.

The Agri-tech Forum project is an opportunity to facilitate these respective objectives.

Please read the below article for more information regarding the Forum.



GOYDER'S LINE—CONTINUED

Committee Nominations & Vacant Board Positions

Members are reminded nominations are open for the GTA Technical Committees for 2024/25 season. Current Technical Committee members also need to renominate. The Nomination process and forms were published by a GTA Member Update (link) and are available on the GTA website. The GTA Board will review and approve nominations at the GTA Board Meeting on October 31st.

Nominations are also open for **3 GTA Board positions**, as per [Member Update](#). Members are encouraged to nominate and to also participate in the election of GTA Directors. Votes can be cast prior to the AGM, or at the AGM by those in attendance at the AGM. I can highly recommend aspiring to a role on the GTA Board as it provides many opportunities and a breadth of learning across industry that is difficult to attain within one organisation. And it's a key part of the grain industry community!

Finally, as we are in the critical spring period for crop production, we wish all GTA members and industry participants well in the lead up to the 2025 harvest.

Yours sincerely,

Andrew Goyder
Chair—Grain Trade Australia



WELCOME TO NEW MEMBERS

We would like to extend a very warm welcome to the following new members who has recently joined Grain Trade Australia:

- **Excel Farms**
- **JH Grain**
- **Norco Co-op**
- **Cropify**
- **Sunrise Commodities**

We are pleased that these businesses have chosen to become part of GTA and contribute to GTA's mission to "facilitate trade".

Please email admin@graintrade.org.au with any member enquiries or ideas.



India Australia Agri-Tech Forum

GTA has been asked to facilitate an India Australia Agri-Tech Forum project on behalf of DAFF to support the Australia India CECA negotiations.

While this project is being facilitated and managed by GTA, it is a cross-sector initiative covering grains, cotton, meat, dairy, horticulture and wine. It will also be undertaken in cooperation with the Business Council of Australia (BCA-CII CEO Forum Agritech Joint Working Group).

GTA is pleased to have GrainCorp CEO Robert Spurway as co-chair of the proposed events in India and in Australia on behalf of the Australian industry. We appreciate Robert's willingness to be involved in the broad industry developments.

This project is an initiative of the CECA negotiations. India has identified agricultural technology/knowledge transfer as a key area of interest, whereas Australia's desire is for improved agricultural market access. The **Agri-tech Forum** project is an opportunity to facilitate these respective objectives.

The project objective is to identify potential opportunities for access to and exchange of technology and know-how that will assist the Indian agriculture sector and to quantify the value of this with respect to potential mutually beneficial market access for the Australian agricultural sector.

GTA will host the initial **Scoping Forum in India** which will identify the areas of interest to India and the potential impact of this technology/information exchange for India.

This will be followed by a Response Forum convened in Australia where the specific opportunities will be discussed in more detail. This could also include field visits for the Indian participants to assist in understanding the opportunities at hand.

The Scoping Forum will be on the 23rd of September in Delhi to coincide with [World Food India, which is a high profile event drawing in delegates from across the globe.](#)

Further information is available on [GTA website.](#)

India Economic Roadmap



India is the world's largest democracy and fifth largest economy. Already our fourth largest export market (all products & services) in 2024, India is forecast to be the world's third largest economy by the end of the decade.

Given its importance the Australian Government has launched consultations on a '[New Roadmap](#)' for Australia's Economic Engagement with India.

GTA has lodged a submission into this inquiry ([here](#)), GTA's positions includes:

- Encourage Government take a long-term view to the India Industry relationship.
- Government strategies should be targeting "front line" programs with industry involvement in the design and program application.
- GTA supports a strategic partnership approach to build capability and strengthen trade relationships.
- Promotion of Australian grains support regional and sovereign goals of food security and the transition and increase in the value-added sectors.

NINE SQUARED CONTAINER LANDSIDE PORT CHARGES INDEX

Supply Chain analyst and consultancy firm NineSquared has just released its annual Landside Port Charges Index (LCPI). The report provides accessible information on container freight landside charges and how they change over time.



The LCPI captures all charges from container stevedore terminals and empty container parks on a national basis.

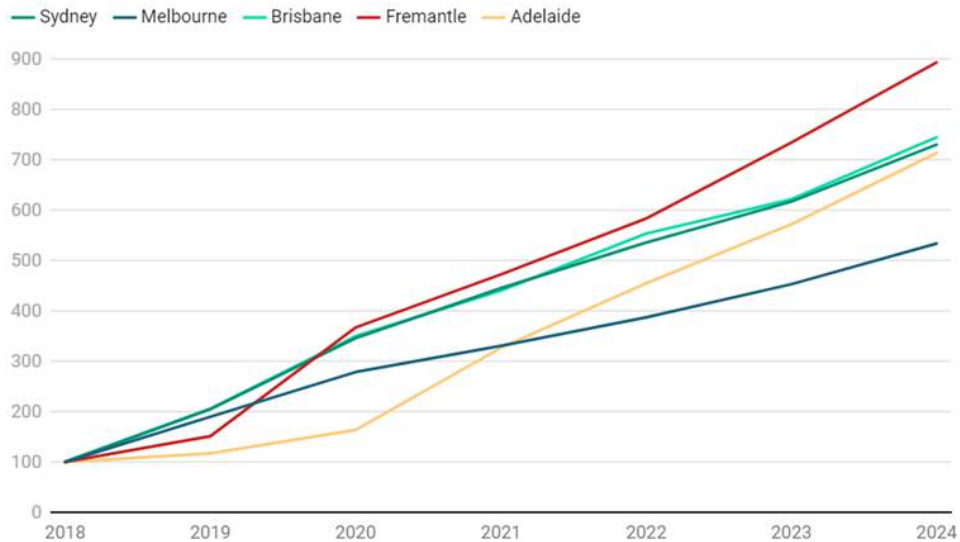
As expected by the grain supply chain the container Landside Port Charges continue to increase. The LCPI reports on 3 cost areas:

1. Access Charges
2. Ancillary Charges
3. Penalty Fees

NINE SQUARED CONTAINER LANDSIDE PORT CHARGES INDEX—CONTINUED

The area of major cost the Access Charges continues to grow with a 21% increase in 2024 as indicated by the below graphical information:

Access charges index

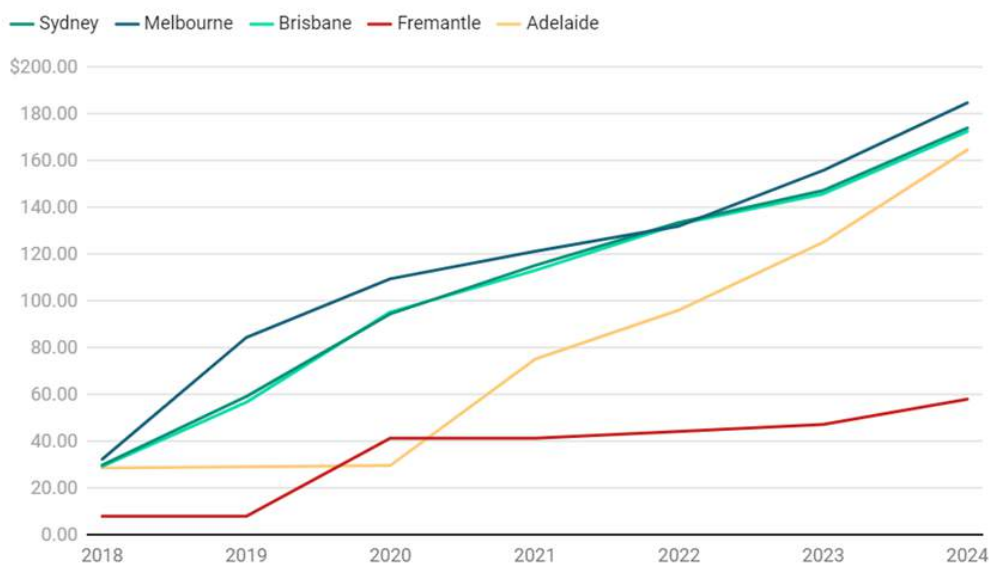


[Get the data](#) • Created with [Datawrapper](#)

Other container charges have also grown substantially with the Ancillary charges increasing by 26% and the Penalty Charges a whopping 37% increase.

Melbourne continues to lead the way based on the average terminal access charges

Average terminal access charges



[Get the data](#) • Created with [Datawrapper](#)

[View NineSquared report here.](#)

TIME TO GET YOUR APPLICATIONS IN

Grain Trade Australia (GTA) is calling for 2024/2025 Technical Committee & Domestic Sector Council nominations. Applicants will be selected by the GTA Board at a meeting following the Annual General Meeting (AGM) to be held on Tuesday 29th of October 2024.

NOMINATIONS CLOSE FRIDAY OCTOBER 4, 2024

GTA's Technical Committees play a critical and important part in GTA's activities. The Technical Committees are part of GTA's Member driven process and work to develop policy that draws in the expertise in industry to develop policy for the broader benefit of industry and Members.

GTA's Technical Committees include:

- **Commerce Committee** - responsible for development and ongoing review of GTA Trade Rules, contracts, Location Differentials (LDs) and the GTA Dispute Resolution Rules and process.
- **Trading Standards Committee** – responsible for development of wheat and coarse grain trading standards, reference methods and other quality related issues effecting GTA members
- **Transport, Storage & Ports Committee** - tasked with advising the GTA Board and industry on issues related to the logistics of grain movement and Safety, Health & Environment.
- **Trade and Market Access Committee** – monitor and liaise with industry on issues relating to local and international grain environment and policies and develop appropriate responses for the Australian grain industry and to ensure Australia's reputation as a supplier of quality grain is protected and market access is assured and improved.
- **Plant Breeding Innovation Committee** - responsible for making recommendations on the potential effect to commercial activity as a result of plant breeding innovations, escape of unapproved grain events, and the planned intentional release of approved GM grain events.
- **Information Technology Advisory Committee** - tasked with identifying risks, gaps, and opportunities for the grain industry from a data and information technology perspective.

GTA also provides governance and support to existing industry associations through the **Sector Council** model. GTA Sector Councils provide a platform and an industry model for existing industry member associations to integrate and gain support from the existing GTA structure, resources and governance arrangements.

GTA is seeking members for the **Domestic Sector Council**. Council members should act as an advocate and provide leadership for the domestic consumption sector.

Candidates need to be aware they need to find someone to **NOMINATE** them.

To apply to become a GTA Technical Committee member, head over to [GTA website and apply online.](#)

Five



GRAIN TRADE AUSTRALIA

Under 30

GTA “Five Under 30” annual program that commenced in 2023/2024 has been created to assist, guide and recognise future leaders in the industry, as well as increase involvement of younger generation of members in GTA activities.

GTA is focused on the need to reach out and engage further with the younger cohort in our industry, making sure that we promote and create the right environment for future leaders.

Each year GTA will select 5 individuals as the “Five under 30” and offer them additional opportunities, encourage involvement in GTA activities, offer mentorship and guidance.

This program was launched at AGIC 2023. The program has been well received by members, many of whom commented it was filling a gap in industry and is a good initiative by GTA.

Applications for the Five Under 30 program for 2024/2025 was also formally launched. The program has its own section on the [GTA website](#).

The Application Process is open to industry participants from GTA Member organisations under the age of 30 at the day of application. It is a “self-nomination” process.

The First Cohort: At AGIC 2024 three of the first 5 under 30 cohort took to the stage with one of their mentors to provide an insight into the year they have experienced.

Delegates heard of what a wonderful, challenging yet fulfilling experience it has been. Participants and their mentors all have benefitted from the first program and recommend that any young people in the industry consider the program.

Applications will close on the 1st of October 2024

APPLY ONLINE

The program is based on merit, encouraging young individuals apply. Applicants from large range of the supply chain will be considered (traders, support staff, logistics staff, etc – any GTA member industry participant).

For the individual participant in the program there are several direct and indirect benefits:

- Mentorship from senior industry leadership
- Public recognition and kudos amongst peers
- Visibility in the industry (to peers and other senior figures)
- Complimentary participation in 2 days of GTA training sessions in 12 months
- Complimentary ticket to AGIC Australia (inclusive of gala dinner)
- Invitation to events at AGIC Australia
- Part of creating and driving an active under 30's network

All illegible candidates are invited to apply online on [GTA website](#). The **Cutoff date** for applications is **1st of October 2024**. Following review by GTA Membership Committee and the Board, selected candidates will be announced in the end of October 2024.

GTA joined a group of grain industry bodies at a recent hearing of the Federal House Committee on Agriculture. This Committee is undertaking an inquiry into **the role of Australian agriculture in Southeast Asian (SEA) markets.**

GTA highlighted the importance of agriculture and food to the SEA regions and how Australia’s agricultural sector and exports are critical to the food and nutritional security of the SEA region, and in turn critically important and directly linked to political stability within the region.

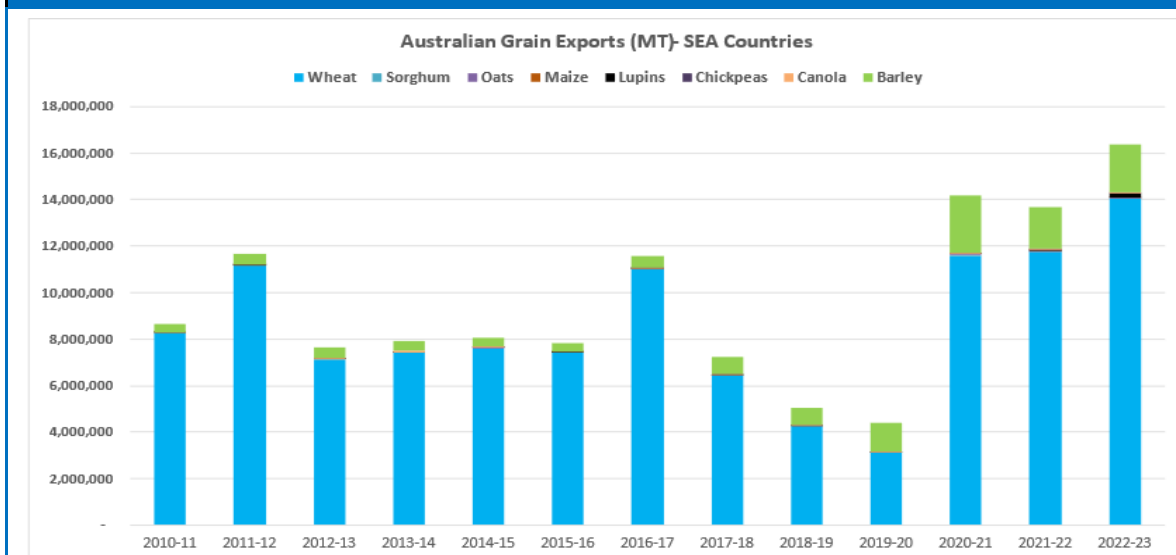
The House Committee were told that whilst the grain sector has long standing trade relationships and significant market access into the SEA region, there remains **opportunity for leverage and growth** and improved market access for exporters, with appropriate and proportionate **funding from government** working with industry expertise.

It is an important market for grain. For example in 2022 the **grain sector contributed A\$ 6.6 billion or 38% of Australia’s agricultural exports to the SEA region**, and 9% of total Australian exports to SEA. The below Table shows Australian grain exports to the SEA region by commodity. Since 2010/11 Australia has exported an average of approximately 9.5 million metric tonnes (MT) of grain per annum to SEA, with a minimum of 4 MT and a maximum of over 16 MT. Wheat is the dominant commodity accounting for 90% of exports, followed by barley (9%).

The Committee was told strategies should be targeting “front line” programs with **industry involvement in the design and program application** focused on practical outcomes for importing economies and their consumers as well as Australian producers. A key message also was to maintain and provide support for the DAFF Agriculture Counsellors who are based around the world in key markets including SEA.

Agriculture counsellors work with our biosecurity, exports and trade and market access teams. Together, they improve and maintain market access for Australian agricultural exports.

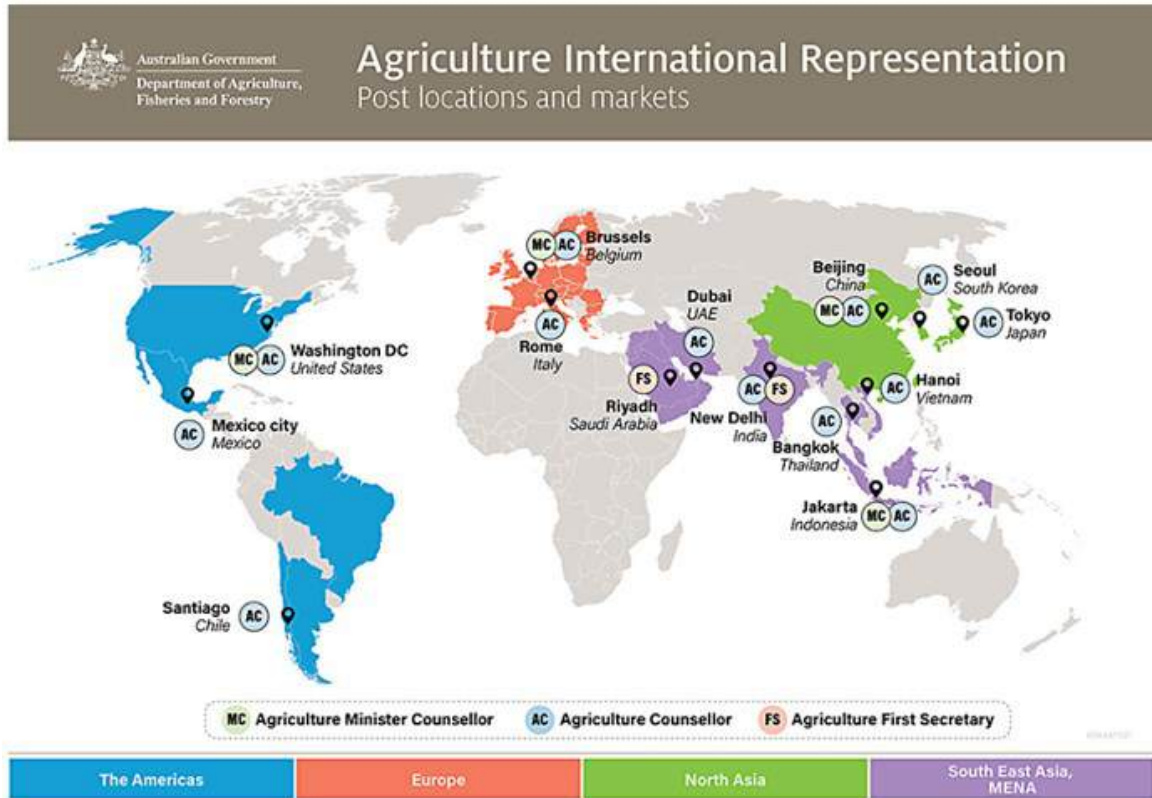
Figure 1 - Australian grain exports to SEA (MT)



Source: ABS

HOUSE COMMITTEE ON AGRICULTURE—CONTINUED

[Trade statistical pivot tables](#) | Australian Government Department of Foreign Affairs and Trade (dfat.gov.au)



GTA's submission in to the House Committee inquiry can be found [here](#).

EAST COAST LOACTION DIFFERENTIALS

2024/2025 GTA Location Differentials (LDs) have now been published for VIC, NSW, and QLD. They are published for the purpose of transferring title of grain in commercial warehouse in up country locations. An Excel version of the EC LDs is available to GTA members by contacting admin@graintrade.org.au.

Each year GTA receive several inquiries relating to GTA LDs. There is still a misconception in industry that the LDs are a proxy for market based freight rates in all states. This is not the case. It is important to understand LDs are not commercial freight rates.

The Fact Sheet on [Understanding Location Differentials](#) provides the background and the structure/basis for the GTA LDs. The LD Fact Sheet should be reviewed by all participants in the grain supply chain to understand how LDs work, and their purpose.

LDs are endorsed by the GTA Commerce Committee and approved by the Board each year.



FIELD TRIAL GM WHEAT

GTA's Plant Breeding Innovation Committee (PBIC) has a focus on developments in relation to Genetically Modified (GM) grain, in particular any applications to the Office of the Gene Technology Regulator (OGTR) to obtain a food approval license in Australia for GM grain.

These applications to the OGTR begin to raise some questions with domestic and export markets and the Committee agreed that GTA should consult with the domestic sector and review the [Grain Industry Stewardship Framework for New Technologies](#) in preparation for further developments.

As recently as the 20th of August 2024 the OGTR released a Notification of Decision on application DIR 204 from Trigall Australia Pty Ltd for a **field trial of GM wheat**. The Regulator has issued this licence to Trigall Australia Pty Ltd, authorising the limited and controlled release (field trial) of wheat genetically modified (GM) for increased tolerance to environmental stress.

The OGTR Risk Assessment and Risk Management Plan (RARMP) and the license were finalised taking into account input received during consultation with the public, State and Territory governments, Australian Government agencies, the Minister for the Environment, the Gene Technology Technical Advisory Committee and local councils.

The finalised RARMP concludes that this field trial poses **negligible risks to the health and safety of people and the environment**, thus it does not require specific risk treatment measures. However, license conditions have been imposed to limit the size, location and duration of the release and to restrict spread and persistence of the GMOs and their genetic material in the environment, as these were important considerations for the RARMP.

It should be noted that this is only an application for field trials, and it is still a number of years away from any form of commercialisation. Field trials with GM wheat are not new in Australia as there have been several largely undertaken by Australian based public sector research agencies.

As part of its stewardship approach GTA has undertaken **consultations with domestic food and feed millers regarding GM wheat**. Some of the key messages from this consultation are:

- Australia is already a significant user of GM ingredients/grains. The feed industry uses substantial quantities of GM soy meal and DDGs, as well as GM canola and canola meal, while the food and feed sector utilise GM ingredients such as enzymes, yeast, etc.
- Both sectors recognise wheat may be perceived differently by the market. The human consumption food industry is likely to be more sensitive than the feed and oil sectors.
- GTA has met with Trigall outlining the industry's Grain Stewardship Framework for New Technologies and highlighted the importance of communication as the trial and any subsequent commercialisation progresses.
- Discussion on how to manage the communications and message regarding this trial and any commercialisation of GM wheat will continue at both PBIC and the other GTA Technical Committees.
- As always GTA welcomes any comment and feedback on any matter including potential market sensitive ones.



ONE SET OF CODES—CIVCML

As a Committee appointed by the GTA Board of Directors, the GTA Information Technology Advisory Committee (ITAC) has a focus on **the data and transactional areas of the grain industry**.

One objective for ITAC is to provide industry Standard Data Reference Tables for common industry data including grain Varietal Codes for use by Members. The purpose of this list is to standardise across all grains a Code allocation system for grain varieties. Having a Standard Reference Table for grain varietal codes enables GTA Members and industry participants to link existing data to a varietal code reference or a master file, providing a common point of reference.

Grain	Industry Standard Code	Variety Name
Barley	B011	SKIFF
Barley	B012	LINDWALL
Barley	B013	GAIRDNER
Barley	B014	CAPSTAN
Barley	B015	MOLLOY
Barley	B016	KEEL
Barley	B017	YERONG
Barley	B018	FITZGERALD
Barley	B019	DICTATOR
Barley	B020	MUNDAH
Barley	B021	MACKAY
Barley	B022	UNICORN
Barley	B023	SLOOP VIC
Barley	B024	SLOOP SA
Barley	B025	DHOW
Barley	B026	BAUDIN
Barley	B027	HAMELIN
Barley	B028	MARITIME
Barley	B029	GROUT

Receival companies utilise these standardised codes to set up their company IT systems to record grain varieties (that are nominated by growers) on the electronic receival ticket.

It is important to note this list is not a formal Industry Classification list and information on the list may vary to Industry Grain Variety Master Lists provided by organisations like Grains Australia (for example due to timing of release of Grains Australia Master Lists).

GTA released the 2024/25 Grain Varietal Code Master List in [Member Update 13 of 24](#). This is an updated version from the 2023/24 List and includes new varieties and some minor alteration to existing varieties.

If required, GTA will provide an Excel version of the Grain Varietal Code Master List which includes a record of deleted varieties from previous annual Lists.

The 2024/25 Standard Reference Table is available on the GTA website and can be accessed [here](#)

THE ROLE OF THE NATIONAL MEASUREMENT INSTITUTE

Grain supply chain participants may not be aware of the role the National Measurement Institute has in industry (NMI).

Where equipment is used that is considered to be 'for trade' it must meet certain conditions regulated by the NMI. This applies where the outcome of the grain assessment and classification process is a trade and a subsequent payment to the supplier of the grain.

In practical terms, this means that when a sample of grain is tested for classification purposes, any analytical results that are used to classify the grain into a grade fall under the NMI review and the related Trade Measurement Regulations.

The grain industry liaises with the NMI through the GTA/NMI Grain Quality Measurements Committee (GQMC). Various industry members representing a range of sectors of the supply chain are participants on this committee. The GQMC is the focal point for grain industry and NMI interaction and is responsible for providing leadership and direction on all activities related to trade measurement in the grain supply chain.

Industry must be aware of and comply with the NMI requirements regarding grain assessment and classification equipment. More information is available in GTA [Technical Guideline No. 16](#)



Australian Grain Industry – Code of Practice
Technical Guideline Document

No. 16
CERTIFICATION of Grain Testing
Equipment used for Trade

Compiled on behalf of the Australian Grain Industry by:
Grain Trade Australia

Version 2
This edition published May 2018

[View full list of GTA Technical Guideline documents online](#)



GTA TRAINING AND DEVELOPMENT PROGRAM

Workshops Schedule Semester 2, 2024

July

Advisory & Compliance Day

Various Presenters

18 July - Zoom

[Register here](#)

Cost - \$395

August

Grain Merchandising

14-15 August - Zoom

Grain Trading Standards

20-21 August - Dubbo, NSW

Grain Trading for Non-Traders

22-23 August - Zoom

September

Grain Trading Standards

2 September - Zoom

4-5 September - Horsham, VIC

10-11 September - Adelaide, SA

Understanding Grain Markets

12 September - Zoom

Trade Rules & Contracts

26 September - Zoom

October

Grain Trading Standards

8-9 October - Perth, WA

Grain Trading Standards

21 October - Zoom

Grain Finance & Risk Management

23 October - Sydney & Zoom

Grain Trading for Non-Traders

16-17 October - Zoom

In-House Workshops

GTA can host above workshops "in-house" - just for your employees. To inquire about this option, please contact Julia Love.

GTA Member fees

1 day Zoom Workshop - \$792
2 day Zoom Workshop - \$1,300
1 day F2F Workshop - \$990
2 day F2F Workshop - \$1,650

Non-Member fees

1 day Zoom Workshop - \$1,184
2 day Zoom Workshop - \$1,650
1 day F2F Workshop - \$1,480
2 day F2F Workshop - \$2,475

Please note all prices are GST inclusive, group discounts apply

[Register online here](#)

For any inquiries please contact GTA on: Tel (02) 9235 2155 or 0449 038 330 admin@graintrade.org.au