

GRAINMatters



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Join us in Bangkok on 4 March and Shanghai on 6 March.



Goyder's Line

As we settle into 2025, I'd like to take a moment to acknowledge the efforts of everyone across the grain industry. The GTA Board and management remain committed to supporting our members and the broader supply chain, ensuring we're prepared for the year ahead.

I look forward to working together in 2025.

Upcoming Changes to Phosphine Fumigation Standards

I am starting to be concerned that the changes proposed by WorkSafe Australia (to commence from December 2026) to the phosphine usage safe work levels may have an impact on the efficiency of the grain supply chain. Phosphine fumigation is the most important tool that the industry has for protecting grain from insect pests and is widely used.

Whilst industry is aware correct usage is essential to ensure compliance the pending phosphine label changes and updates to WorkSafe Australia standards will place greater responsibility on industry to manage phosphine residues correctly. Under current workplace health and safety (WHS) regulations, Australian grain must not exceed a phosphine threshold limit value – time weighted average (TLV-TWA) of 0.3 parts per million (ppm). This is based on safe exposure levels for an individual working an eight-hour day over a five-day week.

From 1 December 2026, this threshold will be reduced to 0.05ppm, significantly tightening the allowable limits. These changes could create supply chain disruptions and restrict the options for insect management strategies.

I see industry engagement, management and dialogue as important to ensure supply chain disruptions are minimised by this change. GTA, the National Working Party for Grain Protection, and grower association groups are working together to assess the implications of these changes and will soon provide further communications and guidance.

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Goyder's Line continued

Regional Information & Q&A Sessions

GTA and the Department of Agriculture, Fisheries and Forestry (DAFF) recently hosted two regional forums, in Toowoomba, QLD, and Narrabri, NSW, for GTA members and other industry participants.

Understanding the quarantine requirements and regulations for each of the 90 countries which Australian grain is exported is vital for Australian grain trading businesses. These forums provided information and opportunity to discuss solutions for meeting import country requirements. It was also a chance to ask questions and for GTA members to actively contribute to shaping future approaches.

Andrew Goyder, Chair - GTA



GTA Performs a Trial of Grain Varietal Assessment Technology

Grain Varietal Purity specifications are included in GTA Trading Standards. Industry has highlighted the need for faster, more accurate grain assessment technology—particularly for malt barley and other grain commodities—to determine varietal purity during the receival process.

Currently, Varietal Purity is primarily assessed using DNA testing. However, due to the time and cost involved, DNA testing is not practical as a field reference method at receival and is generally restricted to laboratory use. This gap presents an opportunity for grain assessment technology providers, with some companies now offering in-field testing equipment to determine grain varietal purity at receival stands.

GTA has been approached by providers seeking endorsement for their technology as a field reference method. To support this, GTA's Technology Sub-Committee has developed a draft Protocol to evaluate new technologies for determining varietal purity, including assessing varietal admixtures across different grain commodities. Where requested by a technology provider, any technology used for this purpose may be assessed under the Protocol.

A trial is scheduled in February to assess one technology provider to determine the reliability and accuracy of the equipment using the draft Protocol. After the trial, the Protocol may be revised based on the findings and will then be made available for industry consultation before final approval and release.

GTA Acts on the Latest ACCC Container Stevedoring Monitoring Report

GTA continues to advocate to the Government and the ACCC for reform to address the market power of Container Terminal Operators. GTA has engaged with the ACCC to offer insights into the impact of terminal and Empty Container Park fees on the competitiveness of the grain container supply chain.

In December 2024, the ACCC released its 2023–24 [Container Stevedoring Monitoring Report](#). This report marks a significant shift, with the ACCC now formally acknowledging market failures in certain fees and charges imposed by Terminal Operators and ECPs.

The ACCC has specifically called on the Australian Government to consider:

1. **Measures to address** market failures related to fixed charges levied by stevedores on transport operators.

2. **Measures to address** the apparent market failures relating to incentive-based charges, levied by stevedores, including the appropriateness of stevedores' weight misdeclaration fees.
3. **Closer scrutiny** of empty container parks to assess whether the apparent market failures relating to notification fees need to be addressed, either through the measures identified for stevedores or other regulatory actions.

While the Government is not obligated to act on these recommendations, GTA will highlight this report in advocacy efforts with both major parties leading up to and following the next federal election.

GTA Signs up to IGTC Working Groups

The International Grain Trade Coalition

Association (IGTC) is a non-profit federation of country associations dedicated to promoting and facilitating the efficiency of the global supply chain for grains, oilseeds, pulses, and derived products.

GTA has recently joined several IGTC Working Groups focused on key trade issues:

International Trade Advocacy – Supporting a stable, rules-based global trading system by engaging in forums such as the WTO, countering anti-trade sentiment, and positioning IGTC as a trusted advisor on trade policy.

Electronic Documentation – Enhancing trade efficiency through digital tools like ePhytos, reducing delays and costs, and exploring broader opportunities for digitalisation.

Non-Tariff Barriers – Addressing regulatory challenges, advocating for harmonisation in areas such as seed innovation and crop protection, and monitoring emerging issues that could impact trade.

These working groups will help align global efforts in these critical areas.



News in Brief



Wheat Port Code Review Update

GTA continues to work with Government and industry stakeholders to progress the DAFF Wheat Port Code Review Report's recommendations. In December 2024, GTA and its members met with the Minister for Agriculture to clarify GTA's position and support for the Wheat Port Code Review Report's recommendations.

GTA remains committed to coordinating the process outlined in the DAFF Report, including the development of an industry-led model. GTA has commenced engagement with an industry Working Group to facilitate discussions and design an appropriate self-managed model.

GTA members will be informed as progress and direction is made and will have opportunity to comment and provide input into the potential industry managed replacement of the regulated Wheat Port Code. GTA's submission relating to the [Final Report on the Second Review of the Wheat Port Code](#) is available to read on the website.

Strengthening Trade with the UAE

The United Arab Emirates (UAE) is Australia's largest trade and investment partner in the Middle East, with two-way trade valued at \$9.94 billion in 2023 and two-way investment stock worth \$20.6 billion. The UAE remains an important market for the Australian grain industry.

On 6 November 2024, Australia and the UAE signed a Comprehensive Economic Partnership Agreement (CEPA) —a bilateral free trade agreement that will strengthen economic ties between the two nations.

The CEPA was tabled in the Australian Parliament on 18 November and is currently under review by the Joint Standing Committee on Treaties (JSCOT). As part of this process, JSCOT invited public submissions, and GTA has provided a [submission](#) into the UAE CEPA.

AGIC Asia Goes to India



For the first time ever, AGIC Asia is going to India!

Join industry leaders, innovators, and experts in MUMBAI as we explore the latest trends, solutions, and opportunities in agribusiness across Asia. For more information and to find out about sponsorship opportunities contact Julia Love, Conference Convenor at agic@ausgrainsconf.com.

GTA CEO Highlights Trade Resilience at Global Policy Seminar

GTA CEO, Pat O'Shannassy, recently participated in a global panel at the virtual policy seminar, *Trade Disruptions and Their Impacts on Agricultural Markets: Looking Back and Ahead*, co-organised by the [International Food Policy Research Institute \(IFPRI\)](#) and the [Agricultural Market Information System \(AMIS\)](#).

The seminar explored how global agricultural markets and supply chains have adapted to disruptions such as trade tensions, the pandemic, Russia's war in Ukraine, the Middle East crisis, and export restrictions. These issues have altered trading patterns, increased price volatility, and led to less efficient markets with higher costs.



Moderated by leaders from the Food and Agriculture Organisation (FAO) and IFPRI, the event featured speakers from Australia, the USA, Egypt, and Africa.

Pat shared insights on the Australia-China barley trade dispute, explaining how Australia used a methodical, respectful approach and WTO Rules to resolve the issue. He highlighted that the dispute tested the system both Australia and GTA support, showcasing the value of a rules-based framework in addressing trade challenges and demonstrating how ultimately WTO Rules provided a pathway to resolution.

Pat also discussed the adaptability of grain markets. When Australian barley lost access to China, exports shifted to Saudi Arabia, North Asia, Southeast Asia, and smaller volumes to Mexico and Latin America, while the EU, Canada, and South America filled China's needs at different prices.

He noted grain traders essentially trade three things - logistics, weather, and global politics. The unpredictability of these create risk, making diversification in market access and business relationships vital for resilience and flexibility in responding to disruptions.

The seminar reinforced the need for robust systems and diversified strategies to protect agricultural trade in a constantly changing global environment. You can watch the recording [here](#)



The seminar was co-organised by IFPRI and Agricultural Market Information System (AMIS). IFPRI is a global research organisation that addresses food insecurity and malnutrition through evidence-based policy solutions. AMIS, an initiative of the G20, promotes market transparency and food security by providing accurate global food market data.

Australian Oilseeds Federation Update



It is a milestone year for AOF as they mark 55 years of representation of the Australian Oilseed Industry. While AOF was established in 1970, the drive for industry growth began in earnest in the early 1990s with the development of its first 5-year industry development plan. Since then, AOF has continued to guide and facilitate industry development and growth through its strategic plans.

2025 sees the commencement of the next 5-year plan and AOF will be working closely with industry stakeholders across the domestic supply chain to chart the course to 2030 and beyond; with sustainability, and developments in the fuel, food and feed sectors being key focus areas. In addition to the development of the 5-year plan, AOF will also be providing input into GIWA's Oilseed Council's WA Grains Industry Strategy 2035+ that covers the whole-of-the WA value chain.

Workshop Schedule—February

Grain Trading for Non-Traders with
Lloyd George 26-27 February



This two-day workshop is ideal for those starting in the grain industry, and participants from other sectors seeking a general understanding of the grain industry. It's a condensed, simplified version of four GTA core workshops and covers the basics of:

- Understanding Grain Markets
- Grain Merchandising
- Trade Rules & Contracts
- Dispute Resolution & Arbitration.

This is a great opportunity to learn from an industry expert. [Register here](#). See Semester 1, 2025 workshops [here](#).

GTA Members

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

Ulupna Pastoral Co Pty Ltd

Mahonys Transport Services

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.



AGIC Asia



The countdown is on for AGIC Asia 2025! This premier industry event is set to take place at the SO/ Bangkok Hotel in **Thailand** on **4 March** and the Jing An Shangri-La Hotel, Shanghai, in **China**, on **6 March**.

AGIC Asia is a key platform for Australian exporters and the Asian grain market, offering valuable opportunities to connect with international buyers, industry leaders, and policymakers. Attendees will gain insights into supply chain trends, Australian grain quality, and the broader global outlook shaping trade dynamics.

Building on the success of past conferences held in Asia and virtual events, AGIC Asia 2025 Speakers will cover important topics such as:

- The Economic World we live in-today
- Crop quality - updates 2024 / 2025 from Australian bulk handlers from East Coast, SA and WA
- Quality Assurance and Market Demands.

Along with two Technical Plenary sessions and Panel discussions, AGIC Asia is your opportunity to hear insights from keynote speakers, technical experts, and decision-makers from Australia, Thailand, and China.

[Register here](#)



The AGIC Asia 2025 program is now available on the website, offering a preview of expert speakers and key topics.

[Download the Conference Program](#)

We extend our thanks to our sponsors for their support in making AGIC Asia possible.

Only a few sponsorship opportunities remain please email Julia Love, Conference Convenor at agic@ausgrainsconf.com for details.

NWPGP 2025



NWPGP Conference returns on 4–5 June 2025 at Sofitel Melbourne on Collins Street, chosen to accommodate growing delegate numbers and increased sponsor interest. This essential event brings together the grains industry to discuss market needs, pest management, pesticide residues, grain protection, application technology, and control methods. Connect with experts from government, industry, and research bodies for critical insights and discussions.

With virtual access available, the conference offers flexibility for both in-person and remote attendees. Past participants rate the program’s relevance at 100%, with 99% valuing the networking—don’t miss out!

[Secure your tickets today](#)

Sponsorship opportunities

Showcase your brand to senior professionals across the grains industry. Sponsorship includes:

- ✓ Enhanced visibility through the conference app and two-day program
- ✓ Direct access to key decision-makers in government, research, and the commercial sector
- ✓ Exposure to both in-person and virtual attendees

[Download](#) the Conference Prospectus and secure your spot early to maximise your brand’s reach and impact.

AGIC Australia 2025



AGIC Australia | 30–31 July 2025!

[Registrations](#) are now open for this key industry conference.

[Register here](#)

We can’t wait to welcome you! Stay tuned for program updates.