

5th August 2024

India Economic Roadmap
C/- Department of Foreign Affairs & Trade
Canberra, ACT.

Via email: IndiaEconomicRoadmap@dfat.gov.au

Dear Sir/Madam,

Thank you for the opportunity to make a submission in response to the India Economic Roadmap discussion paper.

1. About Grain Trade Australia

[Grain Trade Australia](#) (GTA) is a national member association and is the focal point for the commercial grain industry within Australia.

GTA has over 290 organisations as members. Their businesses range from regional family businesses to large national and international trading/storage and handling companies who are involved in grain trading activities, grain storage, grain marketing advisory services, processing grain for human consumption and stock feed milling. GTA Members are substantial employers, from the farm gate through to end point consumption, and notably in rural and regional Australia. Australia's grain is exported by GTA members. A full list of GTA Members is annexed to this submission.

GTA is the convenor of several important grain industry networking events, that focus on building confidence and understanding of the quality assurance systems and processes in the Australian grain supply chain, notably:

- *Australian Grains Industry Conference (AGIC) – Australia,*
- *AGIC - Asia events*
- *AGIC – Asia Roundtable sessions with regional government and industry stakeholders,*
- *The Australian Grain Storage and Protection Conference in association with the National Working Party on Grain Protection.*

GTA's core focus is to 'facilitate trade' in the Australian grain industry. It's products and services, including the [Australia Grain Industry Code of Practice](#), provides a self-regulatory framework across the grain industry to facilitate and promote the trade of grain within the Australian grain value chain.

2. Australia India opportunity

The Australian grain industry supports the position identified in the discussion paper that Australia is well positioned to both benefit from and contribute to India's growth story. Our industry has developed a Grains Partnership strategy built around the principles of Collaborate, Complement and Contribute.

The Australian grain industry has a long history of cooperation and trade with India. There is significant potential to build on this and expand opportunities for mutual benefit as India seeks to increase its nutrition/food security position, its processing/export footprint, and as the Indian middle class continues its rapid growth.

GTA is supportive of the Government's work through the Australia-India Economic Cooperation and Trade Agreement (ECTA) and the expansion of the consular/trade support footprint in India and is working closely with the Department of Foreign Affairs and Trade (DFAT) and the Department of Agriculture, Fisheries and Forestry (DAFF) on the Comprehensive Economic Cooperation Agreement (CECA) that is currently under negotiation.

However, we also recognise the need to take a long-term view to India and the Grains Partnership and see it as a long-term initiative to build relationships and trust. While the AI ECTA and CECA are

opportunities to create a more certain policy environment through improved dialogue and transparency, the Grains Partnership can support this through empathy and sensitivity in developing a two-way trade flow and joint capacity building activities.

GTA supports the view of the discussion paper there is significant untapped potential and much more to be done.

Our approach to building a more collaborative and trusted relationship which will both support India build its nutrition/food security and resilience while also creating a more trade facilitative environment is captured in the *Australia India Strategic Grains Partnership report attached*. We believe this could become an important component of the India Economic Roadmap and would welcome the opportunity to discuss this with you to identify how we can work together to implement this.

GTA is currently working with DAFF on an *India Australia Agri-Tech Forum* project (see **attached**) to support CECA negotiations. While we recognise India's interest in Agri-Tech (and are supportive of this project) as a means of beginning to build cooperation. We would urge the Government not to narrow the focus in relation to the agriculture sector to technology. This may be part of the solution but there is much more that Australia can offer across a broader cooperation and capacity building approach that will have significant long-term benefit for both India and Australia.

Again, these opportunities are identified in the *Australia India Strategic Grains Partnership* report which has been developed from extensive consultation in India and Australia. This report was supported by funding from the Government's ATMAC program.

3. Response to discussion paper questions

Our comments on the questions raised in the discussion paper are addressed below:

Major obstacles to growth and how might be addressed

India's self-sufficiency approach rather than a food security approach incorporating global trade, has limited the opportunity for a stronger economic relationship.

While opportunities exist in commodities that India needs due to shortfalls in its production, opportunities also exist for value-added products sought by India's growing middle class. Despite this, India remains a difficult market, characterised by fluctuating import demand, and sharp and sudden policy changes which make it a high-risk market for exporters. Trade in grains with India is currently constrained, largely due to the tariffs, domestic price supports, subsidies on crop inputs and other protectionist measures that India applies to imports.

Non-tariff barriers remain a significant impediment for the grain industry which need to be addressed alongside tariff reform.

The Grains Partnership would provide India with support and capacity building to assist in achieving its food/ nutrition security objectives, and to build a stronger export sector for value added products and commodities. India's agriculture sector is highly protected. Access to employment opportunities and improved incomes are critical to enabling transformation of the agriculture sector.

Supply chain hygiene and management is a key focus area for India. Australia can provide support and technology in storage and supply chain models which will potentially benefit Indian farmers through leading to a reduction in losses (quality and quantity), increased efficiencies, and access to broader range of marketing options.

The Grains Partnership is a long-term initiative to build relationships and trust. While the ECTA/ CECA may create a more certain policy environment through improved dialogue and transparency, the Grains Partnership can support this through an empathetic and sensitive approach in developing a two-way trade flow and joint capacity building activities.

Opportunities related to net zero transition

While this was not a specific opportunity explored in the Grains Partnership, Australia is a proven producer of sustainably produced feedstock for low carbon liquid fuels which meets the stringent sustainability requirements.

The grain industry supports the Australian Government’s recognition of both the importance and opportunity of developing a Low Carbon Liquid Fuels (LCLF) industry in Australia. Critical to the development of this industry will be the need to domestically create and supply a range of reliable, sustainable and low carbon fuel feedstocks. Australian oilseeds are well placed to be a significant supplier of feedstock to the domestic LCLF industry with internationally verified sustainability credentials already established for the major oilseed, canola. This could be an area of cooperation with India who is a net importer of vegetable oils.

Sectors with greatest opportunity for growth and partnership, and how these can be facilitated

The Grains Partnership strategy recognises the need to demonstrate sensitivity to Indian Government policy challenges, particularly in the context of ‘food and nutrition security’. The increasingly challenging global policy environment is impacting domestic policy considerations for India, in particular the need to judiciously harmonise/balance domestic issues and international rules/obligations. India continues to face the challenge of under-nutrition and protein deficiency. The Australian grain sector has a key role to play with pulses having the potential to provide the most economical vegetable protein.

The Grains Partnership identified a number of short, medium and longer term opportunities – refer below.

Likelihood of success ↑	<p>Short term Opportunistic commodity exports (wheat, chick peas) Lentils</p>	<p>Short term Raw materials for India’s processing sector – wheat, malting barley, pulses</p> <p>Medium term Food grade oat</p>	<p>Short term Capacity building/technical exchange:</p> <ul style="list-style-type: none"> • farm productivity • grain/rice supply chain • market intelligence capability • climate change adaptation • nutrition
	<p>Medium term Finished (retail) pulses</p> <p>Long term Lupins</p>	<p>Short term Faba beans</p> <p>Medium term Feed grain exports (wheat, barley, canola meal) & enhancement of India’s livestock sectors Canola (seed and oil)</p>	<p>Short term Resolution of SPS issues</p> <p>Long term Improved transparency Policy shift from self-sufficiency to food/nutrition security</p>
		<p>Med-long term Plant protein</p>	<p>Med-long term Duties on pulses</p>
	Impact		

In terms of how these can be facilitated/captured, this is articulated in the Grains Partnership report and revolves around six key pillars of activity – refer below

<p>Engagement & relationships Closer and more collaborative relationships between Indian and Australian industry and Government stakeholders that assists to build trust</p>	<p>Market intelligence Market intelligence to enhance understanding of the market and raise awareness of opportunities Build Indian forecasting capability</p>	<p>Capacity Building Support the Indian grain sector through sharing knowledge, expertise, and technical support Build understanding of attributes, applications and value of Australian grain</p>	<p>Value chain Investment Facilitate private sector investment to support innovation and infrastructure investment in India (and Australia)</p>	<p>Harmonisation, transparency, policy alignment Improved policy dialogue</p>	<p>Communications Effective communications strategy for the partnership and parties</p>
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Changes to regulatory, standards and other trade rules to encourage greater trade

India's **policy environment** is a key constraining factor to trade. Policy unpredictability is a key issue impacting supply chain investment, and trade opportunities. In addition to conflicting policies targeted at achieving food self-sufficiency, maintaining farmer incomes, and managing food prices, there are a number of intangible factors surrounding these policies that are limiting trade. These include:

- Food self-sufficiency approach which can lead to arbitrary and ad hoc protectionist measures, rather than a food security approach which could help achieve self-sufficiency in a more consistent, sustainable or economic manner.
- Unpredictability and a lack of transparency which can see abrupt, and reactionary regulatory changes with adverse unintended consequences. Lack of transparency in relation to supply and demand balances is an ongoing challenge for the grain trade.
- Political sensitivity in relation to the agriculture sector which constrains sector reforms. In addition, food, agriculture and water policy is spread across states and several central ministries, making policy management and reform very complex.

Tariffs on grains and pulses are bound between 50% and 100% and are frequently changed, with little forewarning, based on (at times perceived) Indian domestic production and stock levels and market prices. Free trade agreements may be able to address this over time, although ECTA offered little for grains.

India has a wide range of **non-tariff barriers** or measures (NTMs) that hinder and distort trade. The impact of these NTMs includes no/restricted market access, and increased uncertainty, risk and compliance costs. Some of the key issues for the Australian grain sector are:

- Guaranteed minimum support prices (MSP) for farmers for staple grains, with the MSP for wheat, rice and coarse grains (maize, barley, grain sorghum and millet) increasing in recent years
- Input subsidies e.g., for fertiliser, irrigation, electricity, diesel and seed.
- Food subsidies via a Government of India subsidised food distribution program where low-cost food grain is made available to Indian consumers through the Targeted Public Distribution System (TPDS). The Food Corporation India (FCI) provides grain to the TPDS from government stocks.
- Sanitary and phytosanitary (SPS) issues that can be inconsistent, not transparent, and not science based. They may also diverge from internationally accepted standards such as the Codex Alimentarius Commission and the International Plant Protection Convention (IPPC).
- Import clearance process and lack of clarity around sampling and testing.
- Biotechnology - require policies that encourage agricultural innovation and facilitate trade in products derived from biotechnology.

Trade diversification opportunities

Covered above.

GTA works across a range of markets to support trade and investment opportunities and leverage value of free trade agreements. Some general comments/principles that could also be applied to the India relationship and roadmap are summarised below.

Element	Recommendation
Government Programs	<ul style="list-style-type: none"> • Government strategies should be targeting “front line” programs with industry involvement in the design and program application. • Focus on practical outcomes for importing economies and their consumers as well as Australian producers. • Such funding should focus on technical exchanges, networking, and engagement.

	<ul style="list-style-type: none"> Any work to be undertaken on policy and capacity building should focus on a rigorous scientific, evidence risk-based approach as opposed to a “hazard based” approach that can sometimes influence policy, regulatory decision making and application in some countries.
Funding for Trade	<ul style="list-style-type: none"> GTA and its members support additional Government funding to assist in multi-level engagement with key countries that will enable market diversification (i.e. at the government, industry and customer level) to develop and improve capability and regulatory coherence through joint programs. We would be supportive of efforts to enhance market intelligence for exporters, provided such intelligence is as a “primary” source, rather than information provided by commercial information providers.
Focus on Complementary – not Competitive	<ul style="list-style-type: none"> Australian grains offer a consistent source of food and feed grain across a range of markets. Promotion of Australian grain support regional and sovereign goals of food security and the transition and increase in the value-added sectors.
Partnership Approach	<ul style="list-style-type: none"> GTA supports a strategic partnership approach to build capability and strengthen trade relationships.
Growing awareness and shift towards sustainable and eco-friendly food supply chain.	<ul style="list-style-type: none"> Promote Australian sustainability and the value chain’s strong credentials of the Environment, Social and Governance (ESG). The Australian grain sector is recognised as an industry that is focussed and has a very positive story on sustainability and strong credentials on Environment, Social and Governance (ESG) aspects of the value chain. GTA has developed document titled Australia’s grain supply chain and its Environmental, Social and Governance (ESG) credentials. This seeks to illustrate the grain supply chain credentials with respect to: <ul style="list-style-type: none"> Food Safety, Traceability, Sustainability, People & Safety, Food and nutrition quality, and Integrity.
Market-Based Approach	<ul style="list-style-type: none"> Focus on addressing trade barriers, both in terms of tariffs, political interference and Non-Tariff Measures (NTMs).

4. Summary and recommendations

India, as the second most populous country with a population over 1.4 billion people, and a growing middle and wealthy class, can be a major market and a key strategic partner for the Australian grain industry. This builds on the close relationship between the two countries and the recent Australia-India Economic Cooperation and Trade Agreement (AI-ECTA).

Mutual opportunities exist for Australia to assist India build its food and nutrition security, its export focus, and for a more trade facilitative environment to be developed between the two nations. Australia is well positioned to support the Indian grain supply chain modernise and to supply products for India’s higher income market segments, and its processing sector.

The Australia India relationship presents a solid foundation for a Partnership to deliver expanded trade opportunities across grains, in a more open and transparent environment.

The Australia India Grains Partnership would be a joint cooperative initiative between India and Australia to support food/nutrition security in the Indian grains sector and access to the global supply chain for grain products through a facilitative trade and investment environment.

The Partnership would be a forum that brings together Indian and Australian decision makers from government and industry to foster relations and to maximise the opportunities for development and collaboration amongst the Indian and Australian grains, food processing and livestock sectors.

The Australia India Grains Partnership would support India enhance systems that underpins their food/nutrition security, while also focusing on capacity building and trade facilitation.

Achieving this requires Government and Industry to work together over the medium to long-term. Industry can assist through developing stronger association to association, and business to business relationships and providing technical support and knowledge and identifying mutually beneficial opportunities for both sides.

However, it also requires Government to be active in:

- Supporting the bilateral relationship with India;
- Helping understand and negotiate tariff and technical trade barriers;
- Providing the resources to ensure adequate investment in diplomatic, policy and capacity building activities; and
- Supporting market development until a reliable/sustainable commercial market environment has developed.

The Partnership will provide the framework for:

- Strengthening engagement between Australian and Indian agriculture, food and grain industries;
- Supporting India in identified areas of knowledge, expertise and capacity building;
- Strengthening Australia's reputation and position as a longstanding reliable partner; and
- Working with Indian policy makers to support trade facilitative regulation.

We would urge you to consider the Grains Partnership as one of the keys for implementation as part of the New India Economic Roadmap and would welcome the opportunity to engage further with you as the Roadmap develops.

Please do not hesitate to contact GTA at any stage on this and other grain industry matters.

Yours faithfully,



Pat O'Shannassy
Chief Executive Officer

Attachments:

1. *GTA Members list*
2. *India Australia Fact Sheet*



GRAIN TRADE AUSTRALIA

Membership List as of 11 July 2024

Member Type	Member Level	Account Name	Primary Contact	Website
Ordinary Member	A1	CBH Group	Ben Macnamara	www.cbh.com.au
		GrainCorp Australia	Robert Spurway	www.graincorp.com.au
		Viterra Australia	Philip Hughes	www.viterra.com.au
			3	
	A3	Cargill Australia	Zsolt Kocza	www.cargill.com.au
			1	
	A4	ADM Trading Australia	Darryl Borlase	www.adm.com
		Arrow Commodities	Dominic Vanzella	www.arrowcom.com.au
		Australian Grain Export	Tim Martin	www.australiangrainexport.com.au
		Bunge Agribusiness Australia	Stephen Bennett	www.bunge.com
		Louis Dreyfus Company Emerald Australia	David Johnson	www ldc.com
			5	
	B1	CHS Broadbent	Steve Broadbent	www.broadbentgrain.com.au
		ETG Commodities	Peter McMeekin	www.etgworld.com
		George Weston Foods	Michael Schmidt	www.gwf.com.au
		Manildra Group	Peter Sloan	www.manildra.com.au
		Riordan Grain Services	Jim Riordan	www.riordangrains.com.au
			5	
	B2	Centre State Exports	Jeff Voigt	www.centrestateexports.com.au
		Inghams Enterprise Pty Ltd	Matt Clarke	www.ingham.com.au
		J K International Pty Ltd	Sandeep Mohan	www.jki.com.au
		Ridley Agriproducts	Reagan Stroud	www.agriproducts.com.au
		Riverina (Australia) Pty Ltd	Gareth Stapleton	www.riverina.com.au
		Wilmar Gavilon Pty Ltd	Matt Albion	www.wilmargavilon.com
			6	
	B3	Allied Pinnacle	Brett Duczmal	www.alliedmills.com.au
		Boolah Farms Pty Ltd	Stuart Tighe	www.boolah.com.au
		Brahman Commodities	Michael Aikman	www.brahmancommodities.com.au
		Cofco International Australia	Sarah Pan	www.cofcointernational.com
		Demeter Grains	Barry Mansfield	www.demetergrains.com.au
		K M & W M Kelly & Sons	Matt Kelly	www.kellygrains.com.au
		Quadra Commodities Pty Ltd	Robin Cassar	www.quadra.com
	Robinson Grain Trading	Adam Robinson	www.robinsongrain.com.au	
			8	
	C1	Adams Australia Pty Ltd	Ian Mack	www.adamsaustralia.com.au
		Agracom	Joe Hallman	www.agracom.com.au
		Agrisk (Market Check)	Brett Stevenson	www.marketcheck.com.au
		AGT Foods Australia	Michael Brittain	www.agtfoods.com/australia
		Associated Grain t/a Agrocrop Processing Australia	Russell Darbey	www.agrocrop.com.au
		Australian Food & Fibre Processing	Peter Webb	www.australianfoodandfibre.com.au
		Australian Fresh Milk Holdings (AFMH)	Jill Smith	www.afmh.com.au
		BFB Pty Ltd	Shane Bird	www.bfb.com.au
		Blairs Produce Company	Sean Blair	crt.com.au/store/blairs-produce-company/
		Castlegate James Australasia Pty Ltd	Ross Giovanetti	www.castlegatejames.com.au
		COPRICE	Hugo Steinfert	www.coprice.com.au
		Darwalla Milling Co Pty Ltd	Gary Heidenreich	www.darwalla.com.au
		DDT Holdings	Rajeev Saraff	www.dtdholdings.com.au
		Deckert Group Pty Ltd	Chris Deckert	www.deckerts.com.au
		Esperance Quality Grains Pty Ltd	Neil Wandel	www.esperancequalitygrains.com
		Fletcher International Exports	Joe Masters	www.fletchint.com.au
		Fodder Link Pty Ltd	Cameron Angel	www.fodderlink.com.au
		Hanlon Enterprises	Chris Coates	www.hanlonenterprises.com.au
		Hazeldenes Chicken Farm	Marcus Dingle	www.hazeldenes.com.au
		IGH Commodities	Brad Bryant	www.igh.net.au
		Inaria Australia	Karan Singh	www.inariaustralia.com.au
		Irwin Stockfeeds	Bryan Irwin	www.irwinstockfeeds.com.au
		Itochu Australia Ltd	Ayush Rajvanshi	www.itochu.com.au
	Jerilderie Grain Storage & Handling	David Barlow	www.jgsh.com.au	
	Laucke Flour Mills Pty Ltd	Roger Laubsch	www.laucke.com.au	
	Lawson Grains Pty Ltd	John Marshall	www.lawsongrains.com	
	LPC Trading Pty Ltd	Simon Langfield	www.lpctrading.com.au	
	Malteurop Australia Pty Ltd	Eric Fisher	www.malteurop.com/en/australia	
	MC Croker	Jason McPherson	www.crokergrain.com.au	
	MSM Milling Pty Ltd	Peter MacSmith	www.msmmilling.com.au	
	Namoi Cotton Ltd	Nathan Hunter	www.namoicotton.com.au	
	Pentarch Agricultural Pty Ltd	James Whiteside	www.pentarch.com.au	

	Premium Grain Handlers P/L	John Orr	www.pgh.com.au
	Queensland Cotton Corporation	Ashish Govil	www.qcotton.com.au
	Reid Stockfeeds Pty Ltd	Ian Reid	www.reidstockfeeds.com.au
	Rex James Stockfeed	Natasha Davies	www.jamesstockfeed.com.au
	Rivalea (Australia) Pty Ltd - Animal Nutrition	Andrew Philpotts	www.rivalea.com.au
	Riverina Oils & Bioenergy	Krissy Campbell	www.riverinaoils.com
	SunPork Farms Feed Mills	Mark Young	www.sunporkgroup.com.au
	ThriveAgri Pty Ltd	Charlie Brown	www.thriveagri.com
	TSS Grain (Tasmanian Stockfeed Services)	Trevor Macleod	www.tasstockfeed.com.au
	Unigrain Pty Ltd	Ervin Leong	www.unigrain.com.au
	Viridis Ag	Chris Reeves	www.viridisag.com
	W B Hunter Pty Ltd	Stewart Coombes	www.wbhunter.com.au
	Wilken Grain	Richard Wilken	www.wilkens.com.au
	Woods Grain Pty Ltd	Bruce Woods	www.woodsgrain.com.au
	XLD Commodities	John Tuskin	www.xldgrain.com.au
		47	
C2	Access Grain Pty Ltd	Wade Humphries	www.accessgrain.com.au
	Aditi UVG	Harshad Kale	www.aditiuvg.com
	Aditya Birla Global Trading (Australia)	Surya Jain	www.abgtrading.com
	Advantage Grain Pty Ltd	Chris Nikolaou	www.advantagegrain.com.au
	Agmark Commodities	Richard Alcorn	www.agmark.com.au
	Agri Om Australia Pty Ltd	Kishore Bulchandani	www.agriom.com.au
	Agri-Oz Exports (Aust) Pty Ltd	Francois Darcas	linkedin.com/in/francois-darcas-4a440577
	Agromin Australia Pty Ltd	Rajni Patel	www.agromin.com.au
	Alliance Grains	Luke Walker	www.alliancegrains.com.au
	Arya Pulses Australia Pty Ltd	Aravindhan Ravindraraj	www.aryapulses.com.au
	A T Waterfield & Son Pty Ltd	Brad Waterfield	linkedin.com/in/brad-waterfield-8767869b
	Australian - Asian Agricultural Exports (AAAX)	Mick Connolly	www.aaax.ws
	Australian Choice Exports Pty Ltd	James Hunt	www.australianchoiceexports.com.au
	Australian Grain Storage	Matt Bailey	www.sunrice.com.au
	Australian Growers Direct Pty Ltd	Tyrone Stowers	www.ausgrowersdirect.com.au
	Australian Mungbean Company Pty Ltd	Damien White	www.australianmungbean.com.au
	A W Vater & Co	Kim Vater	www.vater.com.au
	Baker Grain	Richard Baker	www.bakergrain.com.au
	Boort Grain Co-Operative	Jon Bucknall	www.boortco-op.com.au
	Broun and Co Grain Pty Ltd	Charles Coventry	www.brounandco.com.au
	C & S Trading Pty Ltd	Craig Scholz	www.scholzbh.com.au
	Carpendale Agri Pty Ltd	Andrew Kluck	www.carpendale.com.au
	Carson Stockfeed Pty Ltd	John Carson	03 6634 7376
	Chester Commodities	Richard Black	www.chestercommodities.com.au
	C K Tremlett Pty Ltd	Andrew Tremlett	linkedin.com/in/andrew-tremlett-36a06385
	CL Commodities	Robert Lean	www.clcommodities.com.au
	Coorow Seeds	Brian Pover	www.coorowseeds.com.au
	Cory Johnston (Aust) Pty Ltd	Alicia Dolan	www.coryjohnston.com.au
	Craig Tyack Grain Trading	Craig Tyack	craig.tyack@bigpond.com
	Defiance Maize Products Pty Ltd	Rodney Walker	www.corson.co.nz
	Direct Commodities Pty Ltd	Hamish Robertson	www.directcommodities.com.au
	East Coast Stockfeeds	Stuart Dolden	www.ecsf.com.au
	Ellerslie Free Range Farms Pty Ltd	Maria Sue-Tin	www.dahall.com.au
	ETG Processing Pty Ltd T/A Wimpak	Brock Tait	www.wimpak.com.au
	Export Import Australia	Dhanesh Kumar	www.exportimportaustralia.com.au
	Export Trading Group Australia Pty Ltd	Shayne Clark	www.etgworld.com
	Fanmac Logistics Pty Ltd	Chris Fanning	www.fanmacag.com.au
	Feed Central Pty Ltd	Tim Ford	www.feedcentral.com.au
	Findlays Barellan	Neil Findlay	www.findlay.world/about-us
	Forest Enterprises Development & Consulting (FEDC)	Charles Lowe	02 6662 8261
	Gold Star International Pty Ltd	Abhishek Kotkar	www.goldstarinternational.com.au
	GO Resources Pty Ltd	Murray Gannon	www.go-resources.com.au
	Grainforce Pty Ltd	Derek Larnach	www.grainforce.com
	Grain Link WA Pty Ltd	Andrew Goyder	www.grainlink.com.au
	GrainTrend Pty Ltd	Sanjiv Dubey	www.graintrend.com
	Grenfell Commodities Pty Ltd	Glenn Beasley	www.grenfellcomm.com.au
	GV Grain & Fodder	Joanne Harry	linkedin.com/in/joanne-harry-707119116
	Hartree Partners (Australia) Pty Ltd	Daniel Miller	www.hartreepartners.com
	Harwood Grains & Stockfeeds	Paul Harwood	www.harwoodgrains.com.au
	Horizon Commodities Pty Ltd	Aaron Jones	www.horizoncommodities.com.au
	HX Food Group (Aus) Pty Ltd	Dong Zhao	www.hxfoodgroup.com.au
	Jatlee Australia	Sunil Kumar	www.jatleecorp.com
	J W Koek & Company	Brian Algate	07 3341 4548
	Kangaroo Island Pure Grain	Emma Tonkin	www.kipuregrain.com
	KB Agri Services Pty Ltd	Karl Bliss	linkedin.com/in/karl-bliss-916bb679
	Kennett Rural Services Pty Ltd	Andrew Kennett	www.kennetrural.com.au
	Lachlan Commodities Pty Ltd	Tony Cogswell	www.lachlancommodities.com

		Lane Grain Pty Ltd	Garry Lane	linkedin.com/in/gary-lane-82635b88
		Laragon Almond Processors Pty Ltd	Mark Webber	www.laragon.com.au
		Mallon AgCommodities	Blake Mallon	mallonag.com.au
		Mandala Trading	Jay Saraff	www.mandalatrading.com.au
		Marina Commodities (Australia)	Palwinder Singh	www.marinacommodities.com
		Matthews Transport and Grain Traders	Neville Matthews	linkedin.com/in/neville-matthews-aa592191
		Max Grains Pty Ltd	Jack Fahy	www.maxgrains.com.au
		Mckenzie Ag Services	Lachlan Mckenzie	www.mckenzieag.com.au
		McNaughts Grain & Fertilizer Pty Ltd	Daniel Mcnaught	www.mcnaughts.com
		Melaluka Trading Pty Ltd	Simon Pritchard	www.melalukatrading.com.au
		Melco Pty Ltd	Steve Mellington	www.melco.com.au
		Nandaly Grain Co-Operative	Jon Bucknall	www.nandalyco-op.com.au
		Network Grains Pty Ltd	Craig Dennis	www.networkgrains.com.au
		Northbound Trading Pty Ltd t/a WA Lupins	Daniel Marshall	www.walupins.com.au
		Origin Grain Pty Ltd	Marcus Currie	www.origingrain.com
		Outlook Commodities	Dominic Hogan	https://facebook.com/Outlookcommodities
		Pacific Global Sprouts Pty Ltd	Prashant Kewlani	www.pacificglobalsprouts.com
		Parkinson Bros	Rohan Parkinson	linkedin.com/in/rohan-parkinson-a76a761b4
		PB Seeds	Peter Blair	www.pbseeds.com.au
		Pearson's Grain	Darren Pearson	www.pearsonsgroup.com.au
		Peters Commodities	Michael Oxley	www.petcom.com.au
		Pinnacle Grains Pty Ltd	Sonal Vij	www.pinnaclegrains.com.au
		Plum Grove	Rikki Foss	www.plumgrove.com.au
		Pure Foods Eggs Pty Ltd	Tim Castle	www.purefoods.com.au
		QS Commodities Pty Ltd	Nick Slipper	www.qscommodities.com
		Quirindi Grain & Produce	John Webster	john.webster@quirindigrain.com.au
		RP Grain Pty Ltd	Gordon Pulham	randpcarriers.com.au/r-p-grains
		Rural Logic (Aust) Pty Ltd	Michael Wood	www.rurallogic.com.au
		Shannon Bros Bulk Storage Pty Ltd	Clayton Shannon	www.shannonbros.com.au
		Silo Bag Grain (NSW QLD) Pty Ltd	Lesley Kilby	www.silobaggrain.com.au
		Societa Cofica Pty Ltd	Dia Ram Sharma	www.societacofica.com.au
		Southern Grain Pty Ltd	Tim Gross	www.southernstockfeeds.com.au
		Southern Grain Storage Pty Ltd	Campbell Brumby	www.southerngrains.com.au
		Spagrico Australia	Jiger Kotecha	www.spagrico.com.au
		Standard Commodities Australia Pty Ltd	Elizabeth Bozinoska	www.stancom.com.au
		Sudima Australia	James Garvey	www.sudima.com
		Sun Euro Australia	Tarun Saxena	www.suneuro.com.au
		Tamma Grains Australia Pty Ltd	Kim Packer	www.tammagrains.com.au
		Tiller Commodities Pty Ltd	Brett Cooper	www.tillercommodities.com
		TRC International	Yohan Goonetilleke	www.trcglobal.com.my
		Trentham Grazing Pty Ltd (t/a Godde's Grain & Fertiliser Pty Ltd)	Barry Fisher	www.goddesgrainandfertiliser.com.au
		Ulusoy Asia Pacific Pty Ltd	Muhammet Genc	www.ulusoyflour.com
		Universal Commodity Management	Tim Dean	www.commoditymanagement.com.au
		Ward McKenzie Pty Ltd	Greg Howe	www.mckenziefoods.com.au
		Waterfall Australia	Ian Mallon	ian@waterfallaustralia.com.au
		Watsons Bulk	Joel Watson	www.wbl.net.au
		WHG Oceania Pty Ltd	Gesheng Shen	shen@tgaj.cn
		Warrinour Transport & Trading	Karl Hendy	www.warrinourtransport.com.au
		WW Agri Pty Ltd	Steve Sloss	www.wagri.com.au
		ZTC Australia	Timothy Byass	www.ztcaus.com
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Transport Operator		Crawfords Freightlines Pty Ltd	Phillip Davis	www.crawfordsfreightlines.com.au
		Gehrke Grains & Transport Pty Ltd	Julian Gehrke	www.gehrke.com.au
		Hamilton Contracting (NSW) Pty Ltd	Jodie Hamilton	www.hamiltoncontracting.com.au
		Horne Ag Logisitics Pty Ltd	Jeremy Horne	www.horneaglogistics.com.au
		Pacific National (NSW) Pty Ltd	Nick Ryder	www.pacificnational.com.au
		SEAWAY Intermodal Pty Ltd	Bikash Ram	www.seawayintermodal.com.au
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Broker	Medium	Fox Commodities Pty Ltd	Paul Cochrane	www.foxcommodities.com.au
		Grain Brokers Australia	Jeff Winspear	www.grainbrokers.com.au
		Horizon Grain Brokers Pty Ltd	Ash Munro	www.horizongb.com.au
		Pure Grain Network Pty Ltd	Stuart Tighe	www.puregrain.com.au
		Quest Commodities Pty Ltd	Jayne Barker	www.questcommodities.com.au
		Rain Agribusiness	Ian Grellman	www.rainag.com.au
		StoneX Financial Pty Ltd	Stefan Meyer	www.intlfcstone.com
		Teague Australia Pty Ltd	Tim Teague	www.teague.com.au
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	Sole Operator	A C Grain	Adam Clarke	www.acgrain.com
		Allied Grain Pty Ltd	Angus Wettenhall	www.alliedgrain.com.au
		Cogeser (Australia) Pty Ltd	Robert Luetolf	www.cogeser.com.au
		Farm Tender	Matt Henke	www.farmtender.com.au
		Lotema Pty Ltd	Todd Lees	www.lotema.com.au
		Mallon Commodity Brokering	Ian Mallon	www.mcbrokering.com

		McDonald Pelz Australia	Stuart Richardson	www.mcdonaldpelz.com	
		Perkins Commodity Brokers	Craig Perkins	linkedin.com/in/craig-perkins-9a27211a	
		Woodside Commodities Pty Ltd	Hamish Steele-Park	www.woodcomm.com.au	
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Corporate	Large	ASX	Ian Waddell	www.asx.com.au/grainfutures	
		Australian Grain Technologies	Tristan Coram	www.agtbreeding.com.au	
		Barrett Burston Malting Co.	Dean Ganino	www.bbmalt.com.au	
		BoortMalt Asia Pacific Pty Ltd	Simon Robertson	www.boortmalt.com	
		CIS Control Union Australia	Mathew Conoulty	cis-controlunion.com	
		Commonwealth Bank of Australia	Tom Morgan	www.commbank.com.au	
		NSW Ports	Campbell Mason	www.nswports.com.au	
		Sanitarium Health Food Company	Nathan Bullock	www.sanitarium.com.au	
		Symbio Laboratories	Kristian Just	www.symbiolabs.com.au	
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		Medium	AgriDigital	Emma Weston	www.agridigital.io
			AgriFood Technology	Doreen Fernandez	www.agrifood.com.au
			Amspec Australia	Lee Shilvock	www.amspecgroup.com.au
			Australian Superintendence Company (ASC)	Andrew Parry	www.austsupco.com.au
			Clear Grain Exchange	Nathan Cattle	www.cleargrain.com.au
			Foss Pacific	Rod Gleeson	www.foss.com.au
			HFW Australia	Stephen Thompson	www.hfw.com
			Holding Redlich	Geoff Farnsworth	www.holdingredlich.com
			Intertek	Debrah Millard	www.intertek.com
			Mars Petcare Australia (t/a Mars Birdcare)	Kurt Sosinski	www.mars.com.au
			Oldendorff Carriers Melbourne	Allen Dewhirst	www.oldendorff.com
			PSC Griffith Goodall Insurance Brokers	Mandy Gladman	www.pscgib.com.au
			Qube Logistics (SB) Pty Ltd (T/A Qube Agri)	Jeremy Brown	www.qube.com.au
		SBA Law	Jeremy Rosenthal	www.sbalaw.com	
		SGS Australia	Trent Charlton-Maughan	www.au.sgs.com	
		T-Ports	Nathan Kent	www.tports.com	
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		Small	Advance Trading Australasia	Andrew Woodhouse	www.advance-trading.com.au
			Ag Scientia	Lloyd George	www.agscientia.com.au
			AgVise (WA) Pty Ltd	Shane Sander	www.agvise.com.au
			Aperture Ag Pty Ltd	Alex Campbell	www.apertureag.com.au
			Basis Commodities	Chris Whitwell	www.basiscommodities.com
	BSM Global		Jason Flemming	www.buysellmove.com	
	Cloudbreak Grain Marketing		Ed Scamps	www.cloudbreak.com.au	
	Delta Agribusiness		Michael Parry	www.deltaag.com.au	
	E P Integrated Commodities Pty Ltd		Tracey Lehmann	epicbrokers.biz	
	Farmanco Marketing Pty Ltd		Donald McTaggart	www.farmanco.com.au	
	FARMARCO Australia Pty Ltd		Rob Imray	www.farmarco.com.au	
	Finesse Solutions		Malcolm Finlayson	malcolm@finessesolutions.com.au	
	Flexi Grain Pty Ltd		Jarrold Tonkin	www.flexigrain.com.au	
	Futari Grain Technology Services		Leah Petrie	www.futari.com.au	
	Goldstar Commodities		Geoff Webb	www.goldstarcommodities.com.au	
	Graintec Scientific		Lucas Anstiss	www.graintec.com.au	
	Grainx		Judi Morgan	www.grainx.com.au	
	Greenoaks Agriculture Pty Ltd		Richard Perkins	https://linkedin.com/in/richard-perkins-39090a3b/	
	Harvestcheck Pty Ltd		Stephen Schumacher	www.harvestcheck.com.au	
	Hay Plains Grain Storage Pty Ltd		Ron Harris	www.fellowsbulk.com.au/grainstorage	
	IKON Commodities		Ole Houe	www.ikoncommodities.com.au	
	Indyn		Rob Martin	www.indyn.net	
	Lachstock Consulting		Nick Carracher	www.lachstockconsulting.com.au	
	Longbridge Commodities		Ben Langford	www.longbridge.com	
	MarketAg Pty Ltd		Mark Martin	www.marketag.com.au	
	McMullen Consulting		Gerard McMullen	www.mcmullengrainagricultural.com	
	Mercari Pty Ltd		Daniel Marsh	www.mercari.com.au	
	Mirfak P/L		Josh Whelan	www.mirfak.com.au	
	National Grower Register		Debbie Newmarch	www.ngr.com.au	
	OMIC Australia Pty Ltd		Koji Nakashima	www.omicaustralia.com.au	
	Perten Instruments		Raul Ovelar	www.perten.com	
	Pinion Advisory		Chris Heijus	www.pinionadvisory.com	
	Planfarm Marketing Pty Ltd	Jerome Critch	www.planfarm.com.au		
	Priag Marketing Pty Limited	Kevin Schwager	www.priag.com.au		
	Primal Foods Group	Peter Longhurst	www.primalfoodsgroup.com		
	Profarmer and Australian Crop Forecasters	James Maxwell	www.nzx.com		
	Rise Agribusiness	Ian Dalgliesh	www.riseagri.com.au		
	Saputo Dairy Australia	Ashley Denishensky	www.saputo.com		
	SGA Solutions Pty Ltd	David Hudson	linkedin.com/in/david-hudson-8240b913		
	Sizer & Cogill (t/a NQ Bulk)	Chris Sizer	www.sizercogill.com.au		
	Ten Tigers	Chris Tonkin	www.tentigers.com.au		
	TE Storage & Logistics Pty Ltd	Tom Hage	www.testorage.com.au		

		TT Club Mutual Insurance	Rhys Richards	www.ttclub.com
		Ultimate Global Trading Pty Ltd	Andrew Alexopoulos	www.ultimategt.com.au
		Wattletree Consulting	Joe Righetti	www.wattletree.net.au
			45	
International Affiliate		CIS Commodity Inspection Services	Paul Schweitzer	www.cis-inspections.com
		Grains Middle East Trading DWC-LLC	Mark Stapleton	www.grains-middleeast.com
			2	
Industry Association		AEGIC	Courtney Draper	www.aegic.org.au
		Grain Growers Limited (GGL)	Shona Gawel	www.graingrowers.com.au
		Grain Industry Association of WA (GIWA)	Peter Nash	www.giwa.org.au
		Grain Producers Australia Ltd (GPA)	Colin Bettles	www.grainproducers.com.au
		NSW Farmers Association	Elen Welch	www.nswfarmers.org.au
		Stock Feed Manufacturers' Council of Australia (SFCA)	Duncan Rowland	www.sfmca.com.au
			6	
Merchant Association		Grain Industry Association of SA	Marie Cunningham	www.giasa.org.au
		Grain Industry Association of VIC (GIIV)	Colin Peace	www.giiv.com.au
		Grain NSW	Joanne Ware	www.grainnsw.com.au
		Queensland Agricultural Merchants (QAM)	Rob Imray	www.qam.org.au
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Australia India Grains Partnership

COLLABORATE COMPLEMENT CONTRIBUTE

A strengthening relationship

India and Australia have a shared vision for economic cooperation and a more prosperous future that has developed over time thanks to remarkable growth in our trading relationship.

Announced in 2020, the India-Australia Comprehensive Strategic Partnership marked a joint commitment to encouraging expanded trade and investment flows for the benefit of both economies.

India is Australia's sixth largest trading partner with two-way trade in goods and services valued at \$48.4 billion in 2022.

The Australia-India Economic Cooperation and Trade Agreement (AI-ECTA) is now in place which deepens India and Australia's bilateral relationship in goods and services. The Australia-India Comprehensive Economic Cooperation Agreement (AI-CECA) currently under negotiation is an opportunity to further strengthen ties and foster economic prosperity in both countries.

Partnership for complementary opportunities

Recognising the long history of collaboration in agricultural research, education, development and capacity building, India and Australia have an opportunity to continue building on this mutually beneficial relationship by exploring the development of a formal Australia India Grains Partnership that deepens engagement and elevates India and Australia's relationship to a more strategic level, aligned with the current AI-ECTA, and the AI-CECA as it is negotiated.

These bilateral agreements have the potential to support a new wave of prosperity in grain industry cooperation, trade and investment. The two countries share a strong history of collaboration in grains and pulses and the Australia India Grains Partnership will be a unique opportunity to deepen and strengthen the relationship and contribute positively to India's grain and food sectors.

This would bring benefits to both countries and build complementary opportunities for India and Australia's grains industries which would in turn contribute positively to both economies and populations.

¹ Department of Foreign Affairs and Trade: India Brief <https://www.dfat.gov.au/geo/india/india-country-brief>

Changing food preferences

Overall food demand in India is likely to increase, driven by population growth and a growing middle/consumer class, changing diets and a shift in favour of products such as protein, fruit, dairy and packaged goods. Increased meat production in India is also expected to have a multiplier effect on demand for grains, protein meal and fodder.



India's food processing sector

India's food processing sector adds significant value to the Indian economy. It is sophisticated, diverse and the number one manufacturing industry employer in the country. The organised milling sector in India is rapidly improving in technology mechanisation, and hygiene.

The sector is being prioritised as a means to expand India's export opportunities and it is estimated that India's food processing sector output could reach AUD839 billion by 2025-26 .

Food processing in India uses wheat for the production of raised breads, biscuits (cookies), bakery items, and to a lesser extent Western-style pasta and confectionery. Packaged flour is also increasing in popularity. Pulse based packaged foods and snacks are a substantial part of the food processing sector.

Thanks to the growing economy, changing demographics and increasing urbanisation, India's grocery and food retail market is evolving and expanding rapidly. It is expected to increase in value to AUD1.3 trillion by 2025.

Australia: a specialised supplier for India's food processing sector

Australia is seeking to support opportunities for economic growth in India through delivering grains and pulses to its expanding food processing sector that are well suited to value adding and export products.

Australian grain could complement India's domestic supply to this sector with consistently high quality grains – raw materials such as wheat, malting barley and pulses – that deliver processing efficiencies for Indian food manufacturers and have unique attributes which mean increased health benefits for consumers.

Supporting India's livestock sector

India has a very large livestock sector with significant opportunities for growth. Australia is well placed to support India's dairy and poultry industries with nutritious grains and protein meal that can boost animal productivity in terms of milk production, egg production and chicken meat.

Building India's food and nutrition security

Looking towards 2030 and beyond, the task of ensuring food and nutrition for India's growing population is significant and is accompanied by increasing urbanisation and demand for safe and healthy food.

Mutual opportunities exist for Australia to assist India in building nutrition security, expanding its export focus, and developing a more trade-facilitative environment between the two countries.

Australia is well positioned not only to be a key supplier of grain and pulse commodities to India but would also be a strategic partner in sharing technical knowledge and expertise that will support further modernisation of the Indian grain supply chain.

A strategic Australia India Grains Partnership would provide India with support and capacity building to assist in achieving its vital food and nutrition security objectives and would help to build a stronger export sector for value added products and commodities.



² <https://www.investindia.gov.in/sector/food-processing>

³ <https://kpmg.com/in/en/home/insights/2021/05/food-processing-growth-opportunities-post-covid-19.html>

⁴ <https://www.investindia.gov.in/sector/retail-e-commerce/food-retail>



Sharing technical expertise

Australia is well placed to cooperate and collaborate with India to support the building of capacity in climate resilience in crop production, grain storage and hygiene technology and best practices.

An Australia India Grains Partnership would improve the sharing of technical expertise between India and Australia and build new capacity in grains storage, supply chain hygiene and biosecurity standardisation. This has the potential to reduce post-harvest losses for farmers, improve supply chain efficiency and grow India's grains and pulses processing and value added product sectors.

The Grains Partnership would also support a reliable source of inputs for the Indian food and feed processing and export industries to support expanded job creation and economic growth.

Capturing value for the Indian grains industry

Cooperation between Australia and India can help India capture more value from its grains industry through the implementation of modern supply chains encompassing storage, handling and transport.

This recognises the importance of the grains sector in meeting India's nutrition security objectives particularly given increasing domestic demand and variable climate impact.

An Australia India Grains Partnership would support increasing crop productivity, sustainability and resilience of the Indian grains sector through sharing of expertise and technology that could support improving crop performance (yield, adaptation, pest and disease resistance), and improved practices to support water use efficiency, soil management and production practices. Farmer exchanges to Australia are another opportunity and can foster improvement in several aspects of India's grain industry.

Building India's grains industry capacity

SUPPLY CHAIN MANAGEMENT

Opportunities

- ✓ Coordinate farmer to farmer exchanges
- ✓ Coordinate Indian grain grower innovation tours to Australia
- ✓ Contribute storage and logistics expertise

VALUE ADDING AND EXPORTS

Opportunities

- ✓ Coordinate commercial exchanges in food processing
- ✓ Share best practice and processed food industry experience
- ✓ Contribute food safety and labelling expertise

TECHNICAL SUPPORT

Opportunities

- ✓ Contribute education on how to extract value from Australian grain
- ✓ Share best practice farmer to farmer
- ✓ Coordinate exchange programs with trade delegations
- ✓ Contribute scholarships for PhD candidates

BIOSECURITY

Opportunities

- ✓ Contribute technical expertise to support adherence to international standards
- ✓ Contribute science-based education in sanitary and phytosanitary (SPS) measures
- ✓ Collaborate with National Institute of Plant Health Management

Collaborative partners in grain

The Australia India Grains Partnership (Grains Partnership) concept is a joint cooperation initiative to support food and nutrition security in the Indian grains sector and to maximise development, collaboration and export opportunities across production, food processing and animal feed grains sectors.

Bringing together Indian and Australian decision-makers from government and industry, the Grains Partnership will foster relations and maximise opportunities for development and collaboration amongst the Indian and Australian grains, food-processing and livestock sectors.

Delivering real impact of grains industries in India and Australia

VISION

India and Australia promote the development of their respective grain industries in a manner that supports food and nutrition security, environmental sustainability and economic opportunity.

GUIDING PRINCIPLES

Industry-driven and aligned with Government objectives:

- Market-driven
- Open and inclusive stakeholder engagement
- Value chain focus
- Mutual benefit

OBJECTIVES



Improving security, prosperity and productivity of the Indian and Australian grains industries



Building a trusted relationship between Indian and Australian grain industries and government



Increasing India's grain production to help meet local demand and food security target



Enhancing Australia's capability to respond to increased demand for grain products in India across differentiated market segments



Improving the trade environment by harmonising, and improving transparency and predictability.

A long-term initiative built on trust and relationships

The Australia India Grains Partnership would be a long-term commitment to delivering mutual benefits to India and Australia and building a platform for future cooperation and two-way trade flow.

Benefits of the Grains Partnership will flow to the Government of India, Indian trade, the Indian grains industry and food processing sector and Indian consumers. Benefits will also be delivered to Australia's grains industry and Australian trade.

