



GRAIN TRADE
AUSTRALIA

ANNUAL REPORT

2018/19

INDUSTRY DRIVEN & MANAGED

GRAIN TRADING STANDARDS ~ TRADE RULES & CONTRACTS
TRADE & MARKET ACCESS ~ TRAINING & DEVELOPMENT
DISPUTE RESOLUTION ~ INDUSTRY STEWARDSHIP & CAPABILITY



INDUSTRY DRIVEN SELF-REGULATORY FRAMEWORK



GTA HAS CONTRACTS THAT TAKE AUSTRALIAN

Contract Confirmation
(GTA No.3), Grower Contract
(GTA No.6) & Commodity
Vendor Declaration

Grain Transport
Contract

Storage and Handling
Agreement

Grain Transport
Contract & Free
on Rail Contract
(GTA No.7)

SUPPORTED BY:

GTA TRADE RULES

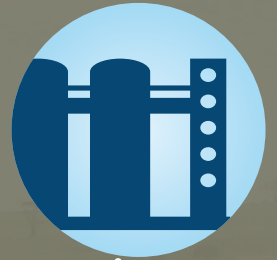
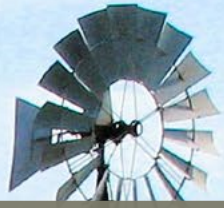
DISPUTE RESOLUTION SERVICES (ARBITRATION)

GRAIN TRADING STANDARDS

AUSTRALIAN GRAIN INDUSTRY CODE OF PRACTICE

GTA TECHNICAL GUIDELINE DOCUMENTS

ACROSS THE ENTIRE



GRAIN TO DOMESTIC AND EXPORT MARKETS

Track Contract (GTA No.2)

Delivered Container Terminal (DCT)
Contract (GTA No.4)

Free on Board (FOB) Contract (GTA No.1)

Voyage Charterparty – AusGrain 2015

Cost Insurance Freight Contract (Containers)
(GTA No.5)

TRADE & MARKET ACCESS INITIATIVES

AUSTRALIAN GRAINS INDUSTRY CONFERENCES (AUSTRALIA & ASIA)

**NATIONAL WORKING PARTY ON GRAIN PROTECTION (NWPGP)
& AUSTRALIAN GRAIN STORAGE & PROTECTION CONFERENCE**

TRAINING & PROFESSIONAL DEVELOPMENT PROGRAMS

INDUSTRY STEWARDSHIP & CAPABILITY

SUPPLY CHAIN

CONTRIBUTING VALUE TO THE GRAIN INDUSTRY SUPPLY CHAIN

Australian Grain Industry Conferences (AGIC) Asia – Indonesia and China were conducted in 2019 to showcase the Australian grain industry.

AGIC Asia Government and Policy Roundtable events in China and Indonesia – Outreach programs targeted at Policy Administrators, Agencies in destination countries to promote the facilitation of trade.

GTA Trading Standards developed by the GTA Standards Committee, following industry consultation conducted annually. The Trading Standards are developed with primary objectives to reflect customer requirements, taking into account regulatory requirements, and the capability of production sector and supply chain.

Wheat Quality Australia – a joint venture with Grains Research & Development Corporation (GRDC), tasked with wheat variety classification and development of the Wheat Variety Masterlist.

National Working Party on Grain Protection (GTA secretariat), ensuring Australia's zero tolerance to live grain insects.

GTA Trading Standards are aligned to **GTA standard form contracts** and have widespread domestic and international recognition.

PUBLICATIONS:

- **Visual Recognition Standards Guide** – a photographic and written national standard of all major grain defects
- **Weed Seed Impurities Guide**
- **Australian Grains Industry Code of Practice**
- **Grains Transport Code of Practice**
- **Technical Guideline Documents**
- **GTA Industry Fact Sheets**
- **Grain Matters (newsletter)**

Industry Developed and Driven Self-Regulatory Framework:

- **Trading Standards**
- **Standardised Grain Contracts**
- **Trade Rules**
- **Dispute Resolution and Arbitration**
- **Industry focussed Stewardship including Code of Practice and Training and Development**



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Get LinkedIn with GTA
[Grain Trade Australia](https://www.linkedin.com/company/grain-trade-australia)

Australian Grains Industry Code of Practice (the “Code”):

- Grains Industry Code of Practice
- All GTA Members must adhere to the Code
- Grain Transport Code of Practice
- Code Assessment Program
- Recognised by Industry and Governments
- Only major grain exporting country with an Industry accepted Code
- Revised in 2017/18

GTA supports the work of the **National Residue Survey** (NRS) – adherence to domestic and export Maximum Residue Limits for chemicals.

INDUSTRY TRAINING:

- Australia's first **tertiary qualification in Grain Management – GTA Diploma of Grain Management**. The only grain specific, post-production accredited course in Australia
- **Conducts the Grain Standards Course** nationally to ensure national consistency in grain testing and sampling
- **Building Grain Industry's skill set**

SUBMISSIONS TO:

- **Codex Alimentarius Commission** (Codex) – international food standards
- **Australian Pesticide & Veterinary Medicines Authority** (APVMA)
- **Department of Agriculture** (DA) on the National Traceability Framework, bio-fouling requirements for international ships, review of the International Treaty on Plant Genetic Resources for Food & Agriculture, review of Export Legislation and Port Access Code Review.
- **SA Committee** on GM Moratorium
- **New Zealand Dept of Primary Industries** Grain Sampling for Import – Feed or Processing
- **The Ministry of Commerce of the Peoples Republic of China** – Industry submissions on Anti-Dumping investigation on Australian barley exports.
- **National Measurement Institute** (NMI) on proposed cost recovery guidelines
- **Australia New Zealand Food Standards Code**
- **WA government inquiry** into compensation mechanisms for farmers who claim to suffer economic loss caused by the contamination of genetically modified material and the
- **Tasmanian GM Moratorium Review**

MEMBER:

- **Department of Agriculture – Grains & Plant Products Export Industry Consultative Committee** (GPPEICC)
- **DA – Non-Tariff Measures Industry Working Group**
- **Australia-ASEAN NTM Business Working Group on Agriculture and Food**
- **National Measurement Institute – Grain Quality Measurement Committee**
- **ACCC Agricultural Consultative Committee**
- **Agricultural Biotechnology Council of Australia** (ABCA)
- **International Grain Trade Coalition** (IGTC)
- **Australian Grains Industry Discussion Group** (AGIDG)
- **GIMAF Grains Forum**
- **Grain Transport Safety Network**
- **NSW Grain Harvest Transport Program**

GRAIN TRADE AUSTRALIA

KEY ATTRIBUTES

Industry driven Self-Regulatory Framework

GTA is a member driven organisation whose core products and services provide industry with a Self-Regulatory Framework to facilitate trade.

Available to all

GTA membership is open to any individual, company or organisation actively involved in the grain industry or in the supply of services to the grain industry.

Making it easier

Standardising Grain Trading Standards, Trade Rules and Contracts enables smooth facilitation of trade within the Australian grain industry, at the same time ensuring confidence in commercial dealings by providing legal rigour and a cost-effective Dispute Resolution Service.

Informing industry

GTA provides information to enable industry participants to stay abreast of the latest trade tools through regular updates, educational programs and representation in domestic and global industry/government circles.

GTA communicates with its Members on important GTA related issues via GTA Member Updates and a monthly Grain Matters e-newsletter, as well as disseminating broader market related matters via GTA Market Notifications. All these communications are openly available and retained on the GTA website (www.graintrade.org.au).

Strategic Direction

The "GTA Strategic Directions" document is released each year. This is a "road map" that details the activities and strategies GTA will undertake on behalf of members to improve facilitation of trade and strengthen the Australian grain value chain.

Critical Success Factors

GTA must deliver:

- **Harmonised trading products and services** – so commercial risks are lowered, improving capital utilisation, and enhanced transparency
- **A suite of tools to enable trade to occur efficiently and seamlessly** – low economical cost transactions are critical to maintain global value chain competitiveness
- **Training & Development programs that enhance the skills of industry participants** – GTA aims to deliver training programs that develop and enhance the capacity of the Australian grains industry 'soft commodities' human resources with educational and relevant material to further enhance the knowledge of businesses
- **Knowledge sharing** – communicating the grain industry and GTA vision is critical to garnering the support required for growth
- **Funds and resources for GTA to deliver required outcomes** – growth in industry services and communication activities by GTA must be met within the current budget and financial policies of GTA
- **Partnerships/linkages with industry stakeholders** – Government and agencies, and international counterparts – members alone cannot fund the entire service load. Partnering will be an important component of success

This Annual Report details the activities that GTA has pursued to ensure that these industry outcomes are achieved.

Industry Outcomes

The goal of GTA is to create an operating environment for the commercial grain industry that is efficient, effective and transparent. These attributes provide the foundation for the Australian value chain and its members to participate in the growth of the global grains industry.

The following reflect the industry outcomes that GTA delivers/influences through its activities:

- **A well informed industry** – decisions based on sound data and research
- **A better skilled industry** – operating at best practice
- **Access to more effective tools and processes**
- **More harmonious and co-operative environment** – a common and clear commercial focus, balanced with a wider community and environmental responsibility
- **Enhanced innovation and leadership** – where new ideas and challenges are welcomed, discussed openly, and advanced as appropriate
- **An industry responsible for itself (industry stewardship and management)** – self-reliant, whilst achieving Government support where common good outcomes are justified and necessary

CHAIRMAN'S REPORT



It is with great pride that I provide my first annual report as Chairman of Grain Trade Australia (GTA).

The 2018/19 year has been a mixed season for the Australian Grain industry with ongoing drought impacting east coast production. This has resulted in grain imports into eastern Australian states from South Australia, Western Australia and from other country origins.

These conditions, whilst challenging the industry and its participants has demonstrated the value and efficiency the Australian grain industry achieves through a united and collaborative approach. Grain Trade Australia (GTA) has again been privileged to play its part, working on behalf of its Members and industry to facilitate trade and provide an industry driven self-regulatory framework.

Despite seasonal variances, the Australian grain industry has continued to grow over the last 10 years. It has evolved from an environment of regulated exports, to what is now an open, competitive and self-regulated market that delivers value through its supply chain. Depending on the season the Australian grain industry is Australia's number one or two agricultural export industry. In 2018/19

ABARES estimates the Australian grain industry value to be around \$A12.9¹ billion (at the farm gate). This is 6% below the 5-year average of \$A13.8 billion.

Exports in 2018/19 are estimated by ABARES at \$A7.9² billion (FOB) and approximately 18.7 million metric tonnes (mmt). This has been severely impacted by the drought being 29% below the 5-year average of \$A11.1 billion and the lowest volume since 2009/10. In addition, there has been approximately 3.5mmt of transshipments from WA and SA to the East Coast to meet the drought driven supply deficit. This volume of transshipments far surpasses anything transhipped in prior droughts.

**FACILITATION OF TRADE,
AND THE ABILITY FOR
INDUSTRY PARTICIPANTS
TO APPROPRIATELY
MANAGE RISK**

Domestic demand for all crops is estimated at 15.5mmt in 2018/19. The domestic market continues to be the largest consumptive home for Australian grain, and its growth is expected to continue with consumption forecast to reach 16mmt in 2019/20.³

The container export trade has been challenged due to the drought but remains optimistic for the future. Container trade has grown from as low as 300kt in 2002/03 to an average level of 3.5mmt (with a peak of 4.2mmt in 2016/17) or around 10 % of exports in a normal year.

The variability of supply and the nature of market demands, means the supply chain and its participants must be dynamic and adaptable. This places greater importance

and value on GTA's core mission of the '*facilitation of trade, and the ability for industry participants to appropriately manage risk*'. Grain will not trade and move as efficiently through the supply chain without the products and services provided to industry by GTA with the support of its Members.

Australia's self-regulatory industry framework enabled by GTA's products and services is unique and well-regarded amongst other grain trading nations. This self-regulatory framework is recognised by Government as an important part of the Australian grain industry.

This framework is a component of GTA's industry stewardship and consists of:

- Trading Standards;
- Standard Form Contracts;
- Trade Rules;
- Arbitration and Dispute Resolution;
- Training and Development; and
- International and domestic advocacy to improve Trade and Market Access.

This framework is driven by voluntary Technical Committees of GTA members.

The Industry Driven Framework provides a sound foundation for the commerce of grain and allows the grain industry to operate with confidence. Industry participants can originate grain from producers, manage price and logistical risks, and manage the task of moving grain from farm to domestic and offshore markets with confidence in the grain product and the terms of trade.

¹ ABARES (farm gate value), July 2019

² ABARES (FOB value), July 2019

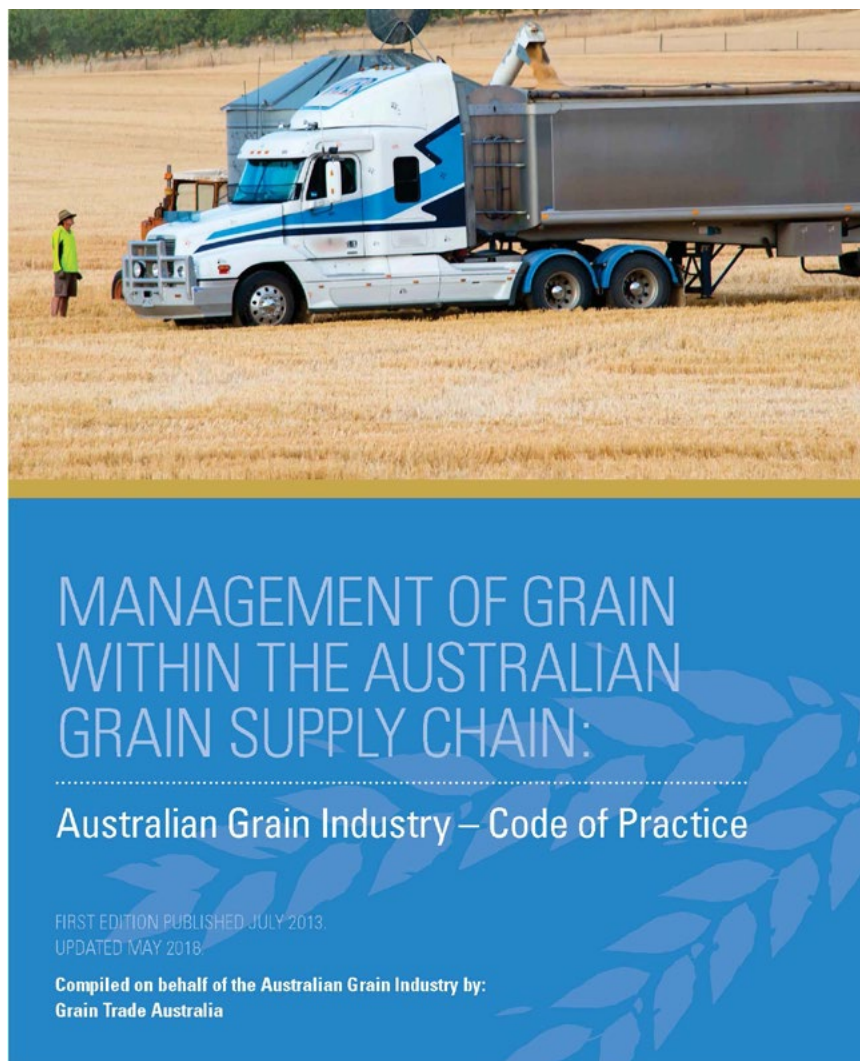
³ ABARES, July 2019

The glue that binds the self-regulatory framework together is the **Australian Grains Industry Code of Practice (Code)**, managed by GTA. The Code plays an important role in the facilitation of trade and creates value by ensuring confidence in the Australian value chain. All GTA Members are required to adhere to the Code. The Code is recognised by the Australian Government and by governments in our destination markets increasing surety and confidence, to support trade and market access arrangements for Australian grains, pulses and oilseeds. Increased market confidence helps drive value for participants across the supply chain. Australia remains the only major exporting country with an industry managed and driven Code of Practice.

GTA's **Dispute Resolution and Arbitration Service** instills commercial confidence in the industry to underpin and provide sanctity of grain contracts in Australia. When contract performance is delinquent there is a recognised process to seek financial compensation. Awards issued by GTA Arbitrations are as enforceable as a ruling by a Court. The GTA Dispute Resolution Services are compliant with the Commercial Arbitration Act (NSW) 2010.

A market lacking confidence amongst counterparties is higher risk and a less efficient market. Increased confidence in the Australian grain market reduces risk and increases value for all. I must acknowledge the role GTA Arbitrators who contribute their time and are a critical part of the dispute resolution process. In 2018/19 GTA held specific training for Arbitrators to reinforce the strengths of the Dispute Resolution process.

GTA, on behalf of its broad membership base across the Australian Grains Industry, has focussed significant attention and resource on ensuring that the grains industry has a strong and collaborative working relationship



with the Australian Government for the betterment of all participants in the industry.

Both the Department of Agriculture (DA) and Department of Foreign Affairs and Trade (DFAT) have undertaken substantive work on grain industry and trade issues. We know that resilient market access, which is so vital for our industry, is a partnership between industry and government. We are very conscious of this fact and ensure it is part of GTA plans and actions.

GTA participates in the Department of Agriculture Industry Consultative Committee and captures and develops industry feedback to assist the Government in its policy formulation, development of sound Australian positions for international protocols and agreements that impact the movement of grains and oilseeds, and protocols such as the China-Australia wheat/

barley protocol. This work ensures GTA Members, and the Australian grain industry is best positioned to take advantage of opportunities to create value and growth in an increasingly competitive global environment.

It is gratifying to see in such challenging times, industry participants coming together for broader industry benefit and that they recognise a foundation for individual, or commercial success is a strong, robust industry. A great example of this has been the Anti-dumping (AD) and Countervailing Duties (CVDs) investigation against Australian barley exports by China.

The Australian grain industry has shown great leadership and collaboration through the establishment of an Industry Working Group (IWG) to address the concerns of the Chinese investigation and diligently work through the investigation process. The industry work

has been led by GTA and GIMAF with support by AGECC and GTA Members.

As part of the process the IWG conducted an information meeting for registered barley exporters in Melbourne on the 10th January 2019.

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.

Over the past year GTA has continued to operate several Technical Committees, namely:

- Trading Standards;
- Commerce;
- Transport, Storage and Ports;
- Information Technology Advisory Committee;
- Trade and Market Access; and
- Plant Breeding Innovation

The **Trading Standards Committee** has worked intensely on developing and continually improving the Trading Standards which are the basis for the facilitation of trade. The Trading Standards Committee and its Sub-Committees have focussed on food safety, international MRLs as well as a major review of the Visual Standards Recognition Guide and Seed Impurities Identification Guide. Both these guides have undergone significant review and are now available to be used with smartphones and other mobile devices.

The **Commerce Committee** and its Sub-Committees have worked on ensuring the commercial basis for the facilitation of trade has strengthened and undergone significant improvement. Through the Commerce Committee, GTA has provided Members information and awareness via Member Updates on legislative changes and regulatory issues such as changes to insolvency laws. During the past year the Commerce Committee has provided further guidance for industry and released a revision to the GTA Trade

Rules as well as the annual review and publication of the Location Differentials for use for settlement of the GTA Contract No 2 – Grain and Oilseeds in Bulk Basis Track.

The **Transport, Storage and Ports Committee** has had a strong focus on developing further information and process for Safety, Health and Environment including a focus on providing information and training to industry on compliance with Chain of Responsibility in the transport sector. GTA, through the Committee has also developed submissions on several policy areas, including the Governments Productivity Commission Inquiry into Transport Regulatory Reform.

Industry can benefit by driving operational efficiency through planning and process harmonisation. The world is shrinking through technology, and increasingly shared platforms and common processes are becoming the normal operating paradigm. GTA through its **Information Technology Advisory Committee (ITAC)** has a role to play in assisting to position Australia's supply chain in the global trade complex. This includes participation in international trade initiatives that support the increased harmonised adoption of electronic documents such as involvement in the International Plant Protection Convention's (IPPC) objective to introduce a global electronic phytosanitary certificate (e-Phyto).

The **Plant Breeding Innovation Committee (PBIC)** has been active on both domestic and global issues. Through this Committee, GTA has made submissions on the Office of Gene Technology Regulator (OGTR) Regulations review, Department of Health Gene Technology Scheme Review, a review of the Australia New Zealand Food Standards Code, SA GM regulations, a WA government inquiry into compensation mechanisms for farmers who claim to suffer economic loss caused by the contamination of genetically modified material and the Tasmanian GM Moratorium Review.

The PBIC undertook a review and updated the *Market Choice Framework and Industry Response Plan* for delivering market choice of GM crops within the supply chain. This work is in addition to active participation in several IGTC Policy teams related to plant breeding innovations.

The **Trade and Market Access Committee** has been focusing on the trading environment, which is becoming more challenging with increasing competition and emerging technical barriers to trade. GTA through the Trade and Market Access Committee has increased its activity to ensure that Australia's reputation as a supplier of quality grain is protected and market access is assured and improved.

GTA remains committed to ongoing participation in international trade policy development. It needs to be recognised these types of trade policies are not developed over a short time period. The time frame tends to be measured in years, but it does require a dedicated focus to ensure a policy does not take an unpredicted turn that could disrupt trade.

GTA has undertaken considerable work on behalf of Members in positioning Australian grain in the domestic and world market. A strong focus has been on **Non-tariff Trade Measures (NTMs)**. Examples of NTMs include phytosanitary issues, chemical residues and grain assessment harmonisation. GTA has been particularly active in the development of global trade policy initiatives and frameworks. This has included being an active member of the International Grade Trade Coalition (IGTC), as well as Wheat Quality Australia (WQA), the National Working Party on Grain Protection (NWPGP) and numerous other industry consultative committees at both Federal and State level.

GTA is a long standing and active member of the **International Grade Trade Coalition (IGTC)**. GTA serves on the global Management Committee and actively participates in the IGTC as it continues to expand its activities

in response to the recognition of the importance of trade and the efficient low-cost movement of grain from regions of surplus supply to regions of deficit. Current activities include work on International Standards for Phytosanitary Measures, Innovative Plant Breeding Techniques, Maximum Residue Levels (MRLs), the Global Initiative on Low Level Presence (LLP) and E-Documentation for grain trading.

Through the IGTC and its own work, GTA has brought issues of importance to Australian industry to global forums such as:

- World Trade Organisation (WTO);
- Food and Agriculture Organisation (FAO);
- International Grain Council (IGC);
- International Plant Protection Convention (IPPC);
- CODEX; and the
- World Grain Trade Forum.

GTA's focus is to advocate for open, competitive markets, regulatory coherence based on sound science and risk-based assessments.

Further, 2018/19 saw GTA become a **founding member of the Australian-ASEAN Business Working Group on Non-tariff Trade Measures**. GTA has led the private sector representation of the APEC Grain Regulatory Forum, which is an initiative of the Australian Department of Agriculture. The APEC work has involved engagement with private sector and trade associations from 11 different countries, and we expect will lead to further regional consultations in 2019/20.

Trade and market activities are supported by the very important and active **National Working Party on Grain Protection**. The Working Party is just one of the many examples of the grain industry working together, with individuals giving freely of their time for the betterment of all. Researchers, regulatory authorities, chemical companies and grain storage suppliers meet with the people who put it all together, the producers, commercial storage providers and traders at the

annual National Grain Storage and Protection Conference, managed and facilitated by GTA.

Australian Grain Exporters Association (AGEA) and GTA consolidated to create the **Australian Grain Exporters Council (AGEC)** as the first Sector Council within GTA.

I am pleased to report, 2018/19 has proven this to be an appropriate and successful model for integration. AGECE has held several member meetings, and actively participated in the Barley Industry Working Group, as well as continued its involvement and participation in GIMAF and the Department of Agriculture Grains Industry Consultative Committee. Congratulations to all the people involved.

GTA believes this is a proven, suitable and flexible framework, that may be considered by industry, but only if driven by industry and members.

GTA hosts the grains industry's premier event, the **Australian Grain Industry Conference (AGIC)**. It continues to demonstrate its importance as the forum that brings the grain industry together. The AGIC program and speakers from the business, science and grain communities reflects the strong position our industry plays in the Australian and global economy.

In a normal production season, over 60% of Australia's grain is exported, with now over 75% of this destined for the Asian market. The importance of Asia is expected to continue to increase into the future, as economic growth, population growth, and preferential shift to cereals and protein in the diet provides growth in demand for grains and oilseeds.

The showcasing of Australian grain in our major markets continued in 2019 with GTA running **AGIC – Asia events in Indonesia and China**. AGIC Asia continues to grow and cement its reputation, with both Indonesia and China conferences being well supported by local and Australian industry.

The networking value and connecting exporters with consumers has strengthened support for these events.

The Indonesian event coincided with the signing of the official Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) which presents some exciting and collaborative opportunities for the Indonesian and Australian grain sectors.

As part of AGIC Asia series, GTA led Australian industry delegations in Round-Table sessions involving local government agencies and trade, to strengthen industry relationships and support the development of mutual trading interests. In Jakarta, AGIC Roundtable was attended by Trade Minister Mr Simon Birmingham and the Australian Ambassador to Indonesia Mr Gary Quinlan. In China meetings were held with high level government and private sector groups. These were very successful and have resulted in some encouraging projects being developed.

The inaugural **Australian Grain Industry Logistics Conference was introduced in 2019**. This Conference was held in Melbourne on the 9th and 10th April 2019. Delegates heard from industry experts on issues and opportunities within the supply chain including the importance of sound policy and strategy to provide a framework for certainty and investment to improve efficiency.

Delegates from across the sector included producers, storage builders, storage operators, road and rail freight companies, researchers, regulators and consumers. This was an important opportunity to focus specifically on logistics as well as providing a forum to discuss how collaboration can help to increase efficiency and value to participants across the supply chain.

A new initiative introduced in 2019 by GTA and the NWPGP was a **Chemical Compliance and Information Workshop** held to promote awareness of chemical related market access issues, and the substantial work



GTA Chairman Andrew Goyder, Previous GTA Chairman Peter Reading.

that is undertaken by industry in this increasingly important area. This was in addition to the annual and long-standing National Grain Storage and Protection Conference, which demonstrates its value by the strong support from industry each year.

An industry that prides itself on self-regulation must also take responsibility for its professional culture and image.

The **Training and Professional Development** programs, including the fully accredited Diploma in Grain Management, have been developed by GTA, and are an important part of industry stewardship. It is pleasing to see an increasing number of students complete the Diploma in Grain Management. These training programs are significant and important professional development opportunities for industry participants to improve skills and knowledge, and importantly improve industry capability.

GTA continues to play a key role in industry good activities by support to grain quality initiatives through our membership in **Wheat Quality Australia** (responsible for Australia's Wheat Classification System) which importantly evaluates new wheat varieties in terms of end-product uses.

On behalf of the Board and Management, I would like to acknowledge the efforts of a team of industry specialists who are prepared to give their time and expertise as members of the various GTA Technical Committees and Industry Working Groups, well as the GTA Arbitrators.

I would also like to acknowledge the contributions of the GTA Board and Management team, past and present. There will be some challenging times ahead however GTA is well placed to face those challenges, having the support of loyal and dedicated consultants and staff.

I especially wish to mention the retirement of Sheryl Brown after 10 years of dedicated service to GTA. During her time at GTA Sheryl worked tirelessly to support and further extend the services of GTA to ensure Members' expectations are met and surpassed. GTA would not be what it is today without the efforts of committed staff like Sheryl.

Finally, I would like to thank our members for their ongoing support. We know and recognise GTA does not have a right to exist. It must continually earn that right from its members, by providing them with the products and services required to support their business needs.

Yours sincerely,

Andrew Goyder
Chairman





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VISION An efficient, equitable and open commercial grain industry in Australia

MISSION To facilitate trade by providing products, services and advocacy for the Australian grain value chain

Our Members

GTA members are drawn from across the grain value chain from production to domestic end users and exporters.

GTA members are involved in grain trading activities, grain storage, food consumptive industries and stock feed milling.

GTA also attracts membership from organisations to the side of the value chain in related commercial activities such as financial (banking), communications, grain advisory services, professional services (legal and accountancy) and production sector groups.

- GTA does not have a right to exist – it must *continually* earn that right from its members.
- Members do not financially support GTA via membership fees or the purchase of products and services out of loyalty but out of the value that GTA is able to offer to their commercial activities.
- GTA is judged on whether it offers a sound value proposition to members by the value obtained by the member in their last interaction with GTA.
- GTA must:
 - be cognisant of factors in the external business environment that impact both the Australian grains industry and GTA and its operations; and
 - operate within the scope and needs of members, the immediate business and industry environment

Our values

GTA will:

- Continually reassess its position in the Australian grain value chain ensuring a contemporary approach to fulfilling its vision. Leadership and innovation will be key features of the manner in which GTA will conduct its operations
- Commit to delivering products and services that add value to our members' businesses and harmonise standards associated with facilitation of trade
- Work cooperatively with all parts of the grain value chain and service all grain value chain members
- Build effective relationships with our members and stakeholders

GTA – core tasks

- **Grain Trading Standards** – development and the ongoing maintenance of grain trading standards that reflect customer requirements, as well as supply-chain and production capabilities.
- **Grain trading contracts and trade rules** – that ensure legal rigour to commercial grain trading activities.
- **Dispute Resolution Services** – underpin contractual arrangements and instils value by ensuring confidence in transacting in the Australian grains industry.
- **Trade and Market Access** – engaging with policy makers and industry to ensure fair and equitable trade policy and systems for improved market access into domestic and global markets and promoting grains industry self-regulatory approach in international markets.
- **Industry Stewardship and Capability** – a determination to increase capability within the grain industry by provision of Australian Grains Industry Code of Practice together with market-based vocational training & development programs.

In addition, GTA also has expansive products and services to provide strong foundations for an industry proud of its ability to develop and implement a self-regulatory framework for the grain industry and to develop policy setting and processes.

This approach is supported and demanded by GTA members, industry stakeholders, government and its related agencies.

GTA members look to GTA to continually reassess and develop additional capacity and capability.



HIGHLIGHTS OF 2018/19

Vital signs

Financial Performance

- Loss of \$22,272
- Equity of \$1,152,644
- A small operating loss was recorded due to lower than expected revenues related to industry conditions, and to additional cost in supporting 'trade and market access', additional complimentary training and services provided to Members.
- As a not-for-profit organisation, GTA cannot distribute profits or build excessive cash reserves.
- GTA is operating within its Cash Reserves Policy.
- Membership fees fund core activities, i.e. Technical Committees, Trade and Market Access Activities and industry advocacy.

Membership

- 283 members at June 2019 (282 at July 2018)

Trade facilitation products and services

Standards Committee – Grain Standards

- Annual Trading Standards review
 - Review and publication of the Wheat Quality Australia Wheat Varietal master list
 - Trading Standards for Wheat, Barley, other cereals published following review
 - Several Sub-Committees involved in ongoing reviews of various Standards issues
- Submissions to Codex Australia
- industry Submissions lodged by GTA to national and international organisations, industry and government agencies

Commerce Committee – Contracts & Trade Rules

Released:

- GTA Contract No 4 – Delivered Container Contract reviewed and updated

- GTA Trade Rules – Trade Rule 17.3 revised
- Member Updates on GTA Trade Rule 13.1 – Conveyance and Delivery Instructions and Trade Rule 18.1 – Settlement of Circle Trades
- Member Updates and Submissions on Location Differentials, Trade Rules and Standard Form Grain Contracts

Currently reviewing:

- Location Differentials for 2019/20 season
- GTA Trade Rule 13.1 – Conveyance and Delivery Instructions
- GTA Trade Rule 18.1 – Settlement of Circle Trades

Trade & Market Access Committee

Consult with and advise industry & Government on:

- China Anti-Dumping Investigations on Australian Barley Exports
- Impact of Non-Tariff Measures (NTMs)
- Maximum Residue Limits for chemicals (MRLs)
- Regional initiatives on Non-Tariff Measures
- Free trade agreements – Indonesia, EU, RCEP
- Market access for Feed grains in several South-East Asia Countries
- China Wheat/Barley Protocol and Industry Management Plan (IMP)
- ePhyto and e-Documentation
- Request for Export Permit Process Review
- Sampling protocols for export grain
- Mobile Bulk Loading protocols
- Traceability within the Grain Supply Chain

Transport, Storage & Ports Committee

Reviewed:

- Improvements to the container supply chain processes, transactions and reference material
- Sampling protocols for export grain
- Outcomes of the Australian Grains Logistics Conference
- Draft GTA Safety Guidelines
- Fact Sheet on Cross contamination risks in the Supply Chain (in conjunction with Fertiliser Australia)

Reviewing:

- Chain of Responsibility adherence – ongoing (National Heavy Vehicle Regulator)
- Implementation of Chain of Responsibility training – Practical Steps to CoR Compliance
- Revised Road Freight Agreement
- Introduction of a Pilot Truck Wash facility
- Chain of Responsibility Safety, Health and Environment (SHE) initiative – development of a series of Technical Guideline Documents

Plant Breeding Innovation Committee

Membership comprises relevant associations from across the grain supply chain.

The Committee updated policies on:

- Genetically Modified Crops
- Low Level Presence (LLP) Initiative and
- Cartagena Protocol on Biosafety

The Committee made submissions to:

- SA GM Parliamentary Inquiry
- Tasmanian GM Moratorium Review

Continued development of the following key industry projects:

- Industry Communication Response Plan; and
- Market Access Framework for the commercial introduction of GM crops

Information Technology Advisory Committee

The Committee has progressed work on:

- Industry Standard Varietal Codes
- E-phyto certificates
- Harmonisation of process and transactions
- Department of Agriculture system consultation
- Electronic Vendor Declarations
- Industry Standard Codes
- Interaction with the Government Traceability Initiative.

Dispute Resolution Service

- 14 (FY 18 – 61) Arbitrations commenced
- 73 (FY 18 – 9) Arbitrations finalised as follows:
 - 8 (FY18 – 1) Awards released

- 4 (FY18 – 8) matters commercial settled prior to a Tribunal making a determination
- 5 (FY18 – 0) GTA closed the Arbitration usually due to inactivity by the Claimant
- 66 (FY18 – 62) Board Approved Arbitrators
- 5 (FY18 – 5) Board Approved Tribunal Chairman (Export Contracts)

GTA Training & Development Program

- 225 participants attended a GTA workshop/program
- 2 Professional Development programs delivered
- 15 workshops – conducted nation-wide to members and the broader industry
- 2 in-house training workshops
- 5 complimentary Arbitrator training workshops delivered

Industry support products offered by GTA

Conferences

- Australian Grains Industry Conference (AGIC) – 785 participants
- AGIC Asia – Indonesia and China – 220 delegates
- Australian Grain Storage & Protection Conference (NWPGP) Melbourne – 130 participants
- Australian Grains Industry Logistics Conference – 123 participants
- Australian Grain Industry Chemical Compliance and Information Workshop – 67 participants
- GTA Advisory & Compliance Workshop – 21 participants

Industry support services conducted by GTA

Australian Grain Industry Code of Practice

- A demonstration of an industry committed to meaningful self-regulation.
- Technical Guideline Documents to assist industry participants to adhere to the requirements as set out in the Code.
- On-line Code of Practice Assessment Program developed and released to industry in August 2018 as part of the revised Code
- Adherence to the Code is mandatory for all GTA Ordinary or post-farm gate Members.

National Working Party on Grain Protection (NWPGP)

- The leading industry body responsible for providing management and leadership to industry in the areas of post-harvest storage, chemical use, market requirements and chemical regulation.
- Continued GTA administrative support to activities of the NWPGP.
- Managed the Australian Grain Storage & Protection Conference.
- Support the coordination of the June 2019 two day annual conference which drew 130 delegates.
- Publication of the Australian Grains Industry Post Harvest Chemical Usage Recommendations and Outturn Tolerances 2019/20.

Advocacy

Domestic

- Dept. of Agriculture (DA) – export inspection & certification processes and trade and market access
- Dept. of Agriculture (DA) – domestic issues
- Australian Pesticides and Veterinary Medicines Authority (APVMA)
- Food Standards Australia New Zealand (FSANZ)
- Codex Australia
- Office of Gene Technology Regulations (OGTR)
- Department of Transport and Infrastructure
- Department of Industry, Innovation and Science
- National Heavy Vehicle Regulator
- Austrade

International

- Department of Foreign Affairs & Trade (DFAT)
- Input into development of a standard for the International Movement of Grain
- Global e-Phyto framework via IGTC
- New plant breeding techniques
- Global Low Level Presence Policy Initiative
- Cartagena Protocol on Biosafety
- Maximum Residue Limits via IGTC
- AGIC Asia – Government Round Table & Policy sessions
- Australia-ASEAN NTM Business Working Group on Agriculture and Food
- APEC Grain Regulatory Forum

Member

- Grain & Plant Product Export Industry Consultative Committee (GPPEICC) and sub-committees
- ACCC Agricultural Advisory Committee
- Grains Industry Market Access Forum
- DA Non-Tariff Measures Industry Working Group
- Agricultural Biotechnology Council of Australia (ABCA)
- National Measurement Institute (NMI) – Grain Quality Measurements Committee
- Australian Grains Industry Discussion Group (AGIDG)
- International Grain Trade Coalition (IGTC) (Management Committee & Working Groups)
- Grains Industry Safety Network

Presentations

Domestic

- Australian Grain Industry Conference Melbourne, *Opening Address*, July 2018 (GTA Chairman)
- Australian Grain Industry Conference Melbourne, *Revised Australian Grain Industry Code of Practice*, July 2018
- Grains Industry Association of Victoria, *GTA Activities and Update*, several 2018/19
- Grain Industry Association NSW, *GTA Activities and Update*, several 2018/19
- Tasmania Grain Industry, *Grain Industry Update & GTA Trading Standards*, July 2018
- Austrade Delegations, *Quality Assurance in the Supply Chain*, several 2018/19
- Elders Agronomy Conference, *Supply Chain Risk*, September 2018
- Australian Fertilizer Industry Conference, *Supply Chain Risk*, October 2018
- DAWR Traceability Project, *Quality Assurance Processes*, February 2019
- Australian Grains Industry Logistics Conference, *Opening Address*, April 2019
- Australian Grain Industry Logistics Conference, *Collaboration in the Supply Chain*, April 2019
- National Working Party on Grain Protection, *Market Access Priorities*, June 2019
- Numerous (216) stakeholder meetings, briefings to members, broader industry, government and their related agencies involving (*GTA Chairman, CEO & Operations Manager*)

International

- AGIC Asia 2019 (Indonesia & China), *Opening Conference Address*, March 2019
- AGIC Asia 2019 (Indonesia & China), *Value from Australian Grain and Supply Chain Assurance*, March 2019
- AGIC Asia Roundtables (Indonesia & China) *Australian Grains Industry and Industry Self Regulation*, March 2019
- World Grain Trade Forum, *Australian Feed Grain Situation*, November 2018, Beijing
- International Grains Council Conference, *Co-operative Progress on NTMs, Impacts & ASEAN Case Study Regional*, London, June 2019
- International Grain Trade Coalition, *ISPM next steps*, London, June 2019

GTA BOARD

Directors

The following persons were directors of the company for the full financial year, unless indicated:

Peter Reading	Special Qualifications – Board appointment (ret. Aug 2018)
Qualifications	B.Sc. (Hons) Agricultural Science, University of Sydney
Experience and expertise	Currently Independent Director of Batlow Apples Co Op. Executive Director of Botanical Resources of Australia. Former Executive Chairman, Canola Breeders. Managing Director of GRDC and Grain Pool WA
Special responsibilities	GTA Board Chairman, Chair – Governance Committee, Member – Audit, Finance & Remuneration Committee
Rebecca Reardon	Non-Executive Director – Board appointment (Special Qualifications Production Sector) (ret. Oct 2018)
Qualifications	B. Agricultural Economics (Honours)
Experience and expertise	Joint manager – DW & RG Reardon Farming. GTA Approved Arbitrator. Formerly held trading and management roles with GrainCorp, Jossco, ABB Grain/Viterra and Special One Grain. Holds position on the Executive Council NSW Farmers Association and is deputy chair of their Grains Committee.
Special responsibilities	Deputy Chair – Information Technology Advisory Committee, Member – Governance and Dispute Resolution Service Committees
Andrew Goyder	Non-Executive Director – Ordinary Level C (ret. Oct 2018), Board appointment (Oct 2018)
Experience and expertise	Managing Director Grain Link WA, established 1999. The company Approved Arbitrator. Previously involved in Seed Industry and Export Canola with SGB Australia and Grain Pool WA as regional manager southern WA. Previously held positions on the boards of NACMA WA, CBH and GIWA.
Special responsibilities	Chairman – Company's Board (since Oct 2018), Member Governance, Standards, Membership and AGIC Committees
Geoffrey E Farnsworth	Non-Executive Director – Board appointment (Special Qualifications)
Qualifications	Bachelor of Law, Bachelor of Arts
Experience and expertise	Partner – Holding Redlich
Special responsibilities	Chair Transport, Storage and Ports and Dispute Resolution Service Committees, Member – Commerce, Governance and Membership Committees, Deputy Chairman – Company's Board
Malcolm Finlayson	Non-Executive Director – Ordinary Level B
Qualifications	Bachelor of Business Studies, MBA, CPA, MAICD
Experience and expertise	Director Finesse Solutions Pty Ltd, Plant Health Australia Ltd, Wheat Quality Australia Ltd, Turfbreed Pty Ltd and Turf Growers Direct Pty Ltd and Chairman, Theodore Water. Formerly – director of Pentag Nidera Pty Ltd, director and CFO of Jossco Group & CFO of DR Johnston Group.
Special responsibilities	Chair – Audit, Finance & Remuneration Committee, Deputy Chair – Information and Technology Advisory Committee, Member – AGIC Committee
Michael Wood	Non-Executive Director – Merchant association
Qualifications	Diploma Applied Science (Agriculture)
Experience	Active member of the Australian Grains Industry for over 20 years. Founding Manager in 1990 of Stockfeed Company James & Son (Australia) established successful operations in Victoria, Tasmania, South Australia and Argentina. Other grain industry roles ABB Victorian State Manager (5 years) and Grains Manager for International Malting Company (2005/2006). Former President of Grains Industry Association of Victoria (2012 2015). Active committee member of GIAV since 2006.
Special responsibilities	Chair Membership Committee, Member Governance Committee, Deputy Chair – company's Board, Chair – Commerce Committee

Robert Imray	Non-Executive Director – Merchant association
Qualifications	Bachelor's Degree in Business, Graduate Diploma in Accounting and Master's Degree in Business (International Business)
Experience and expertise	Managing Director Farmarco Australia, 25 years experience in commodities, both physical & derivative markets, four years with The Sugar Board Domestic Marketing and Treasury.
Special responsibilities	Member – Audit, Finance & Remuneration Committee, Chair – Standards and Plant Breeding Innovation Committees
Jason Craig	Non-Executive Director – Ordinary Level A
Qualifications	B. Commerce (Banking & Finance), Post Graduate Diploma ASIA (Treasury Stream)
Experience and expertise	General Manager (Marketing & Trading) – CBH Group, 20 plus years experience. Commenced career with Grain Pool (now part of CBH Group) in WA, including 4 years in Indonesia as President Director of PT Eastern Pearl Flour Mills. Former GAFTA Council Member and continues to act as a Director for a number of CBH subsidiaries.
Special responsibilities	Chair – Trade & Market Access Committee, Deputy Chair – Transport Storage & Ports and Plant Breeding Innovation Committees, Member of Board Governance Committee.
Ole Houe	Non-Executive Director – Ordinary Level B
Qualifications	BA in Economics – Denmark, BA in International Business – London, Masters of Applied Finance from Kaplan, MBA-AGSM, Sydney. MAICD
Experience and expertise	Has been involved in International Trading for more than 20 years in a number of different roles in Grain, Sugar and Steel. Held international trading roles in the UK, Hong Kong and Australia. Former director of Barley Australia. Is a GTA arbitrator.
Special responsibilities	Member – Audit, Finance & Remuneration, AGIC and Dispute Resolution Service Committees, Chair – Information Technology Advisory Committee
Lachlan Allen	Non-Executive Director – Merchant association
Qualifications	Diploma agricultural Production – Adelaide University
Experience and expertise	Commenced working in the grain industry in 2006 with ABB Grain Ltd. Has worked for a number of major grain trading houses including Viterro, GrainCorp and now Elders in roles from marketing cadet, customer relationship manager, grain merchant and commodity manager to National Grain Manager. Formerly held executive positions with GIASA and is a Grain Trade Australia/Nuffield Fellow.
Special responsibilities	Member – Dispute Resolution Service and AGIC Committee
Lyndon Asser	Non-Executive Director – Ordinary Level A
Qualifications	Bachelor of Economics – Adelaide University and CPA
Experience and expertise	Has 28 years experience in grain trading, specialising in Barley. Currently, Senior Commercial Manager – Glencore Agriculture Pty Ltd, Australia. Formerly, with the Australian Barley Board SA, Viterro and joint head of Glencore's global barley trading operations in The Netherlands.
Special responsibilities	Member – Membership Committee, Deputy Chair – Trade, Market Access and Commerce Committees. Chair – Australian Grain Exporters Council.
Simon Tickner	Non-Executive Director – Board appointment (Special Qualifications Production Sector) (Oct 2018)
Qualifications	Master of Agribusiness, University of Melbourne, GAICD
Experience and expertise	Simon is the owner of a dry land, broad acre grain farming enterprise, Yellow Grain Pty Ltd based in the Wimmera, Victoria. Simon has extensive knowledge of modern agronomic production systems, which focus on profit, risk management and sustainability, operating in a highly variable climate.
Special responsibilities	Member – Commerce Committee, Standards Committee
Michelle Kerr	Non-Executive Director – Ordinary Level C (elected Oct 2018)
Qualifications	Dip App Sc (AgServ), The University of Melbourne
Experience and expertise	Michelle Kerr has been employed at Riordan Grain Services since 2004 where she currently works as the Grain Services Manager. Michelle is a current member of the advisory board for the Riordan Group Pty Ltd, a former committee member and former treasurer of the Grains Industry Association of Victoria (GIAV). Is a GTA arbitrator.
Special responsibilities	Member – Dispute Resolution Service Committee, Deputy Chair – Standards Committee

GTA TECHNICAL COMMITTEES

POSITIONING STATEMENT

GTA will continually review the products and services that allow “trade facilitation” to ensure they reflect the commercial grain trading environment. This will occur via input from the GTA Technical Committees, Members and the broader grains industry. The review process will be public, transparent and open to all.



GTA OPERATES THE FOLLOWING TECHNICAL COMMITTEES COMPRISED OF INDUSTRY PERSONNEL:

1. Standards Committee
2. Commerce Committee
3. Plant Breeding Innovation Committee
4. Transport, Storage & Ports Committee
5. Trade and Market Access Committee
6. Information Technology Advisory Committee

CHARTER FOR THE GTA TECHNICAL COMMITTEES

The Charter of the GTA Technical Committees is composed of:

1. Common section which contains issues common to all Committees (Committee size, quorum, etc)
2. Terms of Reference for each Technical Committee
3. Terms of Reference for Sub-Committees, and a
4. Confidentiality Agreement

Further information:

The Charter of the GTA Technical Committees is available on the GTA website.

KEY POINTS OF THE GTA TECHNICAL COMMITTEES

- GTA is reliant on the Technical Committees to review and develop the GTA commercial resources
- GTA Technical Committees are skills based
- All Technical Committee votes will be required to have a 2/3 majority
- The Committee structure allows Members to raise issues that impact on their commercial operations and lead to industry consensus on contracts/trade rules and grain standards in particular
- GTA calls for nominations to the various Technical Committees each year and the GTA Board select Committee Members based on the applicant's technical competency whilst mindful that the relevant Committee must strive to have representation from:
 - sectors across the grain supply chain affected by the decisions of the Committee;
 - large and small organisations; and
 - all major grain production/trading States
- All Committees are chaired by a GTA Director with a second Director as Deputy Chair
- GTA Committee Members agree to participate on a Committee for the benefit of all Members. They do not represent the interests of any one industry sector or organisation
- All Committee Members agree to be bound by the GTA Anti-competitive Clause as tabled on the agenda at all meetings

TRADING STANDARDS COMMITTEE

POSITIONING STATEMENT

GTA grain Trading Standards are the benchmark for the Australian grains industry. The objective is to unequivocally provide confidence in the quality of Australian grain to processors and consumers.



Objectives

- Consult with industry and develop Trading Standards to apply for the following season. Recommend to the GTA Board changes to existing grain Trading Standards for adoption.
- In conjunction and following consultation with industry, consider quality assurance and associated protocols including additional reference materials across the grain value chain that assist in interpretation and implementation of Trading Standards.
- Advise on the effective adoption and implementation of the GTA grain Trading Standards by individual companies and by the relevant sectors of the industry.
- Communicate between the GTA Board, GTA Management and the Standards Committee on industry matters that relate to GTA grain Trading Standards.

Standards Committee Activities

The GTA Standards Committee is responsible for the annual review and development of cereal grain and wheat Trading Standards.

During 2018/19, the Committee undertook its annual review of the GTA Trading Standards, calling for industry submissions through two rounds of consultation with industry. A number of Sub-Committee meetings were held to consider specific issues identified for review during that submission process.

Following a thorough review, the Visual Recognition Standards Guide was extensively updated for the 2019/20 season to provide greater clarity to industry on the definition and interpretation of defects as outlined in each commodity Standard.

For barley, the grade names for Feed1 and Feed2 were altered to Barley1 and Barley2 to better reflect the multiple end-uses of these grades. Definitions and terminology in oats were altered for consistency with other cereal grains.

The Master Varietal Lists for wheat, barley and oats were amended based on changes to varietal classification for those commodities.

Specific research projects have been progressed to assist industry implementation of Standards. These have included extensive

consultation with the broader grain industry to improve and refine sampling processes, equipment and the establishment of collaborative processes to support industry interpretation and implementation of grain Trading Standards.

Objectives for a range of projects have been developed including an industry collaborative approach to assessing new grain assessment equipment and an assessment of current equipment and processes used to sample grain.

All changes to grain Trading Standards were included in the Standards database for use by industry.

GTA releases the grain Trading Standards for industry on 1 August each year following approval by the GTA Board. All current grain Trading Standards are available on the GTA website.

Standards Committee Members

Name	Organisation	Meetings Eligible to Attend	Meetings Attended
Rob Imray	Chair – GTA Director	4	3
Michelle Kerr	Deputy Chair – GTA Director	4	4
Robert Eassie	Grain Producers Australia	4	4
Gerard McMullen	GTA Technical Consultant	4	4
Vince Moroney	CBH Group	4	4
Jade Saunders	Viterra Australia	4	4
Marcus Dingle	Reid Stockfeeds	4	2
Adrian Reginato	Cargill Australia Ltd	4	4
James Saunders	Commodity Inspection Services	4	3
Luke Mathews	Grain Growers Ltd	4	3
Jason Shanley	GrainCorp Operations Ltd	4	2
Paul Panozzo	Allied Pinnacle	4	3
Melinda Curwood	Emerald Grain	4	4
Simon Tickner	GTA Director	4	3

COMMERCE COMMITTEE

POSITIONING STATEMENT

GTA Contracts & Trade Rules provide a constant and consistent means for facilitation of trade along the value chain from producer to processor/ consumer. The objective is greater commercial certainty, fairness and reduced risk for all participants in the grain value chain.

A key outcome is increased industry confidence supporting the facilitation of trade. This confidence in the terms of trade creates value for GTA members and industry.

Objectives

- Advise the GTA Board on changes to existing and development of new, Trade and Dispute Resolution Rules.
- Advise on the effective adoption and implementation with the GTA Trade Rules by individuals and by the relevant sectors of the industry.
- Foster communication between the Board, Management and the Commerce Committee on industry matters that relate to GTA Trade and Dispute Resolution Rules.
- Advise the Board of any developments and/or implementation of Location Differentials pan Australia; and
- Report and make recommendations to the industry on all matters of relevance addressed by the Commerce Committee.

Commerce Committee Activities

The GTA Commerce Committee held a number of reviews during the 2018/19 year including:

- 2018/19 Location Differentials
- Delivered Container Terminal (DCT) Contract #4

- Umbrella Style Road Freight Agreement
- GTA Trade Rules (Rule 13) Delivery and Conveyance
- GTA Trade Rules (Rule 18) Circle Trades
- SA Location Differentials Methodology
- Standard Operating Procedure for Reviewing Location Differentials
- Standard Operating Procedures for Reviewing GTA Contracts
- Standard Operating Procedure for Reviewing Trade Rules

The GTA Commerce Committee reviewed and published Location Differentials for 2018/19, following the regular industry submission and consultation process.

Following GTA Member consultation (via Member Update 28 of 18), the Committee amended the GTA DCT Contract No.4 to include a number of changes including:

- The inclusion of an Order of Precedence;
- An amendment to the Pre-Advice period;
- An amendment to the weight tolerance to bring it into alignment with other delivered contracts;
- Wording changes to clarify the Sampling and Analysis clause;
- An alteration to the Fumigation clause to remove inconsistencies; and
- Other minor wording changes throughout the contract document.

The Committee endorsed a review be undertaken of changes to the GTA Commodity Vendor Declaration including the potential conversion to a digital format and platform and the inclusion of specific chemicals.

During 2018/19 the Committee appointed a number of Sub-Committees to review specific issues including components of the GTA Trade Rules. The review was in response to Member submissions to consider opportunities to improve clarity of the Trade Rules

and Contracts around the Buyers Call provision, and the delivery arrangements among other aspects. This work commenced in 2017/2018 and has included extensive industry engagement and numerous Submissions received in response to Member Updates seeking comment.

In response to Member Submissions the Committee reviewed Circle Trade Settlement arrangements. The draft changes to Trade Rule 18, after extensive review, discussion and industry engagement are in the final stage of the approval process.

A joint Sub-Committee with the Transport Storage and Ports Committee formed in 2017/2018 continues to consider and assist in the drafting of an umbrella style road Transport Agreement that will assist GTA Members with Chain of Responsibility compliance.

Following a Member submission, the Commerce Committee reviewed the application of the Quality Tolerance in the GTA Number 3 Contract. The Commerce Committee at the end of the review resolved to maintain the current wording as it is appropriate to the purpose of the clause which is to manage the operational aspects of loading trucks on farm.





Commerce Committee Members			
Name	Organisation	Meetings Eligible to Attend	Meetings Attended
Michael Wood	Chair – GTA Director	5	4
Lyndon Asser	Deputy Chair – appointed 24 October 2017	5	3
Geoff Farnsworth	GTA Director	5	4
Simon Tickner	GTA Director	5	3
Darryl Borlase	ADM Trading Australia	5	3
Hannah Janson	Profarmer Australia Pty Ltd	5	1
Nathan Cattle	Clear Grain Exchange	5	2
Simon Gellert	Glencore Grain Pty Ltd	5	5
Andrew Jurgs	Carpendale	5	3
Sam Napier	Cargill Australia Pty Ltd	5	4
Richard Wood	Emerald Grain	5	3
Stephen Howells	Ridley Corporation	5	4
Joshua Lawrence	Allied Mills	5	2
Stephen Howells	Ridley Agriproducts	5	4
Anthony Chapman	Australian Grain Export – retired 24 October 2018	1	1
Luke O'Connor	GrainCorp Operations Ltd	5	5
Wade Dabinett	Grain Producers Australia – retired October 2018	1	0
Scott Haughton	Peter Cremer Australia – retired 24 October 2018	1	1
Fiona McCredie	GrainGrowers Ltd	5	0
Shane Gale	Grain Producers Australia – appointed October 2018	4	3

PLANT BREEDING INNOVATION COMMITTEE

POSITIONING STATEMENT

The Plant Breeding Innovation Committee makes recommendations to the GTA Board and industry on potential effect to commercial activity from the:

- planned intentional release of approved GM grain events; or the
- unplanned and unintentional release (escape) of unapproved grain events
- Implications arising from plant breeding innovations

Objectives

- Ensure appropriate commercial processes exist to enable fair and efficient trade of grain which contains approved GM crops
- Consult with and advise where required, technology proponents and other related parties in relation to GM “pipeline” events intended for release in Australia

- Work proactively with technology proponents and key industry stakeholders to prepare for any regulatory or Freedom to Operate approval for commercial release and cultivation of a GM crop
- Maintain, review and utilise as required the Market Choice Framework for GM Crops
- Utilise the Market Choice Framework, as appropriate, to ensure a seamless integration into the Australian grain market of approved crops which will ensure market access and market choice
- Develop and maintain agreed cross sector ‘unintended presence’ response processes for use should there be a detection of an unapproved GM crop’
- Coordinate activities at an industry/ government level on supply chain issues relating to GM crops containing approved and unapproved GM events
- Monitor developments in relation to plant breeding innovation and develop industry responses/policies as required

Committee members

The Plant Breeding Innovation Committee's membership comprises of invited members from the relevant industry representative bodies and industry specialists.

Plant Breeding Innovation Committee Activities

The Committee had an active year on both domestic and global markets.

1. The Committee developed GTA submissions and/or provided support to a number of reviews and discussions regarding GM and plant breeding innovation regulation across Australia. These included:

- i. Office of Gene Technology Regulator (OGTR) Regulations review

The OGTR Technical Review of the Gene Technology Regulations (2001) aims to provide clarity about whether organisms developed using new technologies are subject to regulation as GMOs and to ensure they are regulated in a manner commensurate with the risks they pose. GTA provided submissions to initial consultations and continues to actively engage with Government to support the implementation of the proposed changes to the regulations.

- ii. Gene Technology Scheme Review

The Third Review of the National Gene Technology Scheme concluded in November 2018 with the Final Report released and endorsed by Commonwealth, state and territory governments. GTA provided submissions to all stages of the consultation.

- iii. Australia New Zealand Food Standards Code (FSANZ)

GTA provided a submission the review of the Australia New Zealand Food Standards Code undertaken by FSANZ. This review considered the application of the Code to the food products of new breeding techniques.

- iv. SA GM Regulation Reviews

in 2018 GTA made submissions to two inquiries by the SA Government, namely the *Select Committee on Moratorium on the Cultivation of*

Plant Breeding Innovation Committee Members

Name	Organisation	Meetings Eligible to Attend	Meetings Attended
Rob Imray	Chairman	2	2
Jason Craig	Deputy Chair	2	1
David Hudson	SGA Solutions Pty Ltd	2	1
Nick Goddard	AOF/Pulse Australia	2	1
Tony Russell	GIMAF	2	2
Tanya Pittard	Grain Producers Australia	2	1
Tresslyn Walmsley	Wheat Breeders Reference Group	2	1
Bill Fuller	Australian Seed Federation	1	1
Osman Mewett	Australian Seed Federation	1	1
Michael Southan	GrainGrowers Limited	1	1
Lucy Darragh	GrainGrowers Limited	1	1
Tristan Coram	Australian Grain Technologies	2	2

GM Crops in SA and the Review of the SA GM Food Crop Moratorium.

The Inquiries found in other mainland states that segregation and identity preservation protocols and codes of practice can and do ensure the successful coexistence of GM and non-GM crops in Australia.

- v. WA government inquiry into compensation mechanisms for farmers who suffer economic loss caused by the contamination of genetically modified material

GTA provided a submission to this inquiry. The committee has reported and found the compensation status quo is adequate for non-GM farmers and that there is no need to introduce a specific GM compensation scheme to deal with any case of GM crop contamination in WA.

- vi. Tasmanian GM Moratorium Under Review

The Tasmanian Government is undertaking a review on its moratorium on the commercial release of GMOs into the environment. GTA has provided a submission to this review.

2. Updating of the Market Choice and industry Response Plan documents:

The *Market Choice Framework* and *Industry Response Plan*, core activities for the Committee were both updated in late 2018. The *Market Choice Framework* is an important guidance document, and provides confidence to Government, industry and the broader community. The document has been endorsed by industry groups and is available on the GTA website (www.graintrade.org.au). The Industry Response Plan is available as a resource document for the industry.

3. The Committee also had active engagement on the international stage, as part of International Grain Trade Coalition (IGTC) activities. Key activities were:

- Low Level Presence (LLP) policy including development of an industry LLP model that was presented at the Global Initiative (GLI) on LLP meeting in Brazil in September 2018. GTA was active in encouraging the Australian Government to participate in the GLI. The IGTC has also updated its LLP policy and advocacy strategy.

- Plant Breeding Innovation remains a key activity. GTA participated in IGTC, led a workshop in Brussels in March 2019 and held a series of meetings with EU Government officials, embassy representatives and industry. IGTC has developed a guidance document on information sharing on plant breeding innovation for the grain trade to provide support when engaging the seed community.
- International declaration on agricultural applications of precision biotechnology – was launched by Argentina at the WTO SPS Committee in November 2018. This declaration supports trade facilitation, transparency and alignment of government regulations. Australia has signed this declaration.
- Cartagena Protocol on Biosafety – this is a founding issue for IGTC and is a key focus. IGTC participates in global forums and meetings of signatories to the Cartagena Protocol.



TRANSPORT, STORAGE & PORTS COMMITTEE

POSITIONING STATEMENT

Efficient transactions and movement of grain to meet the demand of domestic and overseas markets is important in ensuring a competitive Australian grain industry. This process includes up-country receival and storage, rail and road transport, and efficient and equitable bulk and container port facilities.

Objectives

- Foster communication between the GTA Board, Management and the Transport Storage & Ports (TS&P) Committee on industry matters that relate to logistical and supply chain issues.
- Advise the GTA Board of any recommendations made by the Committee in relation to changing legislation such as Heavy Vehicle National Law and Chain of Responsibility.
- Advise the Board and report to industry on all other matters of relevance addressed by the TS&P Committee.
- Report and make recommendations to the industry on potential changes to process and systems that may reduce impediments and provide a more secure and safe supply chain.

Transport, Storage & Ports Committee Activities

The GTA TS&P Committee had several reviews during the 2018/19 year including:

- A focus on biosecurity to ensure reduction in supply chain risk.
- Compliance with Heavy Vehicle National Law and Chain of Responsibility.

- Umbrella Style Road Freight Agreement.
- Improvements to the container supply chain processes and transactions.
- Technical Guidelines Document to provide the process to assess containers for export certification and reference material.
- Introduction of the inaugural Grain Logistics Conference.
- Development of GTA Safety Guidelines.

During 2018/19 the TS&P Committee continued to provide industry, GTA Members, other Technical Committees and GTA Board technical guidance on issues of relevance from a grain supply chain perspective.

In response to Member demand, GTA held the inaugural Australian Grain Industry Logistics Conference in April 2019. Held in Melbourne and attended by more than 120 delegates the conference covered all relevant supply chain areas including government policy and strategy through to farmer led innovative supply chains. This conference, the result of a TS&P

Sub-Committee, will become a regular feature of the GTA suite of conferences with plans to hold it every two years. Outcomes of the Australian Grains Industry Logistics Conference were released to conference attendees and Members via GTA's newsletter – *Grain Matters*.

Safety within the grain supply chain continues to play a major role and is a focus for the Transport, Storage & Ports Committee. The Committee, progressed with the development of grain supply chain Safety Guidelines. These Safety Guidelines will support company safety policy and procedures and assist with industry awareness.

Transport safety has also been a focus of the Committee during this period in developing awareness and industry tools to manage the introduction of changes to the Heavy Vehicle National Law (HVNL) and subsequent impact on Chain of Responsibility (CoR) compliance.

As a result of the review of the changed HVNL and based on feedback from GTA Members at GTA's CoR Compliance

Transport, Storage & Ports Committee Members

Name	Organisation	Meetings Eligible to Attend	Meetings Attended
Geoff Farnsworth	Chair – GTA Director	3	3
Jason Craig	Deputy Chair – GTA Director	3	1
Tim Ross	Grain Trade Australia	3	3
David Syme	Grain Brokers Australia Pty Ltd	3	2
Fiona McCredie	GrainGrowers Ltd	3	1
David Syme	Louis Dreyfus Company	3	3
Andrew Weidemann	Grain Producers Australia	3	3
Justin Bayles	CBH Group	3	0
Mark O'Brien	George Weston Foods	3	1
Shaun Williams	GrainCorp	3	2
Craig Dennis	Network Grains	3	3
Dene Ladmore	Quattro Ports	3	1
William Thompson	Emerald Grain	3	3
Ashley Burt	CHS Broadbent – appointed October 2018	2	2
Edward Bayles	Cargill Australia – appointed October 2018	2	1
Peter Rees	Plum Grove – appointed October 2018	2	2
Richard Glasson	Arrow Commodities – resigned 24 October 2018	1	1
Zsolt Szilassy	Viterra Operations – resigned November 2018	1	1



Seminars the Committee supported the introduction of specific practical training in maintaining compliance. Similarly, the Committee in conjunction with the Commerce Committee appointed a joint Sub-Committee to consider and draft an umbrella style road Transport Agreement that will assist GTA Members with Chain of Responsibility compliance.

Process and documentation issues combined with food grade container supply shortages inherent to the grain container supply chain has been an ongoing focus of the TS&P Committee. This is a complex area with multiple participants. Issues and potential remedies have been examined and jointly discussed with the Department of Agriculture,

Shipping Lines, Container Terminals, Exporters and Container Packers. Activity has included the review of the process of assessing empty containers as suitable for export certification. This has resulted in an agreement to update an existing industry document provided by Shipping Australia (SA). This document will be refreshed and will become a joint SA, GTA and Department of Agriculture document. It will form a new GTA Technical Guideline Document – *Standard for Empty Shipping Container Inspection*, as part of the Australian Grains Industry Code of Practice.

Biosecurity within the supply chain continues to be a focus of the TS&P Committee. Areas of focus of the Committee has included cross-

contamination of grain and treated fertiliser and concerns with chemical residues including Haloxypop. An initiative generated through the TS&P is to seek to implement a pilot commercial truck wash facility to assist industry to minimise risk of cross-contamination.

Government transport strategy is critical in the development of the shape and efficiency of the supply chain. The Committee continues to be the forum for industry to connect with government and provides a platform for GTA Members to contribute to the formation of government strategies for improvement to the country's infrastructure, planning and supply chain coordination.

TRADE & MARKET ACCESS COMMITTEE

POSITIONING STATEMENT

GTA will proactively manage trade and market access issues and advocacy for members and industry stakeholders.

GTA will support and where applicable shape federal and state government efforts to ensure trade is not impacted by technical barriers in bi-lateral and multi-lateral forums or via state based legislative actions.

impacted by technical barriers that may arise in global forums such as the WTO, IPPC, FAO, CODEX, in trade agreements, through country actions, and/or via state based legislative actions.

Trade & Market Access Committee (TMAC) Activities

The TMAC provides input across a broad range of trade and market access issues and supports a very active program of work undertaken by GTA in this area. Further information about GTA Trade and Market Access activities is provided in a separate section of this Annual Report.

Key activities for the Committee across the year included:

- China – including submissions to and advocacy relating to the Anti-Dumping (AD) and countervailing duties (CVD) investigation by China against Australian barley exports, ongoing monitoring of the Wheat and Barley Protocol Industry Management Plan, development of proposals for new approaches to sampling and testing, and support for the AGIC China event and Roundtable meetings.
- India – including advocacy on India's market access restrictions and support to the Government regarding a submission on use of phosphine

as an alternative fumigant for the Indian market.

- Maximum Residue Limits (MRL)s – the Committee initiated a Chemical Information and Advisory Day held in June 2019. The Committee continues to engage with NWPGP, DA, NRS, IGTC and other groups advocating MRLs as an issue of high priority for industry.
- Non-tariff Measures (NTMs) – the Committee provided support, advice and endorsement for the Grains NTM project and was engaged in the DA NTM Industry Working Group.
- The TMAC has supported the Graingrowers Ltd (GGL) led project to investigate a Grain Sustainability Framework.
- IA-CEPA – the Committee has participated in review of implementation issues associated with the IA-CEPA and providing advice to the Government, including industry liaison for potential export permit applications.
- Input into range of SPS issues across a number of markets.

In addition, the TMAC maintained input across core activities including:

- Department of Agriculture – Grain and Plant Products Export Industry Consultative Committee (GPPEICC) and NTM Industry Working Group.
- Global policy developments via membership of the International Grain Trade Coalition (IGTC).
- Participation in free trade agreement discussions and submissions to Government agencies in conjunction with other grain industry sectors.
- Participation in outwards and inwards grain missions.
- Submissions on behalf of members to Government agencies and global institutions.

Objectives

- Proactively manage trade and market access issues impacting the sector.
- Advance independent, fact-based dialogue and advocacy for members and industry stakeholders. Engage with Members to prioritise trade and market access issues and promote the positioning of grain industry issues with the Australian Government and in international forums.
- GTA will support and where applicable shape federal and state government efforts to ensure that trade is not

Trade & Market Access Committee Members

Name	Organisation	Meetings Eligible to Attend	Meetings Attended
Jason Craig	Chairman	6	6
Lyndon Asser	GTA – Deputy Chairman	5	5
Rob Dickie	CBH Group	6	4
Nick Goddard	AOF/Pulse Australia	6	3
Luke Mathews	GrainGrowers Ltd	6	4
Barry Large	Grain Producers Australia	6	1
Adrian Reginato	Cargill Australia Ltd	6	4
Richard Simonaitis	AEGIC	6	6
Tony Russell	Grain Industry Market Access Forum	6	5
Jason Shanley	GrainCorp Operations Ltd	6	1
Larissa Taylor	GIWA	6	6
Ravinesh Prakash	ADM Trading Australia	6	2
Lachlan Allen	Elders	6	3
Andrew Hannon	Viterra	2	1

INFORMATION TECHNOLOGY ADVISORY COMMITTEE

POSITIONING STATEMENT

The grain industry has a high reliance on data and transactional processes.

The Committee's role is to provide a collaborative and consultative platform for a cross section of industry to review and discuss data and processes where there is no commercial advantage and such collaboration may add value and improve facilitation of trade.

Objectives

- Advise the GTA Board of recommendations made by the Committee detailing opportunities to collaboratively investigate system, process and research initiatives that may resolve common grain industry process and transactional issues.
- Foster communication amongst GTA Members and seek opportunities to share information, ideas and learnings across companies in the development of industry reference material, including common transactional processes.
- Report and make recommendations to industry on potential changes to process and systems that may reduce impediments and support improved facilitation of Trade.
- Identification of risks, gaps and opportunities for the grain industry from a data and information technology perspective.
- Provide a consultative and advisory function to GTA's Board, Technical Committees and, on behalf of industry to stakeholders including Government Departments, Agencies and other relevant stakeholders to improve

data exchange across industry and Governments (local and global) to improve efficient facilitation of trade.

Information Technology Advisory Committee Activities

ITAC had several areas of focus during the 2018/19 year including:

- Introduction of Standardised Reference Data including the Grain Varietal Code Master List.
- Reviewing the possible implementation of electronic Commodity Vendor Declarations.
- Provision of a forum to engage with government and international bodies to discuss and progress the introduction of new systems and processes.

The ITAC reviewed and published a Standardised Reference Table – Grain Varietal Code Master List. The purpose of this document is to combine all grain varieties into a common list and apply a consistent code structure to all grains. This document was prepared through an Industry Working Group including Wheat Quality Australia, Barley Australia, Pulse Australia and GTA members.

Further work on standardising reference data is being undertaken with a review of other aspects of the grain supply chain where codes are utilised including port related reference data.

Following GTA Member requests work has progressed on a project to determine the scope, value and operating structure associated with the introduction of a digital version of the GTA Commodity Vendor Declaration (CVD). ITAC members believe a digital CVD will support improvements in many supply chain areas including the data processing and the traceability of grain and associated transactions.

The Committee is focussed on providing an industry forum for governments and international trading organisations to coordinate, engage with and address how industry uptakes new opportunities in technology. The focus this year has included working with the Australian government as it upgrades and introduces modifications to the Department of Agriculture's Plant and Export Management Systems (PEMS) and export trade systems NeXDOCs.

ITAC has provided a forum to improve GTA Members awareness of trade engagement via IGTC of the global Government to Government e-Phyto project. This project facilitates the harmonized exchange of electronic phytosanitary certificates (ePhytos) between countries.

Information Technology Advisory Committee Members

Name	Organisation	Meetings Eligible to Attend	Meetings Attended
Ole Houe	Chair – GTA Director	3	2
Malcolm Finlayson	Deputy Chair – GTA Director	2	2
Rebecca Reardon	Deputy Chair – GTA Director – retired October 2018	1	1
Ashley Cooper	Grain Growers Ltd – retired October 2018	1	1
Ian Dalgleish	Rise Agri – appointed October 2018	2	1
Lucy Darragh	Grain Growers Ltd – Appointed October 2018	2	2
Dominic Dillon	Cargill Australia	3	3
Joshua Whiting	Emerald Grain Pty Ltd	3	2
David Houghton	Market Check	3	3
Mark Sloan	Plansafe Logistics – resigned March 2019	2	1
Scott McClure	GrainCorp – resigned December 2019	2	0
Tristan Coram	Australian Grain Technologies	3	1
Nathan Cattle	Clear Grain Exchange	3	2
Dennis Strydom	CBH Grain	2	1
Peter Neimanis	Department of Agriculture – resigned October 2018	1	1



GTA SECTOR COUNCILS

POSITIONING STATEMENT

GTA and industry participants recognise the ongoing importance of industry groups, associations and organisations coming together to strive for broader industry benefit. A foundation for success for all is a strong and robust industry. GTA will continually review the products and services that allow “trade facilitation” to ensure they reflect the commercial grain trading environment. This includes providing governance and support to existing industry associations through the Sector Council model.

The Charter of GTA Sector Councils is composed of:

- An outline of the role of Sector Councils; its Membership and procedural issues such as meeting and member conduct.
- Terms of Reference for Sector Councils;
- Terms of Reference for Sub-Committees; and a
- Confidentiality Agreement.

Further information: The Charter of the GTA Technical Committees is available on the GTA website.

Key points of the GTA Sector Councils

- 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 Sector Councils, approved by the GTA Board are to consider those issues relevant to its area of expertise/ interest. During establishment as a GTA Sector Council its scope and direction will be agreed and included into its Terms of Reference.
- GTA Sector Councils are skills based and consist of a Council and an Executive Committee.
- On an annual basis the members of each Sector Council will select via a member vote the Chair and members of the Council’s Executive Committee.
- The Sector Council Executive Committee may invite any member of the industry to join the Executive Committee in an advisory capacity and determine their ongoing involvement in the committee.
- GTA Sector Council Members agree to participate for the benefit of all Members and they do not represent the interests of an industry sector or a private or public organisation.
- All Sector Council Members agree to be bound by the GTA Anti-competitive Clause as tabled on the agenda at all meetings.

AUSTRALIAN GRAIN EXPORTERS COUNCIL (AGEC)

POSITIONING STATEMENT

The GTA Sector Council Australian Grain Exporters Council (AGEC) purpose is to make recommendations to the Board on issues that are of importance and directly impact on exporters of grain from Australia including issues within the supply chain, trade policy matters, sanitary and phytosanitary measures and issues of government policy or practice that may impact the sector.

AGEC will focus on matters with operational risk and commercial impact.

Objectives

- Act as an advocate and provide leadership for the Australian grain export sector.
- Monitor local and international grain environments and policies and develop appropriate responses for the Australian grain industry where required.
- Where required assist GTA to liaise and collaborate with industry supply chain organisations and/or government in developing appropriate responses to developments in local and international grain environments and policies.
- Promote and encourage, within a framework of free enterprise, facilitation of trade within Australia and internationally the production, distribution, processing and marketing of grain both domestically and overseas.
- Assist and promote just and equitable trading relationships and discourage and oppose all types of restrictive trade practices.

AGEC Sector Council Members

Name / Organisation	Meetings Eligible to Attend	Meetings Attended
Executive Committee		
Lyndon Asser – Chairman	4	4
Darryl Borlase	4	3
Mark Lewis	4	2
Yebin Li	4	2
Malcolm McMahon	4	3
Erik Wibholm	4	2
Members		
ADM	4	4
Bunge	4	2
Cargill	4	4
CBH	4	1
CHS Broadbent	4	2
COFCO International	4	3
Emerald	4	4
Glencore	4	4
Louis Dreyfus	4	4
Riordan Grains	4	4
Riverina	4	2
Wilmar Gavilon	4	2

- With a view to protecting the rights of or assisting generally exporters of grain, monitor and investigate existing and proposed legislation, rules or ordinances in Australia and internationally that may affect the Australian grain industry and make recommendations to address concerns.
- Engage with stakeholders to encourage increased efficiency and productivity in the Australian grain industry while also encouraging increased respect, understanding and cooperation with all parties in the grain supply chain.
- Communicate the views and policies of the Council through the executive committee developing submissions, presentations, participating in discussions and making comments as appropriate to industry associations, forums, government and media.

AGEC Activities

Key activities of the GTA Sector Council AGEC included input into a broad range of export related issues during the year including:

- Four meetings in Melbourne of the full AGEC membership with speakers including GIMAF, AEGIC, GGL, DFAT, DA.
- Involvement in industry submissions and advocacy relating to the anti-dumping (AD) and countervailing duties (CVD) investigation by China against Australian barley exports to China.
- Participation in the GIMAF board and on the GIMAF Forum.
- Participation in the DA Grains Industry Consultative Committee (GPPEICC).
- Issues discussed and considered include a broad range of current industry issues.

AGEC



INDUSTRY SUBMISSIONS DEVELOPED BY GTA 2018/19

Submitted to	Date	Topic
Department of Agriculture	July 2018	Final Submission to Wheat Port Code Review
SA Committee on GM Moratorium	October 2018	SA GM Moratorium
Independent Review SA GM Moratorium	October 2018	SA GM Moratorium
Minister for Regional Services, Sport, Local Government and Decentralisation	November 2018	Plant Breeding Innovation
State Agriculture Ministers	November 2018	Plant Breeding Innovation
Department of Agriculture	January 2019	Principles of National Traceability Framework
Department of Agriculture	January 2019	National Traceability Framework
Ministry of Commerce of the People's Republic of China	February 2019	Industry Submission on Anti-Dumping Claim
Ministry of Commerce of the People's Republic of China	March 2019	Industry Questionnaire on CVD Claims
Department of Agriculture	May 2019	Bio-fouling Requirements for International Vessels
Department of Agriculture	June 2019	Proposed Changes to International Treaty on Plant Genetic Resources for Food & Agriculture
NZ Department of Primary Industries	June 2019	Grain Sampling for Import – Feed or Processing
Department of Agriculture	June 2019	Proposed Changes to the International Treaty on Plant Genetic Resources for Food and Agriculture
Tasmanian GM Moratorium Under Review	April 2019	Tasmanian GMO Moratorium Review

DISPUTE RESOLUTION SERVICE

POSITIONING STATEMENT

GTA has dispute resolution processes in place for all grain-related transactions, be they grain contracts, financial products or storage agreements.

GTA's **Dispute Resolution Service** and arbitrations instill commercial confidence that underpins and provides sanctity of grain contracts in the Australian grain industry. When contract performance is in dispute or delinquent there is a recognised process to seek financial compensation, ensuring contract integrity.

	2018/ 2019	2017/ 2018
No of arbitrations commenced	14	61
No. of arbitrations settled		
• Awards released	8	1
• Commercially settled prior to hearing	4	8
Active arbitrations as at 30 June 2019	62	60

- GTA works to resolve disputes by peer review, through its Dispute Resolution Process. The process is designed to save time and expense while providing an efficient, fair and equitable means to settle disputes related to commercial transactions.
- All domestic arbitrations are subject to the provisions of the Commercial Arbitration Act NSW (2010) whilst arbitrations that involve international parties and the GTA FOB contract are conducted under the International Arbitration Act 1974 (Cth).
- Parties utilising the Dispute Resolution Service (DRS) must cover all the inherent costs associated with conducting arbitration without cross subsidisation from other GTA revenue streams.
- Aligned to this principle must be the commercial reality that the GTA DRS must be competitive to other forms of dispute resolution, particularly court proceedings.
- GTA dispute resolution services are recognised by industry as the most efficient process to resolve commercial disputes. GTA awards are legally robust and when aligned to GTA contracts and agreements, ensure contracting integrity.
- GTA Arbitrators are industry practitioners acting impartially in a voluntary capacity.

Summary of arbitration award outcomes

Arb. No.	Type of arbitration	Claimant	Respondent	Award in favour of
216	Full	Grain producer	Grain producer	Claimant
225	Full	Grain trader	Grain trader	Claimant
227	Full	Grain trader	Grain trader	Claimant
283	Full	Grain trader	Grain trader	Claimant
284	Fast track	Grain trader	Grain trader	Claimant
285	Fast track	Grain trader	Grain trader	Claimant
286	Fast track	Grain trader	Grain trader	Respondent
293	Fast track	Grain producer	Grain trader	Claimant

Arbitration summaries

GTA publishes the summaries (identities redacted) of Awards where it is deemed the Award will improve the contracting practices within the grains industry.



OF THE ESTIMATED NUMBER OF GRAIN CONTRACTS EXECUTED IN AUSTRALIA ON AN ANNUAL BASIS 0.005% UTILISE THE GTA DISPUTE RESOLUTION SERVICE.

Disputes requiring a legal remedy are minimised due to the contractual integrity of GTA contracts, trade and arbitration rules. GTA Dispute Resolution Service is aligned and complies with the NSW Commercial Arbitration Act (2010).

GTA BOARD APPROVED ARBITRATORS AS AT 30 JUNE 2019

Surname	First name	Organisation
Allen	Guy	Advance Trading Australasia
Basnett	Tom	AgRisk Management Pty Ltd
Barron	Graham	Grain Producer – NSW
Bonfante	Angela	GrainPro Pty Ltd
Benham	Jock	GrainCorp Operations Limited
Bennett	Steve	Bunge Agribusiness Australia Pty Ltd
Brealey	Rob	Industry Consultant
Burt	Steve	Industry Consultant
Carroll	Greg	M C Croker Pty Ltd
Cattle	Nathan	Clear Grain Exchange
Clancy	Simon	Industry Consultant
Clark	Richard	Grain Producer – NSW
Coventry	Charles	Broun & Co Grain P/L
Dalglish	Ian	Rise Agribusiness
Danieli	Robert	Ky Stockfeeds
Delahunty	Leo	Grain Producer – VIC
Dickie	Rob	CBH Grain
Dillon	Graeme	Inghams Enterprises Pty Ltd
Dubey	Sanjiv	Grain Trend Pty Ltd
Fahy	Jack	Max Grains Pty Ltd
Fry	Julian	Glencore Agriculture Pty Ltd
Goyder	Andrew	Grain Link WA Pty Ltd
Hall	Anthony	Agfarm Pty Ltd
Heinjus	Chris	Rural Directions Pty Ltd
Houe	Ole	IKON Commodities
Howard	Peter	GrainTrend Pty Ltd
Howells	Stephen	Ridley Agriproducts
Jones	Michael	Grain Focus
Kelly	Matthew	KM&WM Kelly & Sons
Kerr	Michelle	Riordan Grain Services
Langtry	Gerard	Langtry Logistics
Lengren	David	Industry Consultant
Leong	Ervin	Unigrain Pty Ltd
Lewis	Mark	Riordan Grain Services
Lumsden	Callum	Grain Producer – WA
Massina	James	Cargill Australia
McKay	Robert	Industry consultant
McMahon	Malcolm	Emerald Grain
McMullen	Gerard	McMullen Consulting Pty Ltd
McNair	Simon	Industry consultant
Mead	Andrew	ADM Trading Australia
Notaras	Harry	GrainCorp Operations Ltd

Surname	First name	Organisation
O'Brien	Mark	George Weston Foods Limited
Orr	John	Premium Grain Handlers
Peace	Colin	Industry consultant
Perkins	Craig	Perkins Commodity Brokers
Pratt	Cameron	GrainCorp Operations Ltd
Reardon	Rebecca	Grain Producer – NSW
Schofield	Justen	AgLink CMS
Storey	Ron	Industry Consultant
Syme	David	Grain Brokers Australia
Tainsh	Sam	GrainCorp Operations Ltd
Taylor	Brad	Australian Country Choice
Teague	Tim	Teague Australia Pty Ltd
Tonkin	Chris	Ten Tigers
Torrens	Mark	Mars Petcare
Tuohey	Peter	Grain Producer – VIC
Vater	Kim	A W Vater & Co
Warden	Neil	Grain Producer – NSW
Wells	Henry	Industry Consultant
Whitwell	Chris	Basis Commodities Pty Ltd
Wilsdon	Andrew	Glencore Agriculture Pty Ltd
Wilson	Pat	GrainCorp Operations Ltd
Wood	Michael	Rural Logic
Woodhouse	Andrew	Advance Trading Australasia
Woods	Gerard	Industry Consultant

GTA BOARD APPROVED TRIBUNAL CHAIRS (EXPORT CONTRACTS)

AS AT 30 JUNE 2019

These appointments are made by GTA.

Surname	First name	Organisation
Brasington	Hazel	Ashurst
Farnsworth	Geoff	Holding Redlich
Lockwood	Christopher	HFW
Rosenthal	Jeremy	SBA Law
Thompson	Stephen	HFW

GTA TRAINING & DEVELOPMENT PROGRAM

POSITIONING STATEMENT

Training and Development programs are part of the stewardship provided to Industry by GTA and an important part of the industry's self-regulatory framework.

GTA training programs develop and enhance the capacity of the industry's human resources, ensuring that trade facilitation processes are well understood at all links in the grain value chain.

GTA Diploma of Grain Management

The past year has seen more graduates from the Diploma of Grain Management. The Diploma has had a strong completion rate in the last twelve months due to a strong enrolment rate in the preceding two years.

GTA continues to deliver the fully accredited Diploma of Grain Management. The Diploma of Grain Management is a fee for service qualification and is modelled on self-paced learning. The Australian Skills Quality Authority (ASQA) regulates qualifications and training providers, to ensure nationally approved quality standards are met. The ongoing review and development of resources by industry experts, for the implementation and delivery of the Diploma, has been recognised for its direct context and relevance to the grains industry.

Workshops/Courses conducted in 2018/19

Course/workshop	Location	Registrations
GTA Trade Rules and Contracts	NSW, VIC, SA, WA	34
GTA Grain Standards	NSW, VIC, SA, WA, QLD	28
Grain Merchandising	VIC	5
Understanding Grain Markets	NSW, VIC, SA	28
Grain Accounting	VIC	8
GTA Arbitrators Workshop	VIC, QLD, WA, NSW	73
In-House training	NSW, VIC	28
Advisory & Compliance Workshop	VIC	21
Total		225

The Diploma was included on the NSW Industry Skills list in 2018, which will further the recognition of this qualification. To achieve the Diploma, 10 units must be completed – 3 core and 7 electives. A list of the units delivered in the Diploma of Grain Management is available on the GTA website.

- The Diploma is now recognised, established and supported within the industry sector, with students having graduated with the full Diploma and a number having completed skill sets. The opportunity of completing individual units from the Diploma to form skill sets, relevant to the varying work place skills and knowledge requirements, has proven to be popular across all sectors of the industry. An accredited Statement of Attainment is awarded on completion of a skill set.
- Industry personnel completing the Training & Development workshops have the option to complete the formal assessment for the relevant unit in the Diploma on the online Student Learning Platform. This platform provides direct contact with the trainer/assessor and streamlines the assessment process for students.
- Recognition of Prior Learning (RPL) is offered to industry to enable students to evidence they have met the requirements of the Diploma through relevant industry experience. The RPL process has proven to be a positive pathway for many students and can be used for all or part of a unit.
- GTA delivers in-house training which is contextualised for organisations that have a number of staff requiring upskilling in specific areas. This has proven to be a positive pathway in meeting individual organisations staff training and professional development goals.

THE DIPLOMA OF GRAIN MANAGEMENT IS THE ONLY POST-PRODUCTION, GRAIN-SPECIFIC ACCREDITED COURSE IN AUSTRALIA.





GTA Director and Trainer, Geoff Farnsworth leading an “Arbitrator Training” course.

- GTA Training & Development delivered the Advisory and Compliance workshop in July 2018. The topics included a focus on compliance and advisory issues during periods of drought, Chain of Responsibility legislation, update and changes to insolvency laws, insurance industry issues and dispute resolution. These were delivered by highly respected presenters with specialist expertise in their fields.
- Further development and implementation of resources for the Diploma and other training needs are ongoing.
- GTA has developed training and assessment program to assist its members and industry participants to in upskilling their staff and meeting the needs of the Australian Grain Industry Code of Practice.

The Code Assessment Program is an on-line training tool comprising assessment modules in specific grain value chain pathways. The Code Assessment Program can be accessed through the GTA Website.

- All GTA Training and Development programs are available to all interested parties as well as GTA Members.

THE GTA TRAINING & DEVELOPMENT PROGRAM ENSURES THAT TRADE FACILITATION PROCESSES ARE WELL UNDERSTOOD AT ALL LINKS IN THE GRAIN VALUE CHAIN.

Registered Training Organisations (RTOs)

GTA partners with Wodonga TAFE who are responsible for ensuring GTA applies the appropriate level of academic rigor in the development and conduct of the Diploma units.

Wodonga TAFE Partnership with GTA

Founded in 1986, Wodonga TAFE is a highly regarded training institution that captures both regional VIC and NSW. Training is delivered in every mainland state and territory in Australia. Wodonga TAFE was judged Australian Large Training Provider of the Year in 2018.

TRADE & MARKET ACCESS

GTA continues to invest in providing proactive management of trade and market access for its members and the broader grains industry. GTA's activity is focussed in the key areas of:

- Ensuring the policy settings are supportive of the grains industry and for the facilitation of grain trade.
- Actively promoting the grains industry's priorities and positions in domestic and global forums.
- Providing technical support to the industry to address trade issues as they arise and assist to implement appropriate policies to maintain and enhance future trade.
- Ensuring the industry has transparent and open mechanisms for providing input into and receiving feedback on trade and market access priorities and activities.

GTA's trade and market access activity is about providing proactive influence on the priorities, efforts and resources of the grain value chain, and working in partnership with the Government, in particular Department of Agriculture (DA) and Department of Foreign Affairs and Trade (DFAT) who bring together the policy intelligence, technical expertise and commitment from across the Government.

Current trade and market access activities are outlined below.

FREE TRADE AGREEMENTS

The Indonesia Australia Comprehensive Economic Partnership Agreement (IA-CEPA) was signed in March 2019. The IA-CEPA provides the opportunity to build on the long standing relationship between the Australian grains industry and Indonesia with two grain specific initiatives including a new feed grains quota and a Grains Strategic Partnership. GTA is working with the Government on the implementation of IA-CEPA post ratification.

Other Free Trade Agreement discussions currently underway of relevance to the grains industry are India, EU and RCEP, and prospectively with the UK post Brexit.

NON-TARIFF MEASURES (NTM)

A large focus of GTA's trade and market access activity is on non-tariff measures (NTM), which are increasingly replacing tariffs as barriers to trade. For the grains industry, this is particularly focussed on sanitary and phytosanitary (SPS) measures including MRLs.

The grains industry undertook a major study in 2017 to identify and classify NTMs. The first report was published in early 2018 and was updated in May 2019. The 2019 outcomes are shown below and highlight the importance of NTMs across SPS and MRL issues.

The grain industry has established a market access database to identify, track and respond to NTMs. This database is held by GTA and jointly managed by an Industry Working Group (IWG) comprising GTA, GIMAF, GGL and NWPGP.

The Government plays a key role in technical market access, negotiating with trading partners on arrangements to open, maintain and improve access for commodities. GTA works closely with the Government to address NTMs and other quarantine or certification issues as they arise.

GTA is a member of the Department of Agriculture's NTM Working Group which is a cross commodity group that assists the Government prioritise NTMs. This group provides an opportunity for the grains industry voice to be heard in cross sector activities.

Through this working group, GTA led the grain industry's involvement in

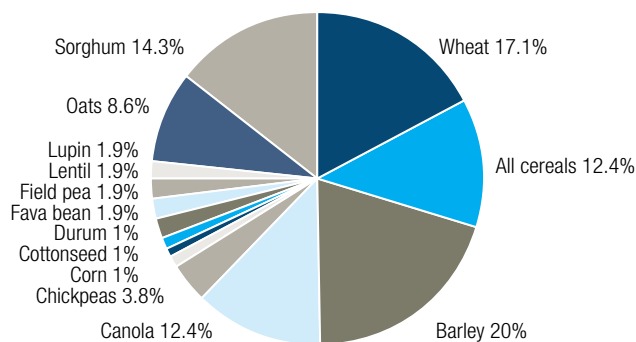
the **Australia-ASEAN NTM Business Working Group on Agriculture and Food.**

This group met in Singapore in March 2019 and identified a number of cross-cutting NTMs affecting the trade in agri-food products between Australia and ASEAN member countries, noting that these may increase in significance in light of dynamic industry trends. The group also identified potential solutions for addressing the NTMs common across sectors and GTA will continue to work with DA and the other sectors to address these NTMs. GTA presented the outcomes of this work to the International Grains Conference in London, 2019.

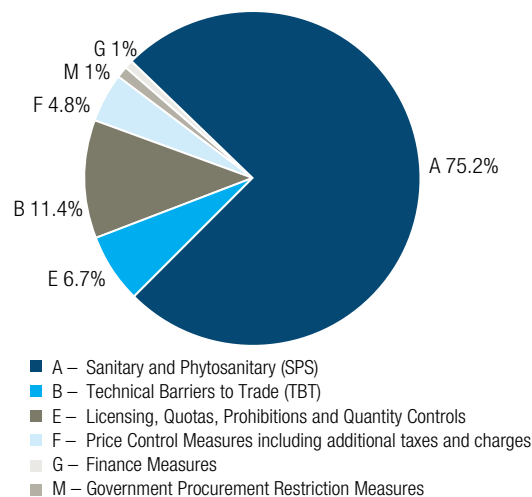
GTA has also been the grain industry lead on a project with the DA NTM group in relation establishment of the **APEC Grain Trade Facilitation Forum**. GTA undertook extensive consultation with customers and industry associations across the APEC members to help inform the development of a project plan for this Forum. The Forum will commence from 1 July 2019 with a workshop to be held in the second half of 2019 with APEC members to identify future work on NTMs affecting grain trade.

A new initiative in 2019 was the **Australian Grain Industry Chemical Compliance and Information Workshop** which aimed to provide increased awareness and updated information on chemical compliance and was widely attended. The reputation of the Australian grain value chain relies on management of the hazards and risks associated with the use of chemicals in agriculture. The global market is becoming increasingly focussed on chemical residues and their impact leading to greater scrutiny on agricultural practices and supply chains. The workshop noted the need for increased industry adherence through knowledge and awareness of chemical use and market requirements.

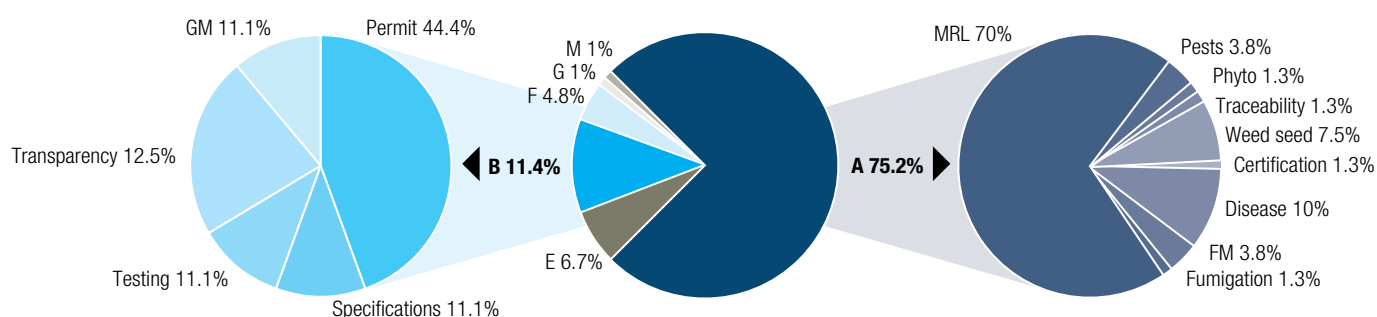
Grain NTMs by commodity



Grain NTMs by UNCTAD classification



Grain NTMs by UNCTAD and grains industry classification



IMPROVING TRADE AND MARKET ACCESS

A key role for GTA is providing technical advice to support Government discussions and negotiations when trade or market access issues arise. This has been particularly important over the past 12 months with China's investigation in relation to Anti-Dumping (AD) and counter veiling duties (CVD) on Australian barley exports. GTA convened and led an industry working group (IWG), and worked closely with DFAT, DA to ensure that the industry's case is presented and managed in accordance with WTO protocols.

GTA has continued to work closely with GIMAF to review and shape tools such as the China Industry Management Plan to build confidence with both the Australian and Chinese Government authorities that Australian grain meets all import requirements, while ensuring that the grains industry can continue to operate efficiently and cost effectively.

GTA has worked with GIMAF to provide input into Australian Government submissions to overseas markets on various technical matters relating to trade.

GTA has continued to build relationships with the agricultural counsellors in-market who undertake regular advocacy activities, and support the industry/Government market access agendas.

Important and ongoing liaison activities with the Department of Agriculture (DA) are with the:

- Grain and Plant Products Export Industry Consultative Committee (GPPEICC)

GPPEICC is the principal forum for DA to consult with grain, fodder, nuts, seed and timber industries on export inspection and certification, export market access and other relevant issues.

GPPEICC aims to provide effective consultation, communication and partnership between DA and industry

stakeholders involved in export of Prescribed Goods by ensuring stakeholders' views are given due consideration.

GTA is an active member of the GPPEICC and several sub-committees such as Finance, Sampling, Request for Permit and Mobile Bulk Loading.

Major issues addressed by the GPPEICC:

- Development of revised fees and charges for the grain export program
- Revision of inspection and documentation IT systems to facilitate exports
- Ongoing review of Request for Permit processes, including revision of the standards for inspection of empty containers
- Authorised Officer (AO) training and interaction with DA and industry
- Review of Export Legislation to make that legislation more contemporary
- Ongoing assistance with the introduction of global e-Phytos

- Review of existing sampling processes and development of guidelines outlining the desired process for obtaining representative samples of export cargoes
- ii. Agriculture Policy Group
- GTA maintains a close working relationship with the DA Agriculture Policy Division. Over the last twelve months, GTA has had proactive involvement with the policy division in relation to:
- Australian Government representation at intentional meetings such as Global Initiative on Low Level Presence, COP-MOP relating to biosafety protocol, International Plant Protection Convention (IPPC)
 - Market Access for Australian grains
 - Free trade agreements and regional Government initiatives through forums such as APEC, ASEAN, RCEP
 - Liaison on the use of the Wheat Industry Surplus Account Funds
 - Wheat Port Code Access review
 - International Grains Council meetings Industry Levies

BUILDING INTERNATIONAL TRADE RELATIONSHIPS

GTA actively builds international linkages in order to promote the value of the Australian grains industry and ensure input into global decision making bodies that set frameworks that have important implications for the grains industry.

GTA proactively initiated and facilitated roundtable industry/Government discussions in Indonesia and China as part of the Australian Grains Industry Conference (AGIC) Asia program.

The Indonesia event was held in conjunction with the signing of the IA-CEPA and the Indonesia roundtable was attended by the Minister for Trade, the Hon Simon Birmingham and the Australian Ambassador to Indonesia, Mr Gary Quinlan.

GTA is an active member and works closely with the International Grain Trade Coalition (IGTC) in relation to engaging in key international decision-making organisations including:

- UN Food and Agriculture Organisation (FAO)
- Convention on Biological Diversity (CBD)
- International Plant Protection Convention (IPPC)
- World Trade Organisation (WTO)
- World Bank
- CODEX Alimentarius

These agencies substantially influence and structure trade policy developments. Their policies/protocols have the potential to both enhance and disrupt or limit the trade of grain and hence, it is critical that the grain trade are active participants in their decision making.

A defining feature of these negotiations at an international level is that progress is slow and can take years, however the ramifications for industry can be

substantial. This means, it is critical that Australia participates in their development, as once they are ratified, they will then become the standard for Australian grain exports. This issue is well recognised by the various Australian Government agencies, notably, DA and DFAT.

GTA is a long standing and active member of the International Grain Trade Coalition (IGTC). IGTC activities aim to secure a market and regulatory environment that is more supportive of trade and avoids disruptions in the international trade of grain, oilseeds, pulses and derived products. Key activities include:

- Plant breeding innovation regulation and industry information sharing policies
- Development of Global Low Level Presence (LLP) policies relating to the export/import of GM grains
- Chemical Issues such as maximum residue limits (MRL's)
- Development of e-Phyto capability
- Cartagena Protocol on Biosafety to the Convention on Biological Diversity
- International Standards on Phytosanitary Measures

IGTC has adopted new policy teams and continues to operate existing policy teams comprised of grain trade stakeholders involved in the international grain trade. GTA is represented as follows on these various activities: Each of these are described in more detail below:

Active IGTC Teams

IGTC has formed teams to work on the various files as seen below and GTA is represented as follows:

Active IGTC Teams	Key objective	GTA
Plant Breeding Innovation (PBI)	Prepare IGTC policy to enhance science-based approach to regulation of PBI applications and develop industry policies and practices regarding transparency and information sharing	Rosemary Richards
Development of Low Level Presence (LLP) policies	Address all matters related to LLP, including Global Low-Level Initiative (GLI)	Rosemary Richards
Maximum Residue Limits (MRLs)	Input into the advocacy strategy to reduce impacts of MRL issues.	Gerard McMullen
Electronic trading documentation	Develop e-Phyto capability on a global basis via a dedicated IT hub.	Rosemary Richards
Cartagena Protocol on Biodiversity	Policy development for upcoming COP/MOP meetings	Rosemary Richards
Phytosanitary Policy	Input into development and use of phytosanitary and quarantine measures for grain traded internationally	Gerard McMullen (Team Lead)



Participants at Global Grain Trade Forum, Beijing, China, November 2018.

i. Plant breeding innovation

Regulatory approaches to Plant Breeding Innovations pose a potential problem for the grain trade, particularly in regard to asynchronicity of the approval process across jurisdictions. GTA has been an active participant in the IGTC Working Group, providing considerable leadership on this matter.

The Australian Government has recently supported new regulations for the Australian regulator – OGTR – relating to new breeding technologies. The Australian Government was also a signatory to the statement by like-minded Governments on *Agricultural Applications of Precision Biotechnology*.

The IGTC plant breeding innovation policy is built around three pillars, namely

- i) product safety
- ii) regulatory coherence and
- iii) education and sharing of information.

A priority area of activity for IGTC over the past twelve months has

been around the development of joint messages on plant breeding innovation with the International Seed Federation (ISF) and development of a guidance document for information sharing with relevant value chain partners. GTA will continue to liaise with the Australian Seed Federation and CropLife Australia to ensure that Plant Breeding Innovations are introduced in a manner that does not disrupt trade.

ii. Global Low Level Presence Policy Initiative

Low Level Presence (LLP) is the presence of trace amounts of a GM event approved in the country of export but not in the country of import. Australia is a member of the Global Initiative on Low Level Presence (GLI) which is a group of like-minded Governments that have come together to discuss issues around LLP policies. GTA, via IGTC, continues to have input into development of LLP policy frameworks and continue to advocate that Australia needs to have a strong representative presence at GLI meetings.

iii. Maximum Residue Limits (MRLs)

GTA continued liaison with the IGTC and National Working Party on Grain Protection (NWPGP) on the impacts of MRLs on food safety and the global trade of grains. Through IGTC a policy on initiatives to improve the transparency of chemical regulations has been developed. The impacts of missing and divergent MRLs at Codex and in various importing countries for various chemicals and commodities was outlined and actions to address included in the IGTC MRL Policy. Ongoing advocacy with IGTC, DA (Trade and Market Access, National Residue Survey) and industry continues.

iv. Electronic Phytosanitary documentation

In March 2015 the Commission on Phytosanitary Measures (CPM), the governing body of the International Plant Protection Convention (IPPC), agreed to develop a global system of electronic phytosanitary certificates, known as e-Phyto. This project is designed to replace paper certificates in export grain commercial activities through the use of a central hub for exchange of certificates from National



GTA CEO, Pat O'Shannassy, presenting at the International Grains Conference, London, June 2019.

Plant Protection Organisations (NPPOs) in exporting and importing countries. The IGTC has taken a leading role in this project as Chair of the ePhyto Industry Advisory Group, which is focussed on the commercial operability of the project and advocating with governments.

While Australia is a major contributor at IPPC, however access to e-phyto has been delayed at this stage and it is expected Australian exporters should be able to access e-phyto in the second half of 2020. GTA will liaise with DA to ensure the new process is sensitive to the needs of the Australian export grain sector.

The IGTC Working Group has also been reviewing opportunities for e-documentation more broadly to address current inefficient processes around documentation and identify opportunities to collaborate to improve traceability, security, efficiency and transparency.

v. Cartagena Protocol on Biosafety

The Cartagena Biosafety Protocol (CBP) is a founding issue for the IGTC and relates to the international movement of products that may contain Living Modified

Organisms (LMOs) derived from modern biotechnology. 171 Parties (governments) have signed the Protocol which covers more than 85% of the world's grain trade movements. IGTC has advocated strongly at all Meeting of the Parties (MOP's) to ensure that the Protocol would not inhibit trade.

As part of the wider UN 'Convention on Biodiversity' (CBD) the 'Parties' to the CBP meet every 2 years to amend or update core texts, as well as agree on guidance to implement specific provisions. These important meetings are often referred to as the 'Conference of the Parties' (COP) and the 'Meeting of the Parties' (MOP).

It is expected that COP15 in Beijing will be more significant for the UN Convention on Biodiversity than other recent meetings. Many issues are expected to come to a head, including the definition of "gene editing" and "synthetic biology" in the Convention, terms for which no national or regional jurisdictions have yet formulated concise and practical definitions. There will be implications for the grain trade if such terms are integrated into the CBP.

GTA remains engaged in discussion on the Protocol, through participation on the IGTC working group. GTA continues to advocate that Australia needs to have a representative presence at COP-MOP meetings.

vi. International Standards on Phytosanitary Measures

GTA has guided discussions on the International Standard for Phytosanitary Movement (ISPM) as IGTC Policy Team Lead. The ISPM has been placed on hold by the IPPC while further work is undertaken on the guidelines for international standards to be known as "commodity pathway standards". Although the grain trade is in favour of governments aligning on common, risk and science-based measures to facilitate trade, GTA/IGTC identified issues in the draft ISPM that would not have a trade facilitative outcome.

The IGTC Policy Team efforts have been redirected to broader issues around SPS issues including phytosanitary-related biosecurity issues, phytosanitary commodity standard setting, transparency of quarantine regulations, etc.

NATIONAL WORKING PARTY ON GRAIN PROTECTION



Delegates at the National Grain Storage and Protection Conference, Melbourne.

The National Working Party on Grain Protection (NWPGP) is the body responsible for providing management and leadership to industry in the areas of grain storage, chemical use, market requirements and chemical regulations.

The annual conference of the NWPGP is a forum providing participants with the latest research and developments in the area of pre and post-harvest storage and hygiene, chemical usage, international and domestic market requirements and regulations. It also discusses industry's success in meeting market access requirements for chemical residue limits over the preceding year and new and ongoing activities to improve that performance. As required, Working Groups are formed to address specific topics of interest to industry identified during the annual conference

GTA acts as the secretariat for the NWPGP and will continue to undertake this role during 2019/20, supporting the Chair and the activities of the Strategic Working Group and NWPGP Working Groups. GTA further supports the NWPGP by administering all aspects of their annual conference planning.

2019 Annual Conference

The NWPGP Annual Conference (known as the **Australian Grain Storage and Protection Conference**) took place in Melbourne on 4-5 June 2019 with over 120 in attendance. Delegates came

from the entire grain supply chain and included growers, storage and transport operators, end users, marketers/traders, researchers, chemical registrants and related service providers, and government agencies.

The conference program was diverse and included speakers covering:

- Continued focus on industry understanding and receiving updates on changing market MRL requirements
- Industry performance in meeting those market MRLs, including chemicals requiring specific actions
- Latest Insect infestation trends
- Discussion on pesticide residue violations and processes to minimise their occurrence
- Industry performance in meeting all export market requirements
- The latest on-farm and post-farm gate storage practices and research to manage grain quality and stored grain insects
- Research into alternative measures to implement the Insect Resistance Management strategy
- The effectiveness of previous research activities into storage and insect control management practices

The activities of a number of industry working groups was outlined including:

1. The phosphine label and venting working group activities to develop

a research strategy for recommending changes to the label.

2. Updates on progress of trial work and the registration status of glyphosate on barley.
3. Research activities from the haloxyfop and flutriafol working groups, in conjunction with the over-arching MRL Compliance working group, whose activities are aimed at improving industry compliance with MRL regulations when marketing grain.

The full list of outcomes from the Conference is available on the GTA website at www.graintrade.org.au/nwpgp but in summary the attendees were advised of:

- The continued close liaison between the Chair of the NWPGP and the National Residue Survey, with assistance from the APVMA, to facilitate the establishment and or maintenance of overseas MRLs as requested by industry.
- The continued trend of a high level of compliance with domestic and export market MRLs.
- Progress on a number of applications to overseas countries for adoption of Import tolerances for various chemicals and commodities of importance to the industry.
- Following the conference, the **Australian Grains Industry Post Harvest Chemical Usage Recommendations and Outturn Tolerances** document which details the chemicals that are permitted for use post-harvest and applicable Maximum Residue Limits (MRLs) for various grain commodities out-turned to Australian domestic or export markets has been updated and also placed on the GTA website for industry use.

AUSTRALIAN GRAINS INDUSTRY CONFERENCES

The Australian Grains Industry Conference (AGIC) is a key activity for GTA each year with the annual program including domestic and international conferences with the development the AGIC Asia program. While the annual AGIC Australia conference

in Melbourne continues to attract delegates from right across the trade and supply chain, the AGIC Asia events have a core focus on end users in key Asian markets and delivers a more technically based program.

AGIC Asia includes Government Roundtable meetings as part of the overall program. The Roundtables have successfully engaged with Government agencies and discuss relevant issues including quality assurance processes in the Australian grain supply chain.



Participants of AGIC Asia 2019 conference.



Chairman Indonesian Flour Mills Association, Francisus Wellirang with GTA Chairman, Andrew Goyder.



"CEOs in Conversation", Jimmy Wilson, CEO CBH, Graham Bradley, Chairman Graincorp, talk with Virginia Trioli.

AGIC AUSTRALIA – MELBOURNE, 1ST & 2ND AUGUST 2018



The 2018 Australian Grains Industry Conference was highly successful with approximately 800 delegates participating in conference activities at various stages over the two days.



The 2018 Conference program was built around the theme of “The Dragon, the Eagle, the Bear...the Kangaroo?” looking at impact of global trade policy shifts on Australia’s grain industry. Also featured was a high-level “CEOs in Conversation” session involving Virginia Trioli in conversation with Graham Bradley, Chairman of Graincorp, and Jimmy Wilson, CEO CBH Group and Graham Turley, Managing Director Institutional Banking, ANZ.

A strong list of international and local speakers included sessions on global markets, trade policy trends, domestic demand trends, and the impacts of technology and investment on the grains industry.



Lyndon Asser

The conference was opened by The Hon. Steve Ciobo, Minister for Trade, Tourism and Investment.

AGIC is the key Australian grains industry event of the year providing experts discussing topical business and industry issues and opportunities for networking across industry. In addition to the Conference itself, a number of other industry organisations schedule meetings around the event. It also continues to grow as a key venue for exhibitors to access a targeted customer base in the grains supply chain.



Joel Fitzgibbon & Andrew Goyder



Will Syers

AGIC IS CO-HOSTED BY AUSTRALIAN OILSEEDS FEDERATION, GRAIN TRADE AUSTRALIA AND PULSE AUSTRALIA. GTA IS THE CONFERENCE ORGANISER.

AGIC ASIA – INDONESIA AND CHINA, MARCH 2019

THE AUSTRALIAN GRAINS
INDUSTRY CONFERENCE
ASIA 2019



GTA held the AGIC Asia program in 2019 with events in Indonesia (Jakarta – 3rd March) and China (Shenzhen – 5th March). This year's events built on the success of previous conferences in Thailand, Vietnam, Indonesia and China. Attendance numbers for the two events were strong with over 280 people in attendance over the two venues.

Asia is an extremely important and significant market for the Australian Grain Industry. Providing information and a clear and consistent message about the Australian industry, its quality and reliability is very important for all sectors of the Industry and particularly for Australian grain growers. The theme this year was around Australia's value proposition comprising grain quality, nutritional features, surety, reliability, reputation and confidence.



The events were well attended by both flour and feed millers and reinforced the strong position that Australian grain holds in these markets. AGIC returning to China was strongly supported with solid attendance at the Shenzhen event. The China event featured a presentations on Australian crop quality, new varieties, industry capacity, and improving nutritional value for feed and food from Australian grains.

The Indonesian event coincided with the signing of the official Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) which presents some exciting and collaborative



opportunities for the Indonesian and Australian grain sectors. Several of these opportunities were identified from AGIC Asia event in Jakarta in 2017.

As part of AGIC Asia series, GTA led Australian industry delegations in Round-Table sessions involving local Government agencies and the trade, to strengthen industry relationships and support the development of mutual trading interests. In Jakarta, the AGIC Roundtable was attended by Trade Minister Simon Birmingham and the Australian Ambassador to Indonesia Gary Quinlan. In China meetings were held with high level Government and private sector groups. These were very successful and have resulted in some encouraging projects being developed.

Over several years, the Roundtable activities held by GTA are successfully leveraging the AGIC Asia events to improve Government and industry relationships in key markets. The Roundtables have increased opportunities for trade facilitation, market access and promotion resulting in improved development of trade policy and communication between respective Asian and Australian industries, at both a commercial and technical level.



The AGIC Asia conference and Roundtable events are very valuable to supporting the maintenance and growth of these important markets for the Australian grain Industry.

**PLANNING IS UNDERWAY
FOR AGIC ASIA 2020.**

**THE PROGRAM WILL
AGAIN INVOLVE HOSTING A
SERIES OF CONFERENCES
AND EVENTS IN KEY
LOCATIONS ACROSS THE
ASIA PACIFIC REGION.**

FINANCIAL PERFORMANCE & POSITION [EXTRACT]

Financial policies

1. Adequate cash reserves will be maintained to conduct the operation of the business and complete the objectives detailed in this and subsequent Strategic Directions. GTA will maintain cash reserves equivalent to 75% of the budgeted expenses in any one year.
2. Membership fees will fund “trade facilitation” products and services, i.e. the GTA management team and Technical Committees; and
3. All industry support products will be offered to members at a fee that will encourage participation but also reflects a reasonable return on funds invested by the broader membership.

Financial position

The company has incurred a deficit of \$22,272 with equity of \$1,152,644.

As a not for-profit-organisation, GTA cannot distribute profits or build excessive cash reserves.

Major contributing factors to the financial accounts:

- Drought and weather conditions throughout FY 18/19 affected GTA members financially, resulting in a number of members reducing their Membership category due to lower trading volumes.
- Training and Development income has been affected by difficult industry conditions impacting attendance numbers.
- Training and Development income has been affected by a conscious decision to provide some complimentary Arbitrator training to industry, in order to increase the number of GTA Arbitrators and to ensure current Arbitrators have access to suitable training opportunities.
- A financial contribution by GTA to an industry fund to manage an industry response to an Anti-Dumping Investigation by China on Australian barley exports to China.
- Chemical Compliance and Information Day held in June attracted unbudgeted expenses.

The following information was extracted from the financial statements of Grain Trade Australia Ltd for the year ended 30 June 2019 and is included for information purposes only.

A complete set of financial statements and independent Audit Report issued by LBW & Partners, Chartered Accountants, can be accessed on the Grain Trade Australia website.

Statement of Profit or Loss and Other Comprehensive Income For the Year Ended 30 June 2019

	2019 \$	2018 \$
Revenue	2,224,191	2,353,993
Expenses		
Direct Expenses	(676,970)	(732,848)
Employee benefits expense	(790,637)	(664,553)
Depreciation and amortisation expense	(5,990)	(8,974)
Rental and lease costs	(78,437)	(73,171)
Consultancy and legal expenses	(76,865)	(90,169)
WQA expenses	(4,150)	(4,847)
Travel and accommodation	(143,001)	(136,635)
Special projects	(306,240)	(197,784)
Other expenses	(164,173)	(141,059)
Surplus/(deficit) before income tax expense	(22,272)	303,953
Income tax expense	-	-
Surplus/(deficit) after income tax expense for the year attributable to the members of Grain Trade Australia Ltd	(22,272)	303,953
Other comprehensive income for the year, net of tax	-	-
TOTAL COMPREHENSIVE INCOME FOR THE YEAR ATTRIBUTABLE TO THE MEMBERS OF GRAIN TRADE AUSTRALIA LTD	(22,272)	303,953

Statement of Financial Position

As at 30 June 2019

	2019 \$	2018 \$
ASSETS		
CURRENT ASSETS		
Cash and cash equivalents	808,159	672,116
Trade and other receivables	917,232	848,979
Other	965,882	906,179
TOTAL CURRENT ASSETS	2,691,273	2,427,274
NON-CURRENT ASSETS		
Property, plant and equipment	718	4,639
TOTAL NON-CURRENT ASSETS	718	4,639
TOTAL ASSETS	2,691,991	2,431,913
LIABILITIES		
CURRENT LIABILITIES		
Trade and other payables	147,564	73,920
Employee benefits	47,906	46,688
Other	1,343,877	1,118,248
TOTAL CURRENT LIABILITIES	1,539,347	1,238,856
NON-CURRENT LIABILITIES		
Employee benefits	-	18,141
TOTAL NON-CURRENT LIABILITIES	-	18,141
TOTAL LIABILITIES	1,539,347	1,256,997
NET ASSETS	1,152,644	1,174,916
EQUITY		
Retained earnings	1,152,644	1,174,916
TOTAL EQUITY	1,152,644	1,174,916

Statement of Changes in Equity For the Year Ended 30 June 2019

2019	Retained Profits \$	Total Equity \$
Balance at 1 July 2018	1,174,916	1,174,916
Deficit after income tax expense for the year	(22,272)	(22,272)
Other comprehensive income for the year, net of tax	-	-
Total comprehensive income for the year	(22,272)	(22,272)
Balance at 30 June 2019	1,152,644	1,152,644

2018	Retained Profits \$	Total Equity \$
Balance at 1 July 2017	870,963	870,963
Surplus after income tax expense for the year	303,953	303,953
Other comprehensive income for the year, net of tax	-	-
Total comprehensive income for the year	303,953	303,953
Balance at 30 June 2018	1,174,916	1,174,916

	2019 \$	2018 \$
CASH FLOWS FROM OPERATING ACTIVITIES:		
Receipts from customers (inclusive of GST)	2,443,603	2,455,166
Payments to suppliers and employees (inclusive of GST)	(2,319,365)	(2,365,627)
Interest received	13,874	21,203
Net cash from operating activities	138,112	110,742
CASH FLOWS FROM INVESTING ACTIVITIES:		
Payments for property, plant and equipment	(2,069)	(1,279)
Net cash used in investing activities	(2,069)	(1,279)
CASH FLOWS FROM FINANCING ACTIVITIES:		
Net cash from financing activities	-	-
Net increase in cash and cash equivalents	136,043	109,463
Cash and cash equivalents at the beginning of the financial year	672,116	562,653
CASH AND CASH EQUIVALENTS AT END OF FINANCIAL YEAR	808,159	672,116

MEMBERS

Membership List as at 07 June 2019

ORDINARY MEMBER (TRADING)

Level A1 (over 7 Million Tonnes)

CBH Grain Pty Ltd
Glencore Grain Pty Ltd

Level A2 (5–7 Million Tonnes)

Graincorp Operations Ltd

Level A3 (3–5 Million Tonnes)

ADM Trading Australia Pty Ltd
Cargill Australia Limited

Level A4 (1.5–3 Million Tonnes)

Cofco International
Emerald Grain Pty Limited
Plum Grove Pty Ltd

Level B1 (1.0–1.5 Million Tonnes)

Arrow Commodities Pty Ltd
Louis Dreyfus Company Australia Pty Ltd

Level B2 (500,000–1 Million Tonnes)

Australian Grain Export Pty Ltd
CHS Broadbent Pty Ltd
Centre State Exports Pty Ltd
George Weston Foods Limited
Ridley Agriproducts Pty Ltd
Riordan Grain Services
Riverina (Australia) Pty Ltd
Bunge Agribusiness Australia Pty Ltd

Level B3 (250,000–500,000 Tonnes)

Agfarm Pty Ltd
Agracom Pty Ltd
AGRIGRAIN
Agrisk Management Pty Ltd
Allied Pinnacle Pty Ltd
Robinson Grain Trading Co Pty Ltd
Special One Grain Accumulator
United World Enterprises Pty Ltd
Wilmar Gaviion Pty Ltd

Level C (under 250,000 Tonnes)

A T Waterfield & Son Pty Ltd
A W Vater and Co
Access Grain Pty Ltd
Adams Australia Pty Ltd
Agmark Commodities
Agri Om Australia Pty Ltd
Agri-Oz Exports Pty Ltd
Agriex Australia Pty Ltd
Agrifoods Australia
Agromin Australia Pty Limited
AGT Foods Australia
AMPS Agribusiness Group
Associated Grain
Auscott Ltd
AusiCan Commodities
Australian – Asian Agricultural Exports Pty Ltd
Australian Choice Exports Pty Ltd
Australian Grain Storage
Australian Growers Direct Pty Ltd
Australian Mungbean Company Pty Ltd
Australian Storage Alliance Pty Ltd
Baker Grain
Berriwillock Grain Storage Co-Operative Ltd
BFB Pty Ltd
Blairs Produce Company
Boolah Grains Pty Ltd
Boort Grain Co-Operative
Broun and Co Grain Pty Ltd
C & S Trading Pty Ltd
C K Tremlett Pty Ltd
Carpendale Commodities
Cameron Pastoral Company Pty Ltd
Castlegate James Australasia Pty Ltd
CL Commodities Pty Ltd
Cleveland Agriculture
Coorow Seeds
COPRICE
Cremer Australia Pty Ltd
DA Hall and Co
Dalby Bio-Refining Limited
Darwalla Milling Co Pty Ltd
Deacon Seeds Company
Deckert Group Pty Ltd
Defiance Maize Products Pty Ltd
Demeter Cormack Pty Ltd
Direct Commodities Pty Ltd
Donnellons Bulk Haulage Pty Ltd
East Coast Stockfeed Pty Ltd
Elders Grain
Esperance Quality Grains
Export Trading Group Australia Pty Ltd
Feed Central Pty Ltd
Fellows Nominees
Findlays Barellan
Five Star Stock Feeds
Fletcher International Exports Pty Ltd
GO Resources Pty Ltd
Golden Harvest Grain Exports
Gold Star International Pty Ltd
Grain Direct Australia
Grain Link (NSW) Pty Ltd
Grain Link WA Pty Ltd
Grainforce Pty Ltd
Grainpro Pty Limited
GrainTrend Pty Ltd
Greentree Farming
GV Grain & Fodder
Hanlon Enterprises Grain
Harwood Grains Pty Ltd
Harberger's Farm Supplies (Trading) Pty Ltd
Hassad Australia Operations Company Pty Ltd
Independent Grain Handlers Pty Ltd
Irwin Stockfeeds
Itochu Australia Ltd
J K International Pty Ltd
J W Koek & Company
James Stock Feed and Fertilizer Pty Ltd
Jerilderie Grain Storage & Handling
KB Agri Services Pty Ltd
K M & W M Kelly & Sons
Kangaroo Island Pure Grain Pty Ltd
Kennett Rural Services Pty Ltd
Lachlan Commodities Pty Ltd
Laharum Bulk Handling Co
Lake Grain Pty Ltd
Lane Grain Pty Ltd
Laragon Almond Processors Pty Ltd
Laucke Flour Mills P/L
Lawson Grains Pty Ltd
LDC Enterprises Australia Pty Ltd
LINX Cargo Care
LPC Trading Pty Ltd
Mandala Trading Pty Ltd
Malteurop Australia Pty Ltd
Matthews Transport and Grain Traders
Max Grains Pty Ltd
MC Croker Pty Limited
McNaughts Grain & Fertilizer Pty Ltd
Melaluka Trading Pty Ltd
Mellco Pty Ltd
Moulamein Grain Co-Operative Ltd
Moxey Farms Pty Limited
MSM Milling Pty Ltd
Murrumbidgee Grains Pty Ltd
Namoi Cotton Ltd
Nandaly Grain Co-Operative Ltd
Network Grains Pty Ltd
Newcastle Agri Terminal Pty Ltd
Northern Riverina Grains Pty Ltd
OOMA Enterprises NSW Pty Limited
Origin Grain Pty Ltd
Pacific Global Sprouts Pty Ltd
Parkinson Bros
PB Seeds Pty Ltd
PeaCo
Pearson's Grain Pty Ltd

Peters Commodities Pty Ltd
 Phoenix Global Australia Pty Ltd
 Premium Grain Handlers P/L
 Preston Grain
 Pulse Association of the South East (PASE) Inc
 Quadra Commodities Pty Ltd
 Quattro Ports
 Quirindi Grain & Produce
 Reid Stockfeeds Pty Ltd
 Rhodium Trading Australia Pty Ltd
 Rivalea (Australia) Pty Ltd – Animal Nutrition
 Riverina Oils & BioEnergy Pty Ltd
 Roty Grain Store
 RT Wallace Pty Ltd
 Ruddenklau Grain Pty Ltd
 Rural Logic (Aust) Pty Ltd
 Seedhouse Tasmania
 Shannon Bros Bulk Haulage
 Silo Bag Grain (NSW QLD) Pty Ltd
 Societa Cofica Pty Ltd
 Southern Cotton Trading Pty Ltd
 Southern Cross Agricultural Exports P/L
 Southern Grain Storage Pty Ltd
 Southern Stockfeeds (Operations) Pty Ltd
 Spagicon Australia Pty Limited
 Spring Market Trading Company
 Standard Commodities Australia Pty Ltd
 Sudima Australia Pty Ltd
 Summer Hill Grains
 SunPork Farms Feed Mills
 Swiss Singapore (Australia) Pty Ltd
 Tasmanian Agricultural Producers Pty Ltd
 Thallon Grains Pty Ltd
 ThriveAgri
 TSS Grain
 Twynam Pastoral Company
 Ulusoy Asia Pacific
 Unigrain Pty Ltd
 Unique Grain Management Pty Ltd
 Universal Commodity Management
 W B Hunter Pty Ltd
 Vivcourt Commodities
 Ward McKenzie Pty Ltd
 Watershed Commodities
 Watson's Bulk Logistics
 WHG Oceania Pty Ltd
 Wilken Grain
 Wimpak Pty Ltd
 Woods Grain Pty Ltd
 WW Agri Pty Ltd
 XLD Grain Pty Ltd
 Yenda Prods Grain Pty Ltd

TRANSPORT OPERATOR

Aurizon Operations Limited
 Gehrke Grains and Transport Pty Ltd
 Hamilton Contracting (NSW) Pty Ltd
 Pacific National (NSW) Pty Ltd SEAWAY
 Intermodal Pty Ltd

BROKER

Medium

Grain Brokers Australia
 Horizon Grain Brokers Pty Ltd
 INTL FCStone Pty Ltd
 McDonald Pelz Australia
 Perkins Commodity Brokers
 Teague Australia Pty Ltd

Sole Operator

A C Grain
 ACCB Australia
 Allied Grain Pty Ltd
 Asiagrains Bulk Commodities Pty Ltd
 Cogeser (Australia) Pty Ltd
 Esquire Commodities Pty Limited
 Farm Tender
 Lotema Pty Ltd
 Mallon Commodity Brokering
 Quest Commodities Pty Ltd
 Wimmera Mallee Grain Services
 Woodside Commodities Pty Ltd

CORPORATE

Large

ASX Limited
 Australia And New Zealand Banking Group
 Australian Grain Technologies Pty Ltd
 Commonwealth Bank of Australia

Medium

AgriDigital
 Agrifood Technology Pty Ltd
 Amspec Australia Pty Ltd
 Australian Superintendence Company
 Commodity Inspection Services (Australia) Pty Ltd
 Foss Pacific Pty Ltd
 Holding Redlich
 Holman Fenwick Willan
 Intertek
 Merricks Capital Pty Limited
 SBA Law
 SGS Australia Pty Ltd
 T-Ports Pty Ltd
 Viridis Ag

Small

Advance Trading Australasia
 Ag Scientia Pty Ltd
 Basis Commodities Pty Ltd
 Clear Grain Exchange
 CloudBreak Grain Marketing Pty Ltd
 Delta Agribusiness Pty Ltd
 EP Integrated Commodities Pty Ltd
 Farmanco Marketing Pty Ltd FarMarCo
 Australia Pty Ltd

Finesse Solutions Pty Limited
 Flexi Grain
 Goldstar Commodities
 Grintec Scientific Pty Ltd
 Grainx
 HarvestCheck Pty Ltd
 Hay Plains Grain Storage Pty Ltd
 Indigo Agriculture Australia Pty Ltd
 IKON Commodities Pty Ltd
 Lachstock Consulting
 MarketAg Pty Ltd
 McMullen Consulting Pty Ltd
 Mercari Pty Ltd
 Mirfak P/L
 National Grower Register Pty Ltd
 OMIC Australia Pty Ltd
 Perten Instruments Australia Pty Ltd
 Pinnacle Commodities Pty Ltd
 Planfarm Marketing Pty Ltd
 Plansafe Logistics Pty Ltd
 Primal Foods Group
 Profarmer Australia Pty Ltd
 Rise Agribusiness Pty Ltd
 Rural Directions Pty Ltd
 Saputo Dairy Australia Pty Ltd
 SGA Solutions Pty Ltd
 TE Storage & Logistics Pty Ltd
 Ten Tigers
 Wattletree Consulting Pty Ltd

INTERNATIONAL AFFILIATE

CCIC Australia Pty Ltd
 CIS – Commodity Inspection Services

INDUSTRY ASSOCIATION

Australia Export Grain Innovation Centre
 Grain Growers Limited
 Grain Industry Association of WA
 Grain Producers Australia Ltd
 NSW Farmers Association
 Victorian Farmers Federation

MERCHANT ASSOCIATION

Grain Industry Association of SA
 Grain Industry Association Of Victoria
 Grain NSW Inc
 Queensland Agricultural Merchants Inc.

LIFE MEMBERS

Mr Mervyn May
 Mr Christopher Kelly
 Mr Geoff Honey



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