



ANNUAL REPORT 2019-20



GRAIN TRADE
AUSTRALIA

INDUSTRY DRIVEN SELF-REGULATORY FRAMEWORK



GTA HAS CONTRACTS THAT TAKE AUSTRALIAN GRAIN TO DOMESTIC AND EXPORT MARKETS

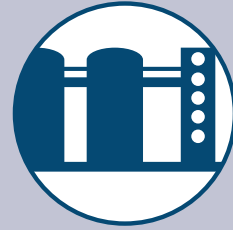
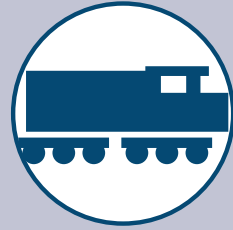
- Free on Board (FOB) Contract (GTA No.1)
 - Track Contract (GTA No.2)
 - Contract Confirmation (GTA No.3)
- Delivered Container Terminal (DCT) Contract (GTA No.4)
- Cost Insurance Freight Contract (Containers) (GTA No.5)
 - Grower Contract (GTA No.6)
- Grain Transport Contract & Free on Rail Contract (GTA No.7)
 - Commodity Vendor Declaration
 - Storage and Handling Agreement
 - Grain Transport Contract
 - Voyage Charterparty – AusGrain 2015

SUPPORTED BY:

- GTA Trade Rules
- Dispute Resolution Services (Arbitration)
 - Grain Trading Standards
- Australian Grain Industry Code of Practice
 - Transport Code of Practice
- GTA Technical Guideline Documents
 - Trade & Market Access Initiatives
- Australian Grain Industry Conferences (Australia & Asia)
- National Working Party on Grain Protection (NWPGP) & Australian Grain Storage & Protection Conference
 - Training & Professional Development Programs
 - Industry Stewardship & Capability

WORKING ACROSS THE ENTIRE SUPPLY CHAIN

CONTRIBUTING VALUE TO THE GRAIN INDUSTRY SUPPLY CHAIN



Australian Grain Industry Conference (AGIC) Asia - Indonesia & China

Conducted in 2019 to showcase the Australian grain industry.

AGIC Asia Government and Policy Round Table 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. GTA Trading Standards are aligned to GTA standard form contracts and have widespread domestic & 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 training

- Specific training and professional development unique to Australia's grain industry.
- Conducts the Grain Standards Course nationally to ensure national consistency in grain testing and classification.
- Building Grain Industry's skillset

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 supports the work of the National Residue Survey (NRS)

Adherence to domestic and export Maximum Residue Limits for chemicals

Australian Grains Industry Code of Practice (the "Code")

- 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

Industry Developed and Driven Self-Regulatory Framework

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

Member:

- DAWE - Grains & Plant Products Export Industry Consultative Committee (GPPEICC)
- DAWE - 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

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.
- Office of Gene Technology Regulator (OGTR) Regulations review
- Department of Health Gene Technology Scheme Review
- 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.



WORKING ACROSS THE ENTIRE SUPPLY CHAIN

Industry driven Self-Regulatory Framework

GTA is privileged to work on behalf of its members and industry to deliver core products and services that provide the industry driven Self-Regulatory Framework that facilitates trade.

Making it easier

Standardising Grain Trading Standards, Trade Rules, Contracts, Reference Data and industry process provides and adds value to industry by enabling 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.

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.

Informing industry

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

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

"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.

Strategic Leadership

GTA has developed a comprehensive "blue print" report on *Modernising the grain supply chain - from drought through Covid-19 through to 2030*. This report provides a comprehensive strategy to modernise the grain supply chain, to drive industry forward from the worst drought in living memory, through the C-19 pandemic through to 2030.

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 grain industry.

The following reflect the industry outcomes that GTA delivers and 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) - self-reliant, whilst achieving Government support where common good outcomes are justified and necessary.

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

Critical Success Factors

GTA must deliver:

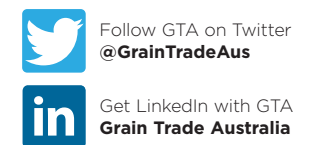
- Harmonised trading products and services - so commercial risks are lowered, improving capital utilisation, and enhanced transparency
- A suite of tools to enable trade to occur efficiently and seamlessly - reduced risk, and low cost transactions are critical to maintain global value chain competitiveness
- Training & Development programs that enhance the skills of industry participants - GTA delivers training programs that develop and enhance the capacity of the Australian grain industry human resources for the betterment of businesses and industry
- 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 budget and financial policies of GTA
- Partnerships with industry stakeholders, including government and agencies, production sector and international counterparts are important to building support for efficient trade facilitation. Partnerships are a critical component of success.

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It is with great pride that I provide the 2019/20 annual report as Chair of Grain Trade Australia (GTA).

GTA is the focal point for the commercial grain industry within Australia. It facilitates trade and works to provide an efficient, equitable and open trading environment by providing leadership, advocacy and commercial services to the Australian grain value chain.

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.

The 2019/20 year has been a challenging and mixed year for the Australian grain industry that has tested our resilience with the ongoing east coast drought combined with the additional challenge of adapting to the impacts of COVID 19.

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. GTA is proud to play its part, working on behalf of its members and industry to facilitate trade and provide an industry driven self-regulatory framework.

As an industry, we are pleased and encouraged to see the signs of emergence from one of the most severe droughts on record.

Drought has not been the only challenge facing the industry with the geopolitical landscape providing challenges for industry and especially barley growers and exporters. GTA shares industry's deep disappointment with the announcement by the People's Republic of China to place punitive tariffs on Australian barley exports to China. This follows an anti-dumping and countervailing subsidy investigations initiated by China in November 2018.



GTA Chair Andrew Goyder

These punitive tariffs impose a dumping margin of up to 73.6% and a subsidy margin of up to 6.9% on all barley imported from Australia, effective from 19th May 2020. These tariffs have disrupted and, most likely will prevent barley exports to China until the situation is resolved. It is estimated this dispute will cost the Australian grain industry and notably rural and regional economies at least \$A2.5 billion over the five-year period of the tariffs being in place.

GTA has worked tirelessly as part of an Industry Working Group with both industry and Government on this issue. GTA has called on the Australian Government to support Australia's farmers and exporters by seeking deep engagement with China in a respectful and meaningful way to resolve the issue and to concurrently explore other trade remedy avenues.

On a positive note GTA acknowledge the collaborative industry and government approach that has resulted in the signing and commencement of the Comprehensive Economic Partnership Agreement (IA-CEPA) between Indonesia and Australia.

The IA-CEPA creates a framework for Australia and Indonesia to unlock the vast potential of economic cooperation between retrospective countries. It will reduce non-tariff barriers to trade, simplify paperwork and will support preferential arrangements for the sale of Australian feed grain into Indonesia.

I applaud all supply chain participants for the expedient and practical steps taken to ensure COVID-19 has had minimal impact on the grain supply chain. It has been outstanding to see the collegiate approach to managing issues and overcoming hurdles. In fact, it has been noted there are some unanticipated flow on benefits from the adversity with the crisis leading to flexibility in supply chain processes by both industry and governments. This is evident in shipping-related trade support functions with electronic trading and flexibility in shipping documentation during the COVID-19 period.

GTA's primary focus is to facilitate trade. GTA works to proactively engage with governments and like-minded industry associations and groups seeking alignment of objectives to break down barriers and to create value for all.



GRAINS AT A GLANCE ¹	2018/19	2019/20	5 Year	5 year (exc19/20)	2020/21
Crop production (kt) ¹	34,008	29,920	41,227	43,797	47,342
Industry Value \$Am FOB ¹	12,535	10,499	12,872	13,506	14,566
Domestic Demand	15,600	14,600	13,711	13,122	
Grain Imports (mmt) (FY)	0.12	0.6	0.60		0.240
Bulk Transhipments (FY)	3.4	3.0	1.6		
Exports (mmt) (FY) ¹	17,217	16,784	25,276	28,583	25,736
% Containers	12.9	14.5	12.5	12.1	
Export Value \$Am FOB ¹	7767	7,314	10,095	10,798	9,610

Source: ABARES, ABS, USDA, ACF ¹ Excludes Rice

The Australian grain sector has been a consistent provider of productivity increases to the Australian economy with the industry, and its ancillary suppliers and service providers, being substantial employers, from the farm gate through to end point consumption, and particularly in rural and regional Australia.

This means investment and efficiency growth across the Australian grain value chain, along with market diversification, will be crucial to maintain a competitive position in both export and domestic markets.

To support its members, GTA has recently released a comprehensive strategy document to drive the industry forward from the worst drought in living memory, through the COVID-19 Pandemic through to 2030. This innovative growth and investment strategy document for the Australian grain supply chain is aimed at leveraging aligned strategic policy and commercial objectives with government and industry.

The strategy - **Modernising the grain supply chain - from Drought, through COVID-19 to 2030** has been prepared by GTA and its member driven Technical Committees on behalf of its members

and will:

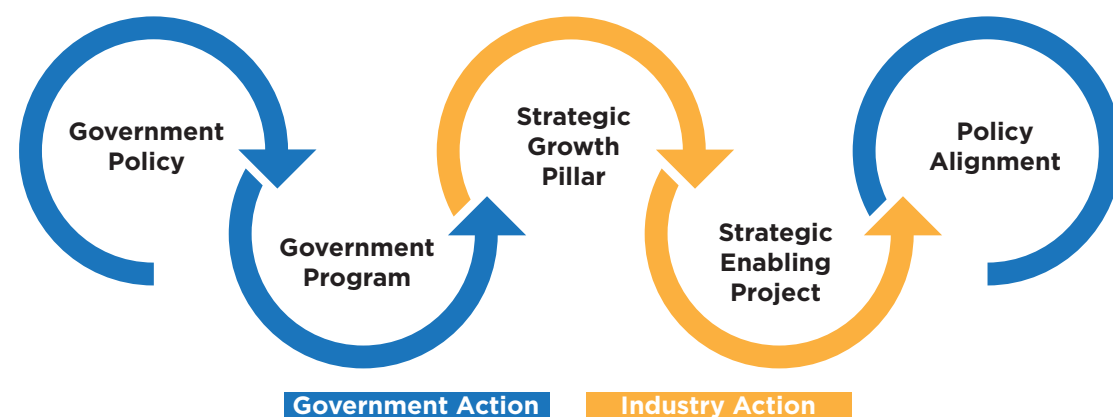
1. Support Australian supply chain initiatives to improve the competitiveness of the Australian Grain Industry.
2. Provide context, structure and to focus the strategic value associated industry driven collaborative projects with Government and other strategic partners.

Focus on the supply chain and investment in industry is critical to remain competitive into the future and to capture the benefits and to deliver economic growth for Australia. This is especially the case given:

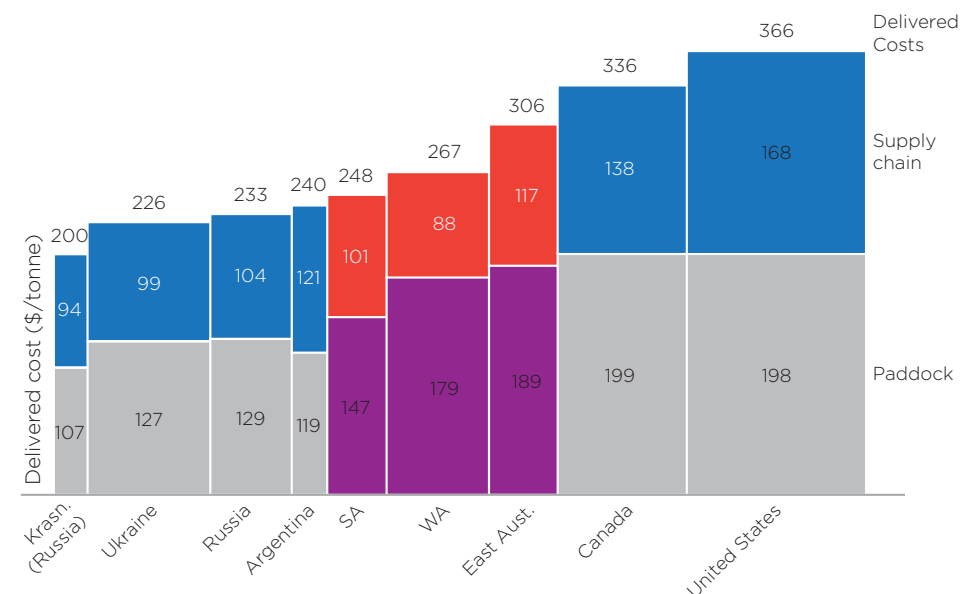
1. 30-35% of a grower's total cost is supply chain cost;
2. The quality advantage for Australian grain is under pressure as processors and consumers increase their efficiency and utilisation of grain from alternative and cheaper origins.

This means increasing pressure on Australian margins, and pressure on costs at both the farm and supply chain level. Australia must compete and develop competitive advantage on both fronts. The **Modernising the grain supply chain strategy** contains, 13 'shovel ready' "strategy enabling projects". These projects identify areas for strategic

Policy Alignment



Supply Side Competitiveness Source: CBH



collaborative investment focusing on four Strategic Growth Pillars, these being:

Growth Pillars

- A. Skills & Capability
- B. Quality & Market Access
- C. Technology
- D. Transport & Logistics



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;
- Establishment of common industry practices, data and transactional processes;
- Training and Development; and
- International and domestic advocacy to improve Trade and Market Access.

Grain Supply Chain & GTA Committees

Advocacy & Market Access Trade	Commerce	Grain Quality and Assurance	Data & Information	Grain movement & logistics	Stewardship & Capability
GTA Trade & Market Access Committee GTA Plant Breeding Innovation Committee	GTA Commerce Committee	GTA Trading Standards Committee	GTA Trading Information Technology Advisory Committee	GTA Transport Ports and Storage Committee	GTA Board Code of Practice GTA training & development programs
Industry driven and managed					

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.

The self-regulatory framework is bound together by the **Australian Grain Industry Code of Practice (Code)**, managed by GTA. The Code outlines the quality assurance processes and procedures in the value chain. This is important to the facilitation of trade and creates value for all by ensuring confidence in the Australian value chain and reduces the risk premium embedded in all stages of the 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. Australia remains the only major exporting country with an industry managed and driven Code of Practice.

The industry driven self-regulatory framework and Code creates value for all by ensuring confidence in the Australian value chain reduces the risk premium embedded in all stages of the value chain

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 of GTA Arbitrators who contribute their time and are a critical part of the dispute resolution process.

GTA's **Sector Councils and Technical Committees** play a critical and important part in GTA's activities. The Sector Councils and 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 as well as providing facilitation and support to the Australian Grain Exporters Council (AGEC)

Technical Committees:

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

Technical Committee members represent all sectors of the value chain including Seed Producers, growers, technical consultants & service industries, BHCs, Industry Good agencies, consumers and small and large marketing enterprises.

Technical Committees operate within a 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.

Similarly, AGECE has held several member meetings, and actively participated in Industry Working Groups such as IA-CEPA, as well as continued its involvement and participation in GIMAF and the Department of Agriculture, Water & the Environment Grains Industry Consultative Committee.

GTA remains committed to ongoing participation in international trade policy development. This requires direct industry experience and a practical 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 strategic focus and activities continue on Non-tariff Trade Measures (NTMs) such as phytosanitary issues, chemical residues, grain assessment variations and regulatory coherence.

GTA has been particularly active in the development of global trade policy initiatives and frameworks. GTA's focus is to advocate for open, competitive markets, regulatory coherence based on sound science and risk-based assessments. This has included being an active participant of the International Trade Coalition (ITC), of which GTA is a long standing and active member. GTA serves on the global Management Council and as

Secretary on the IGTC Executive Committee and actively engages 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.

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
- APEC Grain Trade Facilitation Forum.
- Australian-ASEAN Business Working Group on Non-Tariff Trade Measures

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.

Like previous years, the premier event on the grain industry calendar the **Australian Grains Industry Conference (AGIC)** offered up an impressive line-up of local and international industry experts to provide delegates with the latest insights, learnings and opportunities. AGIC continues to demonstrate its importance as a networking forum that brings the grain industry together.

AGIC Asia was planned for March 2020, with events planned for China and Vietnam including Government Roundtable meetings as part of the overall program. However, due to the Covid-19 pandemic these events were postponed, and a virtual conference was scheduled for July 2020.

GTA committed to a virtual conference in 2020 to ensure continuity of engagement with Australian grain customers and the delivery of the important messages of value in Australian grain, its quality, reliability the quality assurance of its grain supply chain.

The AGIC Asia conference and Roundtable events have proven to be very valuable and have resulted in tangible trade and market access outcomes supporting the maintenance and growth of these important markets for the Australian grain Industry.

The **Training and Professional Development** programs, delivered by GTA, are an important part of industry stewardship and self-regulatory framework. These training programs provide 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).

GTA is a member driven representative supply chain organisation operating in a dynamic and competitive environment.

I would like to acknowledge the efforts of all the industry specialists who volunteer their time and expertise as members of the various GTA Technical Committees (AGEC) and Industry Working Groups, as well as the GTA Arbitrators.

I must acknowledge the contributions of the GTA Board (who also volunteer their time) and management team, past and present.

The volunteer base and contributions to GTA are the critical element of GTA's and industry's "can do" culture and resilient attitude. This benefits the whole Australian grain industry.

We are very aware 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.

There will be some challenging times ahead, however, your Board believes GTA is well placed to face those challenges.

Yours sincerely,



Andrew Goyder
Chair - Grain Trade Australia

Our Vision

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

Our Mission

To facilitate and promote 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 & marketing, grain storage, food and feed processing.

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

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 grain 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 the grain industry self-regulatory approach in international markets.
- **Industry Stewardship and Capability** - a determination to increase capability within the grain industry by provision of Australian Grain Industry Code of Practice together with market-orientated 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 settings 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.

- 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 does not have a right to exist - it must continually earn that right from its members.
- GTA must:
 - be cognisant of factors in the external business environment that impact both the Australian grain industry and GTA and its operations; and
 - operate within the confines and needs of members and the immediate business environment in which GTA operates.

Strategic Direction

PUBLICATION

- GTA Strategic Direction 2019/20
- Modernising the Grain Supply Chain - from drought through Covid 19 to 2030
- A Guide to Selling Grain using Grain Contracts
- Grain Industry NTM Report 2019
- GTA Trade Rules (Revised)
- GTA Dispute Resolution Rules (Revised)
- GTA Dispute Resolution Guidelines (Revised)
- 37 GTA Member Updates
- 15 GTA Market Notifications

Vital signs

Financial Performance

- Profit of \$120,327
- Equity of \$1,272,972
- While membership and training revenues were lower due to drought, a modest profit was achieved due to cost reductions, lower costs due to Covid 19 and assistance from Government pandemic support programs.
- 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

- 274 members at 30th June 2020 (283 at July 2019)



Trade facilitation products and services

Trading Standards Committee

- Grain Trading Standards

- Annual Trading Standards review including a review of Nil Tolerance limits.
- Review and publication of the Wheat Quality Australia Wheat Varietal master list
- Released Trading Standards for Wheat, Barley, other cereals published following review
- Updated the Visual Recognition Standards Guide
- Several Sub-Committees involved in ongoing reviews of various Standards issues including:
 - Sampling Reviews
 - Technology
 - Mobile Bulk Loading
 - 7 Submissions to Codex Australia
 - Submission to APVMA - Anticoagulant Rodenticide Products and the AgVet Chemical Review

Commerce Committee

- Contracts & Trade Rules

RELEASED

- GTA Trade Rules - Trade Rules Revised 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 2020/21 season
 - Location Differential methodology for east coast & SA

Trade & Market Access Committee

Consult with and advise industry & Government on:

- China Anti-Dumping Investigations and Countervailing Duties on Australian Barley Exports
- Impact of Non-Tariff Measures (NTMs)
- Grains Industry Sustainability Framework
- Market diversification - India
- Japan plant breeding innovation requirements
- Maximum Residue Limits for chemicals (MRLs)
- Regional initiatives on Non-Tariff Measures
- Free trade agreements - Indonesia, China, Japan, EU, RCEP, UK
- Market access for Feed grains in several South-East Asian Countries
- China Wheat/Barley Protocol and Industry Management Plan (IMP)
- ePhyto and e-Documentation
- Traceability within the Grain Supply Chain
- 2 Submissions to DAWE - Draft Export Control Bill 2019
- 2 Submissions to DAWE - Cost Recovery Implementation Statement: Plant Export Certification

- Submission to the Japan-Australia Partnership Agreement Post-Implementation Review
- Submission to DAWE - Plant Property Identification Reforms
- Submission to DAWE - Modernising the Research & Development Corporation System
- Submission to GrainGrowers Limited - Wheat Quality Report

Transport, Storage & Ports Committee

RELEASED

- Strategy for a Collaborative Approach to the Grain Supply Chain
- Implemented Chain of Responsibility training - Practical Steps to CoR Compliance
- GTA Safety Guidelines
- 2 Submissions to the Productivity Commission - National Transport Regulatory Reform
- Submission to the NHVR - Grain Harvest Mass Management Schemes Review
- Submission to the Federal Government - Management of the Inland Rail Project by the ARTC and the Commonwealth Government

REVIEWING

- Grain Industry Transport Code of Practice
- Introduction of a Pilot Truck Wash facility
- Improvements to the container supply chain processes, transactions and reference material including updating of the manual - Standards for Empty Shipping Containers

Plant Breeding Innovation Committee

Membership comprises relevant associations from across the grain supply chain.

The Committee addressed the following key issues:

1. Publishing of the Market Choice Framework
2. SA Decision to allow GM canola
3. Response to Gene Technology Scheme recommendations
4. Submissions to International Treaty on Plant Genetic Resources for Food and Agriculture
5. Plant Breeding Innovation - input to global guidance and development of GTA guidance document
6. Japan plant breeding innovation trade advice

Information Technology Advisory Committee

The Committee has progressed work on:

- Industry Standard Reference Data including Varietal Codes
- E-phyto certificates
- Alignment to the international groups and goal of harmonisation of process and transactions
- DAWE system consultation including PEMS and NexDocs
- Electronic Vendor Declarations
- Interaction with the Government Traceability Initiative and Property Plant Identification.

Dispute Resolution Service

- 14 Arbitrations commenced (FY 18 - 61)
- 17 Arbitrations finalised as follows (FY 18 - 9):
 - 8 Awards released (FY18 - 1)
 - 4 matters commercial settled prior to a Tribunal making a determination (FY18 - 8)
 - 5 GTA closed the Arbitration usually due to inactivity by the Claimant (FY18 - 0)
- 66 Board Approved Arbitrators (FY18 - 62)
- 5 Board Approved Tribunal Chairman (Export Contracts) (FY18 - 5)

GTA Training & Development Program

- 20 training and development sessions delivered, over 240 students attending from over 20 organisations.
- Australian Grains Industry Conference (AGIC)
- GTA Advisory & Compliance Workshop
- Export Contracts & Documentation Course
- Covid-19 Webinar Series Managing through the Covid Pandemic

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.
- Transport Code of Practice
- On-line Code of Practice Assessment Program available to demonstrate knowledge and understanding of the Code
- Adherence to the Code is mandatory for all GTA Ordinary or post-farm gate members.

National Working Party on Grain Protection (NWPGP)

- The primary 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.
- 2020 Australian Grain Storage & Protection Conference scheduled for June 2020 was postponed and rescheduled for October 2020
- Publication of the Australian Grains Industry Post Harvest Chemical Usage Recommendations and Outturn Tolerances 2019/20

Presentations

DOMESTIC

- *Australian Grain Industry Conference Melbourne, Opening Address*, July 2019
- *Australian Grain Industry Conference Melbourne, Revised Australian Grain Industry Code of Practice*, July 2019
- *Delegation from China National Food and Strategic Reserve Administration, Value Proposition of Australian Grain and Industry Self-Regulation*, July 2019
- *Grain Industry Association of Victoria, GTA Activities and Update*, several 2019/20
- *Grain Industry Association NSW, GTA Activities and Update*, several 2019/20
- *Austrade Delegations, Quality Assurance in the Supply Chain*, several 2019/20
- *Bulk Freight Futures -Rail Freight Symposium - Key note address Innovate and Collaborate to grow with and support the Grain Supply Chain Junee*, July 2019
- *Viterra Harvest Conference, GTA Role, Activities & Self-Regulatory Framework*, August 2019, Adelaide
- *Productivity Commission - National Transport Reform*
- *Chartered Institute of Logistics & Transport - Supply Chain Efficiency*
- Numerous (267) stakeholder meetings, briefings to members, broader industry, government and their related agencies involving (GTA Chairman, CEO & Operations Manager)

INTERNATIONAL

- *China National Association for Grain Sector, Agtech innovation in the Australian grain industry - opportunities for Australia/China co-operation*, October 2019, China
- *APEC Grain Trade Facilitation Forum, Wheat Value Chain Analysis*, November 2019, China
- *World Grain Trade Forum, IGTC and GTA Advocacy*, November 2019, Brazil
- *International Grain Trade Coalition, General Assembly*, November 2019, Brazil
- *International Grains Council Conference, Virtual-on-line*, June 2020

Advocacy

DOMESTIC

- Dept. of Agriculture, Water & the Environment (DAWE) - export inspection & certification processes and trade and market access
- DAWE - 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
- Department of Foreign Affairs and Trade
- Trade Minister's Office
- Agriculture Minister's office
- Deputy Prime Minister's Office

INTERNATIONAL

- Dept. of Foreign Affairs & Trade
- 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 Trade Facilitation Forum (Beijing in November 2019)
- China National Association for Grain Sector Trade Forum
- China Ministry of Finance & Commerce (Mofcom)
- Covid 19 - International Response Framework (incl IGTC)

MEMBER

- Grain & Plant Product Export Industry Consultative Committee (GPPEICC) and sub-committees
- ACCC Agricultural Advisory Committee
- Grains Industry Market Access Forum
- DAWE 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)
- Grain Transport Safety Network
- Grains Australia Industry Steering Committee
- Grains Australia Director Selection Committee
- Industry Working Group on China Barley Issues
- Grains Industry NTM Working Group



The following persons were directors of the company during the full financial year, unless otherwise stated:

Andrew Goyder

Non-Executive Director

BOARD APPOINTMENT

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.

SPECIAL RESPONSIBILITIES:

Chair - Company's Board, Chair - Governance Committee, Member of Audit, Finance and Remuneration Committee

Geoffrey Farnsworth

Non-Executive Director,

BOARD APPOINTMENT

QUALIFICATIONS:

Bachelor of Law, Bachelor of Arts

EXPERIENCE AND EXPERTISE:

Partner - Holding Redlich

SPECIAL RESPONSIBILITIES:

Deputy Chair - Company's Board, Chair of Dispute Resolution Service Committee, Chair of Transport, Storage and Ports Committee, Member of Governance Committee, Member of Membership Committee, Member of Commerce Committee

Michael Wood

Non-Executive Director

MERCHANT ASSOCIATION NOMINATION

QUALIFICATIONS:

Diploma Applied Science (Agriculture)

EXPERIENCE AND EXPERTISE:

Michael has been an active member of the Australian Grain Industry for 30 years. Sole proprietor of Melbourne-based grain trading and logistics company, Rural Logic. Founding Manager (1990) of Stockfeed company James & Son - Australia and Argentina. ABB Victorian State Manager (5 years) and Grains Manager IMCA Malting Company (2005/2006). Former President of Grain Industry Association of Victoria and continues on as a GIAV committee member for the last 15 years.

SPECIAL RESPONSIBILITIES:

Deputy Chair - Company's Board, Chair of Commerce Committee, Member of Dispute Resolution Service Committee, Member of Trade and Market Access Committee.

Robert Imray

Non-Executive Director

MERCHANT ASSOCIATION NOMINATION

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, 30 years' experience in commodities, both physical & derivative markets, four years with The Sugar Board Domestic Marketing and Treasury. Is a company arbitrator.

SPECIAL RESPONSIBILITIES:

Chair - Audit, Finance and Remuneration Committee, Chair -Standards Committee

Malcolm Finlayson

Non-Executive Director

ORDINARY LEVEL B NOMINATION

QUALIFICATIONS:

Bachelor of Business Studies, MBA, CPA, FAICD

EXPERIENCE AND EXPERTISE:

Director Finesse Solutions Pty Ltd, formerly Plant Health Australia Ltd, Wheat Quality Australia Ltd, Turf breed 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 - Plant Breeding and Innovation Committee, Member of Audit, Finance and Remuneration Committee.

Jason Craig

Non-Executive Director

ORDINARY LEVEL A NOMINATION

QUALIFICATIONS:

B. Commerce (Banking & Finance), Post Graduate Diploma ASIA (Treasury Stream)

EXPERIENCE AND EXPERTISE:

General Manager (Marketing & Trading)- CBH Group, over 20 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 and Market Access Committee, Member of Governance Committee, Member of Transport, Storage and Ports Committee, Member of Plant Breeding and Innovation Committee.

Ole Houe

Non-Executive Director

ORDINARY LEVEL B NOMINATION

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 company arbitrator.

SPECIAL RESPONSIBILITIES:

Chair - Membership Committee, Member of AGIC Committee, Member of Dispute Resolution Service Committee, Member of Information Technology Advisory Committee.

Lyndon Asser

Non-Executive Director

ORDINARY LEVEL A NOMINATION

QUALIFICATIONS:

Bachelor of Economics- Adelaide University and CPA

EXPERIENCE AND EXPERTISE:

Has over 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, Viterra and joint head of Glencore's global barley trading operations in The Netherlands.

SPECIAL RESPONSIBILITIES:

Chair - Australian Grain Exporters Council, Member - Governance Committee, Member - Membership Committee, Member - Commerce Committee, Member - Trade and Market Access Committee.

Simon Tickner

Non-Executive Director

BOARD APPOINTMENT

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 - Membership Committee, Member - AGIC Committee, Member - Commerce Committee, Member - Standards Committee.

Michelle Kerr

Non-Executive Director

ORDINARY LEVEL C NOMINATION

QUALIFICATIONS:

DipAppSc(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 Grain Industry Association of Victoria (GIAV). Is a company arbitrator.

SPECIAL RESPONSIBILITIES:

Member - Dispute Resolution Service Committee, Member - AGIC Committee, Member - Standards Committee, Member - Transport, Storage and Ports Committee.

Daniel Marsh (elected in October 2019)

Non-Executive Director

MERCHANT ASSOCIATION NOMINATION

QUALIFICATIONS:

BSc Biotechnology (Hons), The University of Reading

EXPERIENCE AND EXPERTISE:

Daniel Marsh is currently Executive Director, Agricultural Commodities with the Global Markets division of the Commonwealth Bank of Australia. Dan held the role of Group Treasurer at George Weston Foods from 2009-2017 and had a primary focus on Grain Risk Management. He worked for JPMorgan in London for nine years and held roles in Equity, Credit and Commodity derivatives.

SPECIAL RESPONSIBILITIES:

Chair - Information Technology and Advisory Committee, Member - AGIC Committee, Member - Audit, Finance and Remuneration Committee, Member - Plant Breeding and Innovation Committee.

Lachlan Allen (retired in October 2019)

Non-Executive Director

MERCHANT ASSOCIATION NOMINATION

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 Viterra, 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.

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

GTA operates the following Technical Committees comprised of industry personnel:

1. Trading Standards Committee
2. Commerce Committee
3. Trade and Market Access Committee
4. Transport, Storage & Ports Committee
5. Plant Breeding Innovation 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 require 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, grain trading standards, market access issues, systems and industry processes
- 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 Committees aim 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 and they do not represent the interests of an industry sector or a private or public organisation
- All Committee members agree to be bound by the GTA Anti-competitive Clause as tabled on the agenda at all meetings.

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 Trading Standards Committee on industry matters that relate to GTA grain Trading Standards.

The Committee focussed on the Nil Tolerance parameters and made some significant modification to the definition for Sticks and Stubble as well as variation to 'Severely Damaged' for Wheat, Barley, Sorghum, Cereal Rye & Triticale

Following a thorough review, the Visual Recognition Standards Guide (VRSG) was extensively updated for the 2020/21 season to provide greater clarity to industry on the definition and interpretation of defects as outlined in each commodity Trading Standard.

Specific research projects have been progressed to assist industry implementation of Trading 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 Trading 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.

Trading Standards Committee Activities

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

During 2019/20, 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.

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

ATTENDANCE - TRADING STANDARDS COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Rob Imray	Chair - GTA Director	5	3
Michelle Kerr	Deputy Chair - GTA Director	5	4
Simon Tickner	Deputy Chair - GTA Director	5	3
Gerard McMullen	GTA Technical Consultant	5	5
Robert Eassie	Grain Producers Australia	5	3
Vince Moroney	CBH Group	5	3
Julie O'Dea	Viterra Australia	5	4
Marcus Dingle	Reid Stockfeeds	5	3
Adrian Reginato	Cargill Australia Ltd	5	4
James Saunders	Commodity Inspection Services	5	1
Lucy Darragh	Grain Growers Ltd	5	2
Jason Shanley	GrainCorp Operations Ltd	5	3
Paul Panozzo	Allied Pinnacle	5	3
Melinda Curwood	Emerald Grain	5	3
Mark Schmidt	QAM	5	1

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 2019/20 year including:

- 2019/20 Location Differentials
- GTA Trade Rules (Rule 13) Buyers Call, Delivery and Conveyance
- GTA Trade Rules (Rule 18) Circle Trades
- East coast (EC) & SA Location Differentials Methodology Review
- 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 2019/20, following the regular industry submission and consultation process and commenced preparation of the 2020/21 Location Differentials.

Following GTA Member consultation (via Member Update 5 of 19, 15 of 19, and 18 of 19), the Committee amended the GTA Trade Rules to include a number of changes including:

- Trade Rule 13
 - Insertion of a specific Buyer's Call clause
 - Alterations to the Notice of Delivery Instructions
- Trade Rule 18
 - Alteration to the Settlement Dates of Circle Trades
 - Inclusion of an obligation to assist in ascertaining a Circle Trade

During 2019/2020 the Committee appointed a Sub-Committee to undertake an extensive review of the Location Differential methodology for all states except WA. The purpose of the Review was to evaluate the appropriateness and validity of the Location Differential values and ensure the LD review process is supported by documented procedures.

The EC & SA LDs Methodology Review Sub-Committee met extensively and made significant progress in its review and deliberations. Its findings will be presented to the Commerce Committee in the second half of 2020.

ATTENDANCE - COMMERCE COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Michael Wood	Chair - GTA Director	4	2
Lyndon Asser	Deputy Chair - Deputy Chair	4	2
Geoff Farnsworth	GTA Director	4	1
Simon Tickner	GTA Director	4	2
Nathan Cattle	Clear Grain Exchange	4	4
Simon Gellert	Glencore Grain Pty Ltd	4	4
Andrew Jurgs	Carpendale	4	3
Sam Napier	Cargill Australia Pty Ltd	4	3
Richard Wood	Emerald Grain	4	3
Stephen Howells	Ridley Corporation	4	2
Joshua Lawrence	Allied Mills	4	3
Alex Onus	GrainCorp Operations Ltd	4	4
Amelia Shaw	GrainGrowers Ltd	4	3
Shane Gale	Grain Producers Australia	4	2
Fiona Roycroft	Riordan Grain Services	4	3
Sam Batters	CHS Broadbent	4	3
Hamish Steel-Park	Woodside Commodities	4	4
Justin Wilks	ADM Trading Australia	4	4
Trevor Lucas	CBH Group	4	2

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.

ATTENDANCE - PLANT BREEDING INNOVATION COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Malcolm Finlayson	Chairman	2	1
Jason Craig	Deputy Chair	2	2
Daniel Marsh	Deputy Chair	2	1
Nick Goddard	AOF/Pulse Australia	2	-
Tony Russell	GIMAF	2	1
Tanya Pittard	Grain Producers Australia	2	1
Tresslyn Walmsley	Wheat Breeders Reference Group	2	-
Osman Mewett	Australian Seed Federation	2	2
Lucy Darragh	GrainGrowers Limited	2	1
Tristan Coram	Australian Grain Technologies	2	-
David Hudson	SGA Solutions Pty Ltd	2	1
Michael Roche	GrainCorp	2	1

Activities

A major outcome during the year was the decision by the South Australian Government to lift the GM moratorium. This followed two reviews undertaken the previous year and continued advocacy by a range of grains industry organisations. The GTA PBIC developed submissions to both these inquiries.

The SA Parliament has voted to amend SA’s GM moratorium. Local councils will be given the opportunity to apply to the Minister for Primary Industries to be designated as a GM-free area. Producers in all areas of mainland SA not designated as GM free will have the freedom to choose to grow the crops that best fit their farming system beginning from the 2021 season. The moratorium will remain in place on Kangaroo Island indefinitely. A GM-free designation only applies to cultivation and research. Transport and consumption of GM material will not be affected by a GM-free designation.



Key activities for the Committee were:

- Publication of the Market Choice Plan - The Market Choice Framework is an important guidance document, and provides confidence to Government, industry and the broader community. Following considerable work by the Committee to update, the Framework has been endorsed by industry groups and is available on the GTA website (www.graintrade.org.au)
- Response to Gene Technology Scheme recommendations - the Committee developed a response to the Gene Technology Scheme Review recommendations and engaged with the review around implementation options
- International Treaty on Plant Genetic Resources for Food and Agriculture (Treaty) - the Committee developed two submissions to the Treaty review process and participated in consultation forums
- Plant breeding innovation - the PBIC began work on a GTA guidance document on information sharing which will align with the IGTC guidance document. The Committee also developed a Advice to Trade Notice around Japan’s plant breeding innovation requirements
- 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 a whiteboard video project and preparations for GLI. The video project is being undertaken in two parts where part 1 is intended to give a general overview of the LLP issue and Part 2 will focus in more detail about process controls. Part 1 video is being targeted for release at the GLI meeting in late 2020
 - Plant Breeding Innovation including ongoing dialogue with the International Seeds Federation around the IGTC guidance document on information sharing and development of education tools around supporting systems and tools. In addition, IGTC has promoted support for the WTO draft SPS declaration which includes a positive proposal for future WTO work on plant breeding innovation.
 - 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.

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

- 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 2019/20 year including:

- A focus on biosecurity to ensure reduction in supply chain risk
- Compliance with Heavy Vehicle National Law and Chain of Responsibility including the successful implementation of Chain of Responsibility training - Practical Steps to CoR Compliance
- Ongoing improvements to the container supply chain processes and transactions
- Development of a Strategy for a Collaborative Approach to the Grain Supply Chain
- Release of GTA Safety Guidelines

During 2019/2020 the Transport, Storage & Ports 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. This included the release of Submissions to government reviews including:

- 2 Submissions to the Productivity Commission - National Transport Regulatory Reform
- 1 Submission to the NHVR - Grain Harvest Mass Management Schemes Review
- 1 Submission to the federal government - Management of the Inland Rail Project by the ARTC and the Commonwealth Government

As a follow-up from the Outcomes Papers from the inaugural Australian Grain Industry Logistics Conference held in April 2019 the Committee's view were represented across several strategies included in the recently released GTA strategy document - *Modernising the Grain Supply Chain - from drought through Covid19 to 2030*. These initiatives will be progressed with input from the Committee.



Safety within the grain supply chain continues to play a major role and is a focus for the TS&P Committee. The Committee, progressed the development of grain supply chain Safety Guidelines that were approved for release by the GTA Board. These Safety Guidelines will support company safety policy and procedures and assist with industry awareness.

Transport safety continues to be a focus of the Committee through the implementation of specific practical training in maintaining compliance with Heavy Vehicle National Law (HVNL) and Chain of Responsibility (CoR) compliance.

Process and documentation issues combined with food grade container supply shortages inherent to the grain container supply chain is an important focus of the TS&P Committee. Activity has included the ongoing review of the process of assessing empty containers as suitable for export certification and the update to an existing industry document provided by Shipping Australia (SA). The revised document will become a joint SA, GTA and DAWE document. It will form a new GTA Technical Guideline Document - *Standard for Empty Shipping Container Inspection*, as part of the Australian Grain Industry Code of Practice.

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 Australia's infrastructure, planning and supply chain coordination. The Committee in 2019/20 endorsed an important strategy document developed to provide guidance to the Australian grain industry on the issue of a strategic and collaborative industry approach to the grain supply chain. This collaborative approach will ensure that:

1. The development of strategic planning and related industry discussion is performed in a collaborative, coordinated and harmonious manner with the focus on efficiency, safety and systemic improvement.
2. GTA members and the wider grain industry stakeholders have a clear and unambiguous understanding as to the position of GTA in relation to the management of logistics within the grain supply chain.
3. Federal, state and territory governments, and all grain supply chain participants have an Australian grain industry consultative decision-making process that can give confidence that logistical supply chain is being managed and improvement ideas and issues can be reviewed and addressed.



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 receipt and storage, rail and road transport, and efficient and equitable bulk and container port facilities.

ATTENDANCE - TRANSPORT, STORAGE & PORTS COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Geoff Farnsworth	Chair - GTA Director	3	2
Jason Craig	Deputy Chair - GTA Director	3	1
Michelle Kerr	GTA Director	3	2
David Syme	Grain Brokers Australia Pty Ltd	3	2
Amelia Shaw	GrainGrowers Ltd	3	1
Andrew Weidemann	Grain Producers Australia	3	0
Mark O'Brien	George Weston Foods	3	2
Josh Connell	GrainCorp	3	2
Craig Dennis	Network Grains	3	1
Dene Ladmore	Quattro Ports	3	2
Travis Anderson	Emerald Grain	3	1
Michael Broadbent	CHS Broadbent	3	1
Edward Bayles	Cargill Australia - appointed October 2018	3	2
Derek Robjohns	Viterra Operations	3	2
Matthew Kelly	Kelly Grains	3	1

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

GTA will support and where applicable shape the 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

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 the federal and state government efforts to ensure that trade is not 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 industry working group, submissions 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, management of quarantine pests of concerns and COVID 19 declarations , and maintaining relationships with the China grain sector
- India - A strong focus on market development 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

- Non-tariff Measures (NTMs) - the Committee continued to provide support, advice and endorsement for the Grains NTM project and was engaged in the DAWE Non-Tariff Measures Industry Working Group
- Continued support for the Graingrowers Ltd led project to develop a Grains Sustainability Framework
- IA-CEPA -GTA has actively facilitated a Sub-Committee to review and address with DAWE the implementation of the IA-CEPA. The Sub-Committee provided advice to the Government, and GTA members including industry liaison for the release of an Indonesian customer IA-CEPA Fact Sheet
- COVID-19 - Provided a focal point for GTA members and industry to review COVID-19 impacts, to discuss and take necessary actions to alleviate outcomes and reduce the risk within the Australian grain supply chain
- Input into range of SPS issues across a number of markets.

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

- Department of Agriculture, Water and the Environment - Grain and Plant Products Export Industry Consultative Committee (GPPEICC) and Non-Tariff Measures Industry Working Group
- Global policy developments through active participation in the International Grain Trade Coalition (IGTC)
- Participation in free trade agreement discussions and submissions to Government agencies
- Participation in outwards and inwards grain missions
- Submissions on behalf of members to Government agencies and global institutions.

ATTENDANCE - TRADE & MARKET ACCESS COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Jason Craig	Chairman	5	5
Lyndon Asser	GTA - Deputy Chairman	5	1
Michael Wood	GTA - Deputy Director	5	1
Rosemary Richards	GTA Consultant	5	5
Rob Dickie	CBH Group	5	4
Nick Goddard	AOF/Pulse Australia	5	4
David McKeon	GrainGrowers Ltd	2	0
Luke Matthews	GrainGrowers Ltd	3	3
Adrian Reginato	Cargill Australia Ltd	5	2
Richard Simonaitis	AEGIC	5	4
Tony Russell	Grain Industry Market Access Forum	5	5
Sean Barker	GrainCorp Operations Ltd	5	3
Larissa Taylor	GIWA	5	5
Julie O'Dea	Viterra	5	3
Gerard McMullen	NWPGP - appointed May 2020	1	1
Lachlan Allen	GTA Director	2	2

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 opportunities to collaboratively investigate system, process and research initiatives that may resolve common grain industry process and transactional issues
- Foster communication among 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 2019/2020 year including:

- Continued review of the introduction of Standardised Reference Data including naming convention and code nomenclature for standard items. This included the annual review and release of the Grain Varietal Code Master List
- Provided a focal point for GTA's involvement in the Government's Traceability Program initiative including the ongoing review of the possible implementation of electronic consignment data including 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.

Further work on standardising reference data has been a focus of the Committee including a review of other aspects of the grain supply chain where codes are utilised including port, region and site related reference data.

Traceability within the supply chain has been a policy focus of federal government. This is being driven by increasing global focus on biosecurity and governance in the food supply chain. The Committee has the role of the GTA focal point for international and Australian government and associations striving to promulgate change in this space.

An important required step to further these objectives is to support industry through the digitalisation and sharing of data including the introduction of a digital version of the GTA Commodity Vendor Declaration (CVD).

A continuing focus this year has included working with the Australian government as it upgrades and introduces modifications to DAWE Management Systems (PEMS) and export trade systems NeXDOCs.

ITAC also provides 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.



ATTENDANCE - INFORMATION TECHNOLOGY ADVISORY COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Dan Marsh	Chair - GTA Director	3	1
Ole Houe	Deputy Chair - GTA Director	3	2
Ian Dalglish	Rise Agri	3	2
Lucy Darragh	Grain Growers Ltd	3	3
Emma Weston	Agridigital	3	2
Martin Rooney	Cargill Australia	3	2
Joshua Whiting	Emerald Grain Pty Ltd	3	2
David Houghton	AgRisk	3	2
Peter Johnston	GrainCorp	3	2
Nathan Cattle	Clear Grain Exchange	3	2
Michael Rayner	CBH Grain	3	2

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 & 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.

- GTA currently supports the Australian Grain Exporters Council (AGEC) as the inaugural Sector Council.
- This is a proven, suitable and flexible framework, that may be considered by industry, but only if driven by industry and GTA members.

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.



AGEC

The purpose of Australian Grain Exporters Council (AGEC) is to make recommendations to the Board on issues that are of importance and direct 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 focuses 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
- 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 AGEC included input into a broad range of export related issues during the year including:

- Four meetings - two in Melbourne, two by teleconference, of the full AGEC membership
- Speakers including Grain Producers Australia, Grains industry Market Access Forum, National Working Party on Grain Protection, Grains Research & Development Corporation, Australian Export Grains Innovation Centre
- 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 Department of Agriculture Grains Industry Consultative Committee (GPPEICC)
- Involvement in the Melbourne Port Pricing and Access Review, including meetings with consultants to the review and attendance at a ministerial briefing on the outcomes
- Other issues discussed and considered include:
 - Maximum residue limits
 - AEGIC projects
 - Breeding priorities and wheat quality data for use through Wheat Quality Australia
 - Industry Good Company
 - The Indonesia-Australia Comprehensive Economic Partnership and new feed quota
 - Grain imports and domestic availability
 - Grain stocks reporting



ATTENDANCE - AEGC COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Executive Committee			
Lyndon Asser	Chairman	4	4
Steve Bennett		3	3
Darryl Borlase		4	4
Michael Cole-Sinclair		4	2
Mark Lewis		4	4
Malcolm McMahon		4	3
Erik Wibholm		1	0
Members			
ADM		4	4
AGE		4	1
Bunge		4	3
Cargill		4	2
CBH		4	3
CHS Broadbent		4	4
COFCO International		4	2
Emerald		4	3
Glencore		4	4
Louis Dreyfus		4	4
Plum Grove		4	2
Riordan Grains		4	4
Riverina		4	3
Wilmar Gavilon		4	2

TOPIC	SUBMITTED TO	DATE
National Transport Regulatory Reform	Productivity Commission	July 2019
Japan-Australia Economic Partnership Agreement Review	DFAT	August 2019
South Australia Statutory Consultation on variation to the Genetically Modified Crops Management Act 2004	SA Government - PIRSA	September 2019
China Barley Issues	Prime Minister	October 2019
Grain Harvest Management Schemes Review	NHVR	October 2019
Draft Export Control Bill	DAWE	October 2019
Plant Property Identification Reforms	DAWE	October 2019
Coastal Shipping Reform	Minister for Infrastructure, Transport, Cities & Regional Development	October 2019
2019 Grain Industry NTM Report	Minister for Trade, Tourism & Investment Minister for Agriculture DAWE DFAT	October 2019
National Gene Technology Scheme Review	Minister for Aged Care, Senior Australians, Minister for Youth & Sport	November 2019
Management of the Inland Rail Project by the ARTC and the Commonwealth Government	Department of Transport & Infrastructure	November 2019
Export Cost Recovery Implementation Statement: Plant Export Certification	DAWE	December 2019
Potential Breakdown of the WTO Dispute Settlement Appellate Body	Minister for Trade, Tourism & Investment	December 2019
Modernising the RDC System	DAWE	December 2019
2019 National Transport Regulatory Reform	Productivity Commission	January 2020
Covid-19 Trade Disruptions and Grains Supply Chain Engagement	Minister for Agriculture, Drought and Emergency Management	April 2020
Response to Statement of Essential Facts	China Ministry of Finance & Commerce	May 2020
Wheat Quality Report	Graingrowers Limited	June 2020
Export Control (Plants and Plant Products) Rules 2020	DAWE	June 2020
Consultation on use patterns for anticoagulant rodenticide products	APVMA	June 2020



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.

- 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 and market confidence.
- GTA Arbitrators are industry practitioners acting impartially in a voluntary capacity.

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.

0.005% of the estimated number of grain contracts executed in Australia on an annual basis that 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.

ARBITRATIONS	2018/2019	2019/2020
No of arbitrations commenced	14	25
No of arbitrations settled		
• Awards released	8	49
• Commercially settled prior to hearing	4	7
Active arbitrations as at 30 June 2020	62	15

SUMMARY OF ARBITRATION AWARD OUTCOMES 2019/20:				
TYPE OF ARBITRATION	CLAIMANT	RESPONDENT	AWARD IN FAVOUR OF	NUMBER
Full	Grain trader	Grain trader	Claimant	2
Full	Grain producer	Grain trader	Respondent	45
Fast track	Grain producer	Grain trader	Respondent	1
Fast track	Grain trader	Grain producer	Respondent	1

SURNAME	FIRST NAME	ORGANISATION
Allen	Guy	Advance Trading Australasia
Basnett	Tom	AgRisk Management Pty Ltd
Barron	Graham	Grain Producer - NSW
Benham	Jock	GrainCorp Operations Ltd
Bennett	Steve	Bunge Agribusiness Australia P/L
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
Furse	Anthony	Robinson Grain
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
Imray	Robert	Farmarco
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

SURNAME	FIRST NAME	ORGANISATION
McNair	Simon	Industry consultant
Mead	Andrew	ADM Trading Australia
Meyer	Stefan	Intl FC Stone Pty Ltd
Notaras	Harry	GrainCorp Operations Ltd
O'Brien	Mark	George Weston Foods Ltd
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
Tiller	Benjamin	CBH Group
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 31 March 2020

SURNAME	FIRST NAME	ORGANISATION
Brasington	Hazel	
Farnsworth	Geoff	Holding Redlich
Lockwood	Christopher	HFW
Rosenthal	Jeremy	SBA Law
Thompson	Stephen	HFW

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 offers the following Training and Development Courses:

- GTA Trade Rules and Contracts
- GTA Grain Standards
- Grain Merchandising
- Understanding Grain Markets
- Grain Accounting
- GTA Arbitrators Workshop
- Export Contracts & Documentation
- In-House training
- Advisory & Compliance Workshop
- Chain of Responsibility
- Code of Practice Compliance Program



- As a part of its industry stewardship role, GTA offers specialist grain industry training and development courses specifically targeted at participants in the grain value chain, from producers, transport operators, storage providers, marketers, consumers and regulators.
- GTA Trainers have specialist expertise in the content of each course.
- During 2019/20 GTA held 21 courses, with over 240 students attending from over 20 organisations.
- The most popular (or attended) courses are:
 - Understanding Grain Markets
 - Advisory & Compliance Day
 - Trade Rules and Contracts
- GTA delivers in-house training which is adapted 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.
- GTA Training & Development delivered the Advisory and Compliance workshop in July 2019. The topics included a focus on compliance and advisory issues during periods of drought, Reputational Risk, Chain of Responsibility legislation, grain industry insolvency, insurance industry issues and dispute resolution. These were delivered by highly respected presenters with specialist expertise in their fields.
- With the Covid-19 pandemic training and development courses have successfully moved to on-line "live" workshops. This has been well received by industry and students and allowed easier and time effective access for participants from all regions.
- In response to the Covid-19 Pandemic GTA in conjunction with specialist firms HFW and Grant Thornton held a series of Webinars on the Managing through the Covid Pandemic
- 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.

GTA Trainers have specialist expertise in the content of each course

Strategic Approach

GTA's vision is to promote an efficient, equitable and open commercial grain industry in Australia.

- GTA's activity is focused in the key areas of:
- Ensuring the policy settings are supportive of the grain industry and for the facilitation of trade
 - Actively promoting the grain industry's priorities and position within 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

As a trade exposed sector participants, the grain industry and GTA members, are dependent on open and fair access to export markets. The grain industry has recently experienced considerable market impact due to China's decision on May 2019 to impose punitive tariffs on Australian barley exports.

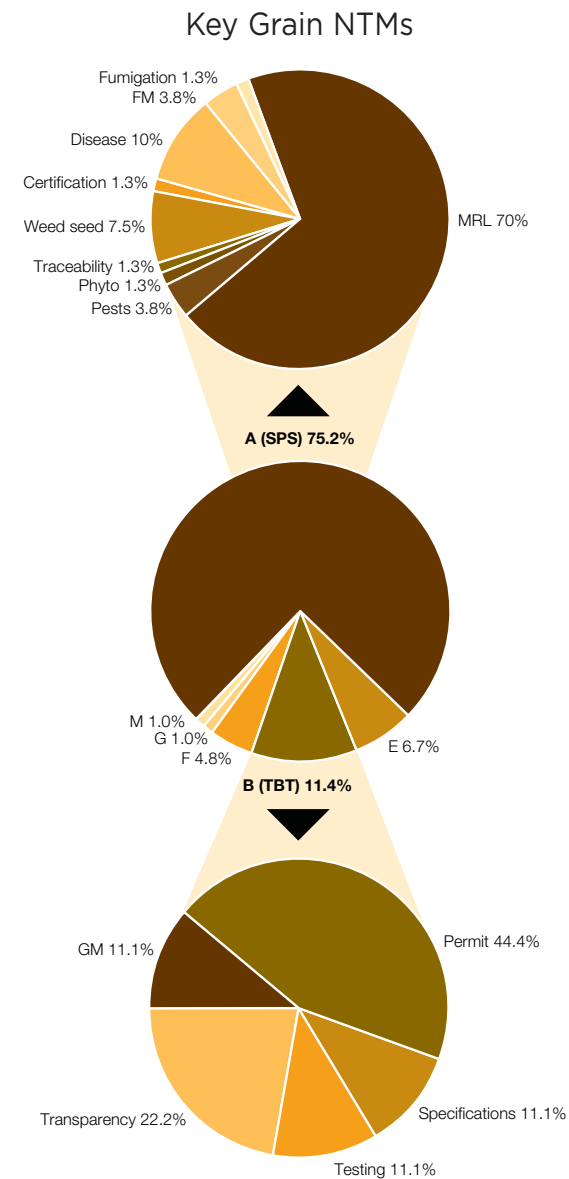
In addition, the industry is increasingly facing technical and phytosanitary barriers that are increasing the difficulty and cost of doing business.

While the cost/benefit of technical barriers are sometimes less tangible than tariffs, they can create potentially significant economic and compliance impacts for Australian growers, exporters and the supply chain. This includes loss of important markets, increased risk in the value chain and potential lower prices for Australian industry.

GTA Trade and Market Access Strategic Framework			
<i>Trade and Market Access Objective</i>			
GTA provides leadership to the Australian grain industry and works to maximise the position of the Australian grain industry in relation to TMA activities and optimise outcomes for industry			
Four pillars underpinning GTA TMA Activities			
Policy <ul style="list-style-type: none"> • Ensuring policy settings are supportive of grain industry trade 	Advocacy <ul style="list-style-type: none"> • Proactively promoting the grain industry's priorities and positions in domestic and global forums 	Support <ul style="list-style-type: none"> • Providing technical and operational support to the industry to address trade issues as they arise and assist to implement appropriate policies to maintain and enhance future trade 	Communication <ul style="list-style-type: none"> • Ensuring industry has transparent and open mechanisms for providing input into and receiving feedback on TMA priorities • Creating a collaborative and shared commitment to TMA activities
Key Strategies			
<ul style="list-style-type: none"> • Identify and communicate industry's position • Advise Government on the impact of trade barriers 	<ul style="list-style-type: none"> • Monitor, articulate and address technical trade barriers • Engage with and influence trade negotiations, regional initiatives and other market access initiatives • Communicate the value of grain trade and the importance of market access • Build relationships with Government, cross sector representatives and global grain partners 	<ul style="list-style-type: none"> • Provide informed analysis and support to Government and other initiatives 	<ul style="list-style-type: none"> • Foster strong engagement with Government and industry in Australia and globally

As such GTA has continued to increase its activity in the area of trade and market access. GTA is uniquely placed to address these issues as it operates (and has practical insight) across the supply chain and has access to its members commercial skills, experience and capabilities. GTA acknowledges the work of other parties in relation to trade and market access and works closely with GGL, GIMAF and other stakeholders.

GTA's trade and market access strategy and activities seek to develop domestic and global policies and endeavours to position the industry to take advantage of trade opportunities, minimise impacts and constraints to trade, and enable trade to continue in an efficient and equitable manner. Recent issues have tested Australia and the capability to trade freely and without constraint. Geopolitical issues combined with the impact of Non-Tariff Measures (NTMs) have increased and are potential barriers to trade.



GTA works proactively with industry stakeholders and Australian Government to counter the growth of non-tariff measures by supporting international standards that are based on sound science and ensuring that international trade is based on these standards. Both industry and governments must work together to build and strengthen science-based trade.

- GTA's trade and market access strategy is built around four pillars:
1. Policy - getting the policy settings right
 2. Advocacy - in domestic and global forums
 3. Support - technical and operational support
 4. Communication - creating a collaborative and shared commitment to TMA activities

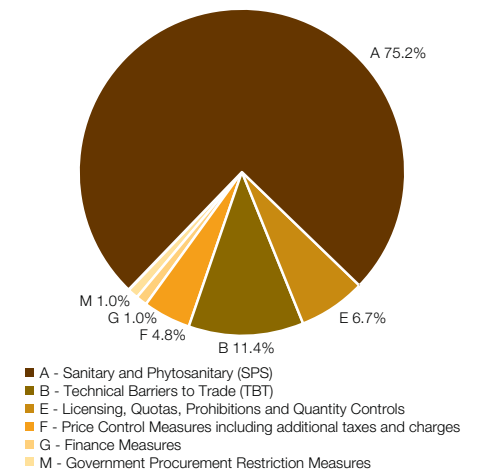
Practical Experience & Market Understanding

Importantly GTA's Trade and Market Access Committee (TMAC) is diversified with significant commercial players and industry organisations, assuring information provided by GTA to Government is informed by 'on the ground' practical experience and market understanding.

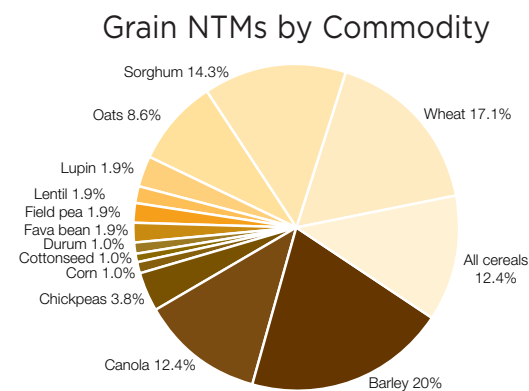
GTA's trade advocacy activities involve the provision of assistance and support on a range of trade-related issues. As a major exporting industry, changes in access to overseas markets affect the profitability of all parties in the value chain. Complex international markets require an ongoing effort to maintain existing rights of access to markets, and where possible, to secure improvements to export conditions.

Maintenance of favourable market access conditions and securing trade reform are commonly undertaken at a government-to-government level. GTA with its broad membership bases, assist the Government through provision of advice, prioritisation and supporting in market and/or inwards activities.

Grain NTMs by classification



GTA Trade and Market Access Strategic Framework	
IGTC FILE	ACTION
Maximum Residue Levels (MRLs)	Trade Enabling Solutions for MRL Related Matters/ Support for Enhancing Codex MRL Development
Plant Breeding Innovation	Prepare IGTC policy to enhance science-based approach to regulation of NPBTs
Global Low-Level Presence (LLP) initiative	Address all matters related to LLP, including Global Low-Level Initiative (GLI), definitions
International Standard on Phytosanitary Measures on the International Movement of Grain	Develop policy regarding the drafting process of the Grain Standard
E-Documentation for grain trading	Assess potential introduction of e-Phytos on a global basis via a dedicated IT hub
Cartagena Protocol on Biodiversity	Policy development for COP/MOP meetings



International Linkages

GTA actively builds international linkages in order to promote the value of the industry and ensure input into global decision-making bodies whose frameworks and decisions can have far-reaching implications for the grain industry.

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

GTA is a long standing and active member of the IGTC. The overarching objective of the IGTC is to achieve a market and regulatory environment supportive of trade that avoids disruptions in the international trade of grain, oilseeds, pulses and derived products. Through IGTC, Australian industry increases its advocacy to a number of international institutions with specific guidelines to try and reduce trade barriers/NTMs.

These include:

- WTO Agreements (principles based)
- Codex Alimentarius Commission (advisory standards based)
- IPPC (standards)
- World Bank
- UN-FAO
- IGC

- APEC (regulatory coherence)
- Systems recognition in bilateral/regional trade agreements

IGTC is a reputable and cost-effective means of helping develop global grain trade solutions including:

1. Encouraging forward-looking policies in FTAs to minimise non-tariff measures:
 - Science based regulatory systems
 - Acknowledge “zero” risk does not exist
 - Commercially acceptable solutions
 - Risk mitigation methods
2. Developing international initiatives:
 - Standardisation and adoption of internationally recognised standard methodologies and testing
 - Promotion of low-level presence policies
 - Mutual recognition of risk assessments

IGTC has several policy/working groups to address those areas impacting on market access and facilitation of trade. These include:

Grains Australia

“Grains Australia” Limited is an apolitical industry services company established in 2019 and funded by GRDC and residual WISA funds. The purpose of Grains Australia is to ensure delivery of service related industry good functions to the grain industry, these being:

1. grain classification;
2. technical market access, technical market services and education/extension; and
3. long term consumptive use and market demand signals.

GTA is a member of the Grains Australia Steering Committee convened by GRDC and a member of the Board Selection Panel for recruiting the inaugural Grains Australia Board. GTA will serve on the Grains Australia Industry Advisory Committee.

2019/20 Activity Matrix

GTA has been active on TMA issues across a number of key areas as identified on the next three pages.

ISSUE	CONTENT	2019/20 ACTIVITY
Elimination of tariffs	An ongoing priority addressed through WTO activities and Articles and Free Trade Agreements.	<ul style="list-style-type: none"> • GTA has engagement with WTO processes through Direct dialogue with DFAT and participation in DFAT & IGTC activities • Input into policy in partnership with other industry stakeholders. • GTA has expended considerable resource in addressing 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 & DAWE in seeking to mitigate the threat of adverse impacts on industry. This included extensive engagement and submission to the Prime Minister’s office, Trade Minister, Agriculture Minister and Chinese Government. • GTA has developed a Market Engagement Strategy for China to support continued exports of other grains, and to re-engage with barley exports, if/when the opportunity arises.
FTAs (tariffs & technical barriers)	Free Trade Agreements are an opportunity to promote elimination of tariffs/quotas and adoption of disciplines relating to non-tariff measures.	<ul style="list-style-type: none"> • GTA has led the industry consultation with DAWE on developing the feed grain TRQ processes for IA-CEPA feed grain market access and provided information for importers and exporters. • Current FTA’s that GTA is providing input to include UK, India, RCEP and EU. • Review and updating of disciplines in relation to MRLs, standards and testing and innovation. • GTA made submissions to reviews of existing FTA’s including Japan-Australia Economic Partnership Agreement Review
Predictable and science based SPS regulations	Plant protection (sanitary & phytosanitary) i.e. SPS measures around concerns such as plant diseases, weed seeds and pests are a high priority issue for the grain industry. GTA works with GIMAF and DAWE Biosecurity to address these issues as they arise. GTA also works with DAWE on regional and bilateral initiatives to create an improved operating environment. GTA works actively with IGTC to advocate at a global level for efficient trade frameworks.	<ul style="list-style-type: none"> • Areas of focus for industry are: <ul style="list-style-type: none"> - Increased transparency and harmonisation through recognition of sampling and testing methods/Equivalence of systems and processes/Common language & terminology - Testing/sampling methods based on recognised science - Recognise ‘free from’ or risk-based systems approach to certain pests or diseases of quarantine concern - Adoption of international best regulatory and technical practices (eg CODEX) - Use of risk and science-based assessments • The Grain Industry NTM Report was updated in 2019 and released to industry and Government stakeholders. The report has identified several SPS based NTMs which are managed via the market access database established by GTA. • GTA works with the Government through regional initiatives including the APEC Grain Trade Facilitation Forum in Beijing in November 2019 where GTA lead the private sector engagement and presented a study on the impact of NTMs on the wheat value chain study, • GTA is an active member of the ASEAN NTM Business Working Group. • GTA continue to develop and strengthen relationships with like-minded international trade associations in importing and exporting countries. • GTA is an active long-standing member of IGTC, serving on its Management Council and as Secretary on the Executive Committee.

ISSUE	CONTENT	2019/20 ACTIVITY
Food safety regulations, in particular, Maximum Residue Limits (MRLs)	MRLs are becoming an increasing risk in the market. Aligning MRL levels in key markets is a major focus. The NWPGP is the lead agency domestically on all chemical issues and GTA works with IGTC on these issues globally.	<ul style="list-style-type: none"> • Areas of focus for GTA & industry are advocacy for a scientific base for forming MRLs, harmonisation/synchronisation of MRLs, adoption of IGTC policy principles on MRLs where appropriate, and harmonization with Codex standard. • GTA works in partnership with NWPGP and provides secretariat and conference management activities. • GTA actively engages with DAWE National Residue Survey (NRS) and made various submissions to APVMA. • Promoting Australia's food safety and quality assurance processes with international customers, including AGIC Asia and AGIC Asia Stakeholder Roundtable seminars. • Management of Australian Grain Industry Code of Practice.
Harmonised international methodology	Standards and testing methodologies can cause market access issues where these are not harmonised or consistent	<ul style="list-style-type: none"> • GTA works with the Government, through regional initiatives such as APEC and IGTC to address lack of harmonisation in relation to regulatory approaches, frameworks, and regulations (e.g. inconsistent terminology, product testing, and product labelling, inconsistent or no MRLs, inconsistent sampling and testing procedures) and promote a principle and system-based approach to improve alignment and harmonisation. • GTA led the private sector engagement and presented a study on the impact of NTMs on the wheat value chain at APEC Grain Trade Facilitation Forum in Beijing in November 2019.
Biotech & new innovation regulations	Regulation of biotech products or new plant breeding innovations should be based in science and not restrict market access. Zero tolerance policies and asynchronous authorisations are increasing compliance risk and costs.	<ul style="list-style-type: none"> • Maintain the Market Choice Framework for GM Crops and implementation of related policies and response plans. • Key priorities are synchronous approval of biotech traits, joint recognition of risk assessments for new technologies and harmonised regulatory approaches to new innovations including low level presence policies • GTA primarily works on these issues through IGTC. Current activities are largely focused around the Cartagena Biosafety Protocol, LLP policy and plant breeding innovation including information sharing with the seed/technology sector. • Engaged with International Seeds Federation, through IGTC and with Australian Seed Federation on information sharing of traits in innovative plant technology.
Sustainability	Lack of alignment of environment, social and agriculture goals in ways of demonstrating compliance and associated costs for certification. Sustainability standards imposed by customers can become market access barriers when they are not coordinated or are not informed by industry best practices	<ul style="list-style-type: none"> • International methodology to define sustainability is an emerging issue • GTA is a member of the Steering Committee for the Grains Sustainability Framework project • Promote awareness of Food Safety and reliability of the grain value chain through NWPGP, AGIC Conferences, Delegation presentations and the Code of Practice

ISSUE	CONTENT	2019/20 ACTIVITY
Increase in regulatory rules and burden	Key issues are: - a lack of transparency around conditions and criteria of import permits - different documentation needed across regions/markets - inconsistent certification requirements - differences in definitions, methodologies and recognition of certifying bodies - adoption of consumer driven regulations that are not based on science.	<ul style="list-style-type: none"> • E-documentation a key focus for clearer visibility of quality assurance processes through the supply chain. Adoption of digital processes (e.g. e-phyto) will assist to streamline processes and improve data validation • GTA worked with the Government, through regional initiatives such as APEC, ASEAN and with IGTC on these issues. • Direct engagement with the Government encouraging flexibility in documentation and certificates in response to Covid-19. • Manage and update grain industry NTM and Market Access Database • Grain Industry NTM report updated in 2019 and provided to Government to raise awareness of the impact of these issues on industry. • NTM presentation to virtual International Grains Conference. • Submissions to Export Legislation consultations
Lack of transparency and predictability of changes in market access rules and regulations		
Capacity Building	Provide leadership and capability development to mitigate risk and improve quality assurance processes in the supply chain. Developing solutions to many NTMS will require capacity building with trade partners to promote international best practice.	<ul style="list-style-type: none"> • Work with the Government to identify international best practice, develop capacity building activities, consultation with stakeholders, and alignment with international and trading partner regulation. • GTA has led several industry working groups including: <ul style="list-style-type: none"> - Review of Food Grade Shipping Container standard - Development of Grain Sampling Methodology and Procedural guidelines - Export Permit Process (RFP) Review - Mobile Bulk Loading Guidelines - Ship Inspection using video capture
Quality Assurance and Market Access	Ensure the quality assurance processes and outcomes in the Australian grain supply chain are efficient cost effective and meet Government regulatory requirements to maintain market access for Australian grain.	<ul style="list-style-type: none"> • Manage the Australian Grain Industry Code of Practice • Active member of Grain and Plant Products Export Industry Consultative Committee (GPPEICC). This is DAWE's principal consultation forum with grain industry stakeholders on export inspection and certification, export market access and other relevant issues. • GTA is an active member of several GPPEICC sub-committees including Strategy, Finance, Sampling, Request for Permit and Mobile Bulk Loading. • Major issues addressed by the GPPEICC: <ul style="list-style-type: none"> - 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 DAWE and industry - Review of Export Legislation to make sure legislation is practical and 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

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. Increasingly the focal area of work has been on in-crop chemical use and the impacts on market access.

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 2020/21, 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.

The NWPGP Annual Conference (known as the Australian Grain Storage and Protection Conference) was deferred from June 2020 and will



be held virtually in October 2020. In the meantime a range of activities occurred during the year both in preparation for the conference and to assist industry's market access. These included:

- A continued review of changes in chemical regulations in domestic and export markets, mainly focussed on maximum residue limits (MRLs) that apply and provision of information on request to industry on other issues associated with market access such as prohibited chemicals.
- Assessment of the impacts on changing MRLs and liaison with industry and the Australian Government on solutions to resolve where proposed changes have a significant negative impact on industry.
- Increased focus on advocacy to all sectors of the supply chain to increase awareness of the importance of understanding market requirements when using chemicals and selecting grain for supply. Specific targets included grower advisory groups and participation in GRDC Regional Updates.
- Providing leadership with other industry organisations on updates to market access requirements for specific markets and chemicals.
- Continued leadership of Working Groups on topics of relevance to be addressed following formation of those Working Groups at prior NWPGP Annual Conferences. This included completion of work for the Glyphosate, MRL Compliance and Flutriafol Working Groups.
- Update to the NWPGP website (www.graintrade.org.au/nwpgp) to provide more updated and relevant information for use by industry.
- Publication of the revised 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. This document has been updated and also placed on the NWPGP website for industry use.
- Input into various Australian chemical reviews including:
 - The Department of Agriculture, Water and the Environment review of the agvet chemicals regulatory system in Australia;
 - Topics to be discussed at the forthcoming Codex Committee on Pesticide Residues meeting and provision of feedback on behalf of the Australian grain industry; and
 - Various Australian Pesticides and Veterinary Medicines Authority (APVMA) Trade Advice Notices for impacts on marketing Australian grain.

The Australian Grains Industry Conference

2019



31 July - 1 August 2019
Crown Promenade,
Melbourne, Australia

The Australian Grains Industry Conference (AGIC) is a key activity for GTA each year. The annual program includes domestic and international conferences and receives strong support from sponsors and delegates from across the grain value chain and related service industries.



The 2019 Australian Grains Industry Conference was highly successful and continues to provide a strong technical program and industry networking opportunities for sponsors and delegates over the two day event.



AGIC continues to grow as a key venue for exhibitors to access a targeted customer base in the grains supply chain.

NAVIGATING THE FUTURE • Roadmap to 2025



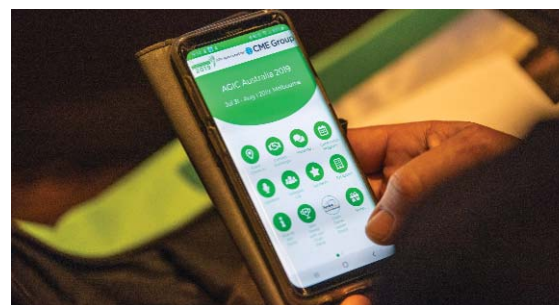
The 2019 Conference program was framed around the theme of "Navigating the future... the roadmap to 2025" looking at the vision for the Australian grain industry and the challenges and practical steps necessary to achieving the vision. The program featured high profile speakers including NFF President Fiona Simson, Bioenergy Chair Dr John Hewson, Indonesian Flour Mills Association Chair Mr Franciscus Welirang and a stirring Farrer Memorial Oration by Professor Tim Reeves. Also featured was a high-level and popular "CEOs in Conversation" session involving Virginia Trioli in conversation with Shayne Elliot - CEO ANZ, Donald McGauchie - Chair of AA Co and Nufarm, and Brenden Bourke - CEO Melbourne Ports.



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

AGIC is the key Australian grain industry event of the year providing experts discussing topical business and industry issues and importantly opportunities for networking across industry. The networking activities culminated with a large Gala AGIC dinner, which featured entertainment from comedians Dave Thornton and Mick Colless.

Planning is underway for AGIC future AGIC events and allows for virtual or face to face formats - depending on Covid-19 situation as we prioritise the health and safety of AGIC delegates



The Australian Grains Industry Conference Asia 2020



AGIC Asia was planned for March 2020, with events planned for China and Vietnam including Government Roundtable meetings as part of the overall program. However due to the Covid-19 pandemic these events were postponed, and a virtual conference was scheduled for July 2020.



AGIC Asia events are well attended by both flour and feed millers and reinforced the strong position that Australian grain holds in the Asian markets. GTA committed to a virtual conference in 2020 to ensure continuity of engagement with Australian grain customers and the important messages of value in Australian grain from quality, reliability and quality assurance in our grains supply chain.

Over several years, the AGIC Asia 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 have proven to be very valuable and have resulted in tangible trade and market access outcomes supporting the maintenance and growth of these important markets for the Australian grain Industry.

It is expected these events will resume once the Covid-19 situation allows safe international travel.

AGIC is co-hosted by Grain Trade Australia, Australian Oilseeds Federation, and Pulse Australia. GTA is the AGIC Conference Organiser.

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 generated a surplus of \$120,327, as compared to a deficit of \$22,272 in the previous year. Net equity at 30/6/20 is \$1,272,971

As a not for profit organisation, GTA cannot distribute profits or build excessive cash reserves. The following factors contributed the financial accounts:

- Conferences and Events being postponed or cancelled due to Covid 19.
- Lower staff and Director travel and accommodation in the last quarter due to Covid 19.
- Benefits received from Government Covid 19 Programs

The following information was extracted from the financial statements of Grain Trade Australia Ltd for the year ended 30 June 2020 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.

Grain Trade Australia Ltd

Statement of profit or loss and other comprehensive income

For the year ended 30 June 2020

	2020 \$	2019 \$
REVENUE	2,031,898	2,207,481
Interest revenue calculated using the effective interest method	11,222	16,710
EXPENSES		
Direct expenses	(619,737)	(676,970)
Employee benefits expense	(759,679)	(790,637)
Depreciation and amortisation expense	(72,675)	(5,990)
Rental and lease costs	(11,005)	(78,437)
Consultancy and legal expenses	(52,490)	(76,865)
WQA expenses	(1,245)	(4,150)
Travel and accommodation	(75,144)	(143,001)
Special projects	(144,989)	(306,240)
Other expenses	(174,332)	(164,173)
Finance costs	(11,497)	-
SURPLUS/(DEFICIT) BEFORE INCOME TAX EXPENSE	120,327	(22,272)
Income tax expense	-	-
SURPLUS/(DEFICIT) AFTER INCOME TAX EXPENSE FOR THE YEAR	120,327	(22,272)
Other comprehensive income for the year, net of tax	-	-
TOTAL COMPREHENSIVE INCOME FOR THE YEAR	120,327	(22,272)

Grain Trade Australia Ltd

Statement of financial position

As at 30 June 2020

	2020 \$	2019 \$
ASSETS		
Current assets		
Cash and cash equivalents	991,243	808,159
Trade and other receivables	193,257	917,232
Contract assets	54,677	-
Other financial assets	629,800	629,800
Other assets	84,858	336,082
Total current assets	1,953,835	2,691,273
Non-current assets		
Property, plant and equipment	-	718
Right-of-use assets	320,536	-
Total non-current assets	320,536	718
Total assets	2,274,371	2,691,991
LIABILITIES		
Current liabilities		
Trade and other payables	140,176	147,564
Contract liabilities	443,073	-
Lease liabilities	71,758	-
Employee benefits	77,901	47,906
Other liabilities	-	1,343,877
Total current liabilities	732,908	1,539,347
Non-current liabilities		
Lease liabilities	259,740	-
Employee benefits	8,752	-
Total non-current liabilities	268,492	-
Total liabilities	1,001,400	1,539,347
Net Assets	1,272,971	1,152,644
EQUITY		
Retained earnings	1,272,971	1,152,644
Total Equity	1,272,971	1,152,644

Grain Trade Australia Ltd

Statement of changes in equity

For the year ended 30 June 2020

	2018 Retained earnings \$	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
2019	Retained earnings \$	Total equity \$
Balance at 1 July 2019	1,152,644	1,152,644
Surplus after income tax expense for the year	120,327 1	20,327
Other comprehensive income for the year, net of tax	-	-
Total comprehensive income for the year	120,327 1	20,327
Balance at 30 June 2020	1,272,971	1,272,971

Grain Trade Australia Ltd

Statement of cash flows

For the year ended 30 June 2020

	2020 \$	2019 \$
Cash flows from operating activities		
Receipts from customers (inclusive of GST)	2,015,096	2,443,603
Payments to suppliers and employees (inclusive of GST)	(1,772,389)	(2,319,365)
Interest received	12,869	13,874
Interest and other finance costs paid	(11,497)	-
Net cash from operating activities	244,079	138,112
Cash flows from investing activities		
Payments for property, plant and equipment	-	(2,069)
Net cash used in investing activities	-	(2,069)
Cash flows from financing activities		
Repayment of lease liabilities	(60,995)	-
Net cash used in financing activities	(60,995)	-
Net increase in cash and cash equivalents	183,084	136,043
Cash and cash equivalents at the beginning of the financial year	808,159	672,116
Cash and cash equivalents at the end of the financial year	991,243	808,159

ORDINARY MEMBER (TRADING)

Level A1 (over 7 Million Tonnes)

CBH Grain P/L
Glencore Agriculture P/L

Level A2 (5-7 Million Tonnes)

Graincorp Operations Ltd

Level A3 (3-5 Million Tonnes)

ADM Trading Australia P/L
Cargill Australia Limited

Level A4 (1.5-3 Million Tonnes)

Level B1 (1.0-1.5 Million Tonnes)

Emerald Grain P/L
Cofco International

Level B2 (500,000-1 Million Tonnes)

Arrow Commodities P/L
Australian Grain Export P/L
CHS Broadbent P/L
Centre State Exports P/L
George Weston Foods Limited
Ridley Agriproducts P/L
Riordan Grain Services
Riverina (Australia) P/L
Bunge Agribusiness Australia P/L

Level B3 (250,000-500,000 Tonnes)

Agfarm P/L
Agracom P/L
Allied Pinnacle P/L
Louis Dreyfus Company Australia P/L
Quadra Commodities P/L
Robinson Grain Trading Co P/L
Wilmar Gavilon P/L

Level C (under 250,000 Tonnes)

A T Waterfield & Son P/L
A W Vater and Co
AACL P/L
Access Grain P/L
Adams Australia P/L
Agmark Commodities
Agri Om Australia P/L
Agri-Oz Exports P/L
Agriex Australia P/L
Agrifoods Australia
Agrigrain
Agrisk Management P/L
Agromin Australia P/L
AGT Foods Australia

Associated Grain
Auscott Ltd
AusiCan Commodities
Australian - Asian Agricultural Exports P/L
Australian Choice Exports P/L
Australian Fresh Milk Holdings (AFMH)
Australian Grain Storage
Australian Growers Direct P/L
Australian Mungbean Company P/L
Australian Storage Alliance P/L
Baker Grain
BFB P/L
Blairs Produce Company
Boolah Grains P/L
Boort Grain Co-Operative
Broun and Co Grain P/L
C & S Trading P/L
C K Tremlett P/L
Carpendale Commodities
Cameron Pastoral Company P/L
Castlegate James Australasia P/L
Chester Commodities P/L
CL Commodities P/L
Continental Grain Handling P/L (CGH)
Coorow Seeds
Coprice
Cory Johnston (Aust) P/L
Craig Tyack Grain Trading
Dalby Bio-Refining Limited
Darwalla Milling Co P/L
Deacon Seeds Company
Deckert Group P/L
Defiance Maize Products P/L
Demeter Cormack P/L
Direct Commodities P/L
Donnellons Bulk Haulage P/L
East Coast Stockfeed P/L
Elders Grain
Ellerslie Free Range Farms P/L
Esperance Quality Grains
ETG Processing Pty Ltd T/A Wimpak
Export Trading Group Australia P/L
Feed Central P/L
Findlays Barellan
Five Star Stock Feeds
Fletcher International Exports P/L
GO Resources P/L
Gold Star International P/L
Grain Direct Australia
Grain Link (NSW) P/L
Grain Link WA P/L
Grainforce P/L
GrainTrend P/L
Greentree Farming
GV Grain & Fodder
Hanlon Enterprises Grain

Harwood Grains P/L
Hutt & Co Pty Ltd T/A GrainSource
Independent Grain Handlers P/L
Irwin Stockfeeds
Itochu Australia Ltd
J K International P/L
J W Koek & Company
James Stock Feed and Fertilizer P/L
Jerilderie Grain Storage & Handling
KB Agri Services P/L
K M & W M Kelly & Sons
Kangaroo Island Pure Grain P/L
Kennett Rural Services P/L
Lachlan Commodities P/L
Laharum Bulk Handling Co
Lake Grain P/L
Lane Grain P/L
Laragon Almond Processors P/L
Laucke Flour Mills P/L
Lawson Grains P/L
LDC Enterprises Australia P/L
Lemarc Agromond P/L
LINX Cargo Care
LPC Trading P/L
Mandala Trading P/L
McKenzie Ag Services
Malteurop Australia P/L
Matthews Transport and Grain Traders
Max Grains P/L
MC Croker Pty Limited
Melaluka Trading P/L
Mellco P/L
Moulamein Grain Co-Operative Ltd
MSM Milling P/L
Namoi Cotton Ltd
Nandaly Grain Co-Operative Ltd
Network Grains P/L
Newcastle Agri Terminal P/L
Origin Grain P/L
Pacific Global Sprouts P/L
Parkinson Bros
PB Seeds P/L
PeaCo
Pearson's Grain P/L
Peters Commodities P/L
Phoenix Global Australia P/L
Plum Grove P/L
Premium Grain Handlers P/L
Preston Grain
Pulse Association of the South East (PASE) Inc
Quattro Ports
Quirindi Grain & Produce
Reid Stockfeeds P/L
Rhodium Trading Australia P/L
Rivalea (Australia) P/L
- Animal Nutrition

Riverina Oils & BioEnergy P/L
RP Grain P/L
RT Wallace P/L
Ruddenklau Grain P/L
Rural Logic (Aust) P/L
Shannon Bros Bulk Haulage
Silo Bag Grain (NSW QLD) P/L
Societa Cofica P/L
Southern Cotton Trading P/L
Southern Cross Agricultural Exports P/L
Southern Grain Storage P/L
Spagricon Australia Pty Limited
Standard Commodities Australia P/L
Sudima Australia P/L
Summer Hill Grains
SunPork Farms Feed Mills
Swiss Singapore (Australia) P/L
Tamma Grains Australia P/L
Tasmanian Agricultural Producers P/L
Thallon Grains P/L
ThriveAgri
TSS Grain
Ulusoy Asia Pacific
Unigrain P/L
Unique Grain Management P/L
Universal Commodity Management
W B Hunter P/L
Ward McKenzie P/L
Watershed Commodities
Watson's Bulk Logistics
WHG Oceania P/L
Wilken Grain
Woods Grain P/L
WW Agri P/L
XLD Grain P/L
Yenda Prods Grain P/L

TRANSPORT OPERATOR

Aurizon Operations Limited
Gehrke Grains and Transport P/L
Hamilton Contracting (NSW) P/L
Pacific National (NSW) P/L
SEAWAY Intermodal P/L

BROKER

Medium

Fox Commodities P/L
Grain Brokers Australia
Horizon Grain Brokers P/L
iGrain.com.au P/L
INTL FCStone P/L
McDonald Pelz Australia
Perkins Commodity Brokers
Teague Australia P/L

Sole Operator

A C Grain
Allied Grain P/L
Cogeser (Australia) P/L
Esquire Commodities P/L
Farm Tender
Lotema P/L
Mallon Commodity Brokering
Quest Commodities P/L
Wimmera Mallee Grain Services
Woodside Commodities P/L

CORPORATE

Large

ASX Limited
Australia and New Zealand Banking Group
Australian Grain Technologies P/L
Commonwealth Bank of Australia

Medium

AgriDigital
Agrifood Technology P/L
Amspec Australia P/L
Australian Superintendence Company
Commodity Inspection Services (Australia) P/L
Foss Pacific P/L
Holding Redlich
Holman Fenwick Willan
Intertek
SBA Law
SGS Australia P/L
T-Ports P/L
Viridis Ag

Small

Advance Trading Australasia
Ag Scientia P/L
Basis Commodities P/L
Clear Grain Exchange
CloudBreak Grain Marketing P/L
Delta Agribusiness P/L
EP Integrated Commodities P/L
Farmanco Marketing P/L
FarMarCo Australia P/L

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

INTERNATIONAL AFFILIATE

CCIC Australia P/L
CIS - Commodity Inspection Services

INDUSTRY ASSOCIATION

Australia Export Grain Innovation Centre (AEGIC)
Grain Growers Limited
Grain Industry Association of WA
Grain Producers Australia Ltd
NSW Farmers Association

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
Mr Terry Deacon



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AUSTRALIA**

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