

ANNUAL REPORT 2022-23



GRAIN TRADE
AUSTRALIA



INDUSTRY DRIVEN SELF- REGULATORY FRAMEWORK



GTA CONTRACTS SUPPORT TRADE TO EXPORT & DOMESTIC MARKETS

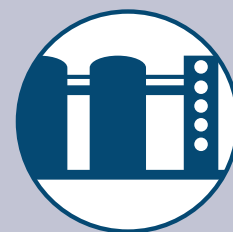
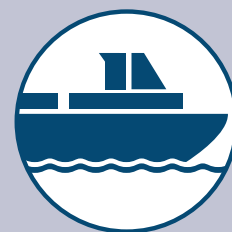
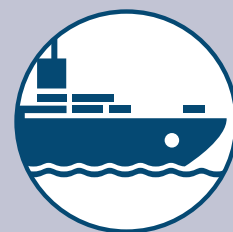
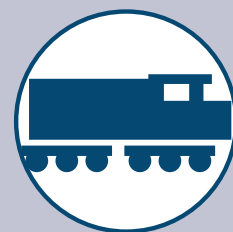
- Free on Board (FOB) Contract (GTA No.1)
 - Track Contract (GTA No.2)
 - Contract Confirmation (GTA No.3)
- Delivered Container Terminal (DCT) Contract (GTA No.4)
- Cost Insurance Freight Contract (Containers) (GTA No.5)
 - Grower Contract (GTA No.6)
- Grain Transport Contract & Free on Rail Contract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

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
 - Industry Fact Sheets
 - Safety Guidelines

WORKING ACROSS THE ENTIRE SUPPLY CHAIN

CONTRIBUTING VALUE TO THE GRAIN INDUSTRY SUPPLY CHAIN



Australian Grain Industry Conference (AGIC) Asia

Two in-person conferences held in Vietnam and Philippines show casing the Australian grain industry to over 350 delegates.

AGIC Roundtable events held with Vietnam and Philippine officials and supported by local Australian Embassy staff.

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, meeting regulatory requirements, and the capability of production sector and supply chain. 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
- Seed Impurities of Grain Identification Guide
- Australian Grains Industry Code of Practice
- Grain Transport Code of Practice
- Technical Guideline Documents
- GTA Member Updates
- GTA Industry Fact Sheets
- Grain Matters (newsletter)
- Grower Guide to using Grain Contracts
- Standards for Empty Shipping Container Inspection
- GTA Market Notifications
- GTA Safety Guidelines
- Common Industry Varietal Code Master List
- Australian Grain Supply Chain ESG Credentials

Industry training

- Training and professional development unique to Australia's grain industry.
- National approach to Grain Trading Standards training to ensure consistency in testing and classification of Australian grain & oilseeds.
- Building Grain Industry's capability

National Working Party on Grain Protection

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 Grain Industry Code of Practice (the "Code")

- All GTA Members must adhere to the Code
- Grain Transport Code of Practice
- Code Assessment Program
- Technical Guideline Documents
- Recognised by Industry and Governments
- Only major grain exporting country with an Industry accepted Code

Industry Developed and Driven Self-Regulatory Framework

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

Member:

- DAFF - Grains & Plant Products Export Industry Consultative Committee (GPPEICC)
- China-Barley Anti-Dumping 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)
- GIMAF Grains Forum
- Grain Transport Safety Network
- NSW Grain Harvest Transport Program
- Australian Agricultural Traceability Governance Committee (AATGC)



GRAIN TRADE AUSTRALIA

WORKING ACROSS THE ENTIRE SUPPLY CHAIN

Industry driven Self-Regulatory Framework

GTA works on behalf of its members and industry to deliver core products and services that facilitate trade and support the industry driven self-regulatory framework.

Making it easier

The provision by GTA of Grain Trading Standards, Trade Rules, Contracts, Reference Data and industry process provides and adds value to industry to enable 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 industry participants 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 industry 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 Activity Plan" is released each year. This is a "road map" that details the activities 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 report on "Modernising the grain supply chain - from drought through COVID-19 through to 2030". This report provides a comprehensive strategy for development of the grain supply chain to ensure its competitiveness and efficiency through to 2030.

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

Industry Outcomes

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

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

- A well-informed industry - decisions based on sound data and research.
- A better skilled industry - high performance levels.
- Access to more effective tools and processes.
- A more harmonious and co-operative environment - a common and clear commercial focus, balanced with a wider community and Environmental, Social and Governance focus and responsibility.
- Enhanced innovation and leadership - ensuring new ideas and challenges are welcomed, discussed openly, and advanced as appropriate.
- An industry that is self-reliant and responsible for actions (industry stewardship) and self-reliant, whilst achieving Government engagement where common good outcomes are justified and necessary.

Critical Success Factors

GTA must deliver:

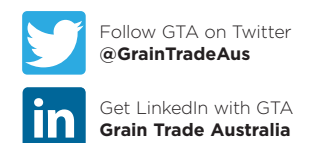
- **Harmonised trading products and services** so commercial risks are lowered, capital is attracted, and transparency is enhanced. A suite of tools to enable trade to occur efficiently and seamlessly - reduced risk and low-cost transactions are critical to maintain global value chain competitiveness.
- **Training & Development programs** that enhance the skills of industry participants - GTA delivers training programs that develop and enhance the capability of GTA members and the Australian grain industry.
- **Knowledge sharing** - communicating the grain industry and GTA vision is critical to industry stewardship and 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 participants**, 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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Grain Trade Australia

As Chair and on behalf of the Board and management I am honoured and pleased to provide the 2022/23 Grain Trade Australia (GTA) Annual Report. As an industry we celebrate a continuing run of record crop production and exports providing value for the Australian economy and all grain industry participants.

The 2022/23 season has been exceptional. Australia produced its third consecutive record winter crop with production of 72 MT. This has followed the previous record large crop of 68 MT in 2021/22 and 60 MT in 2020/21.

The industry has never been in better shape. ABARES current estimate of the grain industry value is at a record of \$31 billion for 2022/23. Grain is currently Australia's the largest agricultural industry.

The record production has provided some challenges. The export supply chain has had to manage three concurrent record years of production. It is so pleasing to say the industry - that is the people - have demonstrated an amazing capacity to grow and thrive under pressure whilst maintaining the reputation of Australia's grain quality, its food safety and our customer's confidence in the capacity and capability of Australia's grain and the grain supply chain.

GTA continues to facilitate trade, provide an industry focal point and works to provide an efficient, equitable and open trading environment. This is provided through leadership, advocacy and supported by the industry driven self-regulatory framework that includes the Australian Grain Industry Code of Practice, Grain Trading Rules, Contracts and Grain Trading Standards. The evolution of GTA, and its leadership has positioned and supported industry to its successful position today.

Global food security is becoming increasingly important and challenging. As conflicts and the environment create concerns and complexity the facilitation of trade in food between countries and counterparties, grows in importance to global food security. From GTA's engagement with Governments and agencies here and globally, I can assure you Global Food Security, is a key, if not the key, political issue impacting trade and our industry. Facilitating the trade of grain is essential to Global food security. This context highlights the



GTA Chair Andrew Goyder

importance of our industry as well as the value of GTA's role and our core mission to 'facilitate trade'.

GTA's products and services are a key part of the self-regulatory framework to manage the commercial and the non-commercial issues that may arise. GTA's Complaints Handling Guidelines and Dispute Resolution Service instil commercial confidence, supports the management of discord, and underpins grain contracts in Australia. GTA Arbitrators are industry experts who volunteer their time, and we must thank them for their important contribution to industry.

Last year was a celebration as GTA hit the 30-year mark - our Pearl Anniversary. Whilst thirty years is momentous the 2023 Grain Storage and Protection Conference marked the 50th consecutive year of providing industry a forum to discuss the latest research and activities focussed on protecting grain within the supply chain. I would like to thank and congratulate all current and past contributors of the National Working Party on Grain Protection

(NWPGP) for their efforts and contributions. Members of the NWPGP have demonstrated that Australia's reputation is a collective responsibility that requires cooperation, knowledge, and ongoing action across all sectors.

Collective responsibility is demonstrated through the responsible use of chemicals and the management of chemical residue levels. Chemical use continues to be a key focus of GTA to ensure Australian grain is compliant with our international customer requirements and regulations. Support by GTA members of the National Residue Survey (NRS) is crucial to a safe food system.

The NWPGP and NRS are two of Australia's many mechanisms for the grain industry to be safe, secure, reliable and sustainable.

In December 2022 GTA released **Australia's Grain Supply Chain Environmental, Social & Governance (ESG) Credentials** and the ESG Statement -

'Improving the Australian grain value chain to better connect the world's demand for food and feed with a globally recognised clean and safe food system, for the benefit of all communities that participate in the grain value chain'.



GRAINS AT A GLANCE ¹				
	2020/21	2021/22	2022/23	5 Year
Crop production (mmt) ¹	59.88	68.05	72.30	53.01
Industry Value \$Am FOB ¹	19,916	28,314	31,136	19,203
Domestic Demand (mmt)	17.27	17.54	17.68	17.35
Exports (mmt)	33.48	45.03	52.32	32.97
% Containers	10.4	8.6	8.3	11.0
Export Value \$Am FOB ¹	13,046	23,708	30,048	16,331

Source: ABARES, USDA

¹ Excludes Rice

Consumers across the globe are increasingly placing a sharp focus on agriculture and its social licence and have an expectation that grain is produced in accordance with social, environmental and community concerns and meets importing country regulations and consumer needs and expectations.

We all, as participants of the Australian Grain supply chain must continue to deliver a safe, high-quality product that meets domestic and importing country regulations and customer demands.

The efficiency of the grain supply chain is critical to the delivery of a safe & high-quality product. GTA continues to focus on supply chain efficiency, under the **“Modernising the grain supply chain”**, strategy designed to enhance industry through strategic efficiency gains in the value chain.

The rationale is simple - improving the efficiency of the grain supply chain improves the value of every tonne of grain that moves through it. That value will flow to all participants in the supply chain.

GTA continues its collaboration with the Department of Agriculture, Fisheries and Forestry (DAFF) to deliver benefits and improve the competitiveness of the Australian grain industry. Major collaborative projects underway include the establishment of the GTA grain Storage Assets & Management Standard, a review of DAFF whole grain and meal import procedures and the progressing of a Standard and supporting framework for the introduction of digital image technology for grain quality and biosecurity assessment.

Both GTA and DAFF are pursuing a shared goal of delivering efficiencies to Australian grain industry participants through a resilient grain supply chain supported by industry assured processes and procedures for grain management.

It is essential supply chain efficiency continues to be a key focus for GTA and all supply chain participants in 2022/23 given the run of record production and high levels of export demand on the Australian supply chain. GTA continues its

involvement with twenty other trade focussed industry organisations. GTA is seeking to highlight to Government the economic impacts on the container export and import trade from indiscriminate allocation of container terminal costs on the transport sector. Following the release of a Productivity Commission report on Australia's maritime logistics system GTA, on behalf of the twenty organisations wrote to the federal Treasurer seeking a plan of action for each of the various report recommendations to improve the productivity of Australia's maritime logistics system.

The Australian grain industry continues to support and welcome Grains Australia Limited (GA). GA funded by the GRDC is responsible for the delivery of certain industry good activities including grain variety classification, market access, and market information and education that benefits the industry's competitiveness and profitability. GTA has been involved with GRDC, GPA, GGL in the grain industry design and formation of GA and has been a member of its Advisory Committee performing roles including the development of the GA Constitution, the appointment of the inaugural skills-based Board, and the successful transitioning of Wheat Quality Australia to GA's control.

GTA and its Board are proud of the involvement and work to establish GA and to ensure it can now deliver on its corporate objectives and deliver value to growers. Now it is well established, the GTA Board made the decision to step back from formal involvement in the oversight and governance of GA and has withdrawn from its formal roles on the GA Advisory Committee and the Director Selection Committee. GTA will continue to work with GA and all other industry associations and stakeholders for the benefit of the participants of the grain value chain.

The continuing uncertain international political landscape, supports the ongoing participation by GTA in international trade policy. GTA is well positioned in this area as GTA has direct industry experience and a practical focus to ensure government and trade policy is supportive and avoids trade disruption.

Trade initiatives GTA has been heavily involved in include a Market Diversification push into the growing Indian market. GTA has been working with government to identify key opportunities and trade and biosecurity issues associated with the Indian grain market. To support this direction GTA is developing an Australia/India strategic grain partnership model based on the successful engagement model GTA has used in other Asian markets, notably China. Building relationships, understanding and collaboration at Government, industry association, technical and commercial levels are key areas of focus of the strategic partnership model.

GTA's trade policy focus includes advocating for open, competitive markets, regulatory coherence based on sound science and risk-based assessments. This includes being actively involved in the International Grade Trade Coalition (IGTC), of which GTA is a long standing and active member. GTA serves on the global Management Council and as Secretary and Vice President on the IGTC Executive Committee.

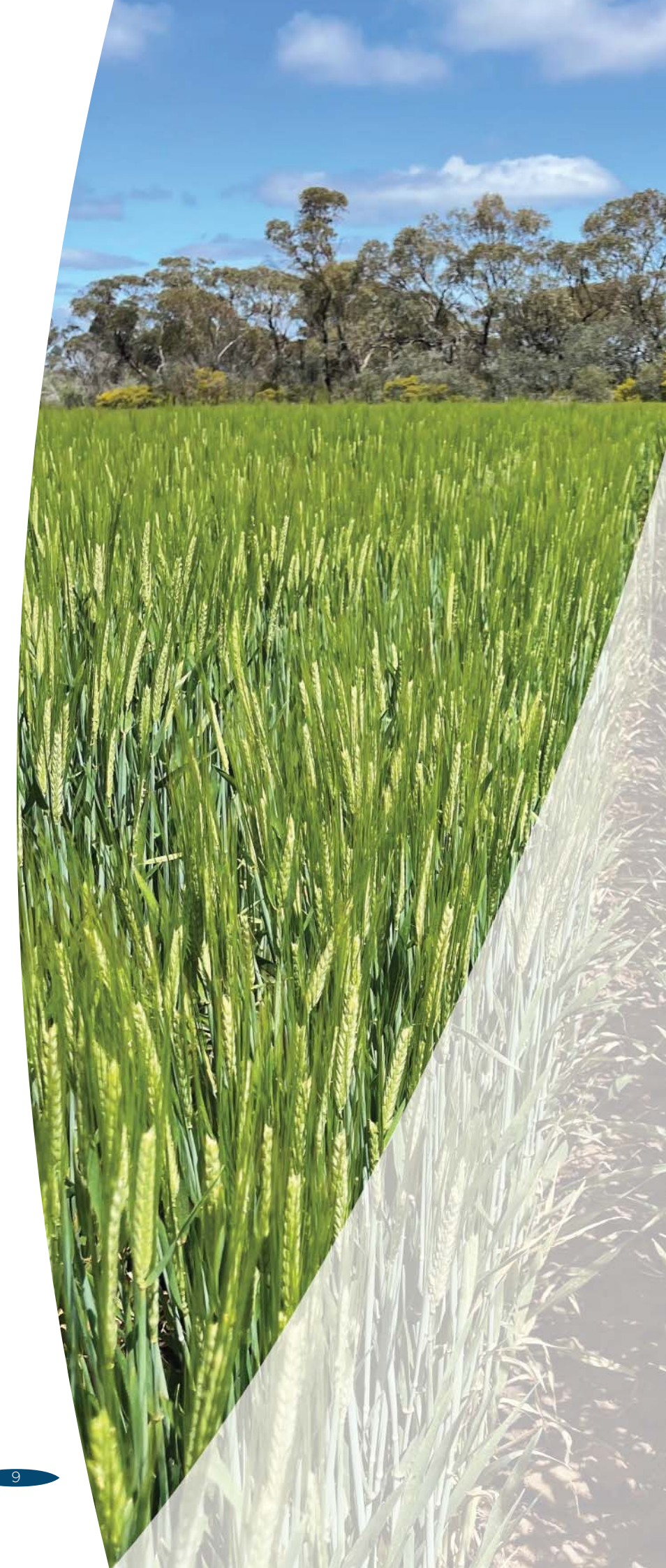
Through the IGTC and its own work, GTA continues to bring issues of importance to the Australian industry to several influential global policy forums including concerns with Non-Tariff Measures (NTMs). NTMs continue to emerge and remain a significant issue in terms of transparency, risk and cost for the grain export industry.

We continue to watch as the Australian grain industry evolves from a statutory focussed regulatory model into an industry driven self-regulatory framework. We all know that change can create uncertainty and lead to debate on market and industry arrangement, structures and market visibility. The supply chain capacity constraints from three consecutive record years (during a period of high global demand for grain) led to some unease within the market that Australian grain was underpriced as compared to measures such as offshore derivative markets.

GTA proactively addressed these concerns through engagement with industry, government and the media providing factual information and a practical perspective of the supply chain. In our view, this supports the industry and the facilitation of trade, with a perspective and understanding that the market is:

- very competitive,
- visible and transparent and
- supportive of all sectors of the industry.

For instance, when the wheat market deregulated in 2008, there were 18 export port terminals operated by 4 companies. Today, there is 32 port terminals operated by 18 companies. It's a big change, and in less than a generation.



After two years of COVID-19 fuelled frustration the Australian grain industry has been able to physically reconnect at an information-packed and entertaining two days at the Australian Grains Industry Conference (AGIC) on the 27th and 28th of July 2022. The 2022 AGIC program was exceptionally strong and provided the Australian grain industry an opportunity to show its support for the Ukraine grain industry and the Ukrainian people with standing ovations during a special keynote address by Mr. Mykola Gorbachov, the President of the Ukraine Grain Association. In a stirring address Mr Gorbachov, who travelled to Melbourne especially for AGIC 2022, said the impact on the Ukraine grain supply chain from the conflict in Ukraine is profound and will have consequences for the world grain supply for several years to come.

Reconnecting & building value was the key theme of a gathering of representatives of the grain industry from Australia and Asian countries at AGIC Asia 2023 events held in Ho Chi Min City, Vietnam on the 7th of March 2023 and in Manila, Philippines on the 9th of March 2023. After three years of 'virtual' events it was exciting to be together again in 2023. The knowledge provided through AGIC Asia about the Australian value chain promotes confidence with processors and consumers of Australian grain, enabling them to approach their customers with increased confidence.

AGIC Asia, including Roundtable meetings with local industry and government agencies, continues to demonstrate value and has resulted in tangible trade and market access outcomes. As an example, recent feed barely imports to Thailand was a direct response to an AGIC Asia event in Bangkok. It is critically important as suppliers of grain we come together with our customers, to meet and to understand what is important to them and to be able to provide confidence and surety in Australian grain.

GTA aims to provide stewardship to its members and industry participants. An aware and educated industry is one that supports growth. 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 their skills and knowledge, and

importantly improve industry capability. During the reporting period GTA has offered a new course - 'trading for non-traders' which has proven to be very popular.

The willingness of GTA members to volunteer their time and collaborate to support an effective industry driven self-regulatory framework enables industry participants to manage risk and operate value chains with confidence and integrity. The key to GTA's existence and its success is and will continue to be based on the support and efforts of all the knowledgeable and skilled industry participants who volunteer their time and expertise as members of the various GTA Technical Committees and Industry Working Groups, as well as the GTA Arbitrators.

Similarly, the commitment and contribution of the current and past GTA Board (also volunteers) and management team, is integral to GTA's success, for which on behalf of the industry I thank them.

This "volunteerism" is critically important, as it drives our organisational, and our industry "can do" culture.

GTA Board and management commit to continuing the vision and the hard work commenced 31 years ago by the founding members of the NACMA Board. We aim to be effective in providing products and services that facilitate trade and therefore support our members and in-turn the Australian grain industry.

The grain industry will continue its growth whilst facing increasingly complex challenges including the current world tension and trade impacts. GTA must continue to respond and adapt in meeting the needs of its members and to facilitate trade. Your Board is committed to ensure GTA continues to support members and the facilitation of trade.

Yours sincerely,



Andrew Goyder
Chair - Grain Trade Australia

Our Vision

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

Our members

GTA members are drawn from across the grain value chain including production through to domestic consumers and exporters. GTA members are involved in grain trading & marketing, grain storage, logistics, and food and feed processing.

GTA also attracts membership from organisations that support 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:

- Represent, advocate, and focus on the interests of its members.
- 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 and processes 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 does not have a right to exist - it must continually earn that right from its members.
- Members do not financially support GTA via membership fees or the purchase of products and services out of loyalty but out of the value that GTA is able to offer value 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.

Our Mission

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

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 rigor to commercial grain trading activities.
- **Dispute Resolution Services** - underpin contractual arrangements and instills value by ensuring confidence in to participate 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 the Australian Grain Industry Code of Practice together with environmental, safety and market-based training & development programs.

GTA's expansive products and services provide strong foundations to an industry that has pride in its ability to develop and implement a self-regulatory framework for the grain industry and to develop policy setting and processes.

This approach is supported and demanded by consumers of Australian grain, GTA members, industry participants, government and its related agencies.

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

- GTA must:
- be mindful of policy settings and factors in the external business environment that impact both the Australian grain industry, GTA and its operations; and
 - operate within the confines and needs of members and the immediate business environment in which GTA operates.

Strategic Direction

PUBLISHED

- GTA Strategic Activity Plan 2022/23
- Modernising the Grain Supply Chain from drought through COVID-19 to 2030 (Version 2)
- GTA Trade Rules (Revised) - Modern Slavery, Anti- Corruption and Anti-Sanction Clauses
- Environmental, Social & Governance Credentials
- Understanding Greenhouse Gas Emissions (GGE) and the GTA Table of GGE Quantity Values
- GTA Contract No. 3 (Revised) - Variation to road truck quantity tolerance
- Dispute Resolution Rules (updated) - Introduced Small Claims process
- Australian White Wheat (AWW) Information Paper (Revised)
- Visual Recognition Standards Guide 2022-2023
- Arbitration Award Summaries
- 41 GTA Member updates
- 13 GTA Market notifications
- 9 Grain Matters editions
- 1 GTA Fact Sheet developed/revised - Understanding Location Differentials (Feb 2023)
- GTA 30th Anniversary Book
- GTA Position Paper - Wheat Dockage

ACTIVITIES

- 3 Conferences delivered - 3 face to face with virtual access
- 28 workshops delivered
- Numerous Technical Committee and Industry Working Group meetings
- 12 Industry submissions lodged
- AGIC Australia & Asia conference events
- Stewardship to industry on the introduction of two new wheat classes (AWW & AIW) and the proposed introduction of a new AWW grade.
- Following the introduction of GTA's Sustainability Program Principles & Guidelines developed:
 - Environmental, Social & Governance Credentials
 - Understanding Greenhouse Gas Emissions and the GTA Table of GGE Quantity Values
- Australian Grain Storage and Protection Conferences, including 50th Anniversary Celebrations
- GTA Advisory and Compliance Workshop
- Updated the industry Standard Data Formats and GTA receival site codes.
- Coordinated 20 Australian trade industry associations to address supply chain issues.
- Continued representing industry to the Treasury review into the 'quality of financial advice'
- Represented industry at Grain and Plant Products Export Industry Consultative Committee

- ATMAC Project - Released the India Australia Strategic Grain Partnership Report Collaborative projects with DAFF:
- Grain Storage Assets & Management Standard
- Grain Assessment Technology Standard & Framework
- Whole Grain and Meal Import Working Group
- AFSL Advocacy & submissions

Vital signs

Financial Performance

- Profit of \$426,948
- Equity of \$2,070,527
- 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

- 287 members on 30th June 2022 (2022-276)

Trade facilitation products and services

Trading Standards Committee

- Grain Trading Standards
- AWW Cascading Rules and draft Trading Standards
- Commenced the review of the proposal to introduce a new ASW grade - ASW9
- Annual Trading Standards review including a number of reviews including Nil Tolerance.
- Review and publication of the Wheat Quality Australia Wheat Varietal master list
- Released Trading Standards for Wheat, Barley, & other cereals following review
- Comprehensive review of the Visual Recognition Standards Guide (VRSG)
- Multiple Sub-Committees and Working Groups involved in ongoing reviews of various Standards issues including:
 - Wheat Dockage Review
 - Technology
 - WQA new wheat Classes - Australian White Wheat & Australian Innovative Wheat
 - Review of Whole grain and protein meal Import processes
 - Proposed new ASW grade with a 9% protein minimum.
 - Consultation to Marine Surveyors Standard

Commerce Committee

- Contracts & Trade Rules

- Revised GTA Trade Rules Modern Slavery, Anti-Corruption and Anti-Sanction clauses
- Revised GTA Contracts - Road truck Quantity Tolerance
- Member Updates and Submissions on Location Differentials, Trade Rules and Standard Form Grain Contracts
- Location Differentials for 2022/23 season
- Input into industry fumigation protocols and revised Mandatory Fumigation protocols
- Approved Submissions into the Productivity Commission review of the Maritime Logistics Systems and provided guidance on Port Reform activities
- Reviewed LD border anomalies - SA & Vic border and approved the revision of the Fact Sheet - Understanding Location Differentials
- Considered the addition of contracts for other agricultural commodities

Trade & Market Access Committee

Consult with and advise industry & Government on:

- Global Food Security - Ukraine Conflict & Climate Change impacts
- China Anti-Dumping Investigations and Countervailing Duties on Australian Barley Exports
- Continued focus on Non-Tariff Measures (NTMs) Report
- Continued focus on Port reform
- Environmental Social and Governance Credentials and GHG reporting
- Market diversification - India - India Australia Grain Partnership
- Regional initiatives on Non-Tariff Measures
- Free trade agreements - Indonesia, UK, India
- Response to the Inquiry into Food Security
- ePhyto and e-Documentation
- Stewardship of new Wheat Classes
- China GACC Regulation changes
- WTO - Global Food Security and Grain Trade forum
- IGC Conference
- Presented to IGC General Assembly session
- National traceability strategy
- Response to the Australia - Thailand Strategic Economic Cooperation Agreement (SECA)
- Input into Wheat Dockage project
- GTA Stewardship Framework

Transport, Storage & Ports Committee

- Government and industry project to review bulk vessel inspections
- Considered required changes to the GTA Grain Transport Code of Practice

- Review and input into the DAFF procedures for the import of whole grain and protein meals.
- Supply chain consideration of new wheat classes.
- Provision of input into the development of the GTA Emissions Monitoring rationale and measures
- Ongoing focus to review operational supply chain issues associated with the current large export programs
- Provided direction to GTA's participation in the coalition of industry associations working on national port reform including submission to the Productivity Commission
- Made refinements to the Manual for Importing Country Requirements (MICOR)
- Managed the implementation of changes to the process for import country mandatory fumigation of grain.
- Commenced review of the truck loading interface and a potential new TGD
- Stewardship of the GTA/DAFF joint project - Storage Assets & Management Standard (SAMS)
- Response to the National Traceability Strategy
- Response to the Implications of Severe Weather events on Rural Roads

Plant Breeding Innovation Committee

The Committee addressed the following key issues:

- Developed and socialised the Market Choice Framework for Technology
- Response to Proposed Changes to Explanatory Notes on Essentially Derived Varieties under the UPOC Convention
- Ongoing response to FSANZ Proposal P1055 - Definitions for Gene Technology and new Breeding Techniques
- Global Initiative on Low Level Presence (GLI)
- Ongoing monitoring and input into the EU direction - Green Deal
- Response to the EU Public Consultation on Plants Produced by Certain New Genomic Techniques

Information Technology Advisory Committee

The Committee has progressed work on:

- Industry Standard Reference Data for all major data codes including the provision of standardised receival site codes.
- Common Industry Varietal Code Master List for 2021/22
- Forum for discussion on data security
- Progressing a Technology Roadmap
- E-phyto certificates
- Alignment to the international groups and goal of harmonisation of process and transactions
- Input into the GTA/DAFF joint project Grain Storage Assets & Management Standard (GSAMS)

- DAFF system consultation including PEMS, NexDocs & e-Phyto
- Facilitating technology improvements and adoption in the supply chain including Industry Government Collaboration on Digital Image Analysis.

GTA Training & Development Program

- Training continued face to face and via Zoom
- 28 training and development courses delivered, 7 of which were delivered “in-house”. 356 students attended from over 25 organisations.
- 198 students attended GTA online learning courses
- New Grain Trading for Non-Traders Workshop
- GTA Advisory & Compliance Workshop
- Grain Export Documentation & Risk Management Workshop

Industry support services conducted by GTA

Australian Grain Industry Code of Practice (Code)

- A demonstration of an industry committed to meaningful self-regulation.
- On-line Code of Practice Assessment Program available to demonstrate knowledge and understanding of the Code
- Technical Guideline Documents to assist industry participants to adhere to the requirements as set out in the Code.
- Grain Transport Code of Practice
- On-line Transport Chain of Responsibility module
- On-line safety & sampling training
- 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.
- 50th National Grain Storage and Protection Conference held in June 2023
- Continued GTA administrative support of the NWPGP.
- Publication of the Australian Grain Industry Post Harvest Chemical Usage Recommendations and Outturn Tolerances 2022/23

Advocacy

DOMESTIC

- Trade Minister
- Agriculture Minister
- DAFF - export inspection & certification processes and trade and market access
- DAFF - domestic issues
- Australian Pesticides and Veterinary Medicines Authority (APVMA)
- Food Standards Australia New Zealand (FSANZ)
- Codex Australia
- Department of Foreign Affairs and Trade
- Office of Gene Technology Regulations (OGTR)
- Department of Transport and Infrastructure
- Department of Industry, Innovation and Science
- Department of Home Affairs
- Department of Treasury
- Australian Securities & Investment Commission
- National Heavy Vehicle Regulator
- Australian Competition & Consumer Commission
- Austrade
- Productivity Commission
- State Merchants Associations
- Australian Seeds Federation
- Pulse Australia
- Australian Oilseeds Federation
- Grains Australia
- National Farmers Federation
- GRDC
- Grain Growers Limited
- Grain Producers Australia

INTERNATIONAL

- Department of Foreign Affairs and Trade
- Global e-Phyto framework via IGTC
- New plant breeding techniques
- Global Low Level Presence Policy Initiative
- Cartagena Protocol on Biosafety
- Maximum Residue Limits
- International Grains Council
- International Seeds Federation
- World Trade Organisation
- AGIC Asia - Government Round Table & Policy sessions
- APEC Grain Trade Facilitation Forum
- China National Association for Grain Sector
- IGTC Member Organisations (NAEGA GAFTA, COCERAL, CGC etc)

MEMBER

- International Grain Trade Coalition (IGTC) (Exec Committee & Working Groups)
- Grain & Plant Product Export Industry Consultative Committee (GPPEICC) and sub-committees
- ACCC Agricultural Advisory Committee
- Grains Industry Market Access Forum
- DAFF national agriculture market intelligence roundtable
- Agricultural Biotechnology Council of Australia (ABCA)
- National Measurement Institute (NMI)
- Grain Quality Measurements Committee
- Grains Australia Industry Steering Committee
- Grains Australia Director Selection Committee
- Industry Working Group on China Barley Issues
- Forum Australian Importers and Exporters Associations - Supply Chain Issues
- Grains Industry NTM Working Group
- Australian Agricultural Traceability Governance Committee (AATGC)



Presentations

DOMESTIC

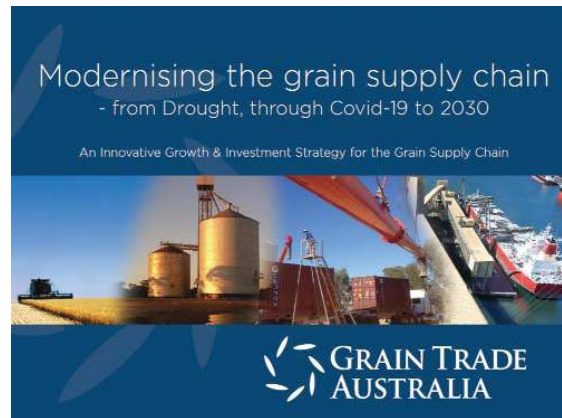
- Crop Life Seminar, *Australian Grain Industry Guidelines for Information Sharing for Products derived from Plant Breeding Innovation Technologies*, July 2022
- Australian Grain Storage & Protection Conference, Opening Address, June 2023
- Australian Grain Storage & Protection Conference, Australia's Grain Supply Chain & its ESG Credentials June 2023
- Australian Grain Industry Conference, Opening Address, July 2022
- Australian Grain Industry Conference, Closing Address, July 2022
- Grains Industry Association of Victoria, GTA Activities and Update, several 2022/23
- Grain NSW, GTA Activities and Update, several 2022/23
- IGC - Presentation by GTA - July 2022 & June 2023
- Australia India Grains Presentation - to Government and Industry November 2022
- Australia's Grain Supply Chain & its ESG Credentials - DAFF June 2023
- Numerous (291) stakeholder meetings, briefings to members, broader industry, government and their related agencies

INTERNATIONAL

- AGIC Asia, Meeting Customer Requirements, March 2023
- International Grains Council Conference, Role of Trade and Trade Organisations in Global Food Security, June 2023
- South African Malting & Brewing Industry Webinar
- Brazilian Malting & Brewing Industry
- Mexican Malting & Brewing Industry
- World Trade Organisation Presentation - An Australian Perspective March 2023.
- Australian Supply Chain - AUSTRADE China Seminar May 2023

Submissions

SUBMITTED TO	TOPIC
EUEU NGT Submission	
Treasury	Financial Adviser Education Standards
Treasury	Quality of Advice Review
Productivity Commission	Lifting Productivity at Australia's Ports
DAFF	Survey on Principles for the National Traceability Framework
Govt Committee	Inquiry into Food Security
Govt Committee	Inquiry into Implications of Severe Weather events on the National Regional, Rural, & Remote Road Network
DAFF	Draft National Agricultural Traceability Strategy Draft Implementation Plan
DAFF	Proposed Changes to Regulatory Charging for Biosecurity Activities
DFAT	Australia-Thailand Strategic Economic Cooperation Agreement (SECA)
Treasury	Treasury Laws Amendment - Financial Adviser Professional Standards
Treasurer	The Performance of Air & Maritime Logistics Services



Modernising the grain supply chain - from drought, through COVID-19 to 2030

Improving supply chain efficiency, improves the value of every tonne of grain and increases the Australian industry's global competitiveness. Value created will flow to all participants in the Australian grain supply chain including regional communities.

In 2020, GTA, with its member driven Technical Committees developed and released an innovative strategy called "Modernising the grain supply chain - from drought, through COVID-19 to 2030". This has identified four key "Strategic Growth Pillars" and several industry driven 'strategy enabling projects' to develop and grow industry, through strategic efficiency gains in the supply chain. The *Modernisation the grain supply chain* strategy continues to be regularly reviewed and to evolve to meet the industry needs.

The Strategic Growth Pillars are:

1. Skills & Capability
2. Quality & Market Access
3. Technology
4. Transport & Logistics

Investment in the grain supply chain and in the 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 30-35% of a grower's total cost is supply chain related and the traditional quality advantage



for Australian grain is under pressure as processors increase their efficiency and utilisation of grain from alternative origins.

However, industry alone cannot make the required supply chain investments or drive the system wide operational efficiencies on their own. There are several reasons for this including:

1. The overall size or quantum of investment required.
2. The risks around developing new technology.
3. The broad base of beneficiaries across the value chain.
4. Limited "first mover advantage" for developing new technology and for investing in certain infrastructure relating to pre-competitive activities.

This means, public and industry partnerships are needed for investment. GTA and Government recognise the importance of aligning whenever possible industry and Government strategy and policy to drive industry economic value and global competitiveness and deliver value to regional communities.

Storage Asset and Management Standards

GTA in conjunction with the Department of Agriculture, Fisheries and Forestry (DAFF) are collaborating to develop an industry driven GTA Grain Storage Asset and Management Standard (Standard) for Australian grain industry participants.

This is the first major project addressed from the GTA's Modernising the grain supply chain strategy, of collaborative investment to drive value within the supply chain and to create a more efficient and globally competitive Australian grain supply chain. DAFF's objective for the project is to deliver efficiencies through recognition of the Standards in meeting Government's regulatory requirements. The project has completed its discovery and a pilot phase where the principles were tested through practical trials, to capture implementation issues and develop methodology and parameters to measure project value. The voluntary framework will aim to deliver efficiencies to industry and may include, but is not limited to, the adoption of emerging technologies, innovative assurance methods and more industry efficient regulation.

The Standard will allow farm-based and commercial storage assets and their operation to be integrated into an industry driven quality assurance system in the export (and domestic) supply chain thus reducing industry exposure to risk and reputational damage and better reflect export requirements.



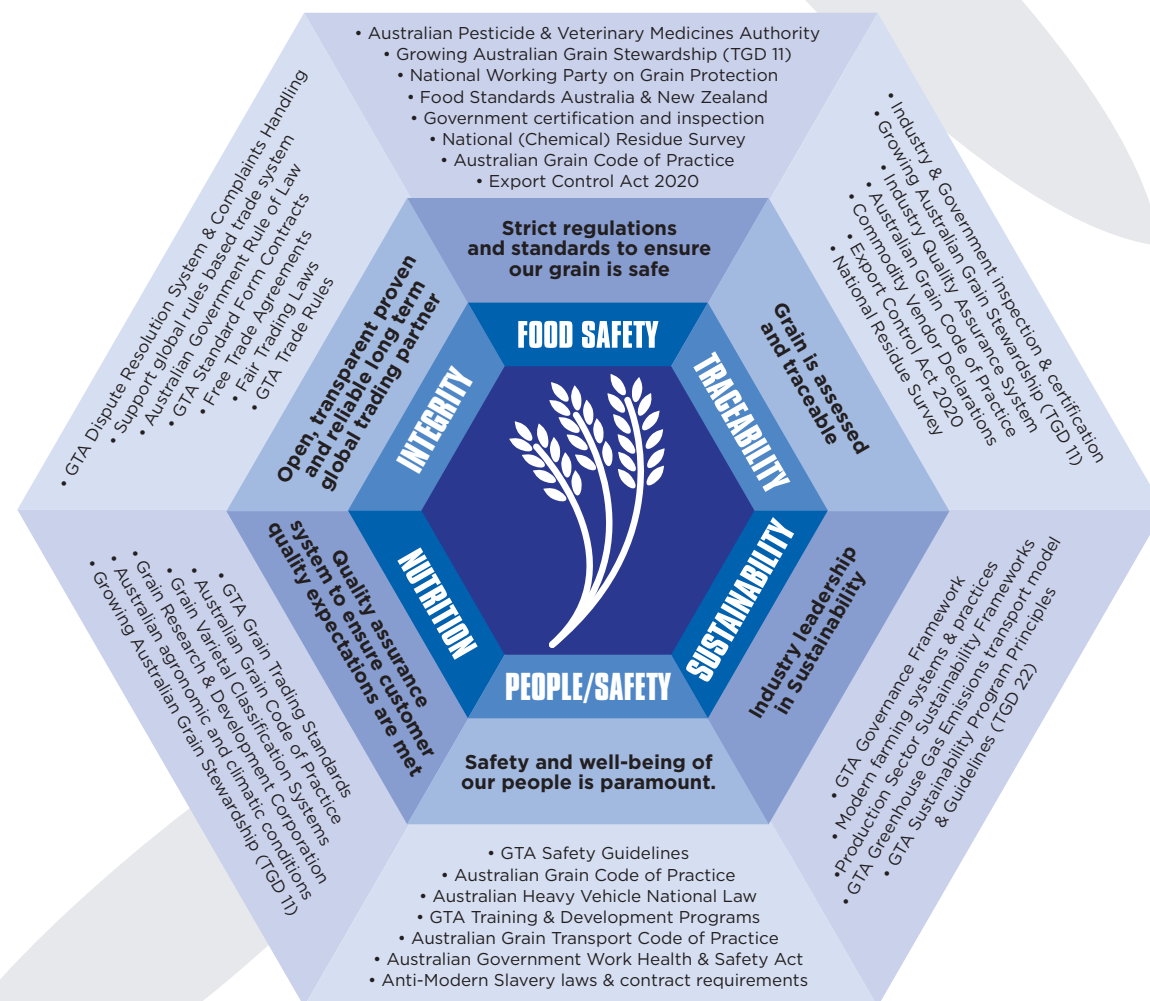
ESG Statement

Improving the Australian grain value chain to better connect the world's demand for food and feed with a globally recognised clean and safe food system, for the benefit of all communities that participate in the grain value chain.

Background

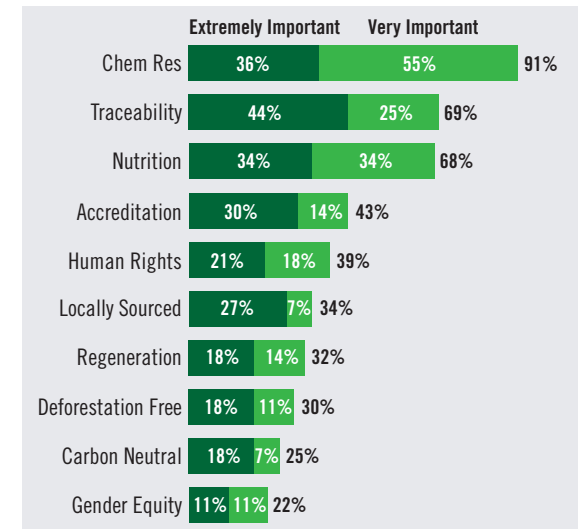
- The world's dynamic climate, political and population situation places a sharp focus on agriculture and its social licence.
- In response, driving efficiency and sustainability in the grain value chain is both an ongoing challenge and opportunity for industry participants.
- While we consume a major portion of the grain we produce, trade remains important as Australia produces an exportable surplus of grain making us reliant on export markets.
- Our customers increasingly have an expectation that grain is produced in accordance with social, environmental and community concerns and meets overseas country regulations and the consumer needs and expectations. This trade is mutually beneficial to both Australia and the consumers in the importing countries.

Australian Grain Industry – Safe, Secure, Reliable, Sustainable

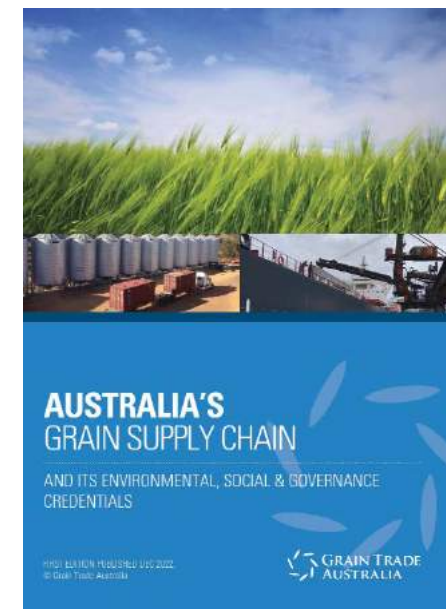


- We must continue to deliver a safe premium product that meets domestic and importing country regulations and customer demands. It is important we continue to strive to understand the expectations of our customers and their customers and stakeholders.
- Australia's grain value chain actively collaboratively engages with the Australian Government with a focus on continuing the self-regulatory framework, accredited processes and practices, innovative and efficient technologies and minimal waste, whilst respecting and protecting the environment and the people we support through trade. This model developed and improved over multiple decades continues to evolve and adapt in response to changing market dynamics, regulatory requirements, and consumer and stakeholder expectations.
- GTA has incorporated ESG into the Terms of Reference of the Board Governance Committee and refocused it to be the ESG Committee.
- GTA's general policy and practical approach is to develop ESG strategic direction, policy principles, and guidelines. GTA's mandate is to, encourage, promote, and inform policy positions to its members.
- GTA sees that the Code of Practice and the Grower Guide to Grain Production provide an over-arching perspective. GTA recognises individual industry segments, members and commercial companies may also develop their own policies, statements and other arrangements based on their own commercial situations and needs.
- GTA has developed a specific Technical Guideline Document (TGD) on Sustainability that outlines some principles and guidelines that:
 - acknowledges the importance of a sustainable grain industry,
 - focuses on developing relevant principles and guidelines to assist members,
 - encourages a risk-based assessment approach and avoids additional Non-Tariff Measures
 - highlights the importance of the Code of Practice in terms of quality assurance through the supply chain, and
 - communicates with stakeholders (regulators, consumers, social licence) recognising the need to address a variety of perspectives, priorities and understanding.
- Customer survey work shows that grain consumers primary concerns are price, followed by food safety (chemical residues), traceability, nutrition (quality) and accreditation.

Customer Importance of Sustainability traits (Source: CBH)



- The Australian grain industry has a strong and positive ESG story, with solid foundations in place across the industry, recognising the customer priorities identified from consultation projects, the foundations around the Sustainability are summarised in the table below.
- Australia's ESG story has been captured in the GTA document - *Australia's Grain Supply Chain and its Environmental, Social & Governance*.
- GTA has provided its members guidance material and tables representing Green House Gas emissions with land based grain transport
- The ESG direction and tools have been developed through a member driven approach and consultation.



The following persons were Directors of the company during the whole of the financial year and up to the date of this report, unless otherwise stated:

Andrew Goyder

Non-Executive Director, Chair

BOARD APPOINTMENT

EXPERIENCE AND EXPERTISE:

Managing Director Grain Link WA, established 1999. Andrew is a company Approved Arbitrator. Previously involved in Seed Industry and Export Canola with SGB Australia and Grain Pool WA as regional manager southern WA. Andrew completed Australian Institute of Company Directors Course (GAICD).

SPECIAL RESPONSIBILITIES:

Chair of Company's Board, Chair of Environment, Social & Governance Committee, Member of Audit, Finance and Remuneration Committee, Chair of Domestic Sector Council.



Geoffrey Farnsworth

Non-Executive Director

BOARD APPOINTMENT

QUALIFICATIONS:

Bachelor of Law, Bachelor of Arts

EXPERIENCE AND EXPERTISE:

Partner - Holding Redlich

SPECIAL RESPONSIBILITIES:

Chair of Transport, Storage & Ports Committee, Chair of the Dispute Resolution Service Committee, Deputy Chair of Commerce Committee, Member of Environment, Social & Governance Committee, Member of Membership 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 Grains Industry for 30 years. He is the Managing Director of Melbourne-based grain trading and logistics company, Rural Logic Founding Manager (1990) of Stockfeed company James & Son for 10 years. Aust Barley Board Victorian State Manager (5 years) and Grains Manager IMCA Malting Company (2005/2006). Former President of Grains Industry Association of Victoria and has remained on the Committee since 2005.

SPECIAL RESPONSIBILITIES:

Chair of Commerce Committee, Member of Trade & Marketing Access Committee, Member of Dispute Resolution Service Committee, Member of Audit, Finance and Remuneration Committee, Member of Environment, Social & Governance 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), GAICD.

EXPERIENCE AND EXPERTISE:

Managing Director Farmarco Australia, 30 years' experience in commodities, both physical & derivative markets. Rob is the Managing Director of Farmarco Australia having held a number of roles there throughout his career following a background in rural accounting and the sugar industry. Rob is a director of Cotton Compass and currently a Committee Member of Queensland Agricultural Merchants (QAM) Inc. Rob is a GTA Approved Arbitrator.

SPECIAL RESPONSIBILITIES:

Chair of Audit, Finance and Remuneration Committee, Deputy Chair of Standards 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, 20 plus years experience. Commenced career with Grain Pool (now part of CBH Group) in WA, including 4 years in Indonesia as President Director of PT Eastern Pearl Flour Mills. Former GAFTA Council Member and continues to act as a Director for a number of CBH subsidiaries.

SPECIAL RESPONSIBILITIES:

Chair of Trade & Market Access Committee, Chair of Plant Breeding for Innovation Committee, Deputy Chair of Transport, Storage & Port Committee, Member of Environment, Social & Governance Committee, Member of Audit, Finance and Remuneration 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, GAICD

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 of Membership Committee, Deputy Chair of Information Technology Advisory Committee, Member of Dispute Resolution Service Committee, Member of Audit, Finance and Remuneration Committee.



Lyndon Asser

Non-Executive Director

ORDINARY LEVEL A NOMINATION

QUALIFICATIONS:

Bachelor of Economics- Adelaide University and CPA

EXPERIENCE AND EXPERTISE:

Has 29 years' experience in grain trading, specialising in Barley. Currently, Senior Commercial Manager - Glencore Agriculture Pty Ltd, Australia. Formerly, with the Australian Barley Board SA, Viterro and joint head of Glencore's global barley trading operations in The Netherlands.

SPECIAL RESPONSIBILITIES:

Chair of Australian Grain Exporters Council, Deputy Chair of Commerce Committee, Deputy Chair of Trade & Market Access Committee, Member of Membership Committee, Member of Environment, Social & Governance 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:

Deputy Chair of Standards Committee, Member of Commerce Committee, Member of Transport, Storage & Port Committee, Member of Membership Committee, Member of Environment, Social & Governance 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 and worked across numerous divisions within the business. Michelle is a former committee member and former treasurer of the Grains Industry Association of Victoria (GIAV). Michelle is a company arbitrator.

SPECIAL RESPONSIBILITIES:

Chair of Standards Committee, Deputy Chair of Transport, Storage & Port Committee, Member of Dispute Resolution Service Committee, Member of Environment, Social & Governance Committee.



Richard Perkins

Non-Executive Director

ORDINARY LEVEL B NOMINATION

QUALIFICATIONS:

BA in Agricultural Systems from UWS, Graduate Certificate in Applied Finance from Kaplan and has completed the Australian Institute of Company Directors course.

EXPERIENCE AND EXPERTISE:

Richard Perkins has over 15 years' experience working in Australian and international grain markets. He is currently the General Manager of Business Development, Advisory and Marketing at Market Check, an independent grain marketing adviser and pool provider for Australian growers.

SPECIAL RESPONSIBILITIES:

Deputy Chair of Trade & Market Access Committee, Member of Audit, Finance & Remuneration, Member of Information Technology Advisory Committee, Member of Dispute Resolution Service Committee.



Daniel Marsh

Non-Executive Director, Deputy Chair

MERCHANT ASSOCIATION NOMINATION

QUALIFICATIONS:

BSc Biotechnology (Hons), The University of Reading

EXPERIENCE AND EXPERTISE:

Daniel Marsh is currently Deputy CEO of the Australian Exchange (AEX) Group. AEX Group offers globally competitive licensed marketplaces for derivative products with a particular focus on tradeable products within the commodity, energy and environmental asset classes. He has 20 years of experience including head of Agricultural Commodities Trading with the Global Markets division of the Commonwealth Bank of Australia (2017-2020), Group Treasurer at George Weston Foods (2009-2017) and derivatives risk management and trading at JPMorgan in London (2000-2008).

SPECIAL RESPONSIBILITIES:

Chair for Information Technology Advisory Committee, Deputy Chair of Plant Breeding for Innovation, Member of Audit, Finance and Remuneration Committee.



Matthew Kelly

Non-Executive Director, Deputy Chair

MERCHANT ASSOCIATION NOMINATION

(Appointed on 25/10/2022)

QUALIFICATIONS:

DipAppSc(AgServ) The University of Melbourne

EXPERIENCE AND EXPERTISE:

Matthew is the CEO and a Director of KM WM Kelly & Sons, a four generational grain merchant and storage family business based in the Southern Riverina of NSW. He has been involved in the grains industry for over 25 years and held a wide range of positions from Grower Accumulation, Storage, Logistics and Trading. He has had a long involvement with the GTA Technical committee for Transport, Storage & Ports and is a GTA arbitrator and previous president of Grains NSW.



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

GTA operates the following Technical Committees comprised of industry personnel:

1. Trading Standards Committee
2. Commerce Committee
3. Trade & 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 for 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.

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

Key points for GTA Technical Committees

- GTA is reliant on its Technical Committees to review and develop GTA’s 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 and opportunities that may impact 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 members to nominate to the Technical Committees each year. The GTA Board approves Committee members nominations based on the applicant’s technical competency mindful the Committees aim to have representation from:
 - sectors across the grain supply chain;
 - 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 for the benefit of all members and commit to represent the interests of the industry as opposed to a private or public organisation
- All Committee members agree to be bound by the Committee Terms of Reference and the GTA Anti-competitive Clause as tabled on the agenda at all meetings

Objectives

- Consult with industry and develop grain Trading Standards to apply for the following season. Recommend to the GTA Board changes to existing GTA 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 GTA Trading Standards.
- Advise on the effective adoption and implementation of the GTA Trading Standards by individual companies and by the relevant sectors of the industry.
- Communicate between the GTA Board, GTA Management and the GTA Trading Standards Committee and its Sub-Committees on industry matters that relate to GTA Trading Standards.

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 2022/23, 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.

The Committee focussed on research projects including AWW Cascading Rules, a proposal to introduce a new ASW Grade (ASW 9), Wheat Dockage, and finalised the review of the Nil Tolerance parameters on the delivery of grain contaminated with eucalypt gumnuts.

Following a thorough review, the Visual Recognition Standards Guide (VRSG) was extensively updated for the 2022/23 season to provide greater clarity to industry on the definition and interpretation of defects

as outlined in each commodity Standard. The VRSG Working Group also commenced a further review for the 2023/24 Guide.

The Committee continued the process to the implement the release of a new Hard wheat Classes - AIW and AWW, the first major additions and change to the Wheat Class system since the introduction of APW (in the mid 1990’s). The Committee and a GTA Working Group continued its review and industry consultation to ensure the effective implementation of these Classes into the Trading Standards framework. This included the establishment of Grades and Cascading Rules for AWW.

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.

GTA grain Trading Standards are a key component of the grain quality framework for the Australian grain industry. The Committee’s objective is to unequivocally provide confidence in the quality of Australian grain to processors and consumers and to provide a quantitative quality framework that facilitates market access and trade and supports GTA’s Trade Rules and Contracts.

ATTENDANCE - TRADING STANDARDS COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Michelle Kerr	Chair - GTA Director	5	5
Rob Imray	Deputy Chair - GTA Director	1	1
Simon Tickner	Deputy Chair - GTA Director	5	2
Matt Kelly	Deputy Chair - GTA Director	5	3
Matthew Madden	Grain Producers Australia	5	4
Gerard McMullen	GTA Technical Consultant	5	5
Vince Moroney	CBH Group	5	3
Cain McGregor	Cargill Australia Ltd	5	5
Julie O'Dea	Viterra Australia	5	3
Marcus Dingle	Hazeldenes	4	4
James Saunders/Geoff Moore	Commodity Inspection Services	5	2
Jason Shanley/Matt Samin	GrainCorp Operations Ltd	5	4
Paul Panozzo	Allied Pinnacle	5	5
Marjorie Main/William Thompson	Emerald Grain	5	5
Sam Nelson	Grain Growers Ltd	5	4
Bobbi Ryan	CHS Broadbent	4	2

Objectives

- Advise the GTA Board on changes to existing and development of new, Trade Rules and Dispute Resolution Rules.
- Advise on the effective adoption and implementation of the GTA Trade Rules by individuals and by the relevant sectors of the industry.
- Foster communication on industry matters that relate to GTA Trade Rules and Dispute Resolution Rules.
- Advise the GTA 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 2022/23 year including:

- Developed Modern Slave Labour, Anti-Corruption and Anti-Sanction provisions for inclusion in the GTA Trade Rules.
- Endorsed changes to GTA Contracts - Road Truck Quantity Tolerance
- Continued the ongoing work and industry discussion on Fumigation protocols within grain contracts and provided input into DAFF revisions of import country mandatory fumigation protocols
- Continued the improvement of the Location Differentials process and procedures

- Reviewed Location Differential anomalies - SA & Victoria border and approved the revision of the GTA Fact Sheet - 'Understanding Location Differentials'.
- Considered the addition of additional contracts for other agricultural commodities
- Approved Submissions into the Productivity Commission review of the Maritime Logistics Systems and provided guidance on Port Reform activities

The GTA Commerce Committee reviewed and published Location Differentials for 2022/23, following the regular industry submission and consultation process and commenced preparation of the 2023/24 Location Differentials.

Following GTA Member consultation (via Member Update 29 of 22) the Committee continued its consultation on the proposed amendment to the GTA Trade Rules by the inclusion of clauses relating to Modern Slavery, Anti-Bribery and Anti-Sanction.

During 2022/2023 the Committee covered wide ranging topics and assisted and provided direction on matters including, the commercial aspects of the introduction of new wheat classes and a proposed new ASW Grade, market commentary on international and Australian price relativities and aspects of the import country mandatory fumigation protocols.

The Commerce Committee continue to provide a forum for industry commercial discussion, support, and direction in the areas of commercial trade.

ATTENDANCE - COMMERCE COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Michael Wood	Chair - GTA Director	6	5
Lyndon Asser	Deputy Chair - GTA Director	6	2
Geoff Farnsworth	Deputy Chair - GTA Director	6	4
Simon Tickner	Deputy Chair - GTA Director	6	4
Simon Gellert	Glencore Agriculture	6	5
Andrew Jurgs	Namoi Cotton	6	4
Nathan Cattle	Clear Grain Exchange	6	6
Michael Commadeur	Emerald Grain	6	2
John Payne	Cargill Australia Ltd	6	5
Colin Bettles	Grain Producers Australia	4	4
Stephen Howells	Ridley Agriproducts	6	3
Fiona Roycroft	Riordan Grain Services	6	5
Sean Cole	Grain Growers	4	3
Sam Batters	CHS Broadbent	6	4
Hamish Steele Park	Woodside Commodities	6	3
Stephen Clarke	ADM Trading Australia	4	4
Joshua Lawrence	Ikon Commodities	6	4
Peter Levido	GrainCorp	4	3
Ben Tiller	CBH Group	6	3
Matt Clarke	Inghams	6	4
Erin Burns	George Weston Foods (Mauri)	4	4
Alex Onus	GrainCorp	2	2
Amelia Shaw	Grain Growers	2	1
Justin Wilks	ADM Trading Australia	2	1

GTA Contracts & Trade Rules provide the stable & consistent contractual framework for the facilitation of trade throughout the value chain from producer to processor/ consumer. The objective of the contractual framework 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.

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 and
- the implications and the opportunities arising from plant breeding innovations



ATTENDANCE - PLANT BREEDING INNOVATION COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Jason Craig	Chair - GTA Director	1	0
Rob Imray	Deputy Chair - GTA Director	1	1
Rosemary Richards	GTA Consultant	1	0
Tristan Coram	Australian Grain Technologies	1	0
Gerard Pagoni	Grain Producers Australia	1	0
Sam Nelson	Grain Growers Ltd	1	0
Tresslyn Walmsley	Intergrain	1	1
David Hudson	SGA Solutions	1	0
Nicholas Chambers	GrainCorp	1	0
Nick Goddard	AOF	1	1
Adrian Regianto	Cargill Australia Ltd	1	1
Sam Nelson	Grain Growers Ltd	1	1

Objectives

- Ensure appropriate commercial processes exist to enable fair and efficient trade of grain which contains approved GM material.
- 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.

Activities

- A major initiative under development across the Plant Breeding Innovation Committee and other Committees is the development of a Guidance Document that outlines a collaborative approach to the 'stewardship of new technologies' impacting the grain supply chain including the introduction of varieties using innovative plant breeding technologies. GTA's Board has acknowledged there are industry gaps and missing frameworks required to support the introduction and effective utilisation of technology including:
 - Grain Assessment Technology
 - Plant Breeding Technology
 - Government Information Technology

The Committee has commenced the progression of this initiative through engagement with the wider industry to commence the conversation on which to build an agreed approach.

Key activities for the Committee were:

- Provision of input to the European Union consultation on plants produced by certain new genomic techniques (NGTs). GTA noted the importance for Australia and its grain producers to have access to innovative seed technology to maintain and enhance its position within the global trading environment and supports a science-based approach that recognises and deals with any risk. GTA and the Australian grain industry supports innovation as this has been a key contributor enabling the industry to deliver improved outcomes for growers and consumers. GTA works with the grain industry to ensure that it has access to and implements systems and processes to maintain choice and ensure that customer requirements in domestic and export markets can be met.



Efficient transactions and movement of grain to meet the demand of domestic and overseas markets is important in ensuring a competitive Australian grain industry.

This process includes up-country receival and storage, rail and road transport, and efficient and equitable bulk and container port facilities.



Objectives

- Foster communication 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 TS&P Committee engaged and provided Input into a joint Government, Shipping Australia, and the Australian Institute of Marine Surveyors project to review the processes and overlapping responsibilities of the separate commercial and government bulk vessels survey inspections.
- Considered changes to the GTA Grain Transport Code of Practice and commenced involvement on behalf of the grain industry in the National Heavy Vehicle Regulator's review of the Transport Master Code.
- Input into the design and development of the GTA Emissions monitoring rationale and the production of GTA's Location Differential Carbon Emissions Model that lists the embodied carbon emissions of transport from silo to ports.
- Provided logistical view and consideration into the introduction of new wheat Classes and the proposed introduction of a new ASW Grade.

ATTENDANCE - TRANSPORT, STORAGE & PORTS COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Geoff Farnsworth	Chair - GTA Director	5	5
Jason Craig	Deputy Chair - GTA Director	5	3
Matt Kelly	Deputy Chair - GTA Director	5	4
Michelle Kerr	GTA Director	5	4
Andrew Weidemann	Grain Producers Australia	5	2
Craig Dennis	Network Grains	5	2
Travis Anderson	Emerald Grain Limited	5	3
Mark O'Brien	George Weston Foods Ltd	5	4
Jock Carter	Quattro Ports - Newcastle	5	1
Zach Whale/Annabel Mactier	Grain Growers Ltd	5	4
Alister Boyd	Cargill Australia	5	4
Derek Robjohns	Viterra	5	4
Josh Connell	GrainCorp	5	3
Michael Broadbent	CHS Broadbent	5	3
Morne Van Wyngaard	CBH Group	5	2
Matt Clarke	Inghams	5	3
Josh Lawrence	NSW Ports	4	2
Scott Merson	Rain Agribusiness	4	3

- Engaged and provided direction to GTA's participation in the coalition of industry associations working on national container and port supply chain reform and the issues of poor performance in the container supply chain. This included submissions into the Productivity Commission review.
- Reviewed and had input into the joint GTA and Government project to simplify the procedures and the timeline for the import of whole grains and plant protein meal.
- Engaged with DAFF and managed the implementation of changes to the process for import country mandatory fumigation of grain.
- Responded to calls for consultation to the National Traceability Strategy and the review - Implications of Severe Weather Events on Rural Roads
- Stewardship of the GTA/DAFF joint project - Grain Storage Assets & Management Standard (GSAMS)
- Consulted on and endorsed Anti-Slavery & Anti-Corruption amendments to the GTA Trade Rules.

During 2022/2023 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 reporting period has included record production and record export shipping. The massive export program and a wide range of weather impacts has created challenges for GTA members. The Committee provided a focal point and a forum to discuss and review and consider remedies to operational supply chain issues associated with the largest export program on record.

Government transport strategy and its process and procedures are critical in the development of the shape and efficiency of the grain supply chain. GTA and the Committee continue to seek opportunities to engage with Government and in 2022/23 participated in a number of supply chain focussed projects including the development of a Grain Storage Assets and Management Standard, a review of the ship survey and inspection processes for bulk vessels and an ongoing review of the process to import whole grain and plant protein meal.



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.
- Support and where applicable shape federal and state government's 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.
- GTA's trade and market access strategy seeks to develop domestic and global policies and approaches 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.
- Focus on improved market access outcomes for its members and the grain industry encompassing new access opportunities, improved access arrangements and maintaining existing market access.

Trade & Market Access Committee (TMAC) Activities

The TMAC provides input across a broad range of trade and market access opportunities and issues to support GTA activities 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:

- Consultation and feedback to Government on:
 - Free Trade Agreements - consultation, input and submissions into several FTA's and FTA reviews, including Indonesia, India, EU, 7 the UK.
 - Implementation of the Indonesia/Australia Comprehensive Economic Partnership Agreement (IA-CEPA).
 - Global Food Security consequences of Russian/Ukraine conflict.
 - AGVET Review - The Committee continues to provide support to GTA in activities relating to the Government Review of the pesticides and veterinary medicines regulatory system in Australia. GTA will continue its advocacy to ensure Government note industry concerns with several of the Reviews proposals.
- China - ongoing 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, review of the changes to China's GACC regulations regarding grain storages and maintaining relationships with the China grain sector.

ATTENDANCE - TRADE & MARKET ACCESS COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Jason Craig	Chair - GTA Director	7	5
Lyndon Asser	Deputy Chair - GTA Director	7	5
Richard Perkins	GTA Director	7	7
Michael Wood	GTA Director	7	5
Rosemary Richards	GTA Consulatat	7	6
Ian Desborough	Australian Grain Exporters Council	7	7
Adrian Reginato	Cargill	7	6
Peter Nash	Grain Industry Association of WA	7	5
Amelia Shaw	Grain Growers Ltd	2	0
Annabel Mactier	Grain Growers Ltd	5	5
Richard Simonaitis	Australian Export Grains Innovation Centre	2	2
Courtney Draper	Australian Export Grains Innovation Centre	6	6
Kellie Todman	CBH Grain	7	7
Sean Barker	GrainCorp	7	6
John Ackerman	Grains Australia Ltd	7	6
Nick Goddard	Australian Oilseeds Federation/Pulse Aust	7	6
Julie O'Dea	Viterra	7	7
Gerard McMullen	National Working Party on Grain Protection	7	5
Joshua Lawrence	Ikon Commodities	7	3
Carl Hinze	Holding Redlich	7	5
James Saunders/Geoff Moore	Commodity Inspection Service	4	2
Scott Merson	Rain Agribusiness	5	2

- Development of a Sustainable and diversified market portfolio - The Committee worked on a strategy to redefine and capture value with an objective on shifting market focus, reassessment of country risk, new models and focus on innovation and modernising value chains. Developing an India - Australia Grain Strategic Partnership, an initiative to bring together Indian and Australian decision makers from government and industry to foster relations and maximise opportunities for collaboration to advance shared interests and activities of mutual benefit to both countries.
- Provided input and direction into the 'GTA Environmental, Social & Governance Credentials' and the information provided on greenhouse gas emissions including the development of carbon measures for grain transported from silo to port.
- Continued to promote and communicate to Government and other stakeholders on the damage to trade and grower returns from Non-Tariff Measures (NTM).
- Engagement with GTA members and industry on:
 - NRS outcomes and participation
 - Adopting a "Market Choice Framework" and information sharing approach for the impending release of new grain classifications and varieties to ensure the seamless introduction of new plant breeding outcomes by understanding, considering and discussing market access and supply chain implications.
 - Provided input in the Technology Stewardship Framework Guidance Document that outlines a collaborative approach to the 'stewardship of new technologies' impacting the grain supply chain including the introduction of varieties using innovative plant breeding technologies and technology for grain assessment and the interface with Government.

- Input into range of SPS issues across a number of markets.

- Submissions to the Productivity Commission on port and container supply chain issues

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

- DAFF - Grain and Plant Products Export Industry Consultative Committee (GPPEICC).
- Global policy developments through active participation in the International Grain Trade Coalition (IGTC)
- Participation in free trade agreement discussions and submissions to Government agencies.
- Submissions on behalf of members to Government agencies and global institutions, including DAFF, DFAT, Productivity Commission.



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

GTA provides leadership to the Australian grain industry maximising value and optimising outcomes in relation to Trade & Market Access.

Objectives

- Advise the GTA Board of opportunities to collaboratively investigate system, process and research initiatives that may resolve common grain industry information, 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 the 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 the efficient facilitation of trade.

Information Technology Advisory Committee Activities

ITAC had several areas of focus during the 2022/23 year including:

- Continued a review of the introduction of industry Standardised Reference Data including naming conventions and code nomenclature for standard items. This included the annual review and release of the Common Industry Varietal Code Master List and the establishment of common data codes for all receival sites listed in the GTA Location Differentials, Port Codes, Port Zones and Site Codes.

- Furthered the development of an industry 'Information Technology Road Map' strategy to provide context for GTA members and to highlight the synergies achievable through technology across industry and government.
- Providing a forum to engage with government and international bodies to discuss and progress the introduction of new systems and processes. The importance of this role is increasing as technology advances towards improved inter-connectivity to improving collaboration and efficient engagement between countries and between companies.
- Facilitating industry and Government collaboration on digital image analysis for grain assessment and certification.

The Committee continues to seek opportunities to leverage government IT initiatives and strategy including the government traceability programs and other initiatives. This work is important as it enables an understanding of government direction and to build industry/government rapport.

Progress on modifications to the DAFF Management Systems (PEMS) the upgrade to the export trade systems EXDOC, and the introduction of electronic phytosanitary certificates continue to frustrate industry as the progress on these upgrades and modifications has been slow. This Committee and other GTA Technical Committees will continue to provide assistance and input into these important government initiatives.

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
Richard Perkins	Chair - GTA Director	2	2
Ole Houe	Deputy Chair - GTA Director	2	2
Nathan Cattle	Clear Grain Exchange	2	2
Ian Dalglish	Rise Agri	2	1
Sam Nelson	Grain Growers Ltd	2	2
Emma Westom	Agridigital	2	1
Peter Johnston	GrainCorp	2	1
Darren Douglas	Cargill	2	1
Ian Sproul	CBH Grain	2	2
David Houghton	AgRisk	2	1
Jay Holland	National Grower Register	1	1
Debbie Newmarch	National Grower Register	1	1
Julie O'Dea	Viterra	2	1

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

The Information Technology Advisory 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.

A foundation for success for all is a strong and robust industry. GTA recognises the ongoing importance of industry groups, associations and organisations coming together to strive for broader industry benefit. In its role to “facilitate trade” GTA provides governance and support to specific market sectors and existing industry groups through the Sector Council model.

- GTA facilitates two Sector Councils. The Australian Grain Exporters Council (AGEC) commenced in 2018/19 as the inaugural Sector Council. In 2020/21 GTA established the Domestic Sector Council, comprising food and feed manufacturers and processors. This Council recognises the domestic market is collectively the largest market for the consumption of Australian grain.
- A Sector Council is a proven, suitable, and flexible framework, open for consideration by industry participants with significant involvement within an industry sector. Sectors Councils are formed and continue to exist if driven by industry and GTA members.

Charter for the GTA

The Charter of GTA Sector Councils is composed of:

1. Common section which contains a description of the Role of the Sector Councils; its Membership and meeting conduct.
2. Terms of Reference for specific Sector Councils;
3. Terms of Reference for Sub-Committees; and
4. Confidentiality Agreement.

Key points of the GTA Sector Councils

- GTA Sector Councils provide a platform and an industry model for all existing industry member associations to integrate into and gain support from the existing GTA structure, resources and its proven governance arrangements.
- GTA Sector Councils, approved by the GTA Board consider those issues relevant to its particular area of expertise / interest. During establishment a GTA Sector Council's 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 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, as outlined below.

- Three meetings of the full AGEC membership, two by videoconference, one in-person.
- Meeting speakers included:
 - Meghan Sheehy, Grains Australia, discussing her approach to managing both wheat and barley classification within Grains Australia, plus industry work towards national oats and pulse classification systems.
 - John Ackerman, Grains Australia, discussing market access issues for China, India and Brazil.
 - Richard Simonaitis and John Ackerman, Grains Australia, exploring strategic issues and organisational development for Grains Australia, plus market access issues for China, India, Indonesia and South America, along with the new Market Access Council.
- Discussion on GTA's approach to the new Australian Government and the grower organisation proposal for an ACCC Inquiry into grain markets.
- Discussion on media reports about prospects for growth of GM wheat varieties in Australia.
- Discussion on the Wheat Port Code review.
- Reports of meetings held with the secretariat of the organisation for International Sustainability and Carbon Certification.

- Consideration of the European Union direction on sustainability and regulation, and how it is heavily influenced by environmental policies with little regard to impacts on agriculture.
- Work between AGEC and GTA to raise concerns with DAFF and the new Minister for Agriculture about the budget and poor financial accountability for the Plant Exports Cost Recovery Program.
- Involvement in continuing advocacy relating to the anti-dumping (AD) and countervailing duties (CVD) investigation by China against Australian barley exports to China, including regular discussions with the Department of Foreign Affairs and Trade.
- Participation in the GIMAF Forum.
- Participation in the Department of Agriculture Grains Industry Consultative Committee (GPPEICC).



ATTENDANCE - AEGC COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Executive Committee			
Lyndon Asser	Chairman	3	3
Steve Bennett		3	2
Tim Henry		2	2
Michael Cole-Sinclair		3	2
Mark Lewis		3	1
Sam Napier		3	2
Darryl Borlase		1	1
Members			
	ADM	3	3
	AGE	3	2
	Arrow Commodities	3	0
	Bunge	3	2
	Cargill	3	2
	CBH	3	2
	CHS Broadbent	3	2
	COFCO International	3	2
	Emerald Grain	3	1
	ETG World	3	3
	Louis Dreyfus	3	3
	Plum Grove	1	1
	Riordan Grains	3	3
	Riverina	3	2
	Viterra	3	3
	Wilmar Trading	3	0

The GTA Domestic Sector Council is formed of GTA members with significant involvement in domestic grain consumption and processing.

The Domestic Sector Council shall make recommendations to the Board on issues that are of importance and direct impact on domestic consumption and processing of grain in Australia. This may include issues within the supply chain, policy matters, grain quality, and issues of Government policy or practice that may impact the sector. The Council will focus on matters with operational risk and commercial impact.

Objectives

- Monitor local grain environments and policies and develop appropriate responses for the Australian grain industry where required.
- When required assist GTA to liaise and collaborate with industry supply chain organisations and/or Government in developing appropriate responses to developments in local grain environments and policies.
- Promote and encourage, within a framework of free enterprise, facilitation of trade within the Australian grain industry, the production, distribution, processing and marketing of grain and value-added products (including feed, livestock, aqua and processed products) where grain is utilised as a key input.

- Assist and promote just and equitable trading relationships and discourage and oppose all types of restrictive trade practices.
- With a view of generally assisting consumers of grain, monitor and investigate existing and proposed legislation, rules or ordinances in Australia that may affect the Australian grain industry and make recommendations to address concerns.
- Investigate and develop actions as may be available against the implementation of unreasonable taxes or levies upon the use of grain.
- 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.

Domestic Sector Council Activities

Council activities included input into a broad range of domestic related issues during the year including:

- Progressed a joint government and Sector Council Working Group with the task of reviewing the process associated with the importation of whole grain and plant protein meal to seek efficiency and reduce the time from application to completion of the import permit process.
- Considered the impact on the domestic sector of new wheat classes Australian and a proposed new ASW grade,
- Reviewed and provided input into the Transport Code of Practice review and considered actions to minimise risk and exposure from grain storages entering administration.

ATTENDANCE - DOMESTIC CONSUMER SECTOR COUNCIL (EXECUTIVE COMMITTEE)			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Andrew Goyder	Chair - GTA Director	2	1
Michelle Kerr	Deputy Chair - GTA Director	2	1
Cameron Pratt	GrainCorp	2	1
Stephen Howells	Ridley Agriproducts	2	1
Matt Clarke	Inghams	2	1
Andrew McMaster	msmilling	2	
Katrina Liston	Cargill Australia Ltd	2	1
Mark O'Brien	Mauri	2	
Brett Duzmal	Allied Pinnacle	2	2
Dean Ganino	Barrett Burston Malting	2	1
Rosemary Richards	AOF	2	1

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

GTA's Dispute Resolution Service, including the recently released Small Claims Arbitration service and arbitrations instil commercial confidence underpinning and providing surety of commercial 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.
- As a principle 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 grain industry.

A minute number of the estimated annual number of grain contracts executed in Australia require 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	2021/2022	2022/2023
No of arbitrations commenced	26	19
No of arbitrations settled		
• Awards released	2	4
• Commercially settled prior to hearing	10	10
Active arbitrations as at 30 June 2023	18	21

SUMMARY OF ARBITRATION AWARD OUTCOMES 2022/23:				
TYPE OF ARBITRATION	CLAIMANT	RESPONDENT	AWARD IN FAVOUR OF	NUMBER
Full	Grain Trader	Grain Producer	Claimant	1
Full	Grain Trader	Grain Trader	Respondent	1
Full	Grain Trader	Grain Producer	Claimant	1
Fast Track	Grain Producer	Grain Trader	Claimant	1

SURNAME	FIRST NAME	ORGANISATION
Allen	Guy	Advance Trading Australasia
Basnett	Tom	AgRisk Management Pty Ltd
Barron	Graham	Grain Producer - NSW
Benecke	Lyndon	Crocker Grain
Benham	Jock	Robinson Grain
Brealey	Rob	Industry Consultant
Brittain	Michael	AGT Foods Australia
Burt	Steve	Industry Consultant
Carroll	Greg	M C Croker Pty Ltd
Cattle	Nathan	Clear Grain Exchange
Clancy	Simon	Industry Consultant
Coventry	Charles	Broun & Co Grain P/L
Dalglish	Ian	Rise Agribusiness
Delahunty	Leo	Grain Producer - VIC
Dickie	Rob	CBH Grain
Dillon	Graeme	Industry Consultant
Dubey	Sanjiv	Grain Trend Pty Ltd
Fahy	Jack	Max Grains Pty Ltd
Fry	Julian	Viterra
Furse	Anthony	Robinson Grain
Goyder	Andrew	Grain Link WA Pty Ltd
Heinjus	Chris	Pinion Advisory
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
McMahon	Malcolm	Industry Consultant
McMullen	Gerard	McMullen Consulting Pty Ltd

SURNAME	FIRST NAME	ORGANISATION
McNair	Simon	Industry consultant
Mead	Andrew	ADM Trading Australia
Meyer	Stefan	Stone-X
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
Smibert	Tom	Viterra
Storey	Ron	Industry Consultant
Syme	David	Industry Consultant
Teague	Tim	Teague Australia Pty Ltd
Tiller	Benjamin	CBH Group
Tonkin	Chris	Ten Tigers
Torrens	Mark	Real Pet Food Co
Wells	Henry	Industry Consultant
Whitwell	Chris	Basis Commodities Pty Ltd
Wilsdon	Andrew	Viterra
Wilson	Pat	GrainCorp
Wood	Michael	Rural Logic

GTA Board Approved Tribunal Chairs

(Export Contract disputes and Small Claims only) as of 28 June 2023

These appointments are made by GTA

SURNAME	FIRST NAME	ORGANISATION
Brasington	Hazel	Ashurst
Farnsworth	Geoff	Holding Redlich
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 Trading Standards
- Grain Merchandising
- Understanding Grain Markets
- Grain Trading for non-Traders
- Grain Finance & Risk Management
- GTA Arbitrators Workshop
- Grain Export Execution & Risk Management
- Advisory & Compliance Workshop
- Chain of Responsibility Program
- Code of Practice Assessment Program
- Grain Sampling Program
- Grower Workshop - Selling Grain using GTA Contracts
- In-House/customised training

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 2022/23 GTA held 28 courses, with overall 554 students (198 of these students participated in the online training modules - Chain of Responsibility and Grain Sampling).

The most popular (or attended) courses are:

- Grain Trading Standards
- Understanding Grain Markets
- Advisory & Compliance Day
- Trade Rules and Contracts

GTA delivers in-house training which can be adapted for organisations that have a number of staff requiring upskilling in specific areas. This has proven to be successful in meeting individual organisations staff training and professional development goals.

GTA introduced a brand new workshop, Grain Trading for Non-Traders. This 2-day workshop is designed for anyone starting in the grain industry as well as participants from other sectors looking to get a general understanding of the grain industry. This workshop gives you a "bird eye view" of what you need to know about the grain industry and trading grain.

It is a condensed, simplified version of 4 GTA core workshops and covers the "basics" of:

- Understanding Grain Markets
- Grain merchandising
- Trade Rules & Contracts
- Dispute Resolution & Arbitration

GTA Training & Development delivered the Advisory and Compliance workshop in July 2022. The topics included a focus on compliance and advisory issues, arbitration outcomes, AFSL issues, Competition law, insolvency issues during the pandemic, insurance industry issues and foreign currency and hedge correlations. These were delivered by highly respected presenters with specialist expertise in their fields.

Some of the training and development courses continue to be successfully delivered through on-line Zoom workshops. This has been well received by industry and students and allowed easier and time effective access for participants from all regions.

GTA has developed training and assessment programs 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.

As a trade exposed sector, the grain industry and GTA members, will always be dependent on open and fair access to export markets. GTA's Trade and Market Access (TMA) strategy seeks to develop domestic and global policies and approaches to position the industry to take advantage of trade opportunities, minimise impacts and trade constraints, and to enable trade to continue in an efficient and equitable manner.



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:

Policy Settings

- Ensuring policy settings are supportive of the grain industry and the facilitation of trade

Priorities

- Actively promoting the grain industry's priorities and position within domestic and global forums

Technical Support

- Providing technical support to industry to address trade issues as they arise and assist the implementation of appropriate policies to maintain and enhance future trade

Consultation & Feedback

- Ensuring the industry has transparent and open mechanisms for providing input into and receiving feedback on trade and market access priorities and activities

Fact Base

- Advancing independent, fact-based dialogue and advocacy for members and industry stakeholders

New & Improved Access

- Improved market access outcomes for its members and the grain industry encompassing new access opportunities, improved access arrangements and maintaining existing market access

Collaboration

- Effective cooperation and coordination between and among government and industry is critical to achieve, maintaining, and improving market access

Management of trade and market access issues is critical for grain exports and GTA members. The impacts of not effectively addressing this include:

1. Higher operational and commercial risk for exporters
2. Risk of trade ban or trade restriction
3. Increased costs (compliance, administration, production)
4. Loss of important markets and potential for lower prices to growers and higher prices for consumers.

Given these impacts on its members, GTA continues to focus significant activity in trade and market access. GTA is ideally placed to address these issues as it operates (and has practical insight) across the supply chain with 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, Grains Australia, AEGIC and other stakeholders.

GTA works proactively with industry stakeholders and the Australian Government to counter the growth of non-tariff measures (NTMs) by supporting international standards that are based on sound science. 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

Complex international markets require an ongoing effort to maintain existing market access, and where possible, secure improved market access and global rules of trade.

Through its broad membership base of commercial companies and its experience GTA is able to assist with a '*frontline perspective*' and provide input and information to Government in developing policies and global advocacy programs. A recent example is the development by GTA of the Australia India Strategic Grains Partnership, an initiative to bring together Indian and Australian decision makers together, foster relationships and to maximise the opportunity for development and collaboration amongst the relevant country grains, food processing and livestock sectors.

GTA Trade and Market Access Strategic Framework

Trade and Market Access Objective

GTA provides leadership to its members and industry and works to maximise the position of the Australian grain industry and optimise outcomes for members and industry

Four pillars underpinning GTA TMA Activities

Policy	Advocacy	Support	Communication
<ul style="list-style-type: none"> Ensuring policy settings are supportive of grain trade 	<ul style="list-style-type: none"> Proactively promoting grain industry priorities and positions in domestic and global forums 	<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 	<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 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"> Communicate the value of grain trade and the importance of market access Foster strong engagement with Government and industry in Australia and globally
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GTA has also worked alongside Government and AEGIC to progress trade activity into Mexico, Sth American countries including Brazil and into Sth Africa. The focus of this activity has been promoting the Australian industry and its key strengths and Australian barley and how it can add value to these countries malting and brewing industries.

Promoting the attributes of the Australian grain and the surety of its supply chain and supporting industry and Government frameworks provides importers with confidence in the product and Australia's capability to deliver.



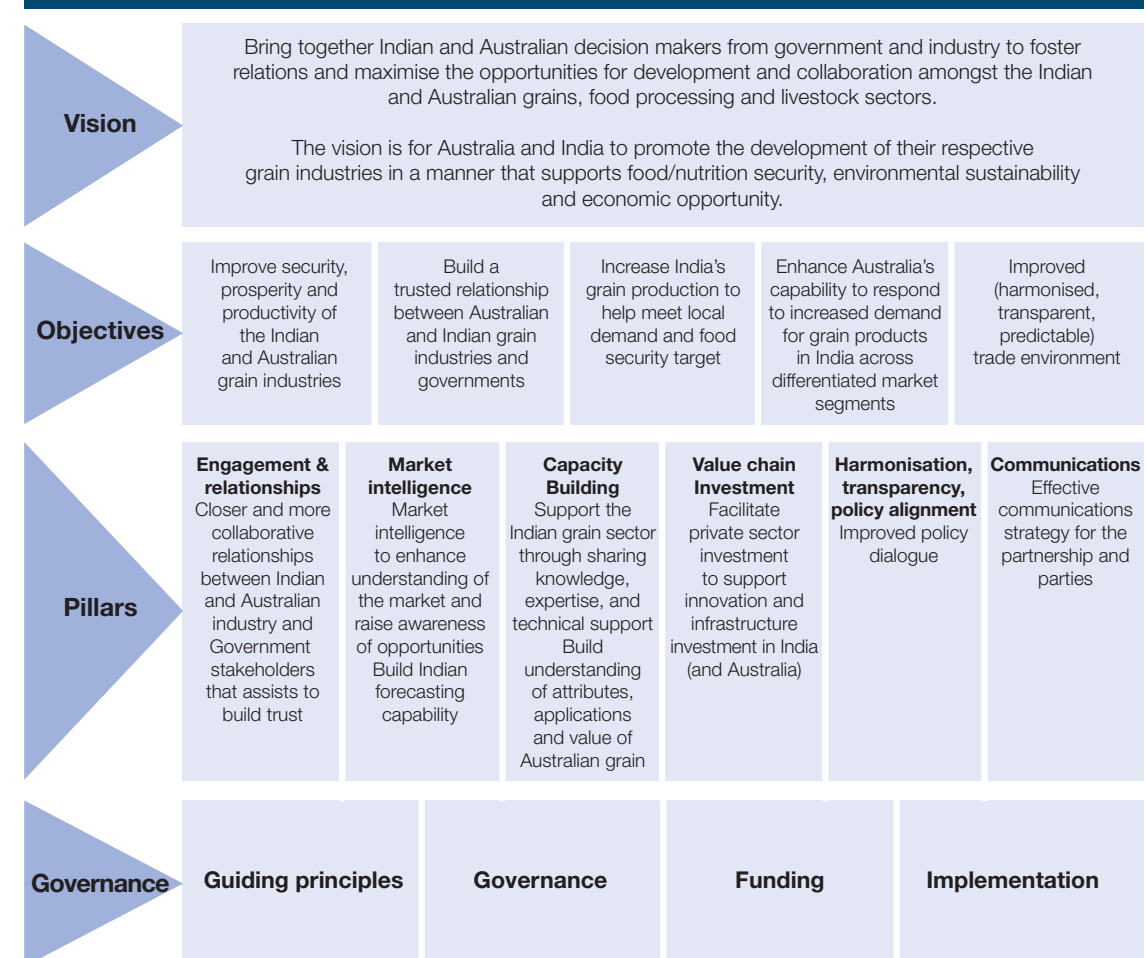
International Linkages

GTA actively builds international linkages to promote the value of the industry and to 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, Vietnam and the Philippines as part of the Australian Grains Industry Conference (AGIC) Asia program and AGIC Asia - Roundtables.

GTA is a long standing and active member of the International Grain Trade Coalition (IGTC), serving on the Executive Committee and Management Council. The overarching objective of the IGTC is to achieve a market and regulatory environment supportive of trade that avoids disruptions in the

Australia / India Grains Partnership



Benefits/Outcomes

The overall aim is to develop relationships and trust which can assist to lead to an environment where the partners can work collaboratively and harmoniously to deliver outcomes.

The partnership will establish clear targets for long and short term outcomes that are purpose, impact and challenge focused.



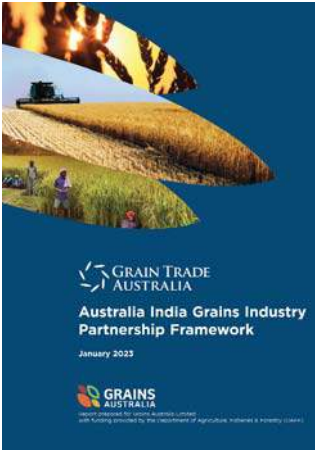
international trade of grain, oilseeds, pulses and derived products. Through IGTC, the Australian industry increases its advocacy to multiple international institutions, bringing Australian issues to the global stage. These institutions include:

- World Trade Organisation - WTO
- Codex Alimentarius Commission
- International Plant Protection Convention (IPPC)
- World Bank
- Food and Agriculture Organisation - FAO
- International Grain Council (IGC)
- Asia Pacific Economic Cooperation - APEC
- APEC Grain Trade Facilitation Forum
- ASEAN



IGTC has a global reputation of helping develop global grain trade solutions from its member driven consensus approach including:

1. Encouraging forward-looking policies in Free Trade Agreements to minimise NTMS:
 - 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 methodologies and testing
 - Promotion of low-level presence policies
 - Mutual recognition of risk assessments



2022/23 Activity Matrix

GTA has been active on TMA issues across a number of key areas as identified below.

ISSUE	CONTENT	2022/23 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, including the Global Food Security and the Role of the Trade Seminar which was a GTA initiative at the WTO in Geneva.• Input into policy in partnership with other industry stakeholders.• GTA continued to lead the industry working group (IWG) addressing China's investigation in relation to Anti-Dumping (AD) and counter veiling duties (CVD) on Australian barley exports. The IWG continues to work closely with DFAT & DAFF through the WTO process and 2023 agreement between China and Australia to review tariff measures.
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 continues to work with Government seeking to implement the TRQ process for IA-CEPA feed grain market access.• Food security presentation to the International Grains Conference and the General Assembly of the International Grains Council.• Presentation to the WTO Markets Committee on the impacts of trade barriers on grain and food producers• Provided input to several FTA's including UK, India, EU and IA-CEPA• Review and updating of disciplines in relation to MRLs, standards and testing and innovation.
Predictable and science based SPS regulations	Concerns with certain Plant protection (sanitary & phytosanitary) SPS measures including plant diseases, weed seeds and pests remain a concern for the grain industry.	<ul style="list-style-type: none">• Areas of focus 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 (e.g. CODEX)- Use of risk and science-based assessments• GTA works with Grains Australia and DAFF to address these issues as they arise. GTA also works with DAFF 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. GTA is an active long-standing member of IGTC, serving on its Management Council and as Secretary on the Executive Committee.• GTA continues to develop and strengthen relationships with like-minded international trade associations in importing and exporting countries.• GTA works with the Government through regional initiatives including the India-Australian Strategic Grain Partnership, where GTA lead the private and public sector engagement delivering a report highlighting the mutual need to develop a Strategic Partnership as part of the development of the bi-lateral relationship.• Initiated the Global Food Security and Role of Grain Trade seminars at the WTO in Geneva.

ISSUE	CONTENT	2022/23 ACTIVITY
Food safety regulations, in particular, Maximum Residue Limits (MRLs)	MRLs are 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 (funded by Grains Australia) and provides administrative and conference management activities. • GTA actively engages with DAFF National Residue Survey (NRS) and with the 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, 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. • Food security presentation to International Grains Conference and the General Assembly of the International Grains Council
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 <i>Market Choice Framework</i> 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 works on these issues through IGTC. Current activities are largely focused on the Cartagena Biosafety Protocol, LLP policy and plant breeding innovation including information sharing with the seed/technology sector. • Engaged with the International Seeds Federation, through IGTC and with Australian Seed Federation on information sharing of traits in innovative plant technology. • GTA has developed a consultative model to look at market access impacts and information sharing for the Australian industry arising from innovative breeding technologies.
Increase in regulatory rules and burden. Lack of transparency & predictability of changes in market access rules & regulations	Key issues include: <ul style="list-style-type: none"> - 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, and with IGTC on these issues. • Maintain the grain industry NTM and Market Access Database to capture and raise awareness of the impact of these issues on industry. • Food security presentation to the International Grains Conference and the General Assembly of the International Grains Council Submissions to Export Legislation consultations

ISSUE	CONTENT	2022/23 ACTIVITY
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"> • Published Version 1. '<i>Australia's Grain Supply Chain and its Environmental, Social & Governance Credentials</i>', to promote industry commitment to ESG and highlight existing initiatives, practices and structures supportive of favourable ESG outcomes. • Provided GTA members support documents on the Rationale for Monitoring Greenhouse Gas Emissions and the Methodology for Estimating Carbon Emissions • Published the <i>GTA Location Differential table of land transport GGE carbon quantity values</i>. • Focus on objective and fact-based dialogue and stakeholder communications • Published <i>TGD 22 - Sustainability Program Principles and Guidelines</i> • Promote awareness of Food Safety and reliability of the grain value chain through NWPGP, AGIC Conferences, Delegation presentations and the Code of Practice
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"> - Preparation of Food Grade Shipping Container standard - Development of Grain Sampling Methodology and Procedural guidelines (TGD No 21) - Export Permit Process (RFP) Review - Mobile Bulk Loading Guidelines - Ship Inspection using video capture - Marine Surveyors review - Development of Grain Storage Asset & Management Standards - Improvements to the procedures for the importation of whole grain and protein meals.
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 DAFF's principal consultation forum with grain industry stakeholders on export inspection and certification, export market access. • 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 - Authorised Officer (AO) training and interaction with DAFF 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 - Ensuring surplus Export Cost Recovery Funds remain committed to grain industry needs and requirements.



The National Working Party on Grain Protection (NWPGP) is the industry body responsible for providing management and leadership to industry in the areas of grain storage, chemical use, market requirements and chemical regulations. This activity relates to stored grain protection as well as chemical use in-crop and all areas of the supply chain as it relates to market access.

The Chair of NWPGP is funded by Grains Australia. GTA acts as the secretariat for the NWPGP supporting the Chair and the activities of the Strategic Working Group and NWPGP Working Groups.

The Australian Grain Storage and Protection Conference is the annual conference for NWPGP. GTA convenes and administers this event. The 2022/23 event was held as a combined virtual and in-person event in June 2023 and was a celebration of the 50th consecutive year of the conference. The event successfully provided participants with the latest research and developments in the area of pre and post-harvest storage and hygiene, chemical usage, changes in international and domestic market requirements and chemical regulations. It also outlined industry's success in meeting market access requirements for chemical residue limits over the preceding year and discussed new and ongoing activities to improve that performance over the next period.



A range of activities occurred during the year both in preparation for the conference and to assist industry's market access efforts. These included:

- A continued review of changes in chemical regulations and maximum residue limits (MRLs) in domestic and export markets. Markets continually review their MRLs, often decreasing them at relatively short notice. Where those changes were considered as having a potentially significant negative trade impact, liaison occurred with a wide range of industry sectors and stakeholders on the potential impacts. Where required, discussion then occurred with the Australian Government to develop solutions to reverse any potential negative outcomes.
- Major impacts on market access for Australian grain in relation to changing market MRLs and regulations, and the progress of developing and implementing solutions, were captured and updated in the Non-Tariff Measures database as a central reference source.
- The previous seasons had highlighted the need for all sectors of the supply chain to fully recognise and understand the impacts of chemical use on the trade of grain domestically and internationally. To assist that task, further advocacy occurred with chemical registrants and those responsible for providing advice to chemical users, being re-sellers, growers and grower advisors, who work closely with users of those chemicals.
- Advocacy continued with other relevant sectors of the supply chain via presentations at a number of industry conferences and meetings. Further detailed market, chemical and commodity MRL and chemical regulatory information was also provided to individual industry stakeholders and groups upon request.
- The NWPGP webpages were updated on the GTA website (www.graintrade.org.au/nwpgp) with links created to a range of material developed to support industry understanding and compliance with market needs, including market access fact sheets developed with support from various industry organisations.
- A revised Australian Grains Industry Post Harvest Chemical Usage Recommendations and Outturn Tolerances document detailing changes to MRLs by commodity and market for chemicals permitted for use post-harvest was published.
- As required, input occurred into various Australian chemical reviews including:
 - The DAFF review of the agvet chemicals regulatory system in Australia;
 - Development of the Australian position on topics to be discussed at the Codex Committee on Pesticide Residues meeting that was held in June 2023 ; and
 - Various Australian Pesticides and Veterinary Medicines Authority (APVMA) Trade Advice Notices for impacts on marketing Australian grain.



The Australian Grains Industry Conference (AGIC) is a key activity for GTA each year.

The annual program includes conferences targeted at both domestic and international audiences. AGIC receives strong support from sponsors and delegates from across the grain value chain and related service industries.

The Australian Grains Industry Conference 2022



AGIC Australia 27-28 July 2022

The 2022 Australian Grains Industry Conference (AGIC) was successfully held in July 2022 and was a celebration of being physically together again and reconnecting after 2 years of interactive virtual conferences enforced because of the COVID-19 pandemic restrictions AGIC 2022 was a great success and celebration whilst providing a strong technical program and industry connectivity for sponsors and delegates over the two-day event.



With over 800 delegates registered across the conference and the dinner, industry showed its enthusiasm and support for in person conferences. In his opening address GTA's Chair stated "it is important to come together as an industry and its people as the impact of the past few years has created a toll on the grain industry and its communities.



The 2022 Conference program was centred around the themes of "Growing with Grain" which reflected the global concern of world food security driven by the conflict in Ukraine and climate uncertainty.



The program was exceptionally strong program with an impressive line-up of local and international experts featuring, an Opening Keynote address by Senator the Hon Murray Watt, Minister for Agriculture, Fisheries and Forestry & Minister for Emergency Management. Featured sessions included expert panels discussing "Price Transparency" and "Megatrends".

It was agreed the highlight of the program was provided during a special keynote address by Mr. Mykola Gorbachov, President, Ukraine Grain Association on the impact on the Ukraine grain supply chain from the conflict in Ukraine. In a stirring address, followed by a standing ovation Mr Gorbachev said the impact is profound and will have consequences for the world grain supply for several years.

In a session involving leading journalist Barry Cassidy in conversation with Ben Macnamara, CEO, CBH Group, Phil Hughes, CEO, Viterro Australia and Tony Geitz from LDC, spoke of the challenges of the grain industry including supply chain bottlenecks and the difficulty of finding labour in the agriculture sector since the COVID pandemic. It was noted the industry has resilience and is facing and winning the challenge of the concurrent large crops.

A strong list of international and local speakers included sessions on digital opportunities and the challenge of managing data, competition in the agricultural sector, generational leaders, consumer trends and sustainability.

AGIC remains 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 Australian Grains Industry Conference Asia 2023



AGIC Asia 7-9 March 2023

AGIC Asia 2023 was held in Ho Chi Minh City (Vietnam) and Manila (Philippines) in March 2023, featuring a special opening keynote addresses from Sarah Hooper, Consul-General in Ho Chi Minh City and Dr Moya Collett, Deputy Head of Mission in Philippines. Support for the first post-COVID face to face event was exceptionally strong with over 357 delegates participating in a broad technical program looking at global market conditions, Australian supply and demand, emerging consumptive trends, and extracting the best return from Australian grain through "Reconnecting & Building Value".

The knowledge provided through AGIC Asia ensures the confidence of processors and consumers of Australian grain, enabling them to approach their customers with increased confidence. Improvements in customer confidence in the Australian supply chain will increase demand for our grain.

AGIC Asia events continue to grow and be well attended by both flour and feed millers with the virtual platform offering a broader reach to communicate the quality assurance and benefits of Australian grain, across the Asian region and globally.

GTA, as host of the AGIC Asia conferences is committed to either in-person and/or virtual formats to ensure industry issues of importance can be raised in open forums together with industry networking and connectivity opportunities. Importantly AGIC is an opportunity for continuity of engagement with Australian grain customers and the important messages of value in Australian grain from quality, reliability and safety.





FINANCIAL PERFORMANCE & POSTITION (EXTRACT)

Financial policies

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

Financial position

The company has generated a surplus of \$426,947 as compared to a surplus of \$124,861 in the previous year. Net equity at 30/6/23 is \$2,070,527.

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

The following factors contributed the financial accounts:

- Higher production levels and consequently stronger supply chain throughput have generated buoyant industry conditions in 2022/23.
- Training and Development margin was stronger due to good participant volumes (likely in response to better seasonal/industry).
- While conference and event income was higher than previous years, with return t in-person events, that has seen encouraging support from sponsors and delegates, and effective cost management.
- Staff and Director travel and accommodation costs have returned to more normal (pre-COVID-19) levels.

The following information was extracted from the financial statements of Grain Trade Australia Ltd for the year ended 30 June 2023 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 2023

	2023 \$	2022 \$
REVENUE	2,568,775	1,982,385
Interest revenue calculated using the effective interest method	55,539	517
EXPENSES		
Direct expenses	(603,131)	(361,579)
Employee benefits expense	(721,445)	(713,550)
Depreciation and amortisation expense	(74,952)	(74,952)
Rental and lease costs	-	-
Consultancy and legal expenses	(141,903)	(177,625)
Travel and accommodation	(193,620)	(110,268)
Special projects	(185,623)	(240,000)
Other expenses	(272,074)	(172,722)
Finance costs	(4,618)	(7,345)
Total expenses	(2,197,366)	(1,858,041)
SURPLUS/(DEFICIT) BEFORE INCOME TAX EXPENSE	426948	124,861
Income tax expense	-	-
SURPLUS AFTER INCOME TAX EXPENSE FOR THE YEAR	124,861	124,861
Retained earnings at the beginning of the financial year	1,643,579	1,518,718
RETAINED EARLINGS AT THE END OF THE FINANCIAL YEAR	2,070,527	1,643,579

Grain Trade Australia Ltd

Statement of financial position

As at 30 June 2023

	2023 \$	2022 \$
ASSETS		
Current assets		
Cash and cash equivalents	587,711	1,137,708
Trade and other receivables	286,743	341,334
Contract assets	46,967	37,008
Other financial assets	2,351,247	1,329,800
Prepayments	189,672	64,832
Total current assets	3,462,340	2,910,682
Non-current assets		
Right-of-use assets	81,199	156,151
Total non-current assets	81,199	156,151
Total assets	3,543,539	3,066,833
LIABILITIES		
Current liabilities		
Trade and other payables	194,130	215,657
Contract liabilities	1,027,993	887,465
Lease liabilities	87,283	80,918
Employee benefits	119,070	103,136
Total current liabilities	1,428,476	1,304,788
Non-current liabilities		
Lease liabilities	7,709	94,992
Employee benefits	36,827	23,474
Total non-current liabilities	44,536	118,466
Total liabilities	1,473,012	1,423,254
Net Assets	2,070,527	1,643,579
EQUITY		
Retained earnings	2,070,527	1,643,579
Total Equity	2,070,527	1,643,579

Grain Trade Australia Ltd

Statement of changes in equity

For the year ended 30 June 2023

2022	Retained earnings \$	Total equity \$
Balance at 1 July 2021	1,518,718	1,518,718
Deficit after income tax expense for the year	124,861	124,861
Other comprehensive income for the year, net of tax	-	-
Total comprehensive income for the year	124,861	124,861
Balance at 30 June 2022	1,643,579	1,643,579
2023	Retained earnings \$	Total equity \$
Balance at 1 July 2021	1,643,579	1,643,579
Surplus after income tax expense for the year	426,947	426,947
Other comprehensive income for the year, net of tax	-	-
Total comprehensive income for the year	426,947	426,947
Balance at 30 June 2022	2,070,527	2,070,527

Grain Trade Australia Ltd

Statement of cash flows

For the year ended 30 June 2023

	2023 \$	2022 \$
Cash flows from operating activities		
Receipts from customers (inclusive of GST)	3,006,303	2,484,546
Payments to suppliers and employees (inclusive of GST)	(2,477,710)	(1,784,015)
Interest received	21,641	517
Interest on leases	(4,618)	(7,345)
Net cash from operating activities	545,616	693,703
Cash flows from investing activities		
Investment in term deposits	1,014,695	-
Net cash used in investing activities	1,014,695	-
Cash flows from financing activities		
Repayment of lease liabilities	(80,918)	(74,900)
Net cash used in financing activities	(80,918)	(74,900)
Net increase/(decrease) in cash and cash equivalents	(549,997)	618,803
Cash and cash equivalents at the beginning of the financial year	1,137,708	518,905
Cash and cash equivalents at the end of the financial year	587,711	1,137,708

ORDINARY MEMBER (TRADING)

Level A1
(over 7 Million Tonnes)
CBH Grain P/L
Viterra Australia P/L
GrainCorp Operations Ltd

Level A3
(3-5 Million Tonnes)
Cargill Australia Limited

Level A4
(1.5-3 Million Tonnes)
ADM Trading Australia P/L

Level B1
(1.0-1.5 Million Tonnes)
Emerald Grain P/L
Manildra Group
Arrow Commodities P/L
Bunge Agribusiness Australia P/L
CHS Broadbent P/L
Riordan Grain Services

Level B2
(500,000-1 Million Tonnes)
Australian Grain Export P/L
Centre State Exports P/L
Cofco International
ETG Commodities P/L
George Weston Foods Limited
Inghams Enterprises P/L
Ridley Agriproducts P/L
Riverina (Australia) P/L

Level B3
(250,000-500,000 Tonnes)
Allied Pinnacle P/L
Robinson Grain Trading Co P/L
Wilmar Gavilon P/L
Louis Dreyfus Company Australia P/L
Quadra Commodities P/L
Brahman Commodities P/L
Boolah Farms Pty P/L
Fletcher International Exports P/L
K M & W M Kelly & Sons
Demeter Grains

Level C1
(over 10 employees, under 250,000 Tonnes)
Adams Australia P/L
Agracom P/L
Agrisk Management P/L
AGT Foods Australia
Associated Grain t/a Agrocorp Processing Australia
Australian Food and Fibre
Australian Fresh Milk Holdings (AFMH)
BFB P/L

Blairs Produce Company
Castlegate James Australasia P/L
Coprice
Darwalla Milling Co P/L
Deckert Group P/L
DDT Holdings P/L
Esperance Quality Grains
Fodder Link P/L
Hanlon Enterprises Grain
Hazeldenes Chicken Farm P/L
HX Food Group (Aus) P/L
Independent Grain Handlers P/L
Irwin Stockfeeds
Itochu Australia Ltd
Inari Australia P/L
J K International P/L
Rex James Stockfeed P/L
Jerilderie Grain Storage & Handling
Laucke Flour Mills P/L
Lawson Grains P/L
LDC Enterprises Australia P/L
LINX Cargo Care
LPC Trading P/L
Malteurop Australia P/L
Mandala Trading P/L
MC Croker P/L
MSM Milling P/L
Namoi Cotton Ltd
Premium Grain Handlers P/L
Quattro Ports
Queensland Cotton Corporation P/L
Reid Stockfeeds P/L
Rivalea (Australia) P/L
- Animal Nutrition
SunPork Farms Feed Mills
ThriveAgri
TSS Grain (Tasmanian Stockfeed Services)
Unigrain P/L
Viridis Ag
W B Hunter P/L
Wilken Grain Woods Grain P/L
XLD Commodities
Yenda Prods Grain P/L

Level C2
(under 10 employees, under 250,000 Tonnes)
A T Waterfield & Son P/L
A W Vater and Co
Advantage Grain P/L
Access Grain P/L
Agmark Commodities
Agri Om Australia P/L
Agri-Oz Exports P/L
Agromin Australia Pty Limited
Australian - Asian Agricultural Exports P/L
Australian Choice Exports P/L

Australian Grain Storage
Australian Growers Direct P/L
Australian Mungbean Company P/L
Avoca Grain Storage P/L
Baker Grain
Boort Grain Co-Operative
Broun and Co Grain P/L
C & S Trading P/L
C K Tremlett P/L
Carpendale Agri P/L
Carson Stockfeeds P/L
Chester Commodities P/L
CL Commodities P/L
Coorow Seeds
Cory Johnston (Aust) P/L
Craig Tyack Grain Trading
Deacon Seeds Company
Defiance Maize Products P/L
Direct Grain P/L
Direct Commodities P/L
East Coast Stockfeed P/L
Ellerslie Free Range Farms P/L
ETG Processing P/L T/A Wimpak
Export Import Australia P/L
Export Trading Group Australia P/L
Fanmac Logisitics P/L
Feed Central P/L
Findlays Barellan
Forest Enterprises Development & Consulting P/L
Grenfell Commodities P/L
GO Resources P/L
Godde's Grain & Fertiliser P/L
Gold Star International P/L
Grain Link (NSW) P/L
Grain Link WA P/L
Grainforce P/L
GrainTrend P/L
GV Grain & Fodder
Hartree Partners (Australia) P/L
Harwood Grains P/L
J W Koek & Company
KB Agri Services P/L
Kangaroo Island Pure Grain P/L
Kennett Rural Services P/L
Lachlan Commodities P/L
Lake Grain P/L
Lane Grain P/L
Laragon Almond Processors P/L
Marina Commodities
McKenzie Ag Services
McNaughts Grains & Fertilizer P/L
Matthews Transport and Grain Traders
Max Grains P/L
Melaluka Trading P/L
Mellco P/L
Nandaly Grain Co-Operative Ltd
Network Grains P/L
Origin Grain P/L

Outlook Commodities P/L
Pacific Global Sprouts P/L
Parkinson Bros
PB Seeds P/L
Pearson's Grain P/L
Peters Commodities P/L
Pinnacle Grains P/L
Plum Grove P/L
Pure Foods Eggs P/L
QS Commodities P/L
Quirindi Grain & Produce
RP Grain P/L
Rural Logic (Aust) P/L
Shannon Bros Bulk Storage P/L
Silo Bag Grain (NSW QLD) P/L
Societa Cofica P/L
Southern Cross Agricultural Exports P/L
Spagrimon Australia Pty Limited
Standard Commodities Australia P/L
Sudima Australia P/L
Southern Grain P/L
Southern Grain Storage P/L
Swiss Singapore (Australia) P/L
Tamma Grains Australia P/L
Targray Australia P/L
Tiller Commodities P/L
TRC International P/L
Ulusoy Asia Pacific
Universal Commodity Management
Ward McKenzie P/L
Watson's Bulk Logistics
WHG Oceania P/L
Wirrinourt Transport & Trading
WW Agri P/L
ZTC Australia

TRANSPORT OPERATOR

Crawfords Freightlines Pty Lts
Gehrke Grains and Transport P/L
Hamilton Contracting (NSW) P/L
Horne Ag Logistics P/L
Pacific National (NSW) P/L
SEAWAY Intermodal P/L

BROKER

Medium
Fox Commodites P/L
Grain Brokers Australia
Horizon Grain Brokers P/L
iGrain.com.au P/L
Rain Argibusiness
StoneX Financial P/L
McDonald Pelz Australia
Perkins Commodity Brokers
Pure Grain Network P/L
Quest Commodities P/L
Teague Australia P/L

Sole Operator

A C Grain
Allied Grain P/L
Cogeser (Australia) P/L
Farm Tender
Lotema P/L
Mallon Commodity Brokering
Woodside Commodities P/L

CORPORATE

Large
ASX Limited
Australia And New Zealand Banking Group
Australian Grain Technologies P/L
Barrett Burston Malting Co P/L
Boortmalt Asia Pacific P/L
Commonwealth Bank of Australia
National Australia Bank Ltd
NSW Ports

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
HFW Australia
Intertek
Mars Petcare t/a Mars Birdcare
Oldendorff Carriers
SBA Law
SGS Australia P/L
T-Ports P/L
Qube Logistics (SB) P/L (T/A Qube Agri)

Small
Advance Trading Australasia
Ag Scientia P/L
Agvise (WA) P/L
Aperture Ag P/L
Basis Commodities P/L
BSM Global 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
Futari Holding P/L
Goldstar Commodities
Graintec Scientific P/L
Grainx

Guud Asset Cerium P/L
HarvestCheck P/L
Hay Plains Grain Storage P/L
IKON Commodities P/L
Indyn P/L
Lachstock Consulting P/L
Longbridge Commodities 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
Pertin Instruments Australia P/L
Planfarm Marketing P/L
Priag Marketing Pty Limited
Primal Foods Group
Profarmer Australia P/L
Rise Agribusiness P/L
Pinion Advisory
Saputo Dairy Australia P/L
SGA Solutions P/L
TE Storage & Logistics P/L
Ten Tigers
TT Club Mutual Insurance
Ultimate Global Trading P/L
Wattletree Consulting P/L

INTERNATIONAL AFFILIATE

CIS - Commodity Inspection Services

INDUSTRY ASSOCIATION

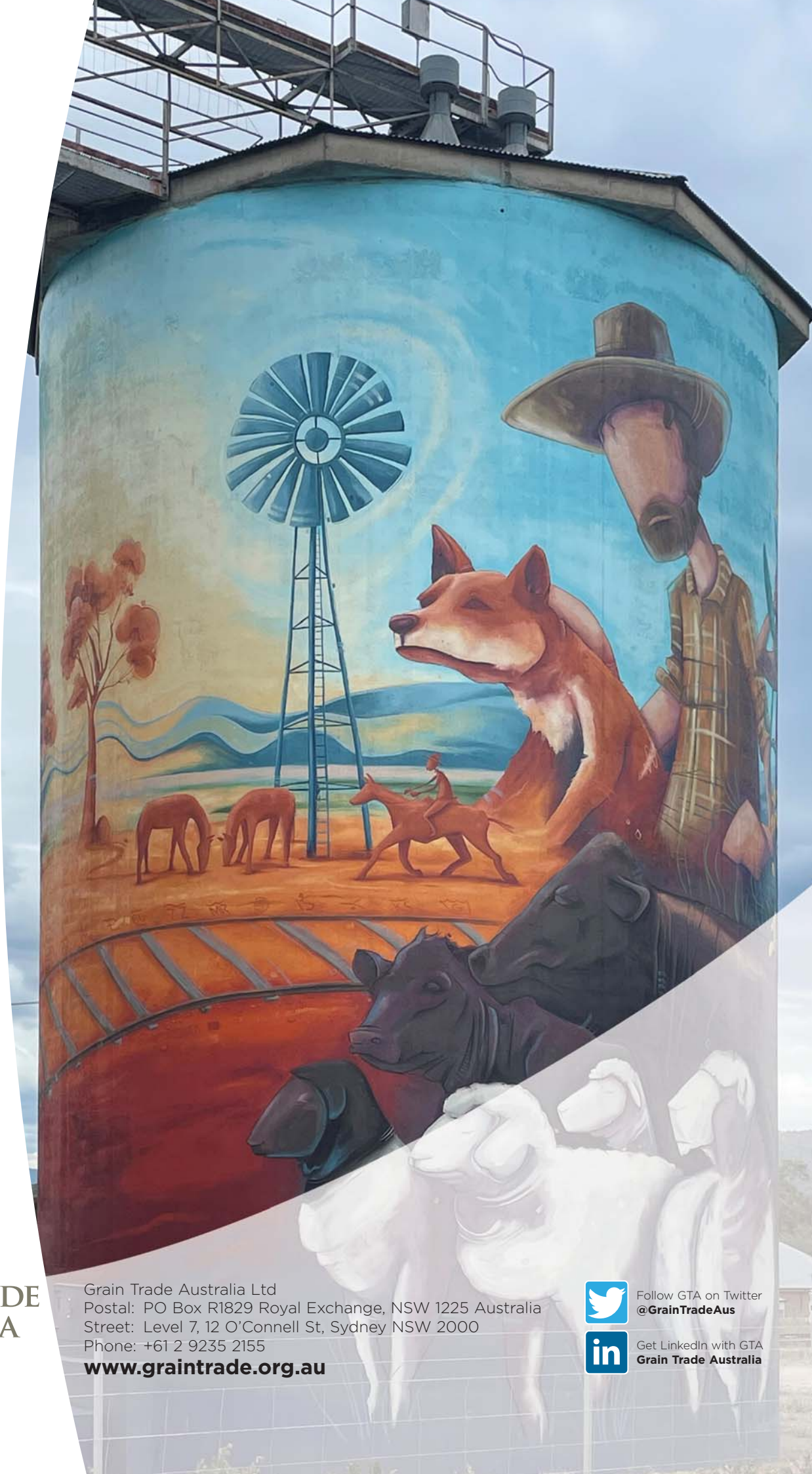
Australia Export Grain Innovation Centre
Grain Growers Limited
Grain Industry Association of WA
Grain Producers Australia Ltd
NSW Farmers Association
Stock Feed Manufacturers' Council of Australia

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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