



# ANNUAL REPORT 2020-21



# INDUSTRY DRIVEN SELF- REGULATORY FRAMEWORK



## GTA CONTRACTS SUPPORT TRADE TO EXPORT & DOMESTIC MARKETS

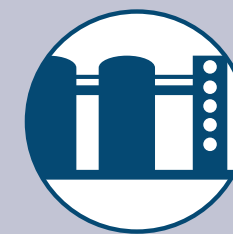
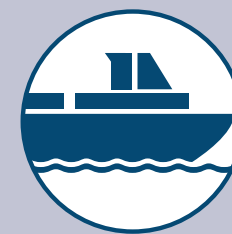
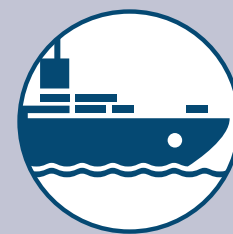
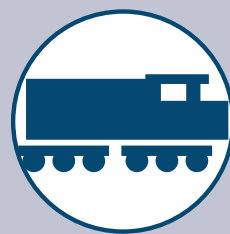
- Free on Board (FOB) Contract (GTA No.1)
  - Track Contract (GTA No.2)
  - Contract Confirmation (GTA No.3)
- Delivered Container Terminal (DCT) Contract (GTA No.4)
- Cost Insurance Freight Contract (Containers) (GTA No.5)
  - Grower Contract (GTA No.6)
- Grain Transport Contract & Free on Rail Contract (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

## WORKING ACROSS THE ENTIRE SUPPLY CHAIN

# CONTRIBUTING VALUE TO THE GRAIN INDUSTRY SUPPLY CHAIN



## Australian Grain Industry Conference (AGIC) Asia

Two Virtual events held showing casing the Australian grain industry to over 650 Delegates, from 25 Countries.

## AGIC Asia Government and Policy Round Table events

Outreach programs targeted at Policy Administrators, Agencies in Indonesia and Vietnam to promote the facilitation of trade.

## GTA Trading Standards

Developed by the GTA Standards Committee, following industry consultation conducted annually. The Trading Standards are developed with primary objectives to reflect customer requirements, 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

## 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

## Wheat Quality Australia

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

## National Working Party on Grain Protection

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
- Formal Complaints Handling
- 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
- Industry focused Stewardship including Code of Practice and Training and Development

## Member:

- DAWE - 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
- Grains Australia Constitution Committee
- Grains Australia Board Appointment Committee
- Grains Australia Advisory Committee
- Wheat Quality Australia

## Submissions to:

- Codex Alimentarius Commission (Codex) - international food standards
- Australian Pesticide & Veterinary Medicines Authority (APVMA)
- Department of Agriculture Water and Environment (DAWE)
- Department of Foreign Affairs and Trade (DFAT)
- Prime Minister
- Minister for Trade, Tourism and Investment
- Minister for Agriculture, Drought and Emergency Management
- Joint Standing Committee on Trade and Investment Growth
- IP Australia
- Office of Gene Technology Regulator (OGTR)
- Victorian Minister for Ports and Freight
- Department of Infrastructure, Transport, Regional Development & Communications
- SA Minister for Primary Industries and Regional Development
- National Transport Commission
- Productivity Commission
- National Heavy Vehicle Regulator



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 provide the industry driven Self-Regulatory Framework that supports and facilitates trade.

### Making it easier

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

### Available to all

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

### Informing industry

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

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

### Strategic Direction

"GTA Strategic Directions" document 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, and transparent. These attributes provide the foundation for the Australian value chain and its members to participate in the growth of the global grain industry.

The following reflect the industry outcomes that GTA delivers / 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 responsibility
- Enhanced innovation and leadership - where new ideas and challenges are welcomed, discussed openly, and advanced as appropriate
- An industry responsible for itself (industry stewardship) and 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



I am pleased to provide the 2020/21 annual report as Chair of Grain Trade Australia (GTA). I must mention that 2021 is the 30th Anniversary of the formation of NACMA/GTA. Everyone involved in the organisation over the last 30 years should be very proud of the achievements and how GTA has evolved and has led the industry to its successful position today.

GTA remains the focal point for the commercial grain industry within Australia. It facilitates trade and works to provide an efficient, equitable and open trading environment by providing leadership, advocacy and an **industry driven self-regulatory framework** including the Australian Grain Industry Code of Practice, grain Trading Rules, Contracts and Grain Trading Standards.

The grain industry story of 2020/21 has been one of recovery following years of severe drought. Australian grain production recovered in 2020/21 season to 58 million tonnes (mmt), the second largest crop on record, with domestic consumption of 16.9 mmt (USDA) and exports of 36.5 mmt (ABARES).



GTA Chair Andrew Goyder

It has been a monumental effort by GTA members to efficiently receive, store and move this large crop to demand points within Australia and across the globe, while ensuring the quality and food safety of the grain along the supply chain. The capacity and capability of the grain supply chain has been truly tested in the past year, and I am pleased to report, despite some challenges, it has passed the test. This highlights the importance and value on GTA's core mission of the 'facilitation of trade, and the ability for industry participants to appropriately manage risk and the willingness of GTA members to support an effective industry driven self-regulatory framework.

In 2021 GTA held the first **Australian Grain Supply Chain Summit** to launch an important strategy called **"Modernising the grain supply chain - from drought, through COVID-19 to 2030"**, developed by GTA to enhance and grow industry, through strategic efficiency gains in the value chain.

The rationale in focusing on the supply chain is simple; given improving the efficiency of the grain supply chain, **improves the value of every tonne** of grain that moves through it. It improves our industry's global competitiveness benefitting not only supply chain participants, including GTA

members and the people they employ, but importantly the benefits will flow to growers and in turn deliver economic value to rural and regional communities.

The GTA strategy is closely aligned with the Department of Agriculture, Water & the Environment (DAWE) strategies and we are collaborating with DAWE to deliver benefits and improve the competitiveness of the Australian grain industry, to better meet the increasing pressure from global competition.

An outcome of the collaboration with DAWE and Shipping Australia Ltd is the joint publication of **Standards for Empty Shipping Container Inspection**, which was released in 2021. This Standard provides the supply chain with guidance on the acceptable quality of containers and providing assurance that the container will not alter the pest or disease status of the grain (or prescribed goods) during transit.

Australia's **self-regulatory industry framework** enabled by GTA's

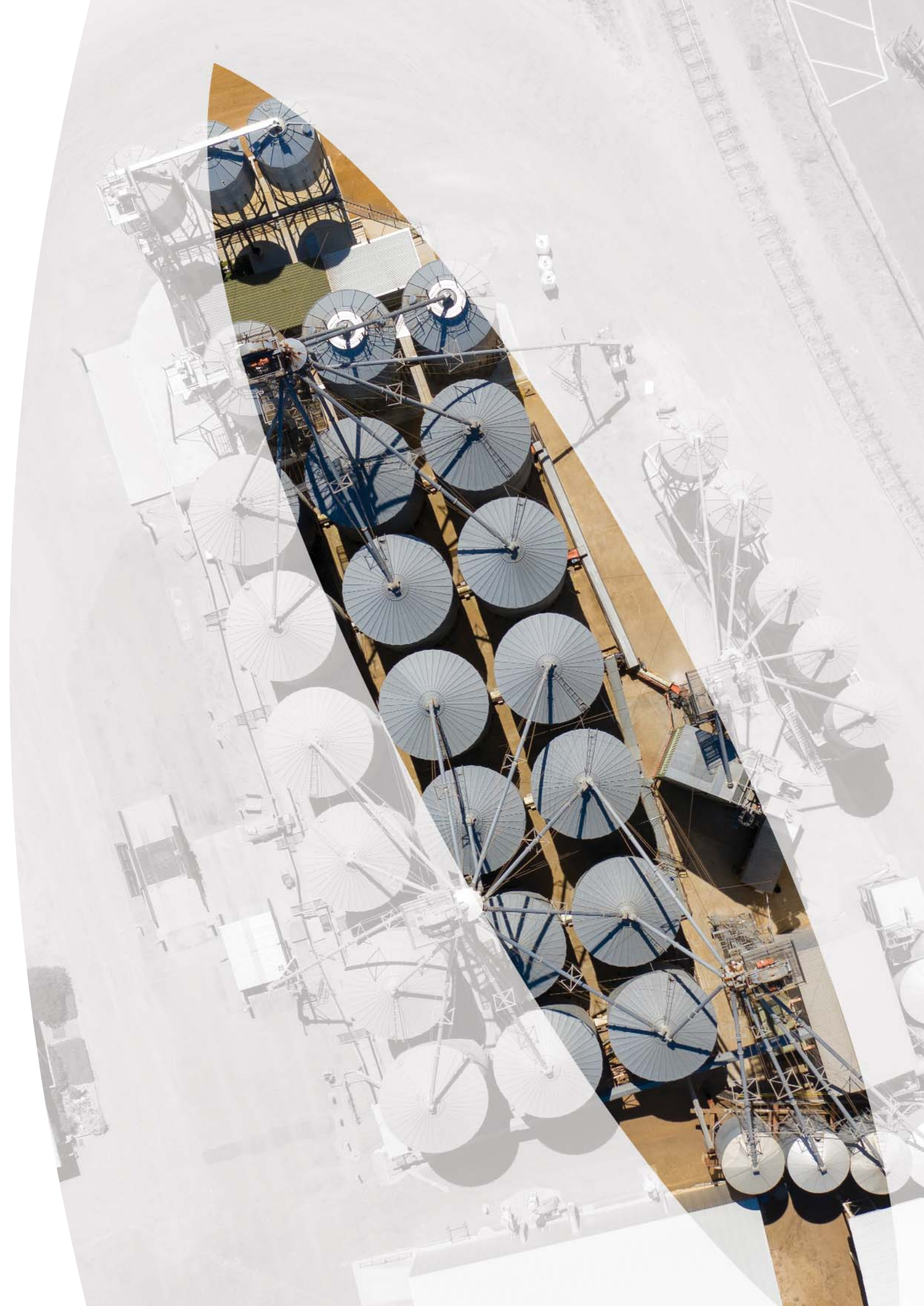
products and services is unique and well-regarded amongst other grain trading nations.

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

- The Australian Grain Industry Code of Practice, ancillary Codes and supporting Technical Guideline Documents.
- Trading Standards;
- Standard Form Contracts;
- Trade Rules;
- Arbitration and Dispute Resolution;
- Establishment of common industry practices, data and transactional processes;
- Training and Development; and
- International and domestic advocacy to improve Trade and Market Access.

The 'industry driven framework' provides a sound foundation for the trade of grain and allows the grain industry to operate with confidence, be it originating grain from producers, managing price and logistical risks, or moving grain from farm to domestic and offshore markets.

The self-regulatory framework is bound together by the **Australian Grain Industry Code of Practice** (Code), managed by GTA. The Code outlines the





GRAINS AT A GLANCE <sup>1</sup>				
	2019/20	2020/21	5 Year	2021/22
Crop production (mmt) <sup>1</sup>	30.938	58.136	44.866	50.213
Industry Value \$Am FOB <sup>1</sup>	11,147	17,659	14,008	14,624
Domestic Demand	16.22	16.95	15.83	17.23
Grain Imports (mmt) (FY)	0.60	0	N/A	0.24
Bulk Transhipments (FY)	3.0	0	1.6	N/A
Exports (mmt) (FY) <sup>1</sup>	17.068	21.37	25.276	0
% Containers	14.4	10.5	12.2	N/A
Export Value \$Am FOB <sup>1</sup>	7,997	12,427	10,646	11,924

Source: ABARES, ABS, USDA

<sup>1</sup> Excludes Rice

quality assurance processes and procedures in the value chain. This creates value for all by ensuring confidence in the Australian value chain and reduces the risk premium embedded in all stages of the value chain.

The industry driven self-regulatory framework and Code creates value for all by ensuring confidence in the Australian value chain and reduces the risk premium embedded in all stages of the value chain. Australia remains the only major exporting country with an industry managed and driven Code of Practice, noting all GTA Members are required to adhere to the Code.

GTA's **Dispute Resolution and Arbitration Service** instills commercial confidence 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.

GTA's **Sector Councils and Technical Committees** are part of GTA's Member driven process and voluntary work that draws on the expertise in industry to develop policy for the broader benefit of industry and members.

I am pleased to report GTA established a Domestic Sector Council in 2021. The Australian domestic market is the largest single "destination" for Australian grain. The GTA Domestic Sector Council

will focus on issues effecting GTA members in the domestic sector and it now joins the Australian Grain Exporters Council (AGEC) as Sector Councils of GTA operating under the Charter of the GTA Sector Councils.

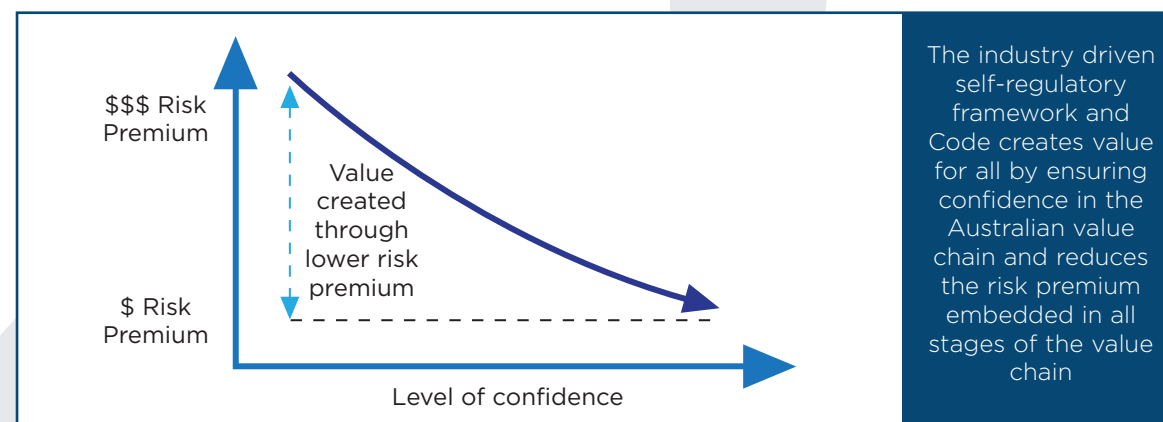
Technical Committees:

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

Technical Committee Members represent all sectors of the value chain including plant breeders, seed producers, growers, technical consultants & service industries, bulk handling companies, port operators, industry agencies, consumers and small and large marketing enterprises.

Technical Committees operate within a trading environment, which is becoming more challenging with increasing competition and emerging technical barriers to trade.

GTA through the Trade and Market Access Committee has a strong focus to ensure that Australia's reputation as a supplier of quality grain is protected and market access is assured and improved.



GTA remains committed to ongoing participation in international trade policy development. This requires direct industry experience and a practical focus to ensure a policy does not take an unpredicted turn that could disrupt trade.

GTA's focus is to advocate 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 on the IGTC Executive Committee.

Through the IGTC and its own work, GTA has brought issues of importance to Australian industry to several influential global policy forums.

Trade and market activities are supported by the very important work and advice of the National Working Party on Grain Protection. Researchers, regulatory authorities, chemical companies and grain storage suppliers meet with producers, commercial storage providers and traders at the annual **National Grain Storage and Protection Conference**, managed and facilitated by GTA.

The premier event on the grain industry calendar remains the **Australian Grains Industry Conference (AGIC)**. Due to the COVID Pandemic, AGIC 2020 was successfully held on a special virtual conference platform. The 2020 AGIC program was exceptionally strong with cabinet ministers, local and international business leaders and speakers providing riveting insights on global markets, trade, politics and the emerging business challenges of the COVID pandemic.

**AGIC Asia** and Roundtable events in China and Vietnam planned for March 2020 had to be postponed due to COVID-19 and were replaced with a highly successful virtual conference held in July 2020.

Following this success AGIC Asia 2021 was held in March 2021 as a virtual conference with over 650 delegates from 25 countries on-line for the event highlighting Australian grain and the quality assurance process in the grain supply chain.

AGIC Asia and its Roundtable events continue to demonstrate value and have resulted in tangible trade and market access outcomes supporting the maintenance and growth of these important markets.

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.

GTA has fulfilled its role in supporting **Wheat Quality Australia** (responsible for Australia's Wheat Classification System), having played an important role in resurrecting this important function in the wake of export deregulation. I can report that WQA stewardship has been passed to Grains Australia Limited from July 2021.

We remained humbled by the support and efforts of all the industry specialists who volunteer their time and expertise as members of the various GTA Technical Committees and Industry Working Groups, as well as the GTA Arbitrators.

The commitment and contribution of the GTA Board (who also volunteer their time) and management team, past and present is integral to GTA's success, for which I thank them.

This volunteer base and their contributions to GTA are the foundations of GTA's and industry's "can do" culture and resilience. We should never underestimate the importance of this commitment to the success of our organisation and industry.

GTA Board and management know we must continue to work hard and be effective in providing products and services that support members and in-turn the Australian grain industry. As the industry continues its growth in value, sophistication as well as complexity, GTA must continue to respond and adapt in meeting the needs of members and facilitating trade.

This is true for trade challenges, during favourable seasonal conditions as well as times of drought. Your Board is committed to ensuring GTA delivers for members under all scenarios.

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 from production 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:

- 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 way GTA will conduct its operations.
- Commit to delivering products and services that add value to our members' businesses and harmonise standards associated with facilitation of trade.
- Work cooperatively with all parts of the grain value chain and service all grain value chain members.
- Build effective relationships with our members and stakeholders.

- GTA 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 rigour to commercial grain trading activities.
- **Dispute Resolution Services** - underpin contractual arrangements and instils 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 a grain industry self-regulatory approach in international markets.
- **Industry Stewardship and Capability** - a determination to increase capability within the grain industry by provision of Australian Grain Industry Code of Practice together with market-orientated training & development programs.

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

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

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

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



## Strategic Direction

### PUBLICATION

- GTA Strategic Direction 2020/21
- Modernising the Grain Supply Chain - from drought through COVID-19 to 2030
- Reviewed Grain Transport Code of Practice
- Guidance Note - GTA Arbitration - 'Proof of Contract'
- GTA Trade Rules (Revised)
- TGD No. 21 Grain Sampling All Scenarios
- Standards for Empty Shipping Container Inspection
- Update to the Visual Recognitions Standards Guide
- Arbitration Award Summaries
- 32 GTA Member updates
- 15 GTA Market notifications
- 10 Grain Matters editions
- 7 GTA Fact Sheets developed/revised

### ACTIVITIES

- 26 On-line Conference events, webinars & workshops
- 35 Technical Committee and Industry Working Group meetings
- 20 Industry submissions lodged
- Facilitated the industry post farm gate COVID-19 response
- Facilitated a review of the Wheat Port Code Wheat Recommendation 12
- COVID-19 Webinar Series - Managing through the Pandemic
- Australian Grain Supply Chain Summit
- Code of Practice Complaint Handling process

## Vital signs

### Financial Performance

- Profit of \$245,747
- Equity of \$1,518,718
- While event and membership revenues were lower than expected, a profit was achieved due to cost reductions, lower costs due to COVID-19 and assistance from Government pandemic support programs.
- As a not-for-profit organisation, GTA cannot distribute profits or build excessive cash reserves.
- GTA is operating within its Cash Reserves Policy.
- Membership fees fund core activities, i.e. Technical Committees, Trade and Market Access Activities and industry advocacy.

### Membership

- 269 members at 30th June 2021 (274 at July 2020)

## Trade facilitation products and services

### Trading Standards Committee

#### - Grain Trading Standards

- Annual Trading Standards review including commencing a review of Wheat Dockage & Foreign Material.
- Review and publication of the Wheat Quality Australia Wheat Varietal master list
- Released Trading Standards for Wheat, Barley, other cereals published following review
- Comprehensive review of the Visual Recognition Standards Guide
- TGD21 - Representative Sampling All Scenarios and a project to provide training for grain sample preparation
- Several Sub-Committees involved in ongoing reviews of various Standards issues including:
  - Sampling Reviews
  - Technology
  - WQA new wheat Class - Australian White Wheat

### Commerce Committee

#### - Contracts & Trade Rules

##### RELEASED

- GTA Trade Rules - added Trade Rule 25 - Contract Assignment
- Released a Guidance Note on 'Proof of Contract'
- Member Updates and Submissions on Location Differentials, Trade Rules and Standard Form Grain Contracts
- Location Differentials for 2020/21 season
- Commenced a review of the Ausgrain Voyage Charter
- Completed a review of East Coast & SA Location Differential methodology

### Trade & Market Access Committee

Consult with and advise industry & Government on:

- China Anti-Dumping Investigations and Countervailing Duties on Australian Barley Exports
- Impact of Non-Tariff Measures (NTMs)
- COVID-19 Domestic and Global Supply Chain impacts
- Grains Industry Sustainability Framework
- Market diversification - India
- Regional initiatives on Non-Tariff Measures
- Free trade agreements - Indonesia, China, Japan, EU, RCEP, UK
- ePhyto and e-Documentation
- Market Diversification - Beyond China Strategy
- Submissions to DAWE - Cost Recovery Implementation Statement: Plant Export Certification
- DAWE Congestion Busting Strategy & Projects

## Transport, Storage & Ports Committee

### RELEASED

- Strategy for a Collaborative Approach to the Grain Supply Chain
- A submission to the National Transport Commission HVNL Review on axle weight limits.
- The updated Grain Transport Code of Practice
- Standards for Empty Shipping Container Inspection

### REVIEWING

- Considered supply chain impacts due to C-19 related issues
- The implementation of the new Hard wheat Class Australian White Wheat
- Improvements to the container supply chain processes, transactions and reference material

## Plant Breeding Innovation Committee

The Committee addressed the following key issues:

- Response to Gene Technology Scheme Consultation & Regulatory impact statement
- Response to the India Non GMO Certificate
- Plant Breeding Innovation - input to global guidance and development of GTA Guidance Document
- Japan plant breeding innovation trade advice
- Global Initiative on Low Level Presence (GLI)

## Information Technology Advisory Committee

The Committee has progressed work on:

- Industry Standard Reference Data including Weight, Rounding of Numbers and Varietal Codes
- E-phyto certificates
- Alignment to the international groups and goal of harmonisation of process and transactions
- DAWE system consultation including PEMS and NexDocs
- Facilitating technology improvements and adoption in the supply chain.



## DISPUTE RESOLUTION SERVICE

- 24 Arbitrations commenced (FY 19 - 25)
- 6 Arbitrations finalised as follows (FY 19 - 49):
- 7 Matters commercially settled prior to a Tribunal making a determination (FY19 - 7)
- 60 Board Approved Arbitrators (FY19 - 66)
- 5 Board Approved Tribunal Chairman (Export Contracts) (FY19 - 5)

## GTA Training & Development Program

- Training continues via on-line delivery during COVID-19
- 18 training and development sessions delivered. Approximately 200 students attending from over 20 organisations.
- Australian Grains Industry Conference (AGIC)
- GTA Advisory & Compliance Workshop
- Grain Contracts & Trading Standards

## Industry support services conducted by GTA

### Australian Grain Industry Code of Practice

- A demonstration of an industry committed to meaningful self-regulation.
- Technical Guideline Documents to assist industry participants to adhere to the requirements as set out in the Code.
- Grain Transport Code of Practice
- On-line Code of Practice Assessment Program available to demonstrate knowledge and understanding of the Code
- Adherence to the Code is mandatory for all GTA Ordinary or post-farm gate Members.

## National Working Party on Grain Protection (NWPGP)

- The primary industry body responsible for providing management and leadership to industry in the areas of post-harvest storage, chemical use, market requirements and chemical regulation.
- The 2020 conference was deferred from 2019/20 and was held virtually in October 2020
- Continued GTA administrative support of the NWPGP.
- Publication of the Australian Grain Industry Post Harvest Chemical Usage Recommendations and Outturn Tolerances 2020/21



## Advocacy

### DOMESTIC

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

### INTERNATIONAL

- Dept. of Foreign Affairs & Trade
- Input into development of a standard for the International Movement of Grain
- Global e-Phyto framework via IGTC
- New plant breeding techniques
- Global Low Level Presence Policy Initiative
- Cartagena Protocol on Biosafety
- Maximum Residue Limits via IGTC
- International Grains Council
- AGIC Asia - Government Round Table & Policy sessions
- APEC Grain Trade Facilitation Forum
- China National Association for Grain Sector
- China Ministry of Finance & Commerce (MofCom)
- COVID-19 - International Response Framework (incl IGTC)

### MEMBER

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

## Presentations

### DOMESTIC

- Australian Grain Industry Conference, *Opening Address*, July 2020
- Grains Industry Association of Victoria, *GTA Activities and Update*, several 2020/21
- Grain Industry Association NSW, *GTA Activities and Update*, several 2020/21
- DAWE Preharvest Meeting, *GTA & Industry Update*, Virtual, September 2020.
- Wodonga Supply Chain Summit, *Grain Supply Chain Meeting Market Requirements*, Wodonga, October 2020, Wodonga
- National Grain Storage and Protection Conference, *Traceability Sustainability - Meeting Market Requirements*, Virtual, October 2020
- National Grain Storage and Protection Conference, *Opening Address*, Virtual, October 2020
- Barley Australia Forum, *In the wake of the China AD/CVD Tariffs*, Virtual, November 2020
- GRDC Research Update, *In the wake of the China AD/CVD Tariffs*, Bendigo, February 2021
- Grain Producers SA, *Contracting using GTA Standard form contracts*, February 2021
- Modernising the Supply Chain Summit, *Opening Address & Strategy Paper*, Virtual, April 2021
- Modernising the Supply Chain Summit, *Congestion Busting*, Virtual, April 2021
- Presentation to Senate Committee into the Management of the Inland Rail project by the ARTC & Government
- Numerous (284) stakeholder meetings, briefings to members, broader industry, government and their related agencies

### INTERNATIONAL

- AGIC Asia, *A multi-lateral approach to addressing NTMs - Impacts & Asean Case Study*, Virtual, July 2020
- AGIC Asia, *Information, quality, confidence - the ingredients of value*, Virtual, July 2020
- AEGIC India Webinar, *Quality Assurance in the Supply Chain - driving value*, Virtual, July 2020
- AEGIC-India Webinar, *Quality Assurance in the Supply Chain - driving value*, Virtual, July 2020
- GTA-Austrade Webinar, *IA-CEPA- Value Proposition for industry*, Virtual, September 2020
- International Grain Trade Coalition, *General Assembly*, Virtual, November 2020
- Black Sea Grain Conference, *Australian Wheat Comeback*, Virtual, December 2020
- APEC NTM Working Group, *Wheat Case Study*, Virtual, May 2021
- International Grains Council Conference, *Official Practices Trade and Resilient Food Systems*, Virtual, May 2021



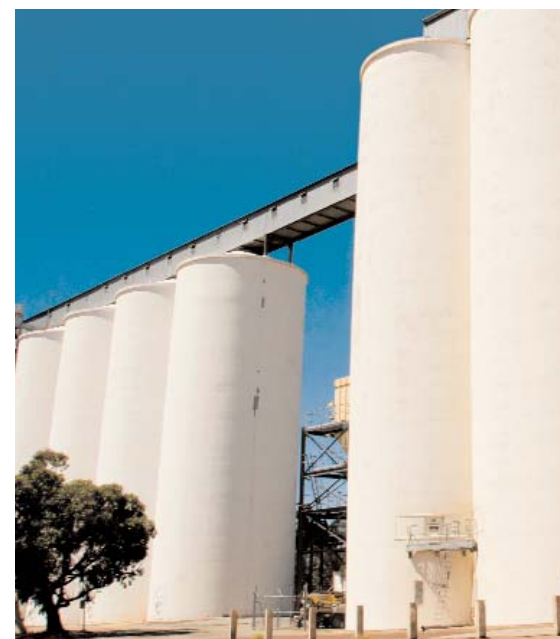
## Modernising the grain supply chain - from drought, through COVID-19 to 2030

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

GTA, with its member driven Technical Committees have developed 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 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 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.
5. Limited “first mover advantage” 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.

## The Initial Project - Storage Asset and Management Standards

The GTA Board has endorsed GTA to progress the development of GTA Grain Storage Asset and Management Standards (Standards) for Australian grain industry participants in conjunction with DAWE.

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. DAWE's objective for the project is to deliver efficiencies through recognition of the Standards in meeting Government's regulatory requirements. 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 Standards 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.



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

#### BOARD APPOINTMENT

#### EXPERIENCE AND EXPERTISE:

Managing Director Grain Link WA, established 1999. He is an Approved Arbitrator. Previously involved in the Seed Industry and export of Canola with SGB Australia and the Grain Pool WA as regional manager southern WA.

#### SPECIAL RESPONSIBILITIES:

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



### Geoffrey Farnsworth

Non-Executive Director

#### BOARD APPOINTMENT

#### QUALIFICATIONS:

Bachelor of Law, Bachelor of Arts

#### EXPERIENCE AND EXPERTISE:

Partner - Holding Redlich

#### SPECIAL RESPONSIBILITIES:

Chair of Transport, Storage & Ports Committee, Chair of the Dispute Resolution Service Committee, Deputy Chair of Commerce Committee, Member of 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 Grain 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 Grain 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

### Robert Imray

Non-Executive Director

#### MERCHANT ASSOCIATION NOMINATION

#### QUALIFICATIONS:

Bachelor's Degree in Business, Graduate Diploma in Accounting and Master's Degree in Business (International Business)

#### EXPERIENCE AND EXPERTISE:

Managing Director Farmarco Australia, 30 years' experience in commodities, both physical & derivative markets, four years with The Sugar Board Domestic Marketing and Treasury. Rob is a GTA Approved Arbitrator.

#### SPECIAL RESPONSIBILITIES:

Chair - Audit, Finance and Remuneration Committee, Deputy Chair of Trading Standards Committee



### Richard Perkins

Non-Executive Director

#### ORDINARY LEVEL B NOMINATION

(Elected October 2020)

#### 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 AGIC - Business Committee, Member of Dispute Resolution Service Committee



### Jason Craig

Non-Executive Director

#### ORDINARY LEVEL A NOMINATION

#### QUALIFICATIONS:

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

#### EXPERIENCE AND EXPERTISE:

Chief Marketing & Trading Officer - CBH Group, over 20 years' experience. Commenced career with Grain Pool (now part of CBH Group) in WA, including 4 years in Indonesia as President Director of PT Eastern Pearl Flour Mills. Former GAFTA Council Member and continues to act as a Director for a number of CBH subsidiaries.

#### SPECIAL RESPONSIBILITIES:

Chair of Trade & Market Access Committee, Chair of Plant Breeding for Innovation Committee, Deputy Chair of Transport, Storage & Port Committee, Member of 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. MAICD

#### EXPERIENCE AND EXPERTISE:

Has been involved in International Trading for more than 20 years in a number of different roles in Grain, Sugar and Steel. Held international trading roles in the UK, Hong Kong and Australia. Former director of Barley Australia. Is a company arbitrator.

#### SPECIAL RESPONSIBILITIES:

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



### Lyndon Asser

Non-Executive Director

#### ORDINARY LEVEL A NOMINATION

#### QUALIFICATIONS:

Bachelor of Economics- Adelaide University and CPA

#### EXPERIENCE AND EXPERTISE:

Has over 28 years' experience in grain trading, specialising in Barley. Currently, Senior Commercial Manager - Viterra Australia. Formerly, with the Australian Barley Board SA, Viterra and joint head of Glencore's global barley trading operations in The Netherlands.

#### SPECIAL RESPONSIBILITIES:

Chair of Australian Grain Exporters Council, Deputy Chair of Commerce Committee, Deputy Chair of Trade & Market Access, Member - Governance Committee, Member - Membership 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 Trading Standards Committee, Member of Commerce Committee, Member of Transport, Storage & Port Committee, Member of Membership Committee, Member - AGIC - Business Committee, Member of Dispute Resolution Service Committee.



### Michelle Kerr

Non-Executive Director

#### ORDINARY LEVEL C NOMINATION

#### QUALIFICATIONS:

DipAppSc(AgServ) The University of Melbourne

#### EXPERIENCE AND EXPERTISE:

Michelle Kerr has been employed at Riordan Grain Services since 2004 where she currently works as the Grain Services Manager. Michelle is a current member of the advisory board for the Riordan Group Pty Ltd, a former committee member and former treasurer of the Grains Industry Association of Victoria (GIAV). Is a company arbitrator.

#### SPECIAL RESPONSIBILITIES:

Chair of Trading Standards Committee, Deputy Chair of Transport, Storage & Port Committee, Member of Dispute Resolution Service Committee, Member - AGIC Business 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 Financial and Energy Exchange (FEX) Group. FEX 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 AGIC Business Committee, Member of Audit, Finance and Remuneration Committee.



### Malcolm Finlayson

Non-Executive Director

#### ORDINARY LEVEL B NOMINATION

(Retired October 2020)

#### QUALIFICATIONS:

Bachelor of Business Studies, MBA, CPA, FAICD

#### EXPERIENCE AND EXPERTISE:

Director Finesse Solutions Pty Ltd, formerly Plant Health Australia Ltd, Wheat Quality Australia Ltd, Turf breed Pty Ltd and Turf Growers Direct Pty Ltd and Chairman, Theodore Water. Formerly- director of Pentag Nidera Pty Ltd, director and CFO of Jossco Group & CFO of DR Johnston Group.

#### SPECIAL RESPONSIBILITIES:

Chair - Plant Breeding and Innovation Committee, Member of Audit, Finance and Remuneration Committee.





GTA will continually review the products & services that support & allow “trade facilitation” to ensure they reflect the commercial grain trading environment.

This will occur via 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.

#### Further information:

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

#### Key points of the GTA Technical Committees

- GTA is reliant on the Technical Committees to review and develop the GTA commercial resources
- GTA Technical Committees are skills based
- All Technical Committee votes require a 2/3 majority
- The Committee structure allows members to raise issues that impact on their commercial operations and lead to industry consensus on contracts, Trade Rules, grain Trading Standards, market access issues, systems and industry processes
- GTA calls for nominations to the various Technical Committees each year and the GTA Board select Committee members based on the applicant's technical competency whilst mindful that the Committees aim to have representation from:
  - sectors across the grain supply chain affected by the decisions of the Committee;
  - large and small organisations; and
  - all major grain production/trading states
- All Committees are chaired by a GTA Director with a second Director as Deputy Chair
- GTA Committee members agree to participate on a Committee for the benefit of all members and they do not represent the interests of an industry sector or a private or public organisation
- All Committee members agree to be bound by the GTA Anti-competitive Clause as tabled on the agenda at all meetings.

#### Objectives

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

#### 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 2020/21, 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 Wheat Dockage and Foreign Material - All Cereals and continued the ongoing review of the Nil Tolerance parameters with the focus on further study into the delivery of eucalypt gumnuts.

Following a thorough review, the Visual Recognition Standards Guide (VRSG) was extensively updated for the 2021/22 season to provide greater clarity to industry on the definition and interpretation of defects as outlined in each commodity Standard.

The Committee were informed during 2021 by Wheat Quality Australia of its decision to introduce a new Hard wheat Class - Australian White Wheat (AWW). This is the first major addition and change to the Wheat Class system since the introduction of APW (in the mid 1990's). The Committee and a GTA Working Group has commenced a process of review and discussion to ensure the effective implementation of this Class into the Trading Standards framework.

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 the benchmark for the Australian grain industry. The objective is to unequivocally provide confidence in the quality of Australian grain to processors and consumers and to provide a quantitative quality framework that supports GTA Trade Rules and Contracts.

#### ATTENDANCE - TRADING STANDARDS COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Michelle Kerr	Chair - GTA Director	4	4
Rob Imray	Deputy Chair - GTA Director	4	3
Simon Tickner	Deputy Chair - GTA Director	4	2
Robert Eassie	Grain Producers Australia	4	1
Gerard McMullen	GTA Technical Consultant	4	4
Vince Moroney	CBH Group	4	3
Cain McGregor	Cargill Australia Ltd	4	4
Jade Saunders	Viterra Australia	4	4
Marcus Dingle	Reid Stockfeeds	4	2
James Saunders	Commodity Inspection Services	4	3
Jason Shanley	GrainCorp Operations Ltd	4	4
Paul Panozzo	Allied Pinnacle	4	3
Melinda Curwood	Emerald Grain	4	4
Zach Whale	Grain Growers Ltd	4	4



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 framework objective is greater commercial certainty, fairness and reduced risk for all participants in the grain value chain.

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

## Objectives

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

## Commerce Committee Activities

The GTA Commerce Committee held a number of reviews during the 2020/21 year including:

- 2020/21 Location Differentials
- Release of a Guidance Note to improve industry knowledge and practice on establishing a sound evidence base for 'Proof of Contract'.
- Commenced a review of the Ausgrain Voyage Charter via a skilled Sub-Committee.
- New GTA Trade Rule (Rule 25) Contract Assignment, requiring mutual agreement.
- Fumigation protocols.

- Commenced a review of the outcomes of the DAWE Wheat Port Code Review - Recommendation 12.
- Delivered outcomes on Contract issues, including conveyance and delivery notice.
- Standard Operating Procedure for Reviewing Location Differentials
- Standard Operating Procedures for Reviewing GTA Contracts
- Standard Operating Procedure for Reviewing Trade Rules

The GTA Commerce Committee reviewed and published Location Differentials for 2020/21, following the regular industry submission and consultation process and commenced preparation of the 2021/22 Location Differentials. Following GTA Member consultation (via Member Update 3 of 21) the Committee amended the GTA Trade Rules to insert a specific rule (Trade Rule 25) requiring mutual agreement to for Contract Assignments.

During 2020/2021 the Committee appointed a Sub-Committee to undertake an extensive review of the Ausgrain Voyage Charter. The purpose of the Review is to evaluate the appropriateness of the existing Ausgrain Voyage Charter and to update it where required.

The EC & SA LDs Methodology Review Sub-Committee finalised its review presented its finding to the Commerce Committee during 2020/21.

## ATTENDANCE - COMMERCE COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Michael Wood	Chair - GTA Director	4	4
Lyndon Asser	Deputy Chair - GTA Director r	4	3
Geoff Farnsworth	GTA Director	4	2
Simon Tickner	GTA Director	4	2
Nathan Cattle	Clear Grain Exchange	4	2
Simon Gellert	Glencore Grain Pty Ltd	4	4
Andrew Jurgs	Namoi Cotton	4	-
John Payne	Cargill Australia Pty Ltd	4	4
George Keldoulis	Emerald Grain	4	3
Stephen Howells	Ridley Corporation	4	4
Joshua Lawrence	Ikon Commodities	4	3
Alex Onus	GrainCorp Operations Ltd	4	4
Amelia Shaw	Grain Growers Ltd	4	3
Shane Gale	Grain Producers Australia	4	2
Fiona Roycroft	Riordan Grain Services	4	3
Sam Batters	CHS Broadbent	4	2
Hamish Steel-Park	Woodside Commodities	4	2
Justin Wilks	ADM Trading Australia	4	4
Ben Tiller	CBH Group	4	3



## 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 consideration and development by the Plant Breeding Innovation Committee is the proposed development of a GTA Guidance Document that outlines a collaborative approach to information sharing in relation to the introduction of varieties using innovative plant breeding technologies.

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

Key activities for the Committee were:

- National Gene Technology Scheme, Consultation Impact Statement (CRIS) - This government consultation identified two options for implementing the National Gene Technology Review. The Committee agreed the risk tiering model was the most consistent with industry’s position. This was communicated by a submission into the CRIS.
- Response to Japanese Flour Milling Association - the Committee developed a response to the JFMA regarding information on gene edited wheat breeding programs. This response now forms the base of a public industry position and that was shared wider through GTA’s Member Update and Market Notification.
- India Non-GMO Certificate - the Committee considered the Order from the Food Safety and Standards Authority of India (FSSAI) to require importers, from 1 January 2021, to mandatory declare non GM status on 24 food crops. The Committee agreed to work with government to seek clarity and to express disappointment with this Order.
- The Committee also had active engagement on the international stage, as part of International Grain Trade Coalition (IGTC) activities. Key activities were:
  - Participation in the 7th meeting of the Global Initiative on Low Level Presence (GLI)
  - Planning for the 10th anniversary of the GLI in 2022 and identification of opportunities to progress action on LLP
  - Participation in the IGTC Policy Groups on Low Level Presence and Plant Breeding Innovation including participation on both LLP and PBI working groups
  - Supporting IGTC dialogue with the International Seeds Federation regarding information sharing approaches relating to plant breeding innovation

ATTENDANCE - PLANT BREEDING INNOVATION COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Jason Craig	Chair - GTA Director	3	2
Daniel Marsh	Deputy Chair - GTA Director	3	3
Nick Goddard	AOF /Pulse Australia	3	2
Tony Russell	GIMAF	3	2
Tanya Pittard	Grain Producers Australia	3	2
Tresslyn Walmsley	Wheat Breeders Reference Group	3	2
Adrian Reginato	Cargill Australia Ltd	3	-
Osman Mewett	Australian Seed Federation	3	3
Zach Whale	Grain Growers Limited	3	1
Tristan Coram	Australian Grain Technologies	3	1
David Hudson	SGA Solutions Pty Ltd	3	2
Nicholas Chambers	GrainCorp	3	-
Rosemary Richards	GTA Consultant	3	3

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 arising from plant breeding innovations



### Objectives

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

### Transport, Storage & Ports Committee Activities

- The TS&P Committee endorsed the proposal for GTA to call for an industry and government review of the grain supply chain based on the approach as articulated in the GTA Strategy for a Collaborative Approach to the Grain Supply Chain.
- Provided input and feedback on immediate and potential supply chain impacts due to COVID-19 related issues. This was utilised in an advocacy strategy by GTA and other associations to identify supply chain risks for government.
- TGD 21 - Representative Sampling All Scenarios and a project to provide training for grain sample preparation
- Axle Weight Limits -Provided a submission to the National Transport Commission HVNL Review on axle weight limits.
- Establishing working relationship with Shipping Australia Limited (SAL) to understand the shipping industry issues and to attempt to increase communication and efficiency.

- Ongoing improvements to the container supply chain processes and transactions including the development and release of the Standards for Empty Shipping Container Inspection
- Engaged across the grain supply chain and other groups on the impacts on industry from the global container market dynamics.
- Participated in the discussion on a proposed Grain Sustainability Framework.
- Completed the Bi-annual review of the Grain Transport Code of Practice.
- Participation in the grain component of the Department of Infrastructure National Freight Benchmarking study.
- Participated in the Australian White Wheat (AWW) review.

During 2020/2021 the Transport, Storage & Ports Committee continued to provide industry, GTA members, other Technical Committees and GTA Board technical guidance on issues of relevance from a grain supply chain perspective. This included the release of Submissions to government reviews including:

- Submission to the Productivity Commission - Vulnerable Supply Chain Study
- 2021 Submission to the HVNL Review Team of the National Transport Commission - concerns associated with axle weight limits
- Submission into the Australian Coastal Trading Cargo - Shipping Reform
- Submission into the Expression of Interest - Inland Rail Interface Program
- Submission to the Minister for Agriculture, Water and the Environment into COVID-19 Border Restrictions and the impact on the Australian Grain Supply Chain
- Submission into the Independent Review of the Victorian Ports System - 2020

ATTENDANCE - TRANSPORT, STORAGE & PORTS COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Geoff Farnsworth	Chair - GTA Director	4	4
Jason Craig	Deputy Chair - GTA Director	4	4
Michelle Kerr	Deputy Chair - GTA Director	4	3
Simon Tickner	GTA Director	4	2
David Syme	Grain Brokers Australia Pty Ltd	4	3
Zach Whale	Grain Growers Ltd	4	1
Andrew Weidemann	Grain Producers Australia	4	2
Morne van Wyngaard	CBH Group	4	2
Mark O'Brien	George Weston Foods	4	4
Josh Connell	GrainCorp	4	3
Craig Dennis	Network Grains	4	2
Travis Anderson	Emerald Grain	4	3
Michael Broadbent	CHS Broadbent	4	1
Edward Bayles	Cargill Australia	4	3
Derek Robjohns	Viterra Operations	4	3
Matthew Kelly	Kelly Grains	4	4

The capabilities of the Australian grain supply chain have been tested in 2020/21 with COVID-19, the re-engagement of the supply chain after the extensive drought in eastern Australia, a large crop and severe weather events in WA, combined with the mice plague in Qld/NSW. Whilst challenged GTA is pleased to report the supply chain is still functioning at high capacity.

Safety within the grain supply chain continues to play a major role and is a focus for the Transport, Storage & Ports Committee. The Committee progressed the biannual review of the Grain Transport Code of Practice to ensure that it continues to be relevant and compliant with National Heavy Vehicle Safety Law.

Process and documentation issues combined with the current global container supply chain issues have been an important focus for the Committee. Demand and freight price spikes that have thrown the container supply chain into chaos resulting in constant changes to planned shipments and food grade container supply shortages. The Committee has worked to understand these constraints and to seek remedy.



Activity has included the completion of a joint Shipping Australia, GTA and DAWE document. It forms a new GTA publication - Standard for Empty Shipping Container Inspection. This digital booklet explains container standards, container assessment procedures and outlines steps to clean and repair non-structural defects. It is anticipated this Standard will support the process of inspection and preparation of containers and will minimise any confusion, reduce unnecessary cost and delays in preparing containers given this is ultimately detrimental to exporters, shipowners and the competitiveness of the industry.

Government transport strategy is critical in the development of the shape and efficiency of the supply chain. GTA and the Committee in 2020/21 participated in the grain component of the Department of Infrastructure National Freight Benchmarking study. This study an objective to increase the available data to measure, monitor and evaluate Australia's supply chain performance and highlight the key issues in Australia's grain supply chain.

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



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

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

### Objectives

- Proactively manage trade and market access issues impacting the sector.
- Advance independent, fact-based dialogue and advocacy for members and industry stakeholders. Engage with members to prioritise trade and market access issues and promote the positioning of grain industry issues with the Australian Government and in international forums.
- GTA will support and where applicable shape the federal and state government efforts to ensure that trade is not impacted by technical barriers that may arise in global forums such as the WTO, IPPC, FAO, CODEX, in trade agreements, through country actions, and/or via state based legislative actions.
- 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.
- GTA will 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 issues and supports a very active program of work undertaken by GTA in this area. Further information about GTA Trade and Market Access activities is provided in a separate section of this Annual Report.

Key activities for the Committee across the year included:

- Free Trade Agreements - input and submissions into several FTA's and FTA reviews, including Indonesia, China, Japan, EU, RCEP, UK.
- China - the barley industry working group, submissions into the China-Australia Free Trade Agreement and 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 and COVID 19 declarations, review of the changes to China's GACC regulations regarding grain storages, and maintaining relationships with China grain sector.

- 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. A Beyond China Strategy, a whole-of-industry approach (in partnership with Government) was developed to provide a strategic "umbrella" for other industry actions and initiatives. The purpose being to develop a market diversification (demand growth in existing markets and new market access) strategy for the Australian grain industry. Specific outputs of the project to include a Market Diversification roadmap that brings together existing and new strategic activities; strategic partnership approach for India; opportunity assessment and plan for unlocking value across new or expanded markets and products, including value added products. Responsibility for this project has now been transferred to Grains Australia Limited.
- Non-tariff Measures (NTM) - the Committee continued to provide support, advice, and endorsement for the Grains NTM project and engaged with DAWE on NTMs. The Committee will provide input as GTA progresses its project (a case study to identify and examine the impact of Maximum Residue Limits (MRLs) and documentation requirements on wheat) as part of the APEC Grain NTM Project Phase 2.
- AGVET Review - The Committee provided support to a GTA Submission into the Government review of the pesticides and veterinary medicines regulatory system in Australia. There was unanimous support for continued advocacy by all members to ensure the government are aware there is little support from industry to the Review's proposed changes.

- COVID-19 - Provided a focal point for GTA members and industry to review COVID-19 impacts, to discuss and take necessary actions to alleviate outcomes and reduce the risk within the Australian grain supply chain.
- Geographical Indications Right Submission - The Committee reviewed and endorsed a Submission to the Government on the potential change to the GI Rights legislation in Australia
- Grains Sustainability Framework - The Committee reviewed the Grain Growers Limited Sustainability Framework and the measures and indicators it proposes and provided valuable insight and comment for GTA's Board to consider its direction.
- Input into range of SPS issues across a number of markets.

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

- DAWE - 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.

ATTENDANCE - TRADE & MARKET ACCESS COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Jason Craig	GTA Director - Chair	4	4
Lyndon Asser	GTA Director - Deputy Chair	4	3
Richard Perkins	GTA Director - Deputy Chair	4	2
Michael Wood	GTA Director	4	2
Rosemary Richards	GTA Consultant	4	2
Rob Dickie	CBH Group	4	3
Nick Goddard	AOF/Pulse Australia	4	4
Amelia Shaw	Grain Growers Ltd	4	2
Adrian Reginato	Cargill Australia Ltd	4	4
Richard Simonaitis	AEGIC	4	4
Tony Russell	Grain Industry Market Access Forum	4	4
Sean Barker	GrainCorp Operations Ltd	4	2
Peter Nash	GIWA	3	1
Jade Saunders	Viterra	4	3
Gerard McMullen	NWPGP	4	4
Joshua Lawrence	IKON Commodities	4	3
Jodie Dean	NSW Farmers Association	4	3





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

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

Objectives

- Advise the GTA Board of opportunities to collaboratively investigate system, process and research initiatives that may resolve common grain industry process and transactional issues.
- Foster communication among GTA members and seek opportunities to share information, ideas, and learnings across companies in the development of industry reference material, including common transactional processes.
- Report and make recommendations to industry on potential changes to process and systems that may reduce impediments and support 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 2020/21 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 Grain Industry Varietal Code Master List.
- Commenced the process of considering the provision of industry direction through 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.
- Further work on standardising codes and reference data across the supply chain. A Sub-Committee is working to assist the development of code data for a range of key supply chain data including Port Codes, Port Zones and Site Codes.
- This follows publication of standard references and data formats for a range of references including Transaction Type, Grain Variety, Weight, currency, rounding of numbers, Movement Authority and Grain Quality Parameters.

The Committee has also sought opportunities to leverage government IT initiatives and strategy including the 'national blockchain roadmap'. The Committee will progress alignment to this government project to understand government direction and to build industry/government rapport.

A continuing focus this year is interfacing with the DAWE as it upgrades and introduces modifications to its Management Systems (PEMS) and export trade systems NeXDOCs. The progress on these upgrades and modifications has been slow and is frustrating industry. 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
Dan Marsh	Chair - GTA Director	4	4
Ole Houe	Deputy Chair - GTA Director	4	3
Richard Perkins	GTA Director	4	3
Ian Dalglish	Rise Agri	4	2
Zach Whale	Grain Growers Ltd	4	3
Emma Weston	Agridigital	4	3
Matthew Trewin	Cargill Australia	4	1
David Houghton	AgRisk	4	3
Peter Johnston	GrainCorp	4	3
Nathan Cattle	Clear Grain Exchange	4	3
Scott Ewing	CBH Grain	4	1
Jay Holland	National Grower Register	4	4
Jade Saunders	Viterra	4	4



TOPIC	SUBMITTED TO	DATE
Agvet Chemicals Regulatory System - Future Reform Opportunities	DAWE	Jul-20
Inquiry into Diversifying Australia's Trade & Investment Profile	Joint Standing Committee on Trade & Investment Growth	Jul-20
ChAFTA Post Implementation Review from GTA	DFAT	Aug-20
ChAFTA Post Implementation Review from AGECC	DFAT	Sep-20
COVID-19 Impacts on cross border movements and labour availability	Ag Minister	Aug-20
Independent Review of the Victorian Port System 2020	Victorian Government	Aug-20
EOI - Inland Rail Interface Program	Dept Transport & Infrastructure	Sep-20
India's proposed Order to require non-GMO certification on imports	DAWE	Sep-20
Industry Recovery Fund	Prime Minister	Sep-20
Coastal Trading Cargo - Shipping Reform	Dept Transport & Infrastructure	Oct-20
HVNL -Review - Regulatory Impact Statement	NHVR	Nov-20
Potential New Geographic Indications	IP Australia	Nov-20
ChAFTA Post Implementation Review	DFAT	Nov-20
SSA GM Crops Management Act	SA - Minister Primary Industries	Nov-20
HVNL Review- Consultation Regulation Impact Statement	National Transport Commission	Nov 20
Response to WTO notice on GACC regulations	DAWE	Jan-21
Agvet Chemical Regulation Review	DAWE	Feb-21
Gene Technology Regulatory Review	OGTR	Mar-21
Vulnerable Supply Chains	Productivity Commission	May-21
Cost Recovery Implementation Statement	DAWE	Jun-21



- The Australian Grain Exporters Council (AGEC) is 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, but only if driven by industry and GTA members.

Charter for the GTA Technical Committees

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 a
4. Confidentiality Agreement.

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

Key points of the GTA Sector Councils

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



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.



# AGEC

The purpose of Australian Grain Exporters Council (AGEC) is to make recommendations to the GTA 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

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

- A member meeting with Minister for Trade, Tourism and Investment, the Honorary Dan Tehan, also including members of GTA's Trade & Market Access Committee
- Participation in the GIMAF board and on the GIMAF Forum
- Participation in the DAWE Grain Plant Product Export Industry Consultative Committee (GPPEICC)
- Ongoing discussions concerning Melbourne Port Pricing issues and participation in Melbourne Ports Roundtable
- Contributing to discussion on GTA's Wheat Port Access Code Review response
- IA-CEPA and new assistance program in Indonesia
- New AWW wheat class
- Breeding priorities and wheat quality data for use through Wheat Quality Australia
- Grains Australia progress
- Technical market access submission through GIMAF for barley to Brazil
- China-Australia Free Trade Agreement review submission from AGEC & GTA



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



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.
- Where 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 Australia the 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 assisting generally 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.

Activities of the Domestic Sector Council

At its inaugural meeting the Council identified the following issues may warrant further consideration by the Council:

- Importation
- Delivered grain issues
- Domestic demand zones
- Input to grain classification and Trading Standards
- Food Safety



ATTENDANCE - DOMESTIC CONSUMER SECTOR COUNCIL (EXECUTIVE COMMITTEE)			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Michelle Kerr	GTA - Director	1	1
Cameron Pratt	GrainCorp	1	1
Stephen Howells	Ridley	1	1
Matt Clarke	Inghams	1	1
James Dellow	MSM Milling	1	1
Katrina Liston	Cargill	1	1
Mark O'Brien	Mauri	1	1
Brett Duczmal	Allied Pinnacle	1	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 and arbitrations instil commercial confidence that underpins and provides surety of grain contracts in the Australian grain industry. When contract performance is in dispute or delinquent there is a recognised process to seek financial compensation, ensuring contract integrity.

- GTA works to resolve disputes by peer review, through its Dispute Resolution Process. The process is designed to save time and expense while providing an efficient, fair, and equitable means to settle disputes related to commercial transactions.
- All domestic arbitrations are subject to the provisions of the Commercial Arbitration Act NSW (2010) whilst arbitrations that involve international parties and the GTA FOB contract are conducted under the International Arbitration Act 1974 (Cth).
- Parties utilising the Dispute Resolution Service (DRS) must cover all the inherent costs associated with conducting arbitration without cross subsidisation from other GTA revenue streams.
- 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	2019/2020	2020/2021
No of arbitrations commenced	25	24
No of arbitrations settled		
• Awards released	29	6
• Commercially settled prior to hearing	7	7
Active arbitrations as at 30 June 2021	15	12

#### SUMMARY OF ARBITRATION AWARD OUTCOMES 2019/20:

TYPE OF ARBITRATION	CLAIMANT	RESPONDENT	AWARD IN FAVOUR OF	NUMBER
Full	Grain trader	Grain trader	Claimant	2
Full	Grain trader	Grain trader	Respondent	1
Full	Grain trader	Grain producer	Claimant	1
Full	Grain producer	Grain trader	Claimant	1
Fast Track	Grain trader	Grain producer	Claimant	1

SURNAME	FIRST NAME	ORGANISATION
Allen	Guy	Advance Trading Australasia
Basnett	Tom	AgRisk Management Pty Ltd
Barron	Graham	Grain Producer - NSW
Benham	Jock	Arrow Commodities
Brealey	Rob	Industry Consultant
Burt	Steve	Industry Consultant
Carroll	Greg	M C Croker Pty Ltd
Cattle	Nathan	Clear Grain Exchange
Clancy	Simon	Industry Consultant
Dalglish	Ian	Rise Agribusiness
Danieli	Robert	Ky Stockfeeds
Delahunty	Leo	Grain Producer - VIC
Dickie	Rob	CBH Grain
Dillon	Graeme	Inghams Enterprises Pty Ltd
Dubey	Sanjiv	Grain Trend Pty Ltd
Fahy	Jack	Max Grains Pty Ltd
Fry	Julian	Glencore Agriculture Pty Ltd
Furse	Anthony	Robinson Grain
Goyder	Andrew	Grain Link WA Pty Ltd
Heinjus	Chris	Rural Directions Pty Ltd
Houe	Ole	IKON Commodities
Howard	Peter	GrainTrend Pty Ltd
Howells	Stephen	Ridley Agriproducts
Imray	Robert	Farmarco
Jones	Michael	Grain Focus
Kelly	Matthew	KM&WM Kelly & Sons
Kerr	Michelle	Riordan Grain Services
Langtry	Gerard	Langtry Logistics
Lengren	David	Industry Consultant
Leong	Ervin	Unigrain Pty Ltd
Lewis	Mark	Riordan Grain Services
Massina	James	Cargill Australia
McKay	Robert	Industry consultant
McMahon	Malcolm	Emerald Grain
McMullen	Gerard	McMullen Consulting Pty Ltd
McNair	Simon	Industry consultant

SURNAME	FIRST NAME	ORGANISATION
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
Storey	Ron	Industry Consultant
Syme	David	Grain Brokers Australia
Taylor	Brad	Australian Country Choice
Teague	Tim	Teague Australia Pty Ltd
Tiller	Benjamin	CBH Group
Tonkin	Chris	Ten Tigers
Torrens	Mark	Mars Petcare
Tuohey	Peter	Grain Producer - VIC
Vater	Kim	A W Vater & Co
Wells	Henry	Industry Consultant
Whitwell	Chris	Basis Commodities Pty Ltd
Wilsdon	Andrew	Glencore Agriculture Pty Ltd
Wilson	Pat	Industry Consultant
Wood	Michael	Rural Logic
Woodhouse	Andrew	Advance Trading Australasia

#### GTA Board Approved Tribunal Chairs (Export Contracts) as at 31 March 2021

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



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

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

GTA offers the following Training and Development Courses:

- GTA Trade Rules and Contracts
- GTA Grain Trading Standards
- Grain Merchandising
- Understanding Grain Markets
- Grain Finance & Risk Management
- GTA Arbitrators Workshop
- Grain Export Execution & Risk Management
- In-House training
- Advisory & Compliance Workshop
- Chain of Responsibility Workshop
- Code of Practice Assessment Program



- As a part of its industry stewardship role, GTA offers specialist grain industry training and development courses specifically targeted at participants in the grain value chain, from producers, transport operators, storage providers, marketers, consumers and regulators.
- GTA Trainers have specialist expertise in the content of each course.
- During 2020/21 GTA held 18 courses, with 196 students attending from over 20 organisations.
- The most popular (or attended) courses are:
  - Understanding Grain Markets
  - Advisory & Compliance Day
  - Trade Rules and Contracts
- GTA delivers in-house training which 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 Training & Development delivered the Advisory and Compliance workshop in July 2020. The topics included a focus on compliance and advisory issues during periods of drought, 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.
- With the COVID-19 pandemic training and development courses have successfully moved to on-line "live" workshops. This has been well received by industry and students and allowed easier and time effective access for participants from all regions.
- GTA has developed training and assessment program to assist its members and industry participants to in upskilling their staff and meeting the needs of the Australian Grain Industry Code of Practice. The Code Assessment Program is an on-line training tool comprising assessment modules in specific grain value chain pathways. The Code Assessment Program can be accessed through the GTA Website.
- All GTA Training and Development programs are available to all interested parties as well as GTA Members.

Other Training & Development events:

- IA-Cepa Webinar hosted jointly with Austrade
  - attended by 201 participants
- New Insolvency Regime Webinar
  - attended by 65 participants

The GTA Training & Development Program ensures that trade facilitation processes are well understood at all links in the grain value chain.

GTA Trainers have specialist expertise in the content of each course.

## Strategic Approach

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

GTA's activity is focused in the key areas of:

- Ensuring policy settings are supportive of the grain industry and the facilitation of trade
- Actively promoting the grain industry's priorities and position within domestic and global forums
- 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
- Ensuring the industry has transparent and open mechanisms for providing input into and receiving feedback on trade and market access priorities and activities

- advancing independent, fact-based dialogue and advocacy for members and industry stakeholders.
- improved market access outcomes for its members and the grain industry encompassing new access opportunities, improved access arrangements and maintaining existing market access.
- Effective cooperation and coordination between and among government and industry is critical to achieve, maintaining, and improving market access.

GTA has expended considerable efforts into the China AD and CVD Investigations on Australian barley exports. Whilst disappointed with the AD & CVD outcomes, in a broader policy sense GTA will continue to advocate for a rules-based approach to

## GTA Trade and Market Access Strategic Framework

### Trade and Market Access Objective

GTA provides leadership to the Australian grain industry and coordinates activities that maximise value and optimises outcomes for industry in relation to TMA

### Four pillars underpinning GTA TMA Activities

Policy	Advocacy	Support	Communication
<ul style="list-style-type: none"> <li>• Ensuring policy settings are supportive of grain industry trade</li> </ul>	<ul style="list-style-type: none"> <li>• Proactively promoting the grain industry's priorities and positions in domestic and global forums</li> </ul>	<ul style="list-style-type: none"> <li>• 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</li> </ul>	<ul style="list-style-type: none"> <li>• Ensuring industry has transparent and open mechanisms for providing input into and receiving feedback on TMA priorities</li> <li>• Creating a collaborative and shared commitment to TMA activities</li> </ul>

### Key Strategies

<ul style="list-style-type: none"> <li>• Identify and communicate industry's position</li> <li>• Advise Government on the impact of trade barriers</li> </ul>	<ul style="list-style-type: none"> <li>• Monitor, articulate and address technical trade barriers                             <ul style="list-style-type: none"> <li>• Engage with and influence trade negotiations, regional initiatives and other market access initiatives</li> </ul> </li> <li>• Communicate the value of grain trade and the importance of market access</li> <li>• Build relationships with Government, cross sector representatives and global grain partners</li> </ul>	<ul style="list-style-type: none"> <li>• Provide informed analysis and support to Government and other initiatives</li> </ul>	<ul style="list-style-type: none"> <li>• Foster strong engagement with Government and industry in Australia and globally</li> </ul>
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global trade. This includes regional and bilateral trade agreements and the ongoing development of mutually beneficial relationships.

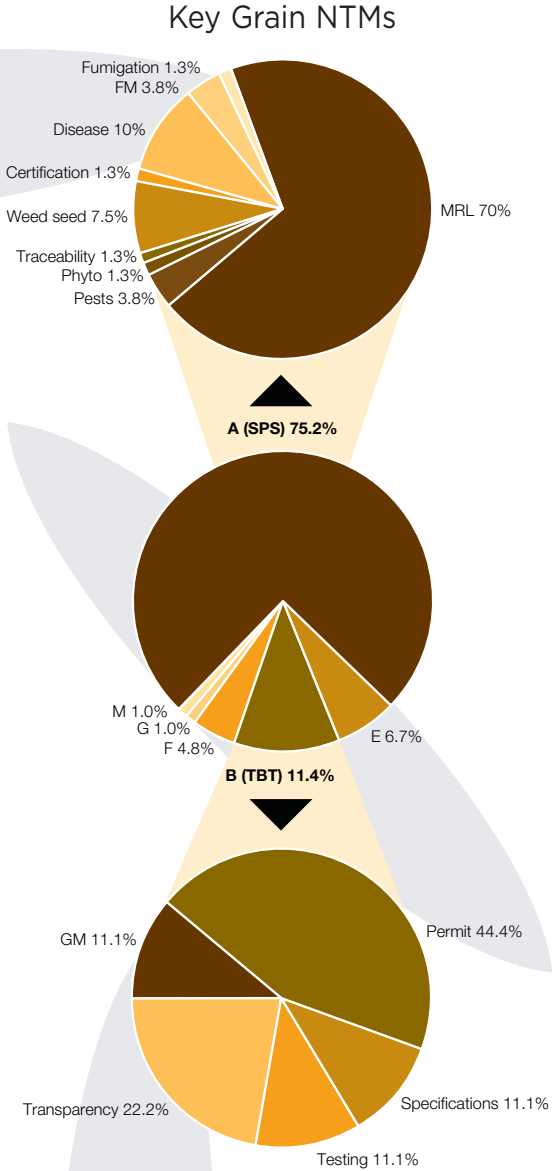
Management of trade and market access issues is critical to doing export trade business. The impact of not effectively addressing this function include:

- 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 members, GTA has continued to focus significant activity in the area of trade and market access. GTA is uniquely placed to address these issues as it operates (and has practical insight) across the supply chain 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, GIMAF, 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

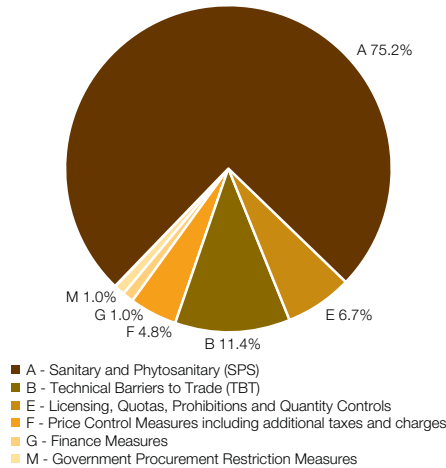


### Practical Experience & Market Understanding

Complex international markets require an ongoing effort to maintain existing market access, and where possible, secure improved market access and the 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.

Grain NTMs by classification



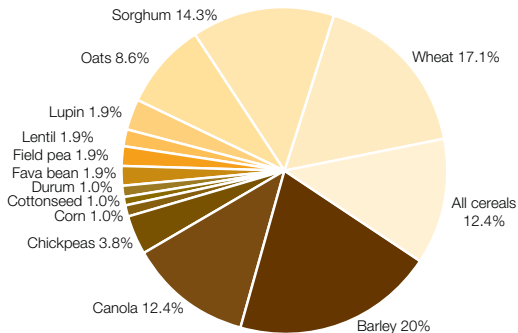
### International Linkages

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

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

GTA is a long standing and active member of the International Grain Trade Coalition (IGTC). The overarching objective of the IGTC is to achieve a market and regulatory environment supportive of trade that avoids disruptions in the international trade of grain, oilseeds, pulses and derived products. Through IGTC, Australian industry increases its advocacy to multiple international institutions, bringing Australian issues to the global stage to try and reduce trade barriers/NTMs.

Grain NTMs by Commodity



These institutions include:

- WTO Agreements
- Codex Alimentarius Commission
- International Plant Protection Convention (IPPC)
- World Bank
- Food and Agriculture Organisation -FAO
- International Grain Council (IGC);
- APEC
- APEC Grain Trade Facilitation Forum

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

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

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



## 2020/21 Activity Matrix

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

ISSUE	CONTENT	2020/21 ACTIVITY
<b>Elimination of tariffs</b>	An ongoing priority addressed through WTO activities and Articles and Free Trade Agreements.	<ul style="list-style-type: none"> <li>GTA has engagement with WTO processes through direct dialogue with DFAT and participation in DFAT &amp; IGTC activities</li> <li>Input into policy in partnership with other industry stakeholders.</li> <li>GTA expended considerable resource in addressing China's investigation in relation to Anti-Dumping (AD) and counter veiling duties (CVD) on Australian barley exports. GTA convened and led the industry working group (IWG) and worked closely with DFAT &amp; DAWE in responding to the investigation. This included extensive engagement and submission to the Prime Minister's office, Trade Minister, Agriculture Minister and Chinese Government.</li> <li>GTA prepared a Market Engagement Strategy for China to support continued exports of other grains, and to re-engage with barley exports, if the opportunity arises.</li> </ul>
<b>FTAs (tariffs &amp; technical barriers)</b>	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"> <li>GTA led the industry consultation with DAWE on developing the feed grain TRQ processes for IA-CEPA feed grain market access &amp; provided information for importers and exporters.</li> <li>Provided input to several FTA's including UK, India, RCEP and EU.</li> <li>Review and updating of disciplines in relation to MRLs, standards and testing and innovation.</li> <li>GTA made submissions to reviews of existing FTA's including Japan-Australia Economic Partnership Agreement Review &amp; ChAFTA.</li> </ul>
<b>Predictable and science based SPS regulations</b>	<p>Plant protection (sanitary &amp; phytosanitary) i.e. SPS measures around concerns such as plant diseases, weed seeds and pests are a high priority issue for the grain industry. GTA works with GIMAF and DAWE to address these issues as they arise. GTA also works with DAWE on regional and bilateral initiatives to create an improved operating environment.</p> <p>GTA works actively with IGTC to advocate at a global level for efficient trade frameworks.</p>	<ul style="list-style-type: none"> <li>Areas of focus for industry are: <ul style="list-style-type: none"> <li>Increased transparency and harmonisation through recognition of sampling and testing methods/ Equivalence of systems and processes / Common language &amp; terminology</li> <li>Testing/sampling methods based on recognised science</li> <li>Recognise 'free from' or risk-based systems approach to certain pests or diseases of quarantine concern</li> <li>Adoption of international best regulatory and technical practices (eg CODEX)</li> <li>Use of risk and science-based assessments</li> </ul> </li> <li>GTA works with the Government through regional initiatives including the APEC Grain Trade Facilitation Forum where GTA leads the private sector engagement and prepared a study on the impact of NTMs on the wheat value chain study,</li> <li>GTA continues to develop and strengthen relationships with like-minded international trade associations in importing and exporting countries.</li> <li>GTA is an active long-standing member of IGTC, serving on its Management Council and as Secretary on the Executive Committee.</li> </ul>

ISSUE	CONTENT	2020/21 ACTIVITY
<b>Food safety regulations, in particular, Maximum Residue Limits (MRLs)</b>	MRLs are becoming an increasing risk in the market. Aligning MRL levels in key markets is a major focus. The NWPGP is the lead agency domestically on all chemical issues and GTA works with IGTC on these issues globally.	<ul style="list-style-type: none"> <li>Areas of focus for GTA &amp; 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.</li> <li>GTA works in partnership with NWPGP and provides secretariat and conference management activities.</li> <li>GTA actively engages with DAWE National Residue Survey (NRS) and made various submissions to APVMA</li> <li>GTA and NWPGP made submission to the Australian Chemical Veterinary Review</li> <li>Promoting Australia's food safety and quality assurance processes with international customers, including AGIC Asia and AGIC Asia Stakeholder Roundtable seminars.</li> <li>Management of Australian Grain Industry Code of Practice.</li> </ul>
<b>Harmonised international methodology</b>	Standards and testing methodologies can cause market access issues where these are not harmonised or consistent	<ul style="list-style-type: none"> <li>GTA works with the Government, through regional initiatives such as APEC and IGTC to address lack of harmonisation in relation to regulatory approaches, frameworks, and regulations (e.g. inconsistent terminology, product testing, and product labelling, inconsistent or no MRLs, inconsistent sampling and testing procedures) and promote a principle and system-based approach to improve alignment and harmonisation.</li> <li>GTA led the private sector engagement for the APEC Grain Trade Facilitation Forum.</li> </ul>
<b>Biotech &amp; new innovation regulations</b>	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"> <li>Maintain the Market Choice Framework for GM Crops and implementation of related policies and response plans.</li> <li>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</li> <li>GTA works on these issues through IGTC. Current activities are largely focused around the Cartagena Biosafety Protocol, LLP policy and plant breeding innovation including information sharing with the seed/technology sector.</li> <li>Engaged with International Seeds Federation, through IGTC and with Australian Seed Federation on information sharing of traits in innovative plant technology.</li> <li>GTA has developed a consultative model to look at market access impacts and information sharing for the Australian industry arising from innovative breeding technologies.</li> </ul>
<b>Sustainability</b>	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"> <li>Sustainability including social licence is an emerging issue</li> <li>Focus on objective and fact-based dialogue and stakeholder communications</li> <li>Promote awareness of Food Safety and reliability of the grain value chain through NWPGP, AGIC Conferences, Delegation presentations and the Code of Practice</li> </ul>

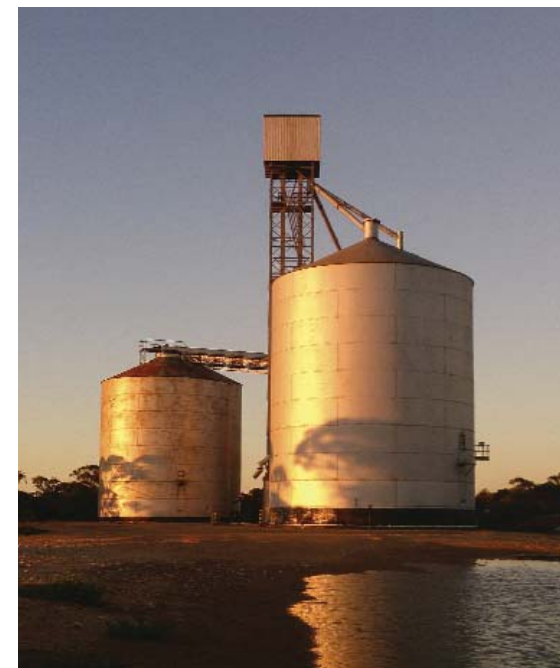


ISSUE	CONTENT	2020/21 ACTIVITY
<b>Increase in regulatory rules and burden Lack of transparency &amp; predictability of changes in market access rules &amp; regulations</b>	Key issues are: <ul style="list-style-type: none"> <li>- a lack of transparency around conditions and criteria of import permits</li> <li>- different documentation needed across regions/markets</li> <li>- inconsistent certification requirements</li> <li>- differences in definitions, methodologies and recognition of certifying bodies</li> <li>- adoption of consumer driven regulations that are not based on science.</li> </ul>	<ul style="list-style-type: none"> <li>• 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</li> <li>• GTA worked with the Government, through regional initiatives such as APEC, ASEAN and with IGTC on these issues.</li> <li>• Direct engagement with the Government encouraging flexibility in documentation and certificates in response to COVID-19.</li> <li>• Manage and update grain industry NTM and Market Access Database Grain Industry NTM database to capture and raise awareness of the impact of these issues on industry.</li> <li>• Food security presentation to virtual International Grains Conference.</li> <li>• Submissions to Export Legislation consultations</li> </ul>
<b>Capacity Building</b>	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"> <li>• Work with the Government to identify international best practice, develop capacity building activities, consultation with stakeholders, and alignment with international and trading partner regulation.</li> <li>• GTA has led several industry working groups including: <ul style="list-style-type: none"> <li>- Preparation of Standards for Empty Shipping Container Inspection</li> <li>- Development of Grain Sampling Methodology and Procedural guidelines (TGD No 21)</li> <li>- Export Permit Process (RFP) Review</li> <li>- Mobile Bulk Loading Guidelines</li> <li>- Ship Inspection using video capture</li> <li>- Development of Grain Storage Asset and Management Standards</li> </ul> </li> </ul>
<b>Quality Assurance and Market Access</b>	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"> <li>• Manage the Australian Grain Industry Code of Practice</li> <li>• Active member of Grain and Plant Products Export Industry Consultative Committee (GPPEICC). This is DAWE's principal consultation forum with grain industry stakeholders on export inspection and certification, export market access and other relevant issues.</li> <li>• GTA is an active member of the GPPEICC and several sub-committees including Strategy, Finance, Sampling, Request for Permit and Mobile Bulk Loading.</li> <li>• Major issues addressed by the GPPEICC: <ul style="list-style-type: none"> <li>- Development of revised fees and charges for the grain export program</li> <li>- Revision of inspection and documentation IT systems to facilitate exports</li> <li>- Ongoing review of Request for Permit processes, including revision of the standards for inspection of empty containers</li> <li>- Authorised Officer (AO) training and interaction with DAWE and industry</li> <li>- Review of Export Legislation to make sure legislation is practical and contemporary</li> <li>- Ongoing assistance with the introduction of global e-Phytos</li> <li>- Review of existing sampling processes and development of guidelines outlining the desired process for obtaining representative samples of export cargoes</li> </ul> </li> </ul>

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

GTA acts as the secretariat for the NWPGP and continued to undertake this role during 2020/21, supporting the Chair and the activities of the Strategic Working Group and NWPGP Working Groups. GTA further supports the NWPGP by administering all aspects of the annual conference.

The Australian Grain Storage and Protection Conference, is the annual conference for NWPGP. The 2020 conference was deferred from 2019/20 year (June 2020) and was held virtually in October 2020. It successfully provided participants with the latest research and developments in the area of pre- and post-harvest storage and hygiene, chemical usage, international and domestic market requirements and regulations. It also 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.



## AUSTRALIAN GRAIN STORAGE & PROTECTION CONFERENCE



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. Where those changes were assessed as having a potentially significant impact, liaison occurred with industry on the potential outcomes. Discussion occurred with the Australian Government to develop solutions to resolve those issues where feasible. All relevant information was captured in the NTM database as a central source of industry issues both previously resolved and being actioned.
- Given the potential impact of changing market regulations and MRLs, significant advocacy also occurred with chemical registrants and users of those chemicals.
- Advocacy occurred to all sectors of the supply chain to increase awareness of the importance of understanding market requirements when using chemicals and selecting grain for supply to markets. This included presentations at a number of industry conferences and meetings. Specific market and commodity information was also provided to individual industry stakeholders and groups upon request.
- Further information was updated on the NWPGP page on the GTA website ([www.graintrade.org.au/nwpgp](http://www.graintrade.org.au/nwpgp)) to provide more detailed and relevant information for use by industry.
- Publication of the revised Australian Grains Industry Post Harvest Chemical Usage Recommendations and Outturn Tolerances document which details the chemicals that are permitted for use post-harvest and applicable Maximum Residue Limits (MRLs) for various grain commodities out-turned to Australian domestic or export markets. This document was updated and also placed on the NWPGP page on the GTA website for industry use.
- Input occurred into various Australian chemical reviews including:
  - The DAWE review of the agvet chemicals regulatory system in Australia;
  - Input into development of the Australian position on topics to be discussed at the Codex Committee on Pesticide Residues meeting that was deferred from 2020 to July 2021; and
  - Various Australian Pesticides and Veterinary Medicines Authority (APVMA) Trade Advice Notices for impacts on marketing Australian grain.



A strong technical program and industry connectivity 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

## Australian Grains Industry Conference

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.



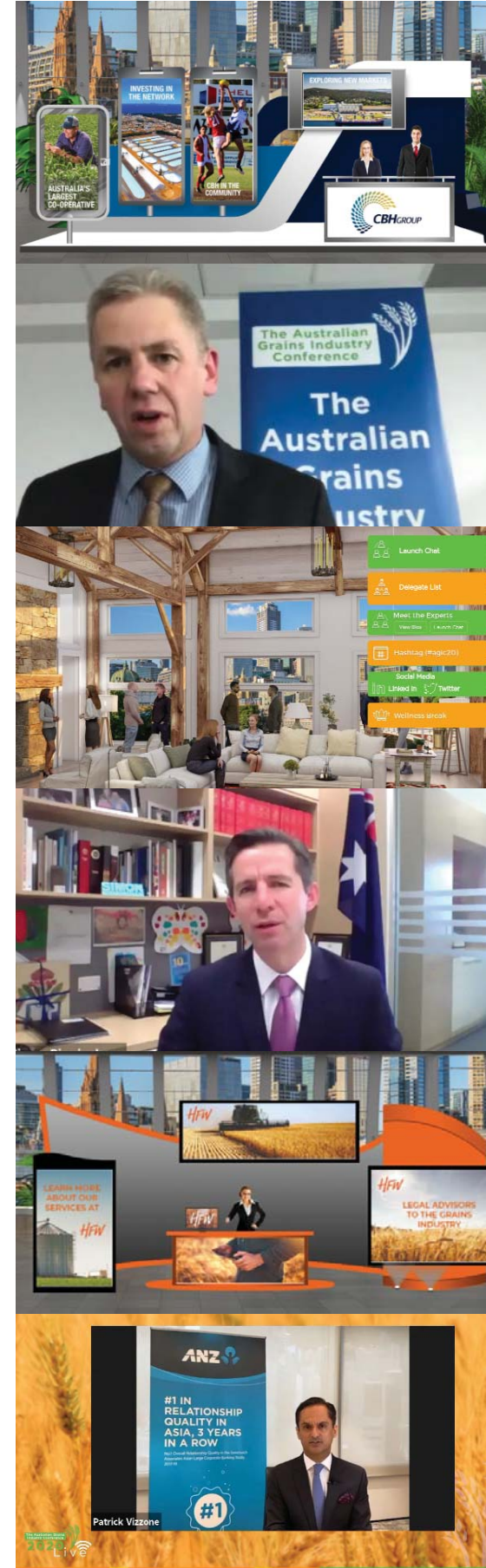
## AGIC Australia VIRTUAL 30th July 2020

With the COVID-19 pandemic preventing travel and in-person events, the 2020 Australian Grains Industry Conference (AGIC) was successfully held on a special interactive virtual conference platform. AGIC was one of the first virtual conference experiences for most delegates, and the feedback showed it continued to provide a strong technical program and industry connectivity for sponsors and delegates over a special one-day event, with over 350 delegates from more than 220 organisations representing 16 countries participating.

The 2020 Conference program was centred around the themes of "Resilience and Re-invention" which reflected the industry moving out of severe drought and confronting the COVID-19 pandemic. The program was exceptionally strong program with over 44 presenters featuring, David Littleproud MP- Minister for Agriculture, Richard Yetzinger - Chief Economist ANZ, Seth Meyer - University of Missouri, the Hon Simon Birmingham - Minister for Trade Tourism and Investment, Barry O'Farrell Ambassador to India, fmr Foreign Minister Alexander Downer, Joel Fitzgibbon MP and Patrick Fizzzone- ANZ Kong Kong. Also featured was a high-level and popular "CEOs in Conversation" session involving leading journalist Hugh Remington in conversation with Alison Watkins - CEO Coca-Cola Amatil, Richard Crump - Managing Partner HFW.

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

AGIC 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.



## AGIC Asia 2020 & 2021

The 2020/21 year featured two AGIC Asia events. AGIC Asia 2020 initially scheduled for March 2020, with events planned for China and Vietnam including Government Roundtable meetings was postponed due to the COVID-19 pandemic. A virtual AGIC Asia 2020 conference was successfully held in July 2020 with over **200 delegates** from **18 countries**.

AGIC Asia 2021 was held virtually on 3rd March 2021 with a special opening keynote address from Australia's Minister for Trade the Hon Dan Tehan. Support for the virtual format was exceptionally strong with over 650 delegates from 25 countries participating in a broad technical program looking at global market conditions, Australian supply and demand, emerging consumptive trends, and extracting value from Australian grain in poultry and pig feed rations.

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.

Over several years, the AGIC Asia Roundtable activities held by GTA are successfully leveraging the AGIC Asia events to improve Government and industry relationships in key markets. These have continued in a virtual format during the COVID-19 pandemic with successful sessions held with Indonesia, Vietnam and the Philippines. The Roundtables have increased opportunities for trade facilitation, market access and promotion resulting in improved development of trade policy and communication between respective Asian and Australian industries, at both a commercial and technical level.

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



**Financial policies**

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

**Financial position**

The company has generated a surplus of \$245,747, as compared to a surplus of \$ 120,327 in the previous year. Net equity at 30/6/21 is \$1,518,718.

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

The following factors contributed the financial accounts:

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

The following information was extracted from the financial statements of Grain Trade Australia Ltd for the year ended 30 June 2021 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 2021

	<b>2021</b>	<b>2020</b>
	<b>\$</b>	<b>\$</b>
<b>REVENUE</b>	<b>2,031,898</b>	2,207,481
Interest revenue calculated using the effective interest method	<b>2,206</b>	11,222
<b>EXPENSES</b>		
Direct expenses	<b>(257,820)</b>	(619,737)
Employee benefits expense	<b>(684,663)</b>	(759,679)
Depreciation and amortisation expense	<b>(77,902)</b>	(72,675)
Rental and lease costs	-	(11,005)
Consultancy and legal expenses	<b>(42,233)</b>	(52,490)
WQA expenses	-	(1,245)
Travel and accommodation	<b>(36,647)</b>	(75,144)
Special projects	<b>(226,165)</b>	(144,989)
Other expenses	<b>(154,320)</b>	(174,332)
Finance costs	<b>(10,313)</b>	(11,497)
<b>SURPLUS/(DEFICIT) BEFORE INCOME TAX EXPENSE</b>	<b>(1,490,063)</b>	(1,922,793)
Income tax expense	-	-
<b>SURPLUS AFTER INCOME TAX EXPENSE FOR THE YEAR</b>	<b>245,747</b>	120,327
Other comprehensive income for the year, net of tax	-	-
<b>TOTAL COMPREHENSIVE INCOME FOR THE YEAR</b>	<b>245,747</b>	120,327



Grain Trade Australia Ltd

## Statement of financial position

As at 30 June 2021

	2021 \$	2020 \$
<b>ASSETS</b>		
<b>Current assets</b>		
Current assets		
Cash and cash equivalents	518,905	991,243
Trade and other receivables	323,921	193,257
Contract assets	96,014	54,677
Other financial assets	1,329,800	629,800
Other assets	123,664	84,858
Total current assets	2,392,304	1,953,835
<b>Non-current assets</b>		
Right-of-use assets	240,032	320,536
Total non-current assets	240,032	320,536
<b>Total assets</b>	<b>2,632,336</b>	<b>2,274,371</b>
<b>LIABILITIES</b>		
<b>Current liabilities</b>		
Trade and other payables	136,171	140,176
Contract liabilities	599,325	443,073
Lease liabilities	77,652	71,758
Employee benefits	103,136	77,901
Total current liabilities	916,284	732,908
<b>Non-current liabilities</b>		
Lease liabilities	182,087	259,740
Employee benefits	5,247	8,752
Total non-current liabilities	197,334	268,492
<b>Total liabilities</b>	<b>1,113,618</b>	<b>1,001,400</b>
<b>Net Assets</b>	<b>1,518,718</b>	<b>1,272,971</b>
<b>EQUITY</b>		
Retained earnings	1,518,718	1,272,971
<b>Total Equity</b>	<b>1,518,718</b>	<b>1,272,971</b>

Grain Trade Australia Ltd

## Statement of changes in equity

For the year ended 30 June 2021

	2019 Retained earnings \$	Total equity \$
Balance at 1 July 2019	1,152,644	1,152,644
Deficit after income tax expense for the year	120,327	120,327
Other comprehensive income for the year, net of tax	-	-
<b>Total comprehensive income for the year</b>	<b>120,327</b>	<b>120,327</b>
<b>Balance at 30 June 2020</b>	<b>1,272,971</b>	<b>1,272,971</b>
<b>2020</b>	<b>Retained earnings \$</b>	<b>Total equity \$</b>
Balance at 1 July 2020	1,272,971	1,272,971
Surplus after income tax expense for the year	245,747	245,747
Other comprehensive income for the year, net of tax	-	-
<b>Total comprehensive income for the year</b>	<b>245,747</b>	<b>245,747</b>
<b>Balance at 30 June 2021</b>	<b>1,518,718</b>	<b>1,518,718</b>

Grain Trade Australia Ltd

## Statement of cash flows

For the year ended 30 June 2021

	2021 \$	2020 \$
<b>Cash flows from operating activities</b>		
Receipts from customers (inclusive of GST)	1,851,759	1,947,096
Payments to suppliers and employees (inclusive of GST)	(1,637,457)	(1,772,389)
Interest received	2,206	12,869
Government COVID-19 related benefits received	90,500	68,000
Interest on leases	(10,189)	(11,497)
Net cash from operating activities	296,819	244,079
<b>Cash flows from investing activities</b>		
Investment in term deposits	(700,000)	-
Net cash used in investing activities	(700,000)	-
<b>Cash flows from financing activities</b>		
Repayment of lease liabilities	(69,157)	(60,995)
Net cash used in financing activities	(69,157)	(60,995)
Net increase/(decrease) in cash and cash equivalents	(472,338)	183,084
Cash and cash equivalents at the beginning of the financial year	991,243	808,159
Cash and cash equivalents at the end of the financial year	518,905	991,243



ORDINARY MEMBER (TRADING)

- Level A1**  
**(over 7 Million Tonnes)**

CBH Grain P/L  
Viterrra Australia P/L
- Level A2**  
**(5-7 Million Tonnes)**

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  
Cofco International
- Level B2**  
**(500,000-1 Million Tonnes)**

Arrow Commodities P/L  
Australian Grain Export P/L  
CHS Broadbent P/L  
Centre State Exports P/L  
George Weston Foods Limited  
Inghams Enterprises P/L  
Ridley Agriproducts P/L  
Riordan Grain Services  
Riverina (Australia) P/L  
Bunge Agribusiness Australia P/L
- Level B3**  
**(250,000-500,000 Tonnes)**

Allied Pinnacle P/L  
Robinson Grain Trading Co P/L  
Willmar Trading (Australia) P/L  
Louis Dreyfus Company Australia P/L  
Quadra Commodities P/L
- Level C1**  
**(over 10 employees,  
under 250,000 Tonnes)**

Adams Australia P/L  
Agriex Australia P/L  
Agrisk Management P/L  
AGT Foods Australia  
Associated Grain t/a Agrocorp  
Processing Australia  
Auscott Ltd  
Australian Fresh Milk Holdings  
(AFMH)  
BFB P/L  
Blairs Produce Company  
Boolah Farms P/L  
Castlegate James Australasia P/L

- Coprice  
Darwalla Milling Co P/L  
Deckert Group P/L  
Esperance Quality Grains  
Five Star Stock Feeds  
Fletcher International Exports P/L  
Hanlon Enterprises Grain  
Independent Grain Handlers P/L  
Irwin Stockfeeds  
Itochu Australia Ltd  
J K International P/L  
James Stock Feed and Fertilizer P/L  
Jerilderie Grain Storage & Handling  
K M & W M Kelly & Sons  
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  
MC Croker Pty Limited  
MSM Milling P/L  
Namoi Cotton Ltd  
Newcastle Agri Terminal P/L  
Premium Grain Handlers P/L  
Quattro Ports  
Reid Stockfeeds P/L  
Rivalea (Australia) P/L  
- Animal Nutrition  
Riverina Oils & BioEnergy P/L  
SunPork Farms Feed Mills  
ThriveAgri  
TSS Grain (Tasmanian Stockfeed  
Services)  
Unigrain P/L  
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  
Agracom P/L  
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  
Baker Grain  
Boort Grain Co-Operative  
Broun and Co Grain P/L  
Cameron Pastoral Company P/L  
C & S Trading P/L  
C K Tremlett P/L  
Carpendale Commodities  
Chester Commodities P/L  
CL Commodities P/L  
Continental Grain Handling P/L (CGH)  
Coorow Seeds  
Cory Johnston (Aust) P/L  
Craig Tyack Grain Trading  
Deacon Seeds Company  
Demeter Cormack P/L  
Defiance Maize Products P/L  
Direct Grain P/L  
Direct Commodities P/L  
Donnellons Bulk Haulage P/L  
East Coast Stockfeed P/L  
Ellerslie Free Range Farms P/L  
ETG Commodities P/L  
ETG Processing P/L t/a Wimpak  
Export Trading Group Australia P/L  
Feed Central P/L  
Findlays Barellan  
Grenfell Commodities P/L  
GO Resources P/L  
Gold Star International P/L  
Grain Link (NSW) P/L  
Grain Link WA P/L  
Grainforce P/L  
GrainTrend P/L  
Greentree Farming  
GV Grain & Fodder  
Harwood Grains P/L  
Hutt & Co P/L t/a GrainSource  
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  
Lemarc Agromond P/L  
Mandala Trading 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  
Moulamein Grain Co-Operative Ltd

- Nandaly Grain Co-Operative Ltd  
Network Grains P/L  
Origin Grain P/L  
Pacific Global Sprouts P/L  
Parkinson Bros  
PB Seeds P/L  
PeaCo  
Pearson's Grain P/L  
Peters Commodities P/L  
Pinnacle Grains P/L  
Plum Grove P/L  
Preston Grain  
Pure Foods Eggs P/L  
Quirindi Grain & Produce  
RP Grain P/L  
RT Wallace P/L  
Ruddenklau 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  
Spagricon Australia Pty Limited  
Standard Commodities Australia P/L  
Sudima Australia P/L  
Summer Hill Grains  
Surat Bulk Grains  
Southern Grain P/L  
Southern Grain Storage P/L  
Swiss Singapore (Australia) P/L  
Tamma Grains Australia P/L  
Ulusoy Asia Pacific  
Universal Commodity Management  
Ward McKenzie P/L  
Watson's Bulk Logistics  
WHG Oceania P/L  
WW Agri P/L

TRANSPORT OPERATOR

- 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  
StoneX Financial P/L  
McDonald Pelz Australia  
Perkins Commodity Brokers  
Teague Australia P/L

Sole Operator

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

CORPORATE

- Large**
- ASX Limited  
Australia And New Zealand  
Banking Group  
Australian Grain Technologies P/L  
Barrett Burston Malting Co P/L  
Commonwealth Bank of Australia

- Medium**
- AgriDigital  
Agrifood Technology P/L  
Amspec Australia P/L  
Australian Superintendence  
Company  
Commodity Inspection Services  
(Australia) P/L  
Foss Pacific P/L  
Holding Redlich  
HFW Australia  
Intertek  
Mars Petcare t/a Mars Birdcare  
SBA Law  
SGS Australia P/L  
T-Ports P/L  
Viridis Ag

- Small**
- Advance Trading Australasia  
Ag Scientia 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 Pty Limited  
Flexi Grain  
Goldstar Commodities  
Graintec Scientific P/L  
Grainx  
HarvestCheck P/L  
Hay Plains Grain Storage P/L

- IKON Commodities P/L  
Lachstock Consulting P/L  
MarketAg P/L  
McMullen Consulting P/L  
Mercari P/L  
Merricks Capital Services P/L  
Mirfak P/L  
National Grower Register P/L  
OMIC Australia P/L  
Perten Instruments Australia P/L  
Pinion Advisory P/L  
Planfarm Marketing P/L  
Priag Marketing Pty Limited  
Primal Foods Group  
Profarmer Australia P/L  
Rise Agribusiness P/L  
Saputo Dairy Australia P/L  
SGA Solutions P/L  
TE Storage & Logistics P/L  
Ten Tigers  
TT Club Mutual Insurance  
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

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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