



GRAIN TRADE AUSTRALIA

**2nd APEC Seminar on Best Practices and Applications of Digitalization
and Innovation in Food Supply Chain**

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INDUSTRY DRIVEN & MANAGED

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



About GTA and Australian grains industry

GTA facilitates trade with a self regulatory framework



**Trading
Standards**



**A Guide to Selling
Grain Using**

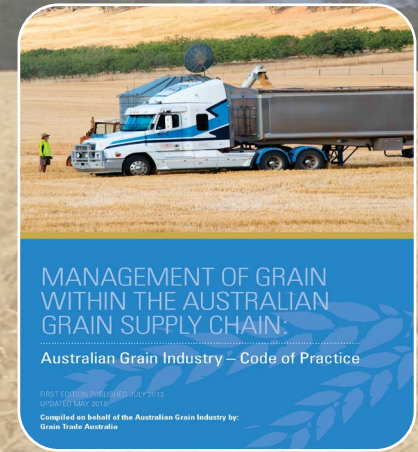
**Contracts &
Trade Rules**



**Dispute
Resolution**



**Trade Policy
& Market
Access**

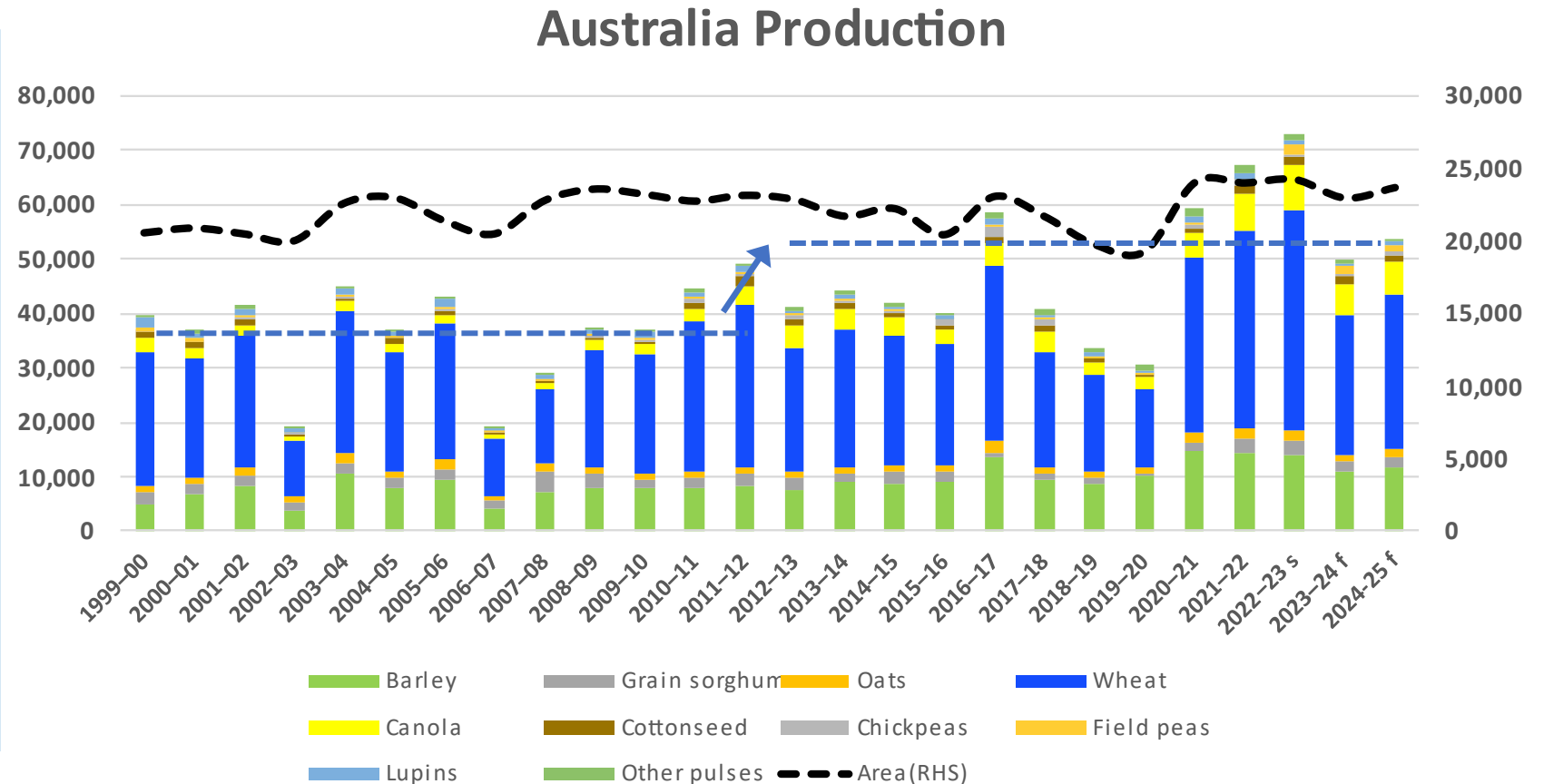


**MANAGEMENT OF GRAIN
WITHIN THE AUSTRALIAN
GRAIN SUPPLY CHAIN:
Australian Grain Industry – Code of Practice**

**Industry
Stewardship
& Capability**

Australian grains at a glance

- Strong planted area
- Production efficiency
 - More tonnes / mm
 - Increasing farmer scale
- Largest crops (24/25 mmt):
 - Wheat 28.4
 - Barely 11.6
 - Canola 6.1
 - Sorghum 2.1



Australian grains at a glance

	2020/21	2021/22	2022/23	2023/24	2024/25	5 year av.
Crop production (MT)	59,876	68,046	73,608	50,469	54,469	53,316
Industry Value \$Am FOB	19,916	28,210	32,809	20,492	44,824	50.114
Domestic Demand	16.78	15.6	16.71	14,59	tbc	17.28
Exports (MT)	33,477	45,029	54,994	41,211	36,918	42,326
% Containers	10.3	8.8	8.1	9.5	n/a	10.2
Export Value \$Am FOB	13,046	23,708	32,309	21,794	19,137	21,999

Includes cereals, oilseeds, pulses. **Excludes Rice**

Source: ABARES 2024

Value of Australian grains





Digital and innovative technologies across the grain supply chain

Application and benefits of data and digital tools

Improved traceability for food supply chains and safety

Improved farm management and performance (precise records/real time data)

Trust and Transparency (accurate data, security)

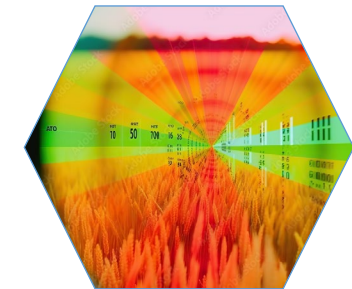
Feedback loops to improve commercial outcomes and efficiencies

Improved efficiency and optimisation across the supply chain

Supports global marketing & participation in new market opportunities (ESG)

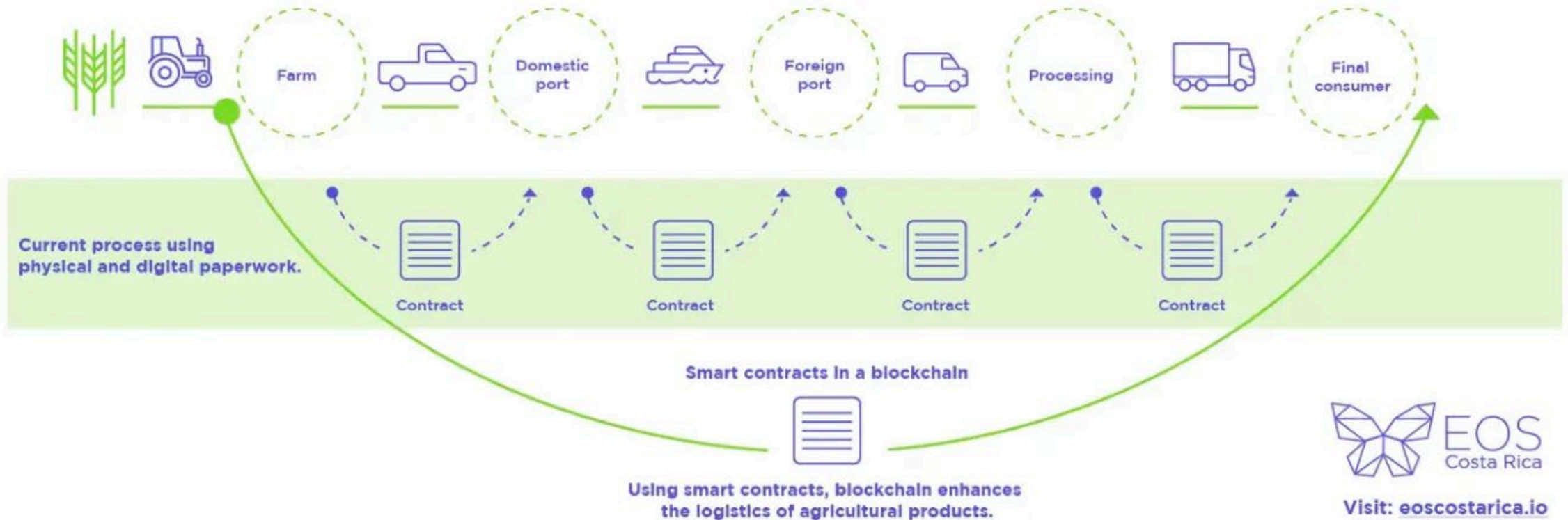
Biosecurity - managing preparedness and resilience

Demonstrating compliance with regulatory requirements for market access



How Blockchain Is Transforming Supply Chain for Agricultural Goods:

Blockchain allows improved traceability and transparency when registering data across the supply chain of products.



Challenges and barriers

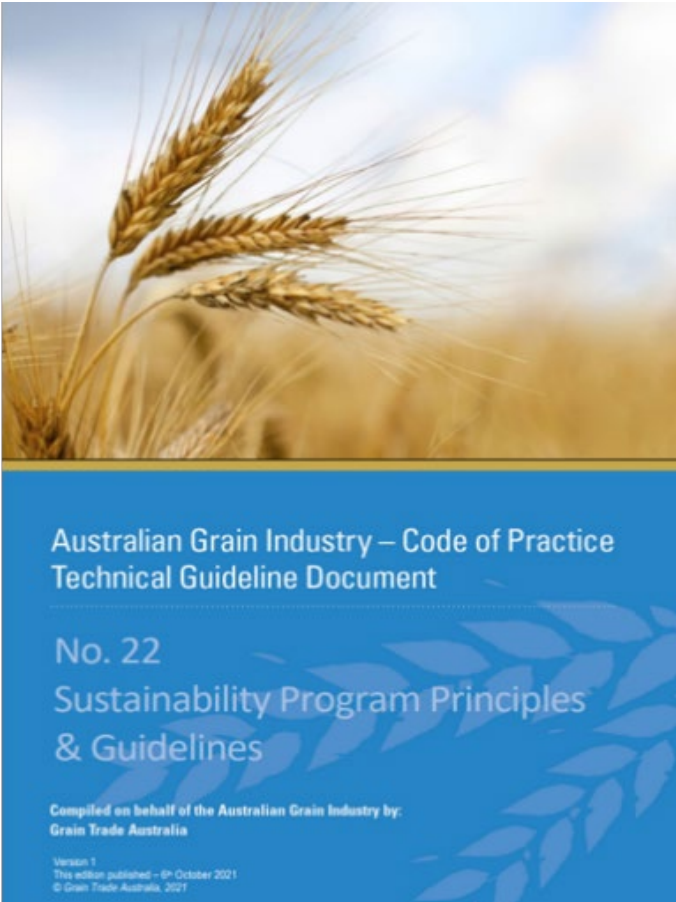
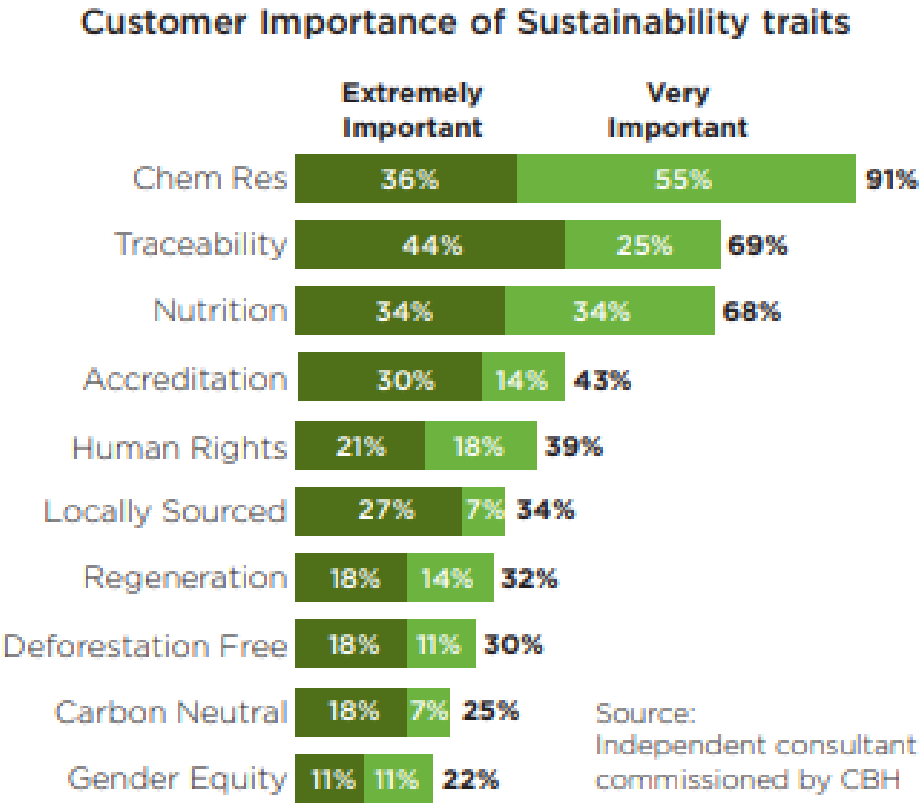
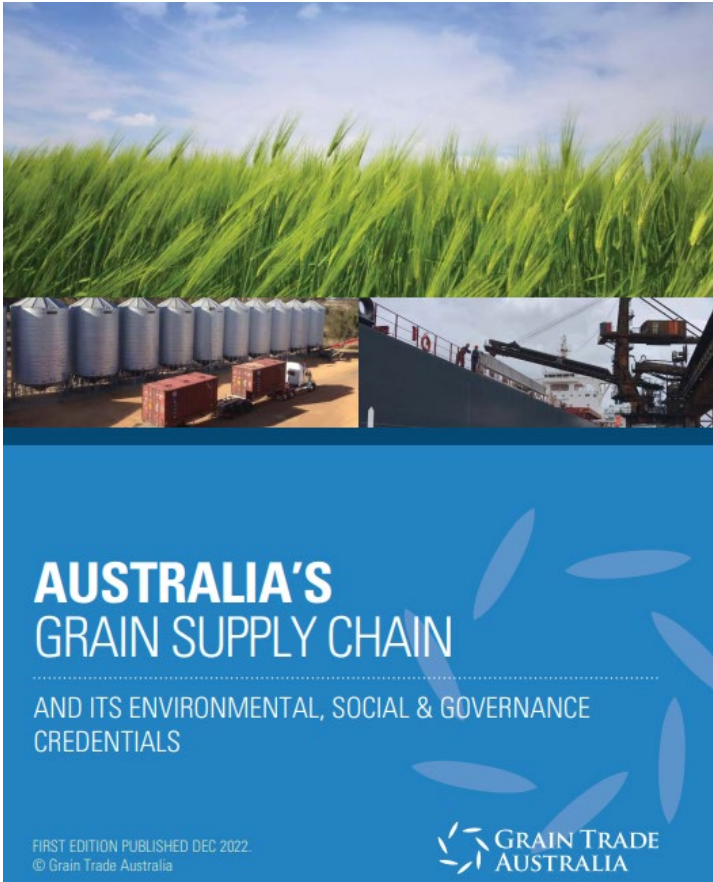
- Data governance/rules and lack of **trust** in shared data
 - Lack of clarity regarding **ownership** and control of data once externally shared
- Grower and consumer trust in **innovation** and technology
- Technical challenges
 - **Fragmented** data sets across industry
 - Lack of interoperability across data sets and systems
- Commercial & market challenges
 - Underdeveloped **pathways** to translate data/information into actionable insights
- Logistical challenges
 - Physical transformation, **movement** and aggregation at various points along supply chain can impact ability to capture benefits
 - Lack of consistent messages around timelines and managing **expectations** where complex technologies and commercial/regulatory environments

Driver/enablers of change

- Recognition that digital agriculture enhances **productivity and profitability**
- Adoption of digital technology delivering on-farm and supply chain **benefits**
- Technological advancements enable data collection at **scale** with no practice change
- Opportunity to support Australian grains industry position as **responsible** and **efficient**
- Australian R&D and **innovation** sector and investment
- Willingness to share data for R&D purposes that **benefit industry** at large
- Increasing momentum related to **environmental sustainability and stewardship**
 - Data strengthens industry ESG/sustainability credentials
 - **Regulatory and institutional** requirements e.g. traceability, ESG
- Industry **commitment** driving change

Chemical residue requirements and traceability are the most important sustainability traits for customers

- >90% of respondents ranked chemical residue ‘extremely’ or ‘very’ important





Modernising the Australian grain supply chain

Links in Australian grain supply chain

ESG focus for
Government, investors,
business & stakeholders

Growing Australian Grain
– safely managing risks
with crop inputs & grain on
farm

Australian **Trading**
Standards for quality
assessment, storage &
segregation

Quality Assurance
procedures & **Code of**
Practice

Traded under commercial
contracts supported by
Trade Rules & formal
Dispute Resolution

Government **Certification**
Process for phytosanitary
requirements

Modernising the grain supply chain

- from Drought, through Covid-19 to 2030

An Innovative Growth & Investment Strategy for the Grain Supply Chain



GRAIN TRADE
AUSTRALIA

GTA technology roadmap



- Capitalise on existing and emerging technology opportunities
- Rapid advances across multiple sectors
- Industry and Government must become more adept



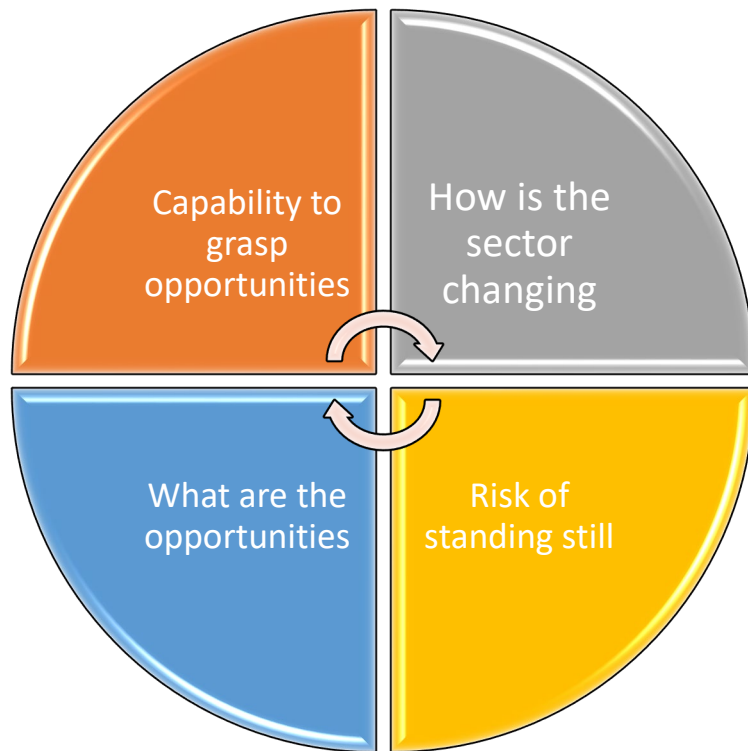
GTA technology roadmap

Quality Assurance

Sales & Marketing

Storage

Logistics & distribution

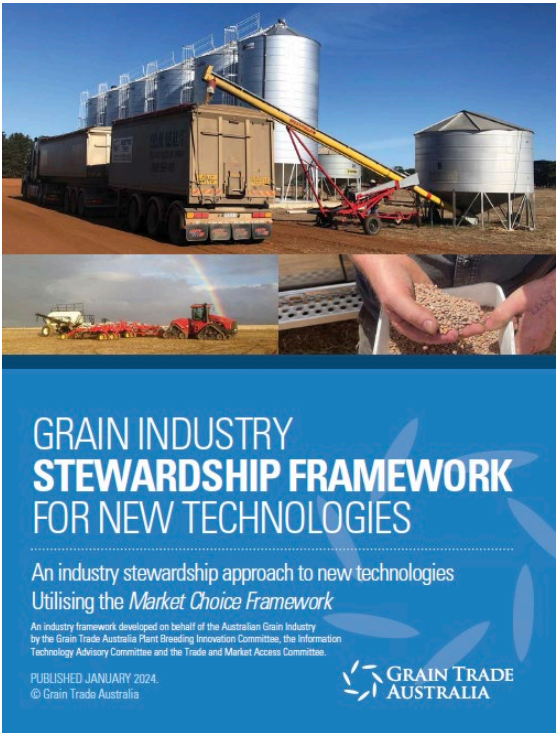


Existing

Near

Future

Technology stewardship



Key areas of focus:

- ❖ Digital & information technology
- ❖ Grain assessment technology

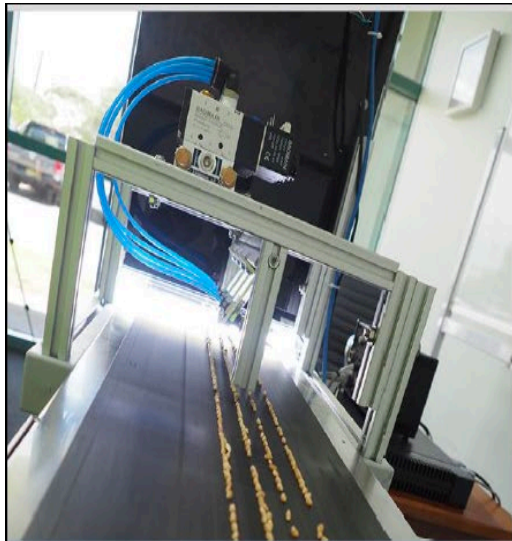
A collaborative approach to:

- Support **access** to innovation
- Provide **flexibility** to meet different stakeholder, market and regulatory requirements
- Minimise or avoid **trade disruptions**

Key elements (technology agnostic)

- Early engagement
- Regulatory and customer focus
- Independent risk assessment

Visual assessment technology



*Grain assessment
technology is moving
& doesn't wait!*

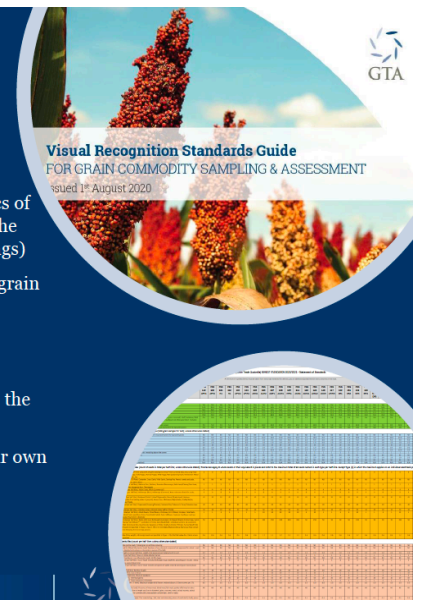
- Opportunities to modernise and increase efficiency exist. Government and industry together need to take the initiative and seize the opportunity.

**Opportunity to supplement
subjective human element to
assess grain for sale**

GTA TRADING STANDARDS

- GTA Trading Standards describe the qualities and characteristics of the various grades of the grain, oilseeds and pulses and details the common characteristics (such as protein, moisture and screenings)
- These standards are the basis of quality in domestic and export grain contracts
- GTA Trading Standards are the responsibility of the Standards Committee which has grower representation
- Defined standards can be included in contracts by referring it to the appropriate CS number
- These are trading standards and the BHCs will regularly set their own standards for off grades

https://www.graintrade.org.au/commodity_standards



Visual Image Standard (GATS) project

Challenge

- How to **assess, approve, and maintain** emerging photographic digital imagery grain assessment technology with **multiple** providers

Approach

- **Industry Standard & Framework** to ensure technology options are effective
- GTA is developing an industry **Standard/Procedure** to enable Government, industry and commercial companies to adopt a **uniform system** for assessing, approving, and maintaining emerging technology

Goal- **confidence** and **consistency**

- Australian Standard
- Capability to perform a uniform test anywhere





Australian Grain Industry

- Safe, Secure, Reliable, Sustainable

AUSTRALIA'S GRAIN SUPPLY CHAIN

AND ITS ENVIRONMENTAL, SOCIAL & GOVERNANCE CREDENTIALS



- Australian Pesticide & Veterinary Medicines Authority
- Growing Australian Grain Stewardship (TGD 11)
- Australian Grain Code of Practice
- Export Control Act 2020

**Strict regulations
and standards to ensure
our grain is safe**

FOOD SAFETY

**Grain is assessed
and traceable**

TRACEABILITY

**Industry leadership
in Sustainability**

SUSTAINABILITY

PEOPLE/SAFETY

**Safety and well-being of
people is paramount.**

NUTRITION

Integrity

**Transparent proven
reliable long term
trading partner**



Summary

Supply - Australia is a reliable supplier of quality grains based on sound industry practice to provide assured quality with confidence

Demand – Australia's export program continues to grow with increased export capacity to serve its market

Digital technology– Key to modernising supply chains and improving efficiency, marketing and production

Confidence - Industry framework and quality assurance practices ensure safe and reliable source of supply

Thank you!

