



ANNUAL REPORT 2023-24



GRAIN TRADE
AUSTRALIA

INDUSTRY DRIVEN SELF-



GTA CONTRACTS SUPPORT TRADE

- 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

WORKING ACROSS THE

REGULATORY FRAMEWORK



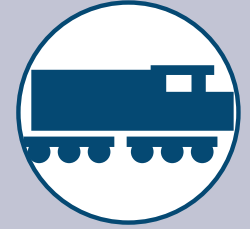
TO EXPORT & DOMESTIC MARKETS

SUPPORTED BY:

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

ENTIRE SUPPLY CHAIN

CONTRIBUTING VALUE TO THE



Australian Grain Industry Conference (AGIC) Asia

Two in-person conferences held in Indonesia and China showcasing the Australian grain industry to over 500 delegates.

AGIC Roundtable events held with Indonesian and Chinese officials and supported by local Australian Embassy staff.

GTA Trading Standards

Developed by the GTA Standards Committee, following industry consultation conducted annually. The Trading Standards are developed with primary objectives to reflect customer requirements, meeting regulatory requirements, and the capability of production sector and supply chain. Aligned to GTA standard form contracts and have widespread domestic & international recognition.

Publications

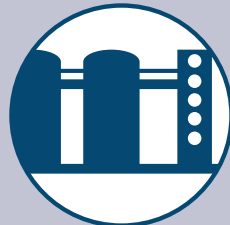
- Visual Recognition Standards Guide - a photographic and written national standard of all major grain defects
- Seed Impurities of Grain Identification Guide
- Australian Grains Industry Code of Practice
- Grain Transport Code of Practice
- Technical Guideline Documents
- GTA Member Updates
- GTA Industry Fact Sheets
- Grain Matters (newsletter)
- Grower Guide to using Grain Contracts
- Standards for Empty Shipping Container Inspection
- GTA Market Notifications
- GTA Safety Guidelines
- Common Industry Varietal Code Master List
- Australian Grain Supply Chain ESG Credentials
- Grain Industry Stewardship Framework for New Technologies
- Emerging Technology Roadmap

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

WORKING ACROSS THE

GRAIN INDUSTRY SUPPLY CHAIN



National Working Party on Grain Protection

Ensuring Australia's zero tolerance to live grain insects.

GTA supports the work of the National Residue Survey (NRS)

Adherence to domestic and export Maximum Residue Limits for chemicals

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

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

Industry Developed and Driven Self-Regulatory Framework

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

Member:

- DAFF - Grains & Plant Products Export Industry Consultative Committee (GPPEICC)
- National Measurement Institute - Grain Quality Measurement Committee
- ACCC Agricultural Consultative Committee
- Agricultural Biotechnology Council of Australia (ABCA)
- International Grain Trade Coalition (IGTC)
- DAFF - Wheat Port Code Review Reference Group
- NSW Grain Harvest Transport Program
- Australian Agricultural Traceability Governance Committee (AATGC)
- APVMA Stakeholder Consultative Group



GRAIN TRADE AUSTRALIA

ENTIRE SUPPLY CHAIN

Industry driven Self-Regulatory Framework

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

Making it easier

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

Available to all

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

Informing industry

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

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

Strategic Direction

"GTA's Strategic Activity Plan" 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, transparent and sustainable. These attributes provide the foundation for the Australian value chain and its members to participate in the growth of the local and global grain industry.

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

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

Critical Success Factors

GTA must deliver:

- **Harmonised trading products and services** - 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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CHAIRMAN'S REPORT



I am honoured to provide the 2023/24 Grain Trade Australia (GTA) Annual Report.

GTA's strength and strategy reflects its ambition to support its members and the wider grain industry. As Chair, and on behalf of the Board and management we are committed to support GTA's Vision of *"an efficient, equitable and open commercial grain industry in Australia"*.

GTA's ability to facilitate trade, provision of an industry focal point and efficient, equitable and open trading environment is provided through leadership, advocacy and supported by the industry driven self-regulatory framework. This framework includes the Australian Grain Industry Code of Practice, Grain Trading Rules, Contracts and Grain Trading Standards.

The 2023-24 season has seen Australian grain production drop back to 51.0 MT after the three prior record production years. This is the fifth season with production exceeding 50Mt, the first being in 2016/17 (59Mt). ABARES report 2023/24 grain industry value at \$43.7 billion, compared to \$33.2 billion in 2016/17. That is an extra \$10.5 billion of value in 2023/24 from 8.5 MT less grain than 2016/17. That is a terrific demonstration of the positive direction the grain industry continues to head.

Whilst grain production, consumption and export volumes have been strong, global issues have challenged us all during 2023-24, with economic pressures, food security challenges, geopolitical unrest, wars and climatic uncertainty all increasing global insecurity and trade complexities. This can lead to a propensity towards increasing protectionism, tariff and non-tariff trade barriers, all

of which undermine the effectiveness and importance of efficient rules-based trade.

Facilitating the trade of grain is essential to global food security. This context and in the unstable geopolitical environment, highlights the importance of our industry as well as the value of GTA's role and our core mission to 'facilitate trade'. It is critical for markets to be driven by the laws of supply and demand, and trade rules based on objective risk assessments and science, rather than costs and politically emotive distortions.

The resumption of Australian barley exports into

the important China market was welcomed in August 2023. GTA has remained active to ensure the smooth resumption of trade to China including a successful visit to China in September 2023 meeting with government agencies as well as the private sector.

Global tensions and the continuing uncertain international political landscape, supports the ongoing participation by GTA in international trade policy. GTA is well positioned in this area as

GTA has direct industry experience and a practical focus to ensure government and trade policy is supportive and avoids trade disruption.

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



GTA Chair Andrew Goyder

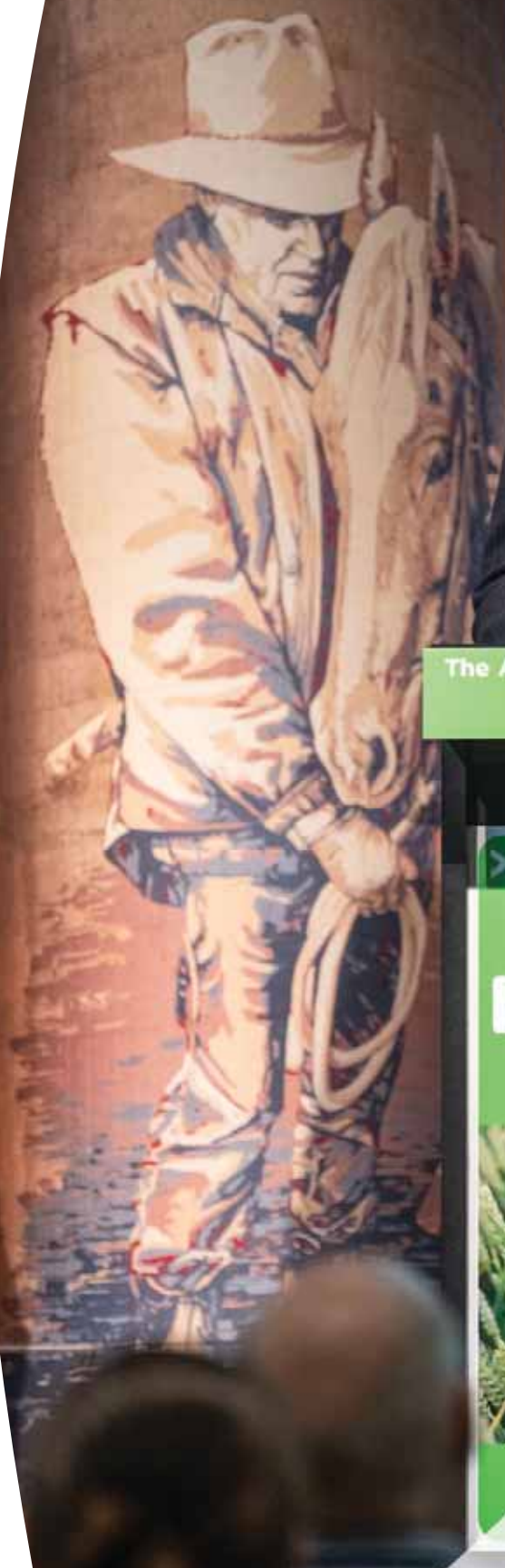
GRAINS AT A GLANCE¹

	2020/21	2021/22	2022/23	2023/24	5 yr Avg
Production	59,876	68,046	73,622	51,031	56,739
Industry Value (FOB) ¹	40,006	56,696	66,405	43,648	45,801
Domestic Demand ²	15,720	15,835	15,510	14,785	15,446
Exports	33,492	45,061	53,585	42,835	38,536
Export Value (FOB)	13,046	23,708	30,924	22,147	19,542

Source: ABARES, USDA.

¹ Includes cereals, oilseeds, oilseed products and pulses; excludes Rice

² Wheat, barley, sorghum, canola



The Australian Grains Industry Conference
2023

A graphic for the conference featuring a green background with a white wheat stalk icon. The text reads: 'The Australian Grains Industry Conference', '2023', 'CHALLENGING SUCCESS', and 'MAINTAINING MOMENTUM'. At the bottom, there are logos for GTA, AOF, and other organizations.

The Australian Grains Industry Conference
2023

CHALLENGING
SUCCESS
MAINTAINING
MOMENTUM

GTA AOF





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

Trade into India has also been a focus of GTA and led to the development of an India-Australia Strategic grain partnership by looking to build relationships, understanding and collaboration at Government, industry association, technical and commercial levels.

As part of this initiative GTA joined Agriculture Minister the Hon. Murray Watt's trade delegation to India in July 2023. A key message when engaging with India, and other markets, is that Australian grain should not be seen as competition, as it can complement Indian production providing niche styles of grain and value adding opportunity, as well as contribute to India's strategic food and nutrition security.

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

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

As the grain industry has evolved and grown, supported by the industry driven self-regulatory framework, there has been a significant increase in investment by GTA members in supply chain capacity, including transport, ports and storage. This is demonstrated by extension in record exports since 2020-21.

The ACCC noted in its submission into the Second review of the Wheat Port Code that there will be 17 port terminal service providers (PTSPs) and 33 operational facilities. This is up from 7 PTSPs and 21 operational facilities when the Code commenced in 2014.

GTA continues to focus on the container supply chain and systemic issues such as the diminishing supply of 20ft containers, regulation and competition supporting GTA members involved in the container trade. This focus is important to ensure the market and competitive value associated with the trade of grain in containers continues.

A key policy area in the 2023/24 year has been the 2nd review of the Bulk Wheat Code of Conduct (WPC) commenced in October 2023. GTA has represented members in this review via submissions and as a

member of the Review Reference Group established by DAFF. Several submissions to this review, including the ACCC and GTA, have stated the WPC is no longer “fit for purpose”. GTA’s position is industry should be given the opportunity to extend the industry driven self-regulatory framework to cover the key aspects of the WPC rather than maintaining or even extending the existing regulation.

We see this as an opportunity for government and industry participants to recognise positive change and to be bold and take the next step in growing and strengthening one of Australia’s largest agricultural industries for the benefit of all participants across the value chain.

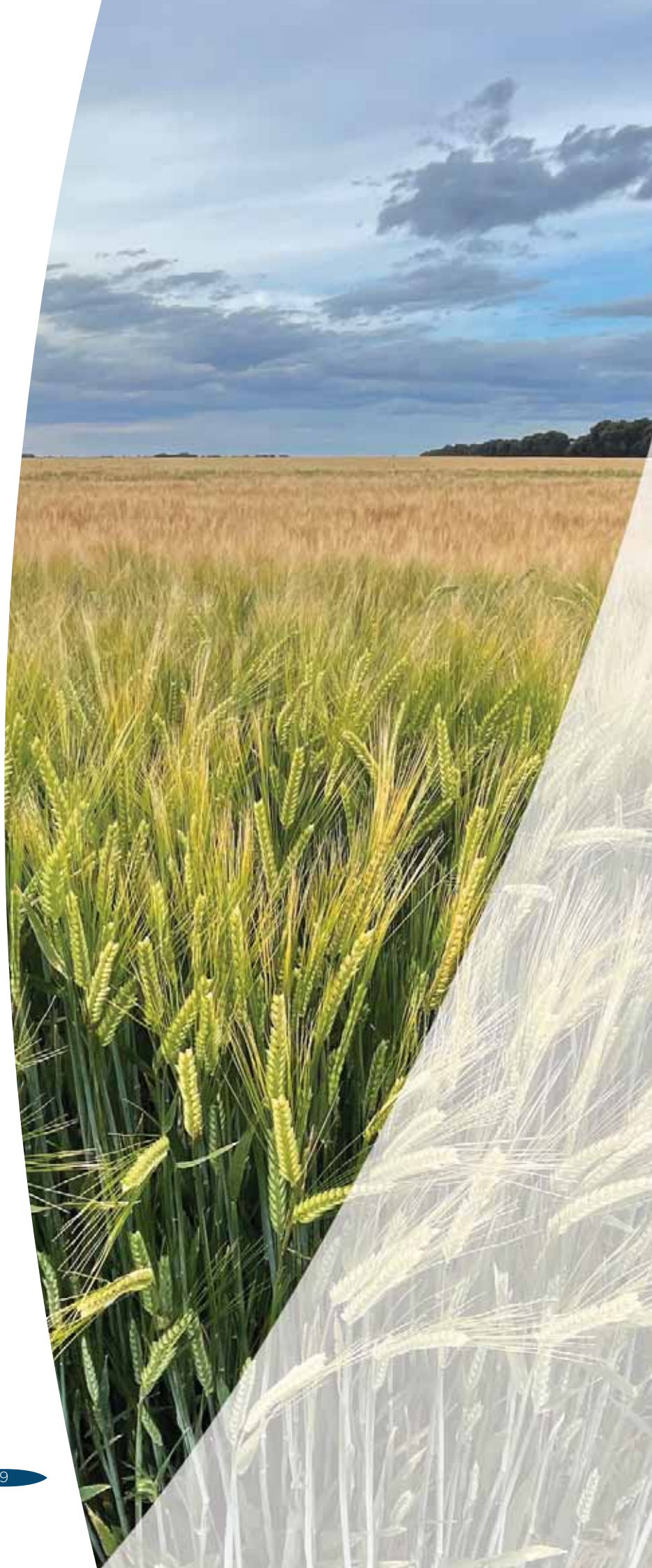
GTA is reasoning is there has been no evidence of market failure or specific identification of problems that warrant a regulatory response, let alone an increase in regulatory oversight.

During 2023 -24 the structure of the Australian grain industry evolved with the responsibilities of Pulse Australia being transferred to other industry organisations including GTA assuming the management of Pulse Trading Standards. To manage this a Pulse Sub-Committee has been established as a sub-committee of the GTA Trading Standards Technical Committee.

The largest market for Australian grain is the Australian domestic market. Consumption increased over many years up to peak grain consumption in 2018/19 of 18.5 MT. Further to this Australia imports approximately 900k tonnes of plant protein meal each year for domestic consumption. With over 1.4 MT grain now consumed monthly in Australia inventory stocks can be depleted quickly and regions and entire states can start to be depleted. This was the case in 2017-2019 period when 6.8mmt of grain was shipped from SA & WA to the east coast.

GTA’s Domestic Sector Council is focussed on being prepared for the next regional and/or national period of poor production. GTA and DAFF have established a formal industry Consultative Committee to provide a mechanism for a joint industry and government review of the process for importing plant-based meals and bulk whole grains and to identify areas for improved efficiency. The goal is to ensure the import processes are robust, support Australia’s biosecurity goals whilst ensuring imported meal and grain is available to meet market requirements.

The world’s dynamic climate, political and population situation places a sharp focus on agriculture and its social licence. Driving efficiency and sustainability in the grain value chain is both a challenge and opportunity for GTA members and industry participants. GTA continues its work to assist participants of the Australian Grain supply





chain to deliver a safe, high-quality product that meets domestic and importing country regulations and customer demands.

To assist members, GTA produced *Australia's Grain Supply Chain and its Environmental, Social & Governance Credentials* (first published in 2022) This was updated in 2024 to align the GTA ESG credentials to the 17 United Nations Sustainability Development Goals.

Australian Grains Industry Conferences (AGIC) are a key part of GTA's industry stewardship program. The 24th AGIC event was held in July 2023 under the theme of "*Challenging Success, Maintaining Momentum*" reflecting the success of three concurrent record Australian crops and maintaining the positive industry momentum.

"*Reconnecting and building value*" was the theme of AGIC Asia 2024, held in March 2024 with over 200 participants from local industry, government agencies, Australian growers and exporters attending each event in Jakarta and Shanghai. These events were a great opportunity to reconnect directly with our customers and talk about the mutual value delivered by the Australian grain value chain, and how it is all built around confidence and trust.

AGIC Asia, including AGIC Roundtable Meetings with local industry and government agencies, demonstrates value and has resulted in tangible trade and market access outcomes.

GTA Training and Professional Development programs, are an important part of industry stewardship and the self-regulatory framework. These training programs provide professional development opportunities for industry participants to improve their skills and knowledge, and importantly increase industry capability.

August 2023 saw the launch of the GTA 'Five under 30' program. Created to assist, guide and recognise future leaders in the industry, and increase involvement of younger members in GTA activities. Each year GTA will select 5 young individuals as 'Five under 30' candidates and offer them

additional opportunities, mentorship and guidance. The key to GTA's existence and its success is and will continue to be based on the support and efforts of all the knowledgeable and skilled industry participants who volunteer their time and expertise as members of the various GTA Technical Committees, Sector Councils and Industry Working Groups, as well as the GTA Arbitrators. This drives our organisational, and our industry "can do" culture.

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

I wish to acknowledge the retirement from the GTA Board during this year of two long serving members in Jason Craig and Lyndon Asser. Their support, commitment and contribution to GTA and the Board is well recognised and I wish to sincerely thank them for their efforts.

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

Yours sincerely,

A handwritten signature in black ink that reads "Andrew Goyder". The signature is fluid and cursive, with a long horizontal stroke at the end.

Andrew Goyder
Chair - Grain Trade Australia

Our Vision

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

Our Mission

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

Our members

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

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

Our values

GTA will:

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

GTA - core tasks

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

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

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

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

- GTA 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.

GTA must:

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

Strategic Direction

PUBLICATION

- GTA Strategic Activity Plan 2023/24
- Environmental, Social & Governance Credentials - Alignment to UN Sustainability Goals
- Visual Recognition Standards Guide 2023-2024
- Arbitration Award Summaries
- 30 GTA Member updates
- 11 GTA Market notifications
- 11 Grain Matters editions
- GTA Fact Sheet revised - GTA Grain Trading Standards
- Emerging Technology Roadmap
- Grain Industry Stewardship Framework for New Technologies
- Reviewed and updated the GTA Safety Guidelines

ACTIVITIES

- 3 Conferences delivered - 3 face to face with virtual access
- 34 workshops delivered with 482 students
- 42 Technical Committee and Industry Working Group meetings
- 11 Industry submissions lodged
- AGIC Australia & Asia conference events
- Following the introduction of GTA's Environmental, Social & Governance Credentials developed:
 - Australian Grain Industry meeting UN Sustainability Goals
- Australian Grain Storage and Protection Conference
- GTA Advisory and Compliance Workshop
- Updated the Common Industry Varietal Code Master List and continued the review of industry Standard Data Formats and GTA receival site codes.
- Continued representing industry to the Treasury review into the 'quality of financial advice'
- Represented industry at the peak industry/government level:
 - Bulk Import of Grain & Meal Industry Consultative Committee
 - Grain and Plant Products Export Industry Consultative Committee
 - Wheat Port Code Review Reference Committee
- Reviewed the GTA Standard Form Contracts to ensure they comply with the substantial changes to the ACCC and ASIC regulation.
- Released the China Australia Strategic Grain Partnership Report with DAFF

Vital signs

Financial Performance

- Profit of \$625,511
- Equity of \$2,696,038
- 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

- 289 members on 30th June 2024 (2023:287)

Trade facilitation products and services

Trading Standards Committee

- Grain Trading Standards
- Revised AWW Cascade Rules
- Introduced a new Desi Chickpea grade - No.3
- Continued the review and discussion prior to supporting the proposal to introduce a new ASW grade - ASW9
- Annual Trading Standards review including a number of reviews including a continued focus on 'Nil Tolerance'
- Integrated the Pulse Trading Standards into GTA's suite of Trading Standards through the formation of a Pulse Sub-Committee. Integration included reformatting the Pulse Standards documents into the GTA format
- Review and publication of the Grains Australia Limited Wheat Varietal master list
- Released Trading Standards for Wheat, Barley, & other cereals following review
- Comprehensive review of the Visual Recognition Standards Guide (VRSG)
- Multiple Sub-Committees and Working Groups involved in ongoing reviews of various Standards issues including:
 - Wheat Dockage Review
 - Technology - Management of the Grain Assessment Technology Standard Project
 - New wheat Classes - ASW9 with a 9% protein minimum.
 - Consultation to Marine Surveyors Standard

Commerce Committee

- Contracts & Trade Rules

- Reviewed GTA Contracts - Changes to the Unfair Contract Regime
- Member Updates and Submissions on Location Differentials, Trade Rules and Standard Form Grain Contracts
- Location Differentials for 2023/24 season
- Considered Port Reform and GTA activity to position industry
- Provided input and direction into GTA activity and role on the industry Reference Group established to work with DAFF on the review of the Wheat Port Code
- Reviewed and made changes to the Grain Storage and Handling Agreement to clarify management of 'residue grain' in an insolvency
- Coordinated the industry process in the DAFF/industry discussion on protocols and arrangements for mandatory import country fumigation within the container supply chain
- Reviewed and considered a submission to introduce a demurrage system for road transport to incentivise better performance and efficiency
- The Committee discussed Track Pricing notification issues and provided GTA assistance with education material
- Reviewed and provided direction to proposed changes to the port services arrangements due to a Australian Institute of Marine Surveyors Guidance Note

Trade & Market Access Committee

Consult with and advise industry & Government on:

- Finalised and closed the China Anti-Dumping Investigations and Countervailing Duties on Australian Barley Exports
- Active engagement with India and Government into the India -Australia Strategic Grain Partnership
- Submission supporting AI-CECA and meaningful market access outcomes and a Most Favoured Nation status
- GTA engaged with Pulse Australia to produce technical webinars relating to grain quality, market arrangements and grain treatment
- Submission into the Productivity Commission review of Vulnerable Supply Chains
- Advocated to Government seeking funding for trade programs and the DAFF Agricultural Counsellors
- Engaged with industry to progress State or Port Zone samples that are deemed "representative" of the grain to be exported to reduce exporters cost
- Developed a draft best practice communication process for the dissemination of critical MRL changes

- Continued work on tolerances for Quarantine Contaminants
- Continued focus on Non-Tariff Measures (NTMs) Report and regional initiatives
- Input into the APVMA Review and redesign
- Provided submission into the DAFF SE Asian Strategy and key input into the China-Australia Strategic Grain Partnership
- Engaged in the review of Sustainable Funding of DAFF
- Continued focus on Port reform
- Environmental Social and Governance Credentials and GHG reporting
- China GACC Regulation changes - Sorghum Import Permits
- WTO - Global Food Security and Grain Trade forum
- IGC Conference
- Presentation to IGC General Assembly session
- National traceability strategy
- Input into the GTA Technology Stewardship Framework

Transport, Storage & Ports Committee

- Government and industry project to review bulk vessel inspections
- Provided grain industry input into the National Heavy Vehicle Regulator review of the Transport Master Code
- Review and input into the DAFF procedures for the import of whole grain and protein meals
- The Committee reviewed the proposed changes to the GTA Safety Guidelines and endorsed the changes
- Supply chain consideration of new wheat classes.
- Provided input into several supply chain reviews including a Grain Growers Limited Supply Chain Review and the next version of the AEGIC Supply Chain Review
- Ongoing focus to review operational supply chain issues associated with the current large export programs
- Provided direction to GTA's activities into the ongoing container terminal fees and Port Reform
- Engaged and provided input into a Submission - Australian Govt Maritime Fleet
- Managed the implementation of changes to the process for import country mandatory fumigation of grain
- Stewardship of the GTA/DAFF joint project - Storage Assets & Management Standard (SAMS)
- Response to the National Freight and Supply Chain Strategy
- Response to the Performance of Air and Maritime Logistics Systems

Plant Breeding Innovation Committee

The Committee addressed the following key issues:

- Developed and released the Grain Industry Technology Stewardship Framework for Technology
- Considered GM wheat developments and the potential trade and supply chain impacts
- Response to Proposed Changes to Explanatory Notes on Essentially Derived Varieties under the UPOC Convention
- Ongoing response to FSANZ Proposal P1055 - Definitions for Gene Technology and new Breeding Techniques
- Global Initiative on Low Level Presence (GLI)
- Ongoing monitoring and input into the EU direction - Green Deal
- Response to the EU Public Consultation on Plants Produced by Certain New Genomic Techniques

Information Technology Advisory Committee

The Committee has progressed work on:

- Industry Standard Reference Data for all major data codes including the provision of standardised receival site codes
- Common Industry Varietal Code Master List for 2023/24
- Forum for discussion on data security
- Developed and released the Grain Industry Technology Roadmap
- Alignment to international groups and goal of harmonisation of process and transactions
- Input into the GTA/DAFF joint project Grain Storage Assets & Management Standard (GSAMS)
- DAFF system consultation including PEMS, NexDocs & e-Phyto
- Facilitating technology improvements and adoption in the supply chain including Industry Government Collaboration on Digital Image Analysis
- Provided the Information Technology input into the development of the Grain Industry Technology Stewardship Framework for Technology
- Discussed and engaged on the transactional and system issues associated with a proposed government Biosecurity Levy
- Released an Industry Call for Consult on IT Initiatives

GTA Training & Development Program

- Training continued face to face and via Zoom
- GTA held 34 courses, with 482 students (115 of these participated in the online training modules - Chain of Responsibility and Grain Sampling)
- 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

Industry support services conducted by GTA

Australian Grain Industry Code of Practice (Code)

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

National Working Party on Grain Protection (NWPGP)

- The primary industry body responsible for providing management and leadership to industry in the areas of post-harvest storage, chemical use, market requirements and chemical regulation
- 51st National Grain Storage and Protection Conference held in June 2024
- Continued GTA administrative support of the NWPGP
- Publication of the Australian Grain Industry Post Harvest Chemical Usage Recommendations and Outturn Tolerances 2023/24

Advocacy

DOMESTIC

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

- Australian Seed Federation
- Pulse Australia
- Australian Oilseeds Federation
- Grains Australia
- National Farmers Federation
- GRDC
- Grain Growers Limited
- Grain Producers Australia

INTERNATIONAL

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

MEMBER

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

Presentations

DOMESTIC

- Australian Grain Industry Conference, *Opening Address*, July 2023
- Australian Grain Industry Conference, *Closing Address*, July 2023
- Grains Industry Association of Victoria, *GTA Activities and Update*, several 2023/24
- Grain NSW, *GTA Activities and Update*, several 2023/24
- Numerous (348) stakeholder meetings, briefings to members, broader industry, government and their related agencies
- Australian Grain Storage & Protection Conference, *Opening Address*, June 2024

INTERNATIONAL

- International Grains Council Conference June 2024
- Indian Dairy Industry Delegation August 2023
- Global Grain Conference Geneva 2023
- South Korean Delegation December 2023
- APEC, Best Practices and Applications of Digitalization and Innovation in Food Supply Chain, Dec 2023
- AGIC Asia 2024 , Reconnecting & Building Value International Grains Council General Assembly, June 2024
- In-bound trade delegations (India, China, Bangladesh, Sth Korea)

Submissions

SUBMITTED TO	TOPIC
Govt Committee	Review of the National Freight & Supply Chain Strategy
Govt Committee	Inquiry into the Australian Government's approach to negotiating Trade & Investment agreements
NHVR	Heavy Vehicle National Law (HVNL) Consultation Regulation Impact Statement (CRIS)
The Treasurer	Protecting Consumers from Unfair Trading Practices
DAFF	Agriculture & Land Sectoral Plan
DAFF	Wheat Port Code Review
DITRD	Strategic Maritime Fleet Policy
Senate Committee	Agriculture (Biosecurity Protection) Levies Bill 2024 and related bills
DAFF	Cost Recovery Implementation Statement: Plant Export Certification
Senate Committee	Role of Australian Agriculture in Southeast Asia Markets
Standing Committee	Inquiry into the Understanding and Utilisation of Benefits under Free Trade Agreements



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

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

GTA, with its member driven Technical Committees 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 *Modernisation the grain supply chain strategy* continues to be regularly reviewed and to evolve to meet industry needs.

The Strategic Growth Pillars are:

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

Investment in the grain supply chain and 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 a large portion 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 system wide operational efficiencies on their own. There are several reasons for this including:

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

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



Storage Asset and Management Standard

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

The project has completed its discovery and a pilot phase and is now focussed on the design of an assurance system that will provide surety and confidence in the Standard. The voluntary framework will aim to deliver efficiencies to industry and may include, but is not limited to, the adoption of emerging technologies, innovative assurance methods and more industry efficient regulation. The Standard will allow farm-based and commercial storage assets and their operation to be integrated into an industry driven quality assurance system in the export (and domestic) supply chain thus reducing industry exposure to risk and reputational damage and better reflect export requirements.

Grain Assessment Technology Standard & Supporting Framework

Australia is operating in a globally competitive environment which means industry and governments must continue to innovate to remain competitive and maintain our good trade reputation. Part of this includes digitising agricultural supply chains, including digital image analysis technology for the assessment of grain. GTA through the work of its Technology Sub-Committee have identified an urgent need to develop an industry Standard called the Grain Assessment Technology Standard (the Standard) and a broad supporting framework which will cater to:

1. DAFF biosecurity certification requirements; and
2. as part of the assessment of grain for quality segregation purposes and food safety.

The replacement of the subjective human element and the reduction in costs associated with manual grain assessment tasks and inconsistencies they bring is achievable and will benefit the broader value chain in meeting industry quality requirements and Government biosecurity and phytosanitary requirements.

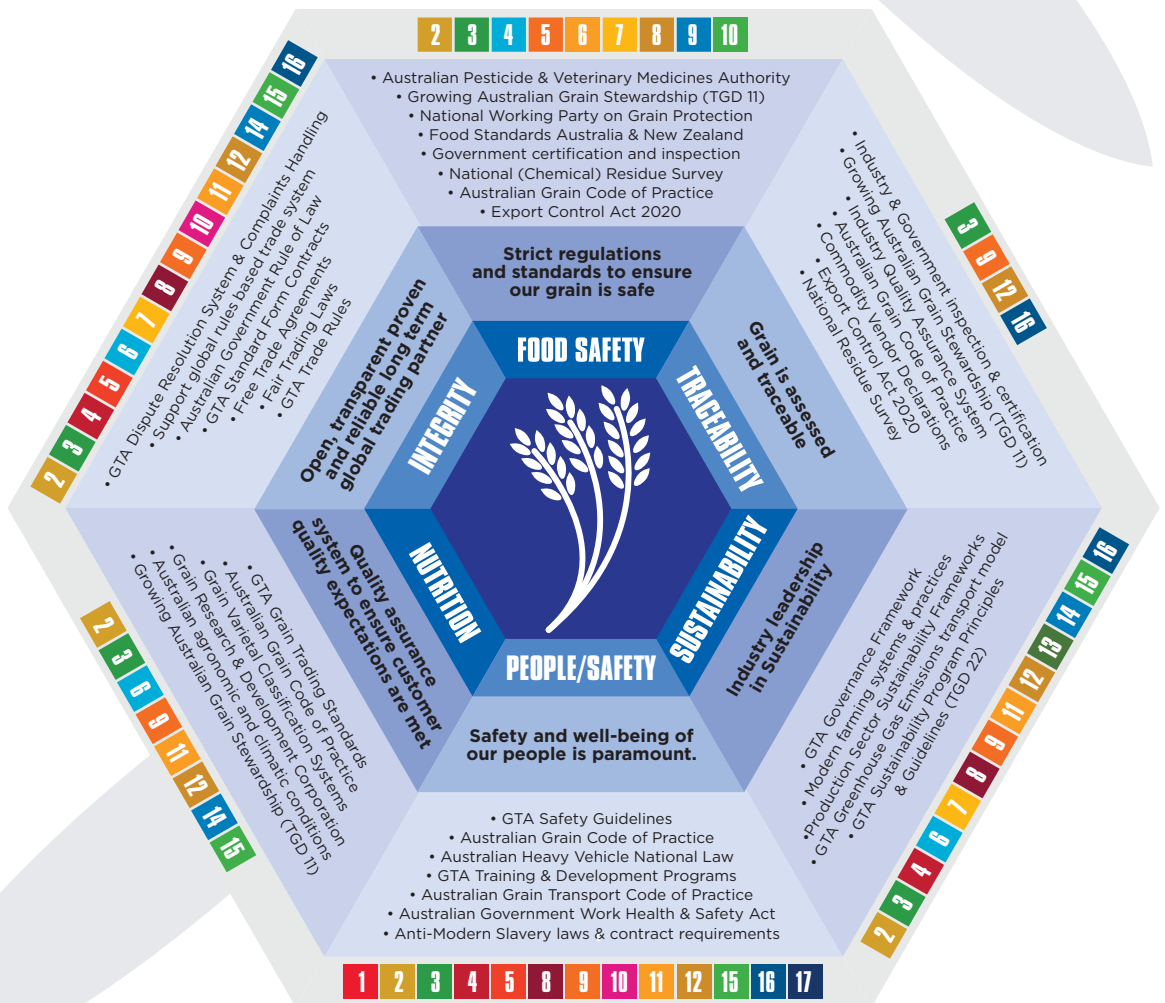


ESG Statement

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

Background

- The world's dynamic climate, political and population situation places a sharp focus on agriculture and its social licence.
- In response, driving efficiency and sustainability in the grain value chain is both an ongoing challenge and opportunity for industry participants.
- Our customers increasingly have an expectation that grain is produced in accordance with social, environmental and community concerns and meets overseas country regulations and the consumer needs and expectations. This trade is mutually beneficial to both Australia and the consumers in the importing countries.
- We must continue to deliver a safe premium product that meets domestic and importing country regulations and customer demands. It is important we continue to strive to understand the expectations of our customers and their customers and stakeholders.

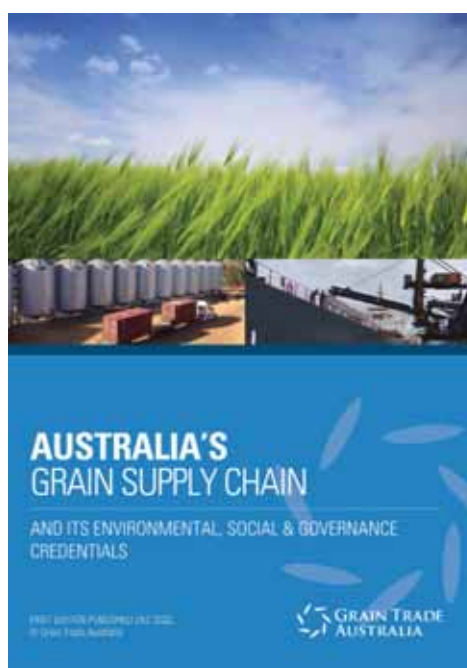


- Australia's grain value chain actively and collaboratively engages with the Australian Government with a focus on continuing the self-regulatory framework, accredited processes and practices, innovative and efficient technologies and minimal waste, whilst respecting and protecting the environment and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

foundations around the Sustainability are summarised in the table below.

Customer Priority	GTA / Industry Foundation
Price	GTA Contracts, Trade Rules, Dispute Resolution
Food Safety	Code of Practice cl, MRLs (TGD 15), NWPGP, APVMA, NRS (TGD 20), Grower Guide (TGD 11), Govt Inspection
Traceability	Code (1 back/fwd), stock selection, sampling & testing (TGD 21)
Nutrition (Quality)	Trading Standards, Classification, strengths Aust grain, RD&E, Grower Guide (TGD 11)
Human/Safety	Code of Practice, GTA Safety Guidelines, OHS Laws, COR, Training & Development
Sustainability	GTA Sustainability Program Principles & Guidelines (TGD 22), SGA

- Australia's ESG story has been captured in the GTA document - *Australia's Grain Supply Chain and its Environmental, Social & Governance Credentials*.
- This work has been expanded to include a review of the Australian grain industry capability in meeting the *United Nations Sustainability Goals*.
- GTA has provided its members guidance material and a table representing Green House Gas emissions with land-based grain transport.
- The ESG direction and tools have been developed through a member driven approach and consultation.



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

Andrew Goyder

Non-Executive Director, Chair

BOARD APPOINTMENT

EXPERIENCE AND EXPERTISE:

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

SPECIAL RESPONSIBILITIES:

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



Geoffrey Farnsworth

Non-Executive Director

BOARD APPOINTMENT

QUALIFICATIONS:

Bachelor of Law, Bachelor of Arts

EXPERIENCE AND EXPERTISE:

Partner - Holding Redlich

SPECIAL RESPONSIBILITIES:

Chair of Transport, Storage & Ports Committee, Chair of the Dispute Resolution Service Committee, Deputy Chair of Commerce Committee, Member of Environment, Social & Governance Committee, Member of Membership Committee



Michael Wood

Non-Executive Director

MERCHANT ASSOCIATION NOMINATION

QUALIFICATIONS:

Diploma Applied Science (Agriculture)

EXPERIENCE AND EXPERTISE:

Michael has been an active member of the Australian Grains Industry for 30 years. He is the Managing Director of Melbourne-based grain trading and logistics company, Rural Logic Founding Manager (1990) of Stockfeed company James & Son for 10 years. Aust Barley Board Victorian State Manager (5 years) and Grains Manager IMCA Malting Company (2005/2006). Former President of Grains Industry Association of Victoria and has remained on the Committee since 2005.

SPECIAL RESPONSIBILITIES:

Chair of Commerce Committee, Member of Trade & Marketing Access Committee, Member of Dispute Resolution Service Committee, Member of Environment, Social & Governance Committee.



Robert Imray

Non-Executive Director

MERCHANT ASSOCIATION NOMINATION

QUALIFICATIONS:

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

EXPERIENCE AND EXPERTISE:

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

SPECIAL RESPONSIBILITIES:

Chair of Audit, Finance and Remuneration Committee, Chair of Plant Breeding & Innovation Committee



Simon Tickner

Non-Executive Director

BOARD APPOINTMENT

QUALIFICATIONS:

Master of Agribusiness, University of Melbourne, GAICD

EXPERIENCE AND EXPERTISE:

Simon is the owner of a dry land, broad acre grain farming enterprise, Yellow Grain Pty Ltd based in the Wimmera, Victoria. Simon has extensive knowledge of modern agronomic production systems, which focus on profit, risk management and sustainability, operating in a highly variable climate.

SPECIAL RESPONSIBILITIES:

Deputy Chair of Standards Committee, Member of Commerce Committee, Member of Membership Committee, Member of Environment, Social & Governance Committee.



Ole Houe

Non-Executive Director

ORDINARY LEVEL B NOMINATION

QUALIFICATIONS:

BA in Economics - Denmark, BA in International Business - London, Masters of Applied Finance from Kaplan, MBA-AGSM, Sydney, GAICD

EXPERIENCE AND EXPERTISE:

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

SPECIAL RESPONSIBILITIES:

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



Simon Gellert

Non-Executive Director

ORDINARY LEVEL A NOMINATION



QUALIFICATIONS:

Bachelor of Agricultural Science, Bachelor of Business (International Finance), Masters in Applied Finance and completed Australian Institute of Company Directors course - GAICD

EXPERIENCE AND EXPERTISE:

Simon started his career in the Australian grains industry in 2006 and has held various roles in accumulation, logistics and domestic and international trading. Simon is currently the Grains Trading Manager for Viterra in Australia and New Zealand and has been a member of their Executive team since 2019. Actively involved in various industry groups with a strong focus on wheat, Simon previously sat on the WQA Wheat Council and is a current member of the GIWA Wheat Council since 2018.

SPECIAL RESPONSIBILITIES:

Member, GTA Commerce Committee, Member of Audit, Finance & Remuneration Committee, Member of AGECC Sector Council

Michelle Kerr

Non-Executive Director

ORDINARY LEVEL C NOMINATION



QUALIFICATIONS:

DipAppSc(AgServ) The University of Melbourne

EXPERIENCE AND EXPERTISE:

Michelle Kerr is an Executive Officer at Riordan Grain Services. Michelle worked at Riordan Grain Services since 2004 across numerous divisions within the business. Michelle is a former committee member and former treasurer of the Grains Industry Association of Victoria (GIAV) and is a company arbitrator.

SPECIAL RESPONSIBILITIES:

Chair of Standards Committee, Member of Dispute Resolution Service Committee, Member of Audit, Finance & Remuneration Committee.

Matthew Kelly

Non-Executive Director, Deputy Chair

MERCHANT ASSOCIATION NOMINATION



QUALIFICATIONS:

DipAppSc(AgServ) The University of Melbourne

EXPERIENCE AND EXPERTISE:

Matthew is the CEO and a Director of KM WM Kelly & Sons a four generational grain merchant and storage family business based in the Southern Riverina of NSW. He has been involved in the grains industry for over 25 years and held a wide range of positions from Grower Accumulation, Storage, Logistics and Trading.

SPECIAL RESPONSIBILITIES:

Member of Membership Committee, Member of Dispute Resolution Service Committee, Member of Grain Standards Committee, Member of Transport, Storage & Port Committee.

Brianna Peake

Non-Executive Director

ORDINARY LEVEL A NOMINATION



QUALIFICATIONS:

Advanced Management Program, Harvard Business School, Graduate of the Australian Institute of Company Directors, Fellow of the Australian Rural Leadership Foundation, Bachelor of Science in Natural Resource Management, Graduate Certificate in Corporate Finance

EXPERIENCE AND EXPERTISE:

Brianna has a strong affiliation with the agriculture and regional development sectors, growing up in the Wheatbelt of Western Australia, and with over 20 years' experience in the industry. She is currently the Chief of Stakeholder Relations, Sustainability, and Strategy at the CBH Group; Australia's largest grain exporter and grower-owned co-operative, with a supply chain that spans the grain-growing regions of Western Australia. In this role, she manages the Group's reputation and relationships with its grower members, Government, industry, and the communities in which it operates, as well as the Group's sustainability and strategy portfolios. She is also a Commissioner on the Lotterywest Board and a General Councillor of the Chamber of Commerce and Industry WA.

SPECIAL RESPONSIBILITIES:

Chair of Trade & Market Access Committee, Member of Membership Committee, Member of Environment, Social & Governance Committee

Richard Perkins

Non-Executive Director

ORDINARY LEVEL B NOMINATION



QUALIFICATIONS:

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

EXPERIENCE AND EXPERTISE:

Richard Perkins has been working in the Australian grains industry for a range of Australian and international trading companies for over 20 years. Richard hails from Walgett in Northern NSW and began his career with Agracom before moving to Melbourne with a European company managing the export trading of grains and oilseeds. He then helped set up the Australian trading arm of US Based Co-op CHS where he finished as the Trading Manager before moving to Market Check where he oversaw the grower advisory team and growth strategy of the business. Richard is currently the Managing Director of Greenoaks Agriculture, a grain marketing consultant and broker working with a range of participants along the grain supply chain.

SPECIAL RESPONSIBILITIES:

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

GTA TECHNICAL COMMITTEES

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

GTA operates the following Technical Committees comprised of industry personnel:

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

Charter for the GTA Technical Committees

The Charter for the GTA Technical Committees is composed of:

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

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

Key points for GTA Technical Committees

- GTA is reliant on its Technical Committees to review and develop GTA's commercial resources.
- GTA Technical Committees are skills based.
- All Technical Committee votes require a 2/3 majority.
- The Committee structure allows members to raise issues and opportunities that may impact their commercial operations and lead to industry consensus on contracts, Trade Rules, grain Trading Standards, market access issues, systems and industry processes.
- GTA calls for members to nominate to the Technical Committees each year. The GTA Board approves Committee members nominations based on the applicant's technical competency mindful the Committees aim to have representation from:
 - sectors across the grain supply chain
 - large and small organisations; and
 - all major grain production/trading states
- All Committees are chaired by a GTA Director with a second Director as Deputy Chair
- GTA Committee members agree to participate for the benefit of all members and commit to represent the interests of the industry as opposed to a private or public organisation
- All Committee members agree to be bound by the Committee Terms of Reference and the GTA Anti-competitive Clause as tabled on the agenda at all meetings

Objectives

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

The Committee revised the AWW Cascading Rules, introduced a new ASW Grade (ASW 9), and also introduced a new Desi Chickpea No. 3 grade.

Following a thorough review, the Visual Recognition Standards Guide (VRSG) was extensively updated for the 2023/24 season to provide greater clarity to industry on the definition and interpretation of defects as outlined in each commodity Standard.

The proposed new ASW introduction of the new grade, ASW9 involved extensive industry engagement. The Committee and a GTA Working Group reviewed and consulted with industry to determine the value proposition in establishing the new ASW grade. The findings indicated the rationale of the value for the new grade was to ensure ASW above 9% is segregated and marketed separately.

A number of research projects associated with Trading Standards were continued. These included developing a Framework to assess new technology to assess grain quality parameters, and continued engagement in a research project to verify the validity of sampling loads of grain tendered for delivery against Trading Standards.

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

Trading Standards Committee Activities

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

During 2023/24, the Committee undertook its annual review of the GTA Trading Standards, calling for industry submissions through two rounds of consultation. A number of Sub-Committee meetings were held to consider specific issues identified for review during that submission process. The Committee assumed responsibility for management of the pulse Trading Standards previously undertaken by Pulse Australia.

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.

ATTENDANCE - TRADING STANDARDS COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Michelle Kerr	Chair - GTA Director	4	3
Simon Tickner	Deputy Chair - GTA Director	4	4
Matt Kelly	Deputy Chair - GTA Director	4	2
Matthew Madden	Grain Producers Australia	4	3
Gerard McMullen	GTA Technical Consultant	4	2
Vince Moroney/Clair Shadbolt	CBH Group	4	3
Cain McGregor	Cargill Australia Ltd	4	4
Julie O'Dea	Viterra Australia	4	4
Marcus Dingle	Hazeldenes	4	4
Mat Samin	GrainCorp Operations Ltd	4	4
Paul Panozzo	Allied Pinnacle	4	4
William Thompson	Emerald Grain	4	3
Sam Nelson	Grain Growers Ltd	4	2
Kyla Davie	CHS Broadbent	4	2
Justin Everitt	NSW Farmers	4	1
Joe Finch	Fletcher International Exports	4	2

Objectives

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

Commerce Committee Activities

The GTA Commerce Committee held several reviews during the 2023/24 year including:

- a major review of GTA Contracts to consider and implement changes to the Unfair Contract Regime.
- Considered container port reform and GTA activity.
- Work and industry discussion on Fumigation Protocols within grain contracts and trade rules
- Input into DAFF revisions of import country mandatory fumigation protocols in the container supply chain.

- Revised the GTA Grain Storage and Handling Agreement to clarify management of commingled and 'surplus grain' when a storage operator becomes insolvent.
- Input into GTA activity on the industry Reference Group established to work with DAFF on the review of the Wheat Port Code.
- A submission to introduce a demurrage system for road transport to incentivise better performance and efficiency.
- Reviewed Track Pricing notification issues and provided GTA assistance with industry education material.
- Direction to proposed changes to the port services arrangements due to an Australian Institute of Marine Surveyors Guidance Note.
- Continued the improvement of the Location Differentials process and procedures

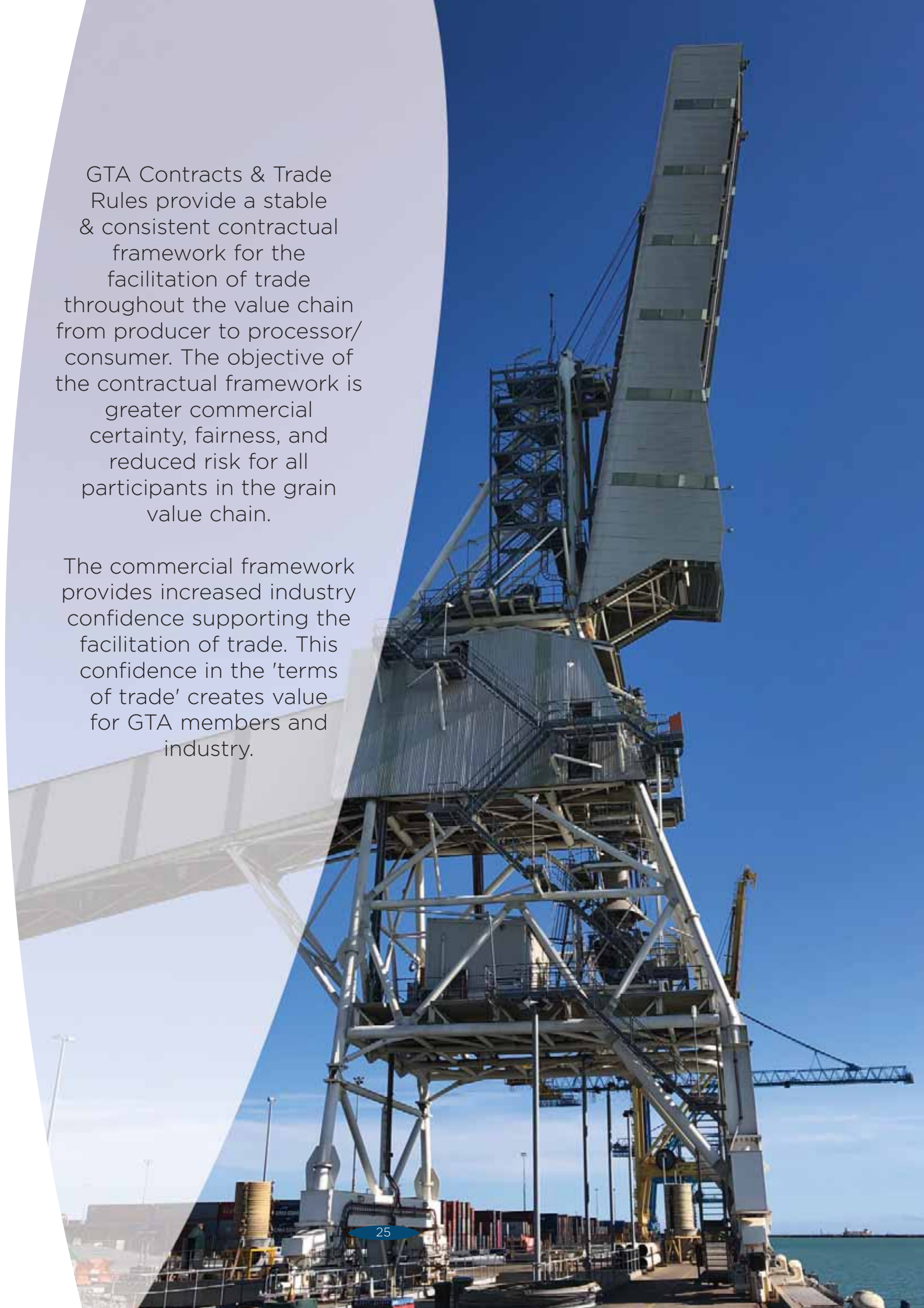
The GTA Commerce Committee reviewed and published Location Differentials for 2023/24, following the regular industry submission and consultation process and commenced preparation of the 2024/25 Location Differentials.

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

ATTENDANCE - COMMERCE COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Michael Wood	Chair - GTA Director	6	4
Lyndon Asser	Deputy Chair - GTA Director	2	1
Geoff Farnsworth	Deputy Chair - GTA Director	6	4
Simon Tickner	Deputy Chair - GTA Director	2	2
Simon Gellert	Glencore Agriculture	6	4
Richard Perkins	GTA Director	4	3
Nathan Cattle	Clear Grain Exchange	6	4
Michael Commadeur	Emerald Grain	2	2
John Payne	Cargill Australia Ltd	6	6
Colin Bettles	Grain Producers Australia	6	4
Reagan Stroud	Ridley Agriproducts	4	3
Stephen Howells	Ridley Agriproducts	2	0
Andrew Lang	Riordan Grain Services	4	3
Fiona Roycroft	Riordan Grain Services	2	2
Sean Cole	Grain Growers	6	5
Sam Batters	CHS Broadbent	6	5
Stephen Clarke	ADM Trading Australia	6	6
Joshua Lawrence	Ikon Commodities	6	5
Peter Levido	GrainCorp	6	5
Ben Tiller	CBH Group	6	3
Matt Clarke	Inghams	6	4
Erin Burns	George Weston Foods (Mauri)	6	4
Joe Finch	Fletchers International Commodities	4	4
Tim Crowe	LDC	4	3
Tom Smibert	Viterra	4	4
Peter McMeekin	ETG	4	4
Edwina Cockburn	5 Under 30 Observer	3	3
Cooper Vinci	5 Under 30 Observer	2	2

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

The commercial framework provides increased industry confidence supporting the facilitation of trade. This confidence in the 'terms of trade' creates value for GTA members and industry.



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

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



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 and/or novel plant breeding innovation.
- Maintain, review, and utilise as required the Grain Industry Stewardship Framework for New Technologies and the Market Choice Framework for GM Crops Utilise the Stewardship Framework for New Technologies and 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 and/or novel plant breeding innovation.
- Monitor developments in relation to plant breeding innovation and develop industry responses/policies as required.

ATTENDANCE - PLANT BREEDING INNOVATION COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Rob Imray	Chair - GTA Director	2	2
Simon Gellert	Deputy Chair - GTA Director	2	0
Rosemary Richards	GTA Consultant	2	1
Tristan Coram	Australian Grain Technologies	2	1
Duncan Young	Grain Producers Australia	2	0
Sam Nelson	Grain Growers Ltd	2	2
Tresslyn Walmsley	Intergrain	2	2
David Hudson	SGA Solutions	2	1
Nicholas Chambers	GrainCorp	2	1
Nick Goddard	AOF	2	2
Adrian Regianto	Cargill Australia Ltd	2	2
Katherine Delbridge	Australian Seed Federation	2	1
Sonya Richard	AEGIC	1	1

Activities

- A major initiative developed across the Plant Breeding Innovation Committee and other Committees is the development of a Guidance Document (Stewardship Framework for New Technologies) that outlines a collaborative approach to the 'stewardship of new technologies' impacting the grain supply chain including the introduction of varieties using innovative plant breeding technologies. This will support the introduction and effective utilisation of technology and reduce risk of supply chain and market disruption including:
 1. Grain Assessment Technology
 2. Plant Breeding Technology
 3. Government Information Technology

The Committee has commenced the communication of this framework and initiative through engagement with the wider industry.

Key activities for the Committee were:

- Developed and released the Grain Industry Technology Stewardship Framework for New Technology
- Monitored GM wheat developments and the potential trade and supply chain impacts.
- Provided a response to Proposed Changes to Explanatory Notes on Essentially Derived Varieties under the UPOC Convention
- Ongoing response to FSANZ Proposal P1055 - Definitions for Gene Technology and new Breeding Techniques
- Ongoing monitoring and GTA member input into the EU direction - Green Deal
- Response to the EU Public Consultation on Plants Produced by Certain New Genomic Techniques

GTA and the Australian grain industry supports innovation as this has been a key contributor enabling the industry to deliver improved outcomes for growers and consumers. GTA works with the grain industry to ensure that it has access to and implements systems and processes to maintain choice and ensure that customer requirements in domestic and export markets can be met.



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

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



Objectives

- Foster communication on industry matters that relate to domestic and export 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 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 continued to engage and provide input into a joint Government, Shipping Australia, and the Australian Institute of Marine Surveyors project to review the processes and overlapping responsibilities of the separate commercial and government bulk vessels survey inspections.
- Provided input on behalf of the grain industry in the National Heavy Vehicle Regulator's review of the Transport Master Code.
- Input into and endorsed the review and update to the GTA Safety Guidelines guidance document.
- Supported GTA's participation and work on national container and port supply chain reform and the issues of poor performance in the container supply chain.

ATTENDANCE - TRANSPORT, STORAGE & PORTS COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Geoff Farnsworth	Chair - GTA Director	5	5
Jason Craig	Deputy Chair - GTA Director	1	0
Matt Kelly	Deputy Chair - GTA Director	5	5
Michelle Kerr	GTA Director	1	1
Andrew Weidemann	Grain Producers Australia	5	2
Craig Dennis	Network Grains	5	2
Travis Anderson	Emerald Grain Limited	1	0
Mark O'Brien	George Weston Foods Ltd	2	2
Jock Carter	Quattro Ports - Newcastle	4	0
Annabel Mactier	Grain Growers Ltd	5	4
Alister Boyd	Cargill Australia	5	4
Derek Robjohns	Viterra	5	4
Josh Connell	GrainCorp	5	4
Michael Broadbent	CHS Broadbent	5	2
Morne Van Wyngaard	CBH Group	5	2
Matt Clarke	Inghams	5	5
Josh Lawrence	NSW Ports	5	5
Scott Merson	Rain Agribusiness	5	4
Joe Masters	Fletchers International Export	4	3
Ben Redway	LDC	4	3

- Provided input and guidance into the joint GTA and Government project to simplify the procedures and the timeline for the import of whole grains and plant protein meal.
- Provided input into several industry supply chain reviews and initiatives.
- Engaged with DAFF and managed the discussion of changes to the process for import country mandatory fumigation of grain in the container supply chain.
- Stewardship of the GTA/DAFF joint project - Grain Storage Assets & Management Standard (GSAMS).

During 2023/2024 the Transport, Storage & Ports Committee continued to provide industry, GTA members, other Technical Committees and GTA Board technical guidance on issues of relevance from a grain supply chain perspective.

This reporting period has included a further year of strong production and export shipping. The massive export program and a wide range of weather impacts has created challenges for GTA members. The Committee provided a focal point and a forum to discuss and review and consider remedies to operational supply chain issues associated with the large export program.

Government transport strategy and its process and procedures are critical in the development and efficiency of the grain supply chain. GTA and the Committee continue to seek opportunities to engage with Government and in 2023/24 participated in a number of supply chain focussed projects including the development of a Grain Storage Assets and Management Standard, the continuation of a review of the ship survey and inspection processes for bulk vessels and an ongoing review of the process to import whole grain and plant protein meal.



Objectives

- Proactively manage trade and market access issues impacting the sector.
- Advance independent, fact-based dialogue and advocacy for members and industry stakeholders. Engage with members to prioritise trade and market access issues and promote the positioning of grain industry issues with the Australian Government and in international forums.
- Support and where applicable shape federal and state government's efforts to ensure that trade is not impacted by technical barriers that may arise in global forums such as the WTO, IPPC, FAO, CODEX, in trade agreements, through country actions, and/or via state based legislative actions.
- GTA's trade and market access strategy seeks to develop domestic and global policies and approaches to position the industry to take advantage of trade opportunities, minimise impacts and constraints to trade, and enable trade to continue in an efficient and equitable manner.
- Focus on improved market access outcomes for its members and the grain industry encompassing new access opportunities, improved access arrangements and maintaining existing market access.

Trade & Market Access Committee (TMAC) Activities

The TMAC engages and provides input across a broad range of trade and market access opportunities and deals with issues to support GTA activities in this area. Further information about GTA Trade and Market Access activities is provided in a separate section of this Annual Report.

Key activities for the Committee across the year included:

- Consultation and feedback to Government on:
 - Free Trade Agreements - consultation, input and submissions into several FTA's and FTA reviews, including Indonesia, China, India and the EU .
 - Active engagement with India and Government to promote and support the India-Australia Strategic Grain Partnership.
 - Continued focus on the implementation and extraction of grain industry value from the Indonesia/Australia Comprehensive Economic Partnership Agreement (IA-CEPA).
 - AGVET Review - The Committee continues to provide support to GTA in activities relating to the Government review of the pesticides and veterinary medicines regulatory system in Australia. GTA will continue its advocacy to ensure Government note industry concerns with several of the Reviews proposals.

ATTENDANCE - TRADE & MARKET ACCESS COMMITTEE MEMBERS

NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Jason Craig	Chair - GTA Director	1	1
Brianna Peake	Chair - GTA Director	4	4
Lyndon Asser	Deputy Chair - GTA Director	2	1
Michael Wood	Deputy Chair - GTA Director	6	4
Richard Perkins	GTA Director	2	1
Simon Gellart	GTA Director	4	3
Rosemary Richards	GTA Consulatan	6	4
Ian Desborough	Australian Grain Exporters Council	6	5
Adrian Reginato	Cargill	6	5
Peter Nash	Grain Industry Association of WA	6	5
Annabel Mactier	Grain Growers Ltd	6	4
Courtney Draper	Australian Export Grains Innovation Centre	6	5
Kellie Todman	CBH Grain	2	2
Rob Dickie	CBH Grain	4	3
Sean Barker	GrainCorp	2	1
Harry Notaras	GrainCorp	4	4
John Ackerman	Grains Australia Ltd	6	4
Nick Goddard	Australian Oilseeds Federation/Pulse Aust	6	4
Julie O'Dea	Viterra	6	4
Gerard McMullen	National Working Party on Grain Protection	6	4
Joshua Lawrence	Ikon Commodities	6	3
Carl Hinze	Holding Redlich	5	5
Scott Merson	Rain Agribusiness	6	3
Joe Finch	Fletchers International Exports	4	3
Tim Crowe	LDG	3	3
Jess Kirkpatrick	5 Under 30 Observer	4	3
Tessa Bevilacqua	5 Under 30 Observer	4	2

- China - engaged and provided input into a re-setting of the China - Australia trade relationship post the cessation of the Anti-Dumping (AD) and countervailing duties (CVD) investigation by China against Australian barley exports. Strategies included the establishment of the China-Australia Strategic Grain Partnership. Ongoing monitoring of the Wheat and Barley Protocol Industry Management Plan, management of quarantine pests of concerns, review of the changes to China's GACC regulations regarding grain storages and maintaining relationships with the China grain sector.
- Continued the development of a Sustainable and diversified Market Portfolio. This included the Committee working on the strategy to develop an India-Australia Grain Strategic Partnership, an initiative to bring together Indian and Australian decision makers from government and industry to foster relations and maximise opportunities for collaboration to advance shared interests and activities of mutual benefit to both countries.
- Provided input and direction into the *GTA Environmental, Social & Governance Credentials* alignment to the UN Sustainability Goals.
- Promoted at international forums the importance of trade in dealing with Global Food Security consequences such as the Russian/Ukraine conflict.
- Continued to promote and communicate to Government and other stakeholders on the damage to trade and grower returns from Non-Tariff Measures (NTM).
- Engagement with GTA members and industry on:
 - NRS outcomes and participation
 - Adopting a "Grain Industry Stewardship for New Technologies" an information sharing approach for the impending release of new technologies, grain classifications and varieties to ensure the seamless introduction of new plant breeding outcomes by understanding, considering and discussing market access and supply chain implications.
- Input into SPS issues across a number of markets.
- Submissions to the Productivity Commission review of Vulnerable Supply Chains and into the Government SE Asian Strategy.

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

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



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

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

Objectives

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

Information Technology Advisory Committee Activities

ITAC had several areas of focus during the 2023/24 year including:

- Provided the Information Technology input into the development of the Grain Industry Technology Stewardship Framework for New Technologies.
- Engaged with industry to derive a common position on the transactional and system issues associated with the proposed Government biosecurity levy.
- Continued a review of the introduction of industry Standardised Reference Data including naming conventions and code nomenclature for

standard items. This included the annual review and release of the Common Industry Varietal Code Master List and the establishment of common data codes for all receipt sites listed in the GTA Location Differentials, Port Codes, Port Zones and Site Codes.

- Released to industry the '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, processes and data security issues. The importance of this role is increasing as technology advances towards improved inter-connectivity to improving collaboration and efficient engagement between countries and between companies.
- Facilitating industry and Government collaboration on digital image analysis for grain assessment and government certification.

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

The Committee continues to be the focal point for progress on modifications to the DAFF Management Systems (PEMS) the upgrade to the legacy export trade systems EXDOC, and the introduction of electronic phytosanitary certificates. This Committee and other GTA Technical Committees will continue to provide assistance and input into these important government initiatives.

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

ATTENDANCE - INFORMATION TECHNOLOGY ADVISORY COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Richard Perkins	Chair - GTA Director	3	3
Ole Houe	Deputy Chair - GTA Director	3	3
Nathan Cattle	Clear Grain Exchange	3	1
Ian Dalgleish	Rise Agri	3	2
Sam Nelson	Grain Growers Ltd	3	2
Emma Weston	Agridigital	3	3
Darren Douglas	Cargill	3	1
Ian Sproul	CBH Grain	3	0
David Houghton	AgRisk	3	3
Jay Holland	National Grower Register	3	2
Julie O'Dea	Viterrra	3	3
Michael Shanahan	5 Under 30 Observer	3	2



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

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

GTA SECTOR COUNCILS

A foundation for success for all is a strong and robust industry. GTA recognises the ongoing importance of industry groups, associations and organisations coming together to strive for broader industry benefit.

In its role to 'facilitate trade' GTA provides governance and support to specific market sectors and existing industry groups through the Sector Council model.

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

Charter for the GTA

The Charter of GTA Sector Councils is composed of:

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

Key points of the GTA Sector Councils

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

AGEC

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

AGEC focuses on matters with operational risk and commercial impact.

Objectives

- Act as an advocate and provide leadership for the Australian grain export sector.
- Monitor local and international grain environments and policies and develop appropriate responses for the Australian grain industry where required.
- Where required assist GTA to liaise and collaborate with industry supply chain organisations and/or government in developing appropriate responses to developments in local and international grain environments and policies.
- Promote and encourage, (within a framework of free enterprise, facilitation of trade within Australia and internationally) the production, distribution, processing and marketing of grain both domestically and overseas.
- Assist and promote just and equitable trading relationships and discourage and oppose all types of restrictive trade practices.
- With a view to protecting the rights of (or assisting generally) exporters of grain, monitor and investigate existing and proposed legislation, rules or ordinances in Australia and internationally that may affect the Australian grain industry and make recommendations to address concerns.
- Engage with stakeholders to encourage increased efficiency and productivity in the Australian grain industry while also encouraging increased respect, understanding and cooperation with all parties in the grain supply chain.
- Communicate the views and policies of the Council through the executive committee developing submissions, presentations, participating in discussions and making comments as appropriate to industry associations, forums, government and media.





AGEC Activities

AGEC's inaugural and longstanding Chair, Lyndon Asser, retired from the role in October 2023 and was succeeded by Mark Lewis, with the members acknowledging Mr Asser's years of service, which included steering the merger of the Australian Grain Exporters Association into GTA, forming AGEC as GTA's first sector council.

AGEC had input into a broad range of export related issues during the year, as outlined below.

- Four meetings of the full AGECE membership, three by videoconference, one in-person.
- Presenters and topics addressed included:
 - DFAT, explaining the various actions taken since the April 2023 announcement of the MOFCOM review of China's barley tariffs.
 - Grains Australia, discussing market access topics and recent visits to China and India.
 - DP World, discussing industrial relations, charges and customer service at container terminals.

- Grains Australia, discussing market access topics for China, Mexico and Indonesia.
- DAFF, discussing export registered establishments and exporter management of contract execution.
- Grains Australia, discussing market access topics for India, biofuels, China and Indonesia.
- Australian Export Grains innovation Centre, presenting on the organisation's range of activities.
- Discussion on the Wheat Port Code review.
- Discussion on various issues related to the DAFF plant exports division, including finance, messaging to authorised officers, documentation for China, and the overall DAFF interest in traceability.
- Discussion on GTA activities on sustainability and visual imagery grain assessment.
- Participation in the Department of Agriculture Grains Industry Consultative Committee (GPPEICC).

ATTENDANCE - AGECE COMMITTEE MEMBERS			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Executive Committee			
Lyndon Asser	Chair until Oct 2023	3	3
Steve Bennett		4	3
Michael Cole-Sinclair		1	1
Simon Gellert	Appointed Oct 2023	2	2
Tim Henry		4	2
Mark Lewis	Chair from Oct 2023	4	3
Peter McMeekin	Elected Oct 2023	3	1
Sam Napier		4	4
Ben Tiller	Elected Oct 2023	3	2
Members			
	ADM	4	3
	AGE	4	0
	Arrow Commodities	4	2
	Bunge	4	4
	Cargill	4	4
	CBH	4	2
	CHS Broadbent	4	4
	COFCO International	4	3
	ETG World	4	2
	GrainCorp	1	0
	Louis Dreyfus	4	4
	Riordan Grains	4	4
	Riverina	4	3
	Viterra	4	4
	Wilmar Trading	4	0

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

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

Objectives

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

- Assist and promote just and equitable trading relationships and discourage and oppose all types of restrictive trade practices.
- With a view of generally assisting consumers of grain, monitor and investigate existing and proposed legislation, rules or ordinances in Australia that may affect the Australian grain industry and make recommendations to address concerns.
- Investigate and develop actions as may be available against the implementation of unreasonable taxes or levies upon the use of grain.
- Engage with stakeholders to encourage increased efficiency and productivity in the Australian grain industry while also encouraging increased respect, understanding and cooperation with all parties in the grain supply chain.
- Communicate the views and policies of the Council through the executive committee developing submissions, presentations, participating in discussions and making comments as appropriate to industry associations, forums, government, and media.

Domestic Sector Council Activities

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

- Continued to progress a joint government and Sector Council Industry Consultative Committee and Working Group with the task of reviewing the process associated with the importation of whole grain and plant protein meal to seek efficiency and reduce the time from application to completion of the import permit process. This is a critical process as delays to imports during periods of low production can severely impact the domestic feed sector.
- Considered the impact on the domestic sector of new wheat classes and a proposed new ASW grade,
- Provided the domestic market input into the GTA ESG Credentials alignment to the UN Sustainability Goals.
- Reviewed and provided input into GTA projects the Grain Assessment Technology Standard and the Grain Storage Assets Management Standard.

ATTENDANCE - DOMESTIC CONSUMER SECTOR COUNCIL (EXECUTIVE COMMITTEE)			
NAME	ORGANISATION	MEETINGS ELIGIBLE TO ATTEND	MEETINGS ATTENDED
Andrew Goyder	Chair - GTA Director	1	1
Cameron Pratt	GrainCorp	1	1
Stephen Howells	Ridley Agriproducts	1	1
Matt Clarke	Inghams	1	1
Andrew McMaster	MSM Milling	1	1
Katrina Liston	Cargill Australia Ltd	1	1
Mark O'Brien	Mauri	1	1
Brett Duczmal	Allied Pinnacle	1	1
Dean Ganino	Barrett Burston Malting	1	0
Rosemary Richards	AOF	1	0

DISPUTE RESOLUTION SERVICE

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

GTA's Dispute Resolution Service, including the recently released Small Claims Arbitration service and arbitrations instil commercial confidence underpinning and providing surety of commercial contracts in the Australian grain industry. When contract performance is in dispute or delinquent there is a recognised process to seek financial compensation, ensuring contract integrity.

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

Arbitration summaries

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

A minute number of the estimated annual 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	2022/2023	2023/2024
No of arbitrations commenced	19	4
No of arbitrations settled		
• Awards released	4	3
• Commercially settled prior to hearing	10	3
Active arbitrations as at 30 June 2024	21	5

SUMMARY OF ARBITRATION AWARD OUTCOMES 2023/24:				
TYPE OF ARBITRATION	CLAIMANT	RESPONDENT	AWARD IN FAVOUR OF	NUMBER
Fast Track	Grain Trader	Grain Trader	Claimant	1
Fast Track	Grain Trader	Grain Trader	Respondent	1
Full	Grain Producer	Grain Trader	Respondent	1

SURNAME	FIRST NAME	ORGANISATION
Allen	Guy	Advance Trading Australasia
Basnett	Tom	AgRisk Management Pty Ltd
Barron	Graham	Grain Producer - NSW
Benecke	Lyndon	M C Croker
Benham	Jock	Robinson Grain
Brealey	Rob	Industry Consultant
Brittain	Michael	AGT Foods Australia
Burt	Steve	Industry Consultant
Carroll	Greg	M C Croker
Cattle	Nathan	Clear Grain Exchange
Clancy	Simon	Industry Consultant
Coventry	Charles	Broun & Co Grain P/L
Dalgliesh	Ian	Rise Agribusiness
Delahunty	Leo	Grain Producer - VIC
Dickie	Rob	CBH Grain
Dubey	Sanjiv	Grain Trend Pty Ltd
Fahy	Jack	Max Grains Pty Ltd
Fry	Julian	Viterra
Furse	Anthony	Robinson Grain
Goyder	Andrew	Grain Link WA Pty Ltd
Heinjus	Chris	Pinion Advisory
Houe	Ole	IKON Commodities
Howard	Peter	GrainTrend Pty Ltd
Howells	Stephen	Ridley Agriproducts
Imray	Robert	Farmarco
Jones	Michael	Grain Focus
Kelly	Matthew	KM&WM Kelly & Sons
Kerr	Michelle	Riordan Grain Services
Langtry	Gerard	Langtry Logistics
Lengren	David	Industry Consultant
Leong	Ervin	Unigrain Pty Ltd
Lewis	Mark	Riordan Grain Services
McMahon	Malcolm	Industry Consultant
McMullen	Gerard	McMullen Consulting Pty Ltd
McNair	Simon	Industry consultant

SURNAME	FIRST NAME	ORGANISATION
Mead	Andrew	ADM Trading Australia
Meyer	Stefan	Stone X Pty Ltd
Notaras	Harry	GrainCorp Operations Ltd
O'Brien	Mark	Industry Consultant
Orr	John	Premium Grain Handlers
Peace	Colin	Industry consultant
Perkins	Craig	Perkins Commodity Brokers
Pratt	Cameron	GrainCorp Operations Ltd
Reardon	Rebecca	Grain Producer - NSW
Schofield	Justen	AgLink CMS
Smibert	Tom	Viterra
Storey	Ron	Industry Consultant
Syme	David	Industry Consultant
Teague	Tim	Teague Australia Pty Ltd
Tiller	Benjamin	CBH Group
Tonkin	Chris	Ten Tigers
Torrens	Mark	Real Pet Food Co
Wells	Henry	Industry Consultant
Whitwell	Chris	Basis Commodities Pty Ltd
Wilsdon	Andrew	Viterra
Wilson	Pat	GrainCorp
Wood	Michael	Rural Logic

GTA Board Approved Tribunal Chairs

(Export Contract disputes and Small Claims only) as of 25 June 2024

These appointments are made by GTA

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

GTA BOARD APPROVED ARBITRATORS
as of 25 June 2024

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

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

GTA offers the following Training and Development Courses:

- GTA Trade Rules and Contracts
- GTA Grain Trading Standards
- Grain Merchandising
- Understanding Grain Markets
- Grain Trading for non-Traders
- Grain Finance & Risk Management
- GTA Arbitrators Workshop
- Grain Export Execution & Risk Management
- Advisory & Compliance Workshop
- Chain of Responsibility Program
- Code of Practice Assessment Program
- Grain Sampling Program
- Grower Workshop - Selling Grain using GTA Contracts
- In-House/customised training

As a part of its industry stewardship role, GTA offers specialist grain industry training and development courses specifically targeted at participants in the grain value chain, from producers, transport operators, storage providers, marketers, consumers and regulators.

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

During 2023/24 GTA held 34 courses, with 482 students (115 of these students participated in the online training modules - Chain of Responsibility and Grain Sampling).

The most popular courses are:

- Grain Trading Standards
- Grain Trading for Non-Traders
- 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.

The Grain Trading for Non-Traders course continued seeing great uptake in 2023-24, following its initial introduction in 2022-23. This 2-day workshop is designed for anyone starting in the grain industry as well as participants from other sectors looking to get a general understanding of the grain industry. This workshop gives a "bird eye view" of what you need to know about the grain industry and trading grain.

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

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

GTA Training & Development delivered the Advisory and Compliance workshop in July 2023. It focused on compliance and advisory issues, arbitration outcomes, AFSL issues, Competition law, insolvency issues during the pandemic, insurance industry issues and foreign currency and hedge correlations. These were delivered by highly respected presenters with specialist expertise in their fields.

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

In 2023-2024, in-house training programs saw a significant increase, providing participants with the flexibility and convenience of GTA workshops conducted at their own locations. This allowed large numbers of staff to benefit from the training without needing to travel or take extra time off work.

GTA has developed training and assessment programs to assist its members and industry participants in upskilling their staff and meeting the needs of the Australian Grain Industry Code of Practice. The Code Assessment Program is an on-line training tool comprising assessment modules in specific grain value chain pathways. The Code Assessment Program can be accessed through the GTA Website.

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

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

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

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



Strategic Approach

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

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

Policy Settings

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

Priorities

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

Technical Support

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

Consultation & Feedback

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

Fact Base

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

New & Improved Access

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

Collaboration

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

Management of trade and market access issues is critical for GTA members and all grain industry participants. The impacts of not proactively managing market access issues 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 reputation and important markets and the potential for lower prices to growers and higher prices for consumers.

Based on the severity of these impacts on its members, GTA continues to focus significant activity and effort into trade and market access. GTA is ideally placed to address these issues as it operates (and has practical insight) across the supply chain with access to its members commercial skills, experience, and capabilities. GTA acknowledges the work of other parties in relation to trade and



market access and works closely with GGL, Grains Australia, AEGIC and other stakeholders.

There is an increasing prevalence in the use of non-tariff measures (NTMs) by governments to impact and hinder trade. NTMs are requirements that countries apply to traded goods separate to ordinary customs tariffs. GTA works collegiately and proactively with industry stakeholders and the Australian Government to counter the growth of NTMs by supporting international standards that are based on sound science. Both industry and governments must work together to build and strengthen science-based trade.

GTA's trade and market access strategy is built around four pillars:

1. **Policy** - getting the policy settings right
2. **Advocacy** - in domestic and global forums
3. **Support** - technical and operational support
4. **Communication** - creating a collaborative and shared commitment to TMA activities

Practical Experience & Market Understanding

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

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

GTA has also been active across several other country trade opportunities in conjunction with AEGIC. The focus of this activity has been

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

promoting the Australian industry and its key strengths and how it can add value to these countries human consumption and animal feed industries.

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



International Linkages

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

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

GTA is a long standing and active member of the International Grain Trade Coalition (IGTC), serving on the Executive Committee and Management Council. The overarching objective of the IGTC is to achieve a market and regulatory environment supportive of trade that avoids disruptions in the international trade of grain, oilseeds, pulses and derived products. Through IGTC, the Australian grain industry increases its advocacy to multiple international institutions, bringing Australian issues to the global stage. These institutions include:

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



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

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



2023/24 Trade & Market Access Activity Matrix

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

ISSUE	CONTENT	2023/24 ACTIVITY
Elimination of tariffs	An ongoing priority addressed through WTO activities and Articles and Free Trade Agreements.	<ul style="list-style-type: none"> • GTA has engagement with WTO processes through Direct dialogue with DFAT and participation in DFAT & IGTC activities, including the Global Food Security and the Role of the Trade Seminar which was a GTA initiative at the WTO in Geneva. • Input into policy in partnership with other industry stakeholders. • GTA has led a 'Strategic Grain Partnership' approach with both China and India. This is a strategic 'umbrella' approach to address trade related issues and to improve market access.
FTAs (tariffs & technical barriers)	Free Trade Agreements are an opportunity to promote elimination of tariffs/quotas and adoption of disciplines relating to non-tariff measures.	<ul style="list-style-type: none"> • GTA continues to work with Government seeking to implement the TRQ process for IA-CEPA feed grain market access. • Food security presentation to the International Grains Conference and the General Assembly of the International Grains Council. • Presentation to the WTO Markets Committee on the impacts of trade barriers on grain and food producers. • Provided input to several FTA's including UK, India, EU and IA-CEPA. • Review and updating of disciplines in relation to MRLs, standards and testing and innovation.
Predictable and science based SPS regulations	Concerns with certain Plant protection (sanitary & phytosanitary) SPS measures including plant diseases, weed seeds and pests remain a concern for the grain industry.	<ul style="list-style-type: none"> • Areas of focus include: <ul style="list-style-type: none"> - Increased transparency and harmonisation through recognition of sampling and testing methods/ Equivalence of systems and processes / Common language & terminology - Testing/sampling methods based on recognised science - Recognise 'free from' or risk-based systems approach to certain pests or diseases of quarantine concern - Adoption of international best regulatory and technical practices (e.g. CODEX) - Use of risk and science-based assessments • GTA works with Grains Australia and DAFF to address these issues as they arise. GTA also works with DAFF on regional and bilateral initiatives to create an improved operating environment. • GTA works actively with IGTC to advocate at a global level for efficient trade frameworks. GTA is an active long-standing member of IGTC, serving on its Management Council and as Secretary on the Executive Committee. • GTA continues to develop and strengthen relationships with like-minded international trade associations in importing and exporting countries. • GTA works with the Government through regional initiatives including the India-Australian Strategic Grain Partnership, where GTA lead the private and public sector engagement delivering a report highlighting the mutual need to develop a Strategic Partnership as part of the development of the bi-lateral relationship. Presented to the Global Food Security and Role of Grain Trade seminars at the WTO in Geneva. Presented to International Grain Council General Assembly and conference in London.

ISSUE	CONTENT	2023/24 ACTIVITY
Food safety regulations, in particular, Maximum Residue Limits (MRLs)	MRLs are an increasing risk in the market. Aligning MRL levels in key markets is a major focus. The NWPGP is the lead agency domestically on all chemical issues and GTA works with IGTC on these issues globally.	<ul style="list-style-type: none"> • Areas of focus for GTA & industry are advocacy for a scientific base for forming MRLs, harmonisation/synchronisation of MRLs, adoption of IGTC policy principles on MRLs where appropriate, and harmonization with Codex standard. • GTA works in partnership with NWPGP (funded by Grains Australia) and provides administrative and conference management activities. • GTA actively engages with DAFF National Residue Survey (NRS) and with the APVMA. • Promoting Australia's food safety and quality assurance processes with international customers, including AGIC Asia and AGIC Asia Stakeholder Roundtable seminars. • Management of the Australian Grain Industry Code of Practice.
Harmonised international methodology	Standards and testing methodologies can cause market access issues where these are not harmonised or consistent	<ul style="list-style-type: none"> • GTA works with the Government, and IGTC to address lack of harmonisation in relation to regulatory approaches, frameworks, and regulations (e.g. inconsistent terminology, product testing, and product labelling, inconsistent or no MRLs, inconsistent sampling and testing procedures) and promote a principle and system-based approach to improve alignment and harmonisation. • Food security presentation to International Grains Conference and the General Assembly of the International Grains Council.
Biotech & new innovation regulations	Regulation of biotech products or new plant breeding innovations should be based in science and not restrict market access. Zero tolerance policies and asynchronous authorisations are increasing compliance risk and costs	<ul style="list-style-type: none"> • Maintain the Market Choice Framework for GM Crops and implementation of related policies and response plans. • Key priorities are synchronous approval of biotech traits, joint recognition of risk assessments for new technologies and harmonised regulatory approaches to new innovations including low level presence policies. • GTA works on these issues through IGTC. Current activities are largely focused on the Cartagena Biosafety Protocol, LLP policy and plant breeding innovation including information sharing with the seed/technology sector. • Engaged with the International Seeds Federation, through IGTC and with Australian Seed Federation on information sharing of traits in innovative plant technology. • GTA has developed a consultative model to look at market access impacts and information sharing for the Australian industry arising from innovative breeding technologies.
Increase in regulatory rules and burden. Lack of transparency & predictability of changes in market access rules & regulations	Key issues include: <ul style="list-style-type: none"> - a lack of transparency around conditions and criteria of import permits - different documentation needed across regions/markets - inconsistent certification requirements - differences in definitions, methodologies and recognition of certifying bodies - adoption of consumer driven regulations that are not based on science 	<ul style="list-style-type: none"> • E-documentation a key focus for clearer visibility of quality assurance processes through the supply chain. Adoption of digital processes (e.g. e-Phyto) will assist to streamline trade transactions and improve data validation. • GTA worked with the Government, and with IGTC on these issues. • Continue the grain industry focus on NTMs to capture and raise awareness of the impact of these issues on industry. • Food security presentation to the International Grains Conference and the General Assembly of the International Grains Council Submissions to Export Legislation consultations.

ISSUE	CONTENT	2023/24 ACTIVITY
Sustainability	Lack of alignment of environment, social and agriculture goals in ways of demonstrating compliance and associated costs for certification. Sustainability standards imposed by customers can become market access barriers when they are not coordinated or are not informed by industry best practices.	<ul style="list-style-type: none"> • Reviewed 'Australia's Grain Supply Chain and its Environmental, Social & Governance Credentials' and aligned them to the United Nations 17 Sustainability Goals. • Promoted the industry commitment to ESG and highlighted existing initiatives, practices and structures supportive of favourable ESG outcomes. • Focus on objective and fact-based dialogue and stakeholder communications. • Promote awareness of Food Safety and reliability of the grain value chain through NWPGP, AGIC Conferences, Delegation presentations and the Code of Practice.
Capacity Building	Provide leadership and capability development to mitigate risk and improve quality assurance processes in the supply chain. Developing solutions to many NTMs will require capacity building with trade partners to promote international best practice.	<ul style="list-style-type: none"> • Work with the Government to identify international best practice, develop capacity building activities, consultation with stakeholders, and alignment with international and trading partner regulation. • GTA has led several industry working groups including: <ul style="list-style-type: none"> - Developed a grain industry 'Emerging Technology Roadmap' - Preparation of Food Grade Shipping Container standard - Development of Grain Sampling Methodology and Procedural guidelines (TGD No 21) - Export Permit Process (RFP) Review - Mobile Bulk Loading Guidelines - Ship Inspection using video capture - Development of Grain Assessment Technology Standard and a supporting framework - Development of Grain Storage Asset and Management Standards - Reviewed and updated the GTA Safety Guidelines - Improvements to the procedures for the importation of whole grain and protein meals.
Quality Assurance and Market Access	Ensure the quality assurance processes and outcomes in the Australian grain supply chain are efficient, cost effective, and meet Government regulatory requirements to maintain market access for Australian grain.	<ul style="list-style-type: none"> • Manage the Australian Grain Industry Code of Practice. • Active member of Grain and Plant Products Export Industry Consultative Committee (GPPEICC). This is DAFF's principal consultation forum with grain industry stakeholders. • Major issues addressed by the GPPEICC: <ul style="list-style-type: none"> - Development of revised fees and charges for the grain export program - Revision of inspection and documentation IT systems to facilitate exports - Ongoing review of Request for Permit processes - Authorised Officer (AO) training and interaction with DAFF and industry - Review of Export Legislation to make sure legislation is practical and contemporary - Ongoing assistance with the introduction of global e-Phytos - Review of existing sampling processes and development of guidelines outlining the desired process for obtaining representative samples of export cargoes - Ensuring surplus Export Cost Recovery Funds remain committed to grain industry needs and requirements. • Active member of the Bulk Imports of Grain and Meal Industry Consultative Committee (BIGMICC) a consultative forum between DAFF and industry involved in the import of bulk plant-based protein meal and grain.



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

The Chair of NWPGP is funded by Grains Australia. GTA acts as the secretariat for the NWPGP supporting the Chair and the activities of the Strategic Working Group and various NWPGP Working Groups formed to address specific issues.

The Australian Grain Storage and Protection Conference is the annual conference for NWPGP. GTA convenes and administers this event. The 2024 event was held in-person in June 2024 and was a celebration of the 51st consecutive year of the conference. The event was attended by a record number of attendees, with over 180 registered. The increasing attendance from across all sectors of the supply chain highlights the importance of the conference in providing participants with the latest research and developments in the area of pre- and post-harvest storage and hygiene, chemical usage, changes in international and domestic market requirements and chemical regulations.

A key theme of the conference was the continued vigilance and systems industry needs to implement in order to maintain our success over the past year in meeting market access maximum residue limits (MRLs) for chemicals used both in-crop and post-harvest.

A range of activities occurred during the year in preparation for the annual conference. To assist industry in meeting those market requirements a number of speakers highlighted areas of focus. These included:

- As with Australia, exports markets are continually reviewing their chemical regulations and MRLs that apply on crop commodities of importance to the grain industry. The Chair of NWPGP reviews those changes and based on the potential impact, liaises with industry and the Australian government on required actions to assist industry compliance.
- Where these changes were considered significant in relation to the ability of industry to meet market access requirements, the issues and industry solutions were again captured and updated in the Non-Tariff Measures database as a central reference source.

- A significant level of advocacy occurred with all sectors of the supply chain to ensure all were aware of their role in meeting market requirements for MRLs. This included providing a range of chemical information in various forms such as presentations to key stakeholders along the supply chain involved in chemical use and decision making of selecting grain that meets market requirements. These stakeholders included chemical registrants and those responsible for providing advice to chemical users, being re-sellers, growers and grower advisors, who work closely with users of those chemicals.
- The NWPGP webpages were updated on the GTA website (www.graintrade.org.au/nwpgp) with a range of material to support those industry advocacy efforts. This included a revised Australian Grains Industry Post Harvest Chemical Usage Recommendations and Outturn Tolerances document detailing changes to MRLs by commodity and market for chemicals permitted for use post-harvest.
- A number of reviews of regulations in Australia also occurred. These included:
 - A continuation of the DAFF review of the Agvet chemicals regulatory system in Australia.
 - The annual Codex Committee on Pesticide Residues meeting was provided with the grain industry position on impending changes to MRLs at Codex, in order to develop the Australia delegation position.
 - The Australian Pesticides and Veterinary Medicines Authority (APVMA) commenced concluding a number of chemical reviews that had been outstanding. Significant advocacy and industry communication on various chemicals of concern to the grain sector occurred.
 - Various industry Working Groups were also formed to assist developing the grain industry position on the above, and further Working Groups will continue their activities in the ensuing year on a review of phosphine and other chemicals of priority to industry.





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

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

The Australian Grains Industry Conference
2023



AGIC Australia
26-27 July 2023

The 2023 Australian Grains Industry Conference (AGIC) was successfully held in July 2023 and was an opportunity to reflect on the success of three concurrent record Australian crops. With the theme of *'challenging success - maintaining momentum'* AGIC 2023 was a great success and celebration whilst providing an excellent technical program and industry connectivity for sponsors and delegates over the two-day event.



More than 600 delegates joined AGIC Australia from 13 countries, and enthusiastically connected, networked and discussed the topical issues with colleagues, potential customers and suppliers. AGIC again provided the opportunity for industry to connect and communicate, supporting and developing industry connectivity, leadership and culture.

The program of 25 sessions delivered by 43 speakers over the 2 days was exceptionally strong and included an impressive line-up of local and international experts featuring, an Opening Keynote address by Senator the Hon Murray Watt, Minister for Agriculture, Fisheries and Forestry & Minister for Emergency Management. Food security and Environmental Governance & Sustainability (ESG) was a strong focus of both international and local

speakers. Key messages included the importance in meeting the customer, and community, expectations towards sustainable agriculture.



Trade Minister the Hon. Don Farrell in his presentation noted the relationship between diplomacy, politics and trade has become increasingly complex resulting from global tensions and extreme climate conditions. Climatic conditions are leading to an increased focus on Environmental Social and Governance (ESG) and its impact on agriculture. Delegates heard from Su McCluskey, Special Representative, Australian Agriculture that ESG is being used by some countries as protectionist trade policy leading to pressure on our agricultural sector. Marketing of Australia's ESG credentials to the global market is a challenge industry needs to tackle and win.

The grain supply chain and rural infrastructure was a key discussion point. It was noted the agricultural supply chain is becoming increasingly complex and more so since the impacts of Covid-19. Delegates heard supply chains need to be resilient and reliable to support market needs and requirements whilst being able to deal with the climate driven peaks and redundancies in grain exports.

Industry stewardship of emerging technology was a focus of discussion across a number of sectors including plant breeding, grain assessment technology and information technology supported and enhanced through Artificial Intelligence was the subject of a panel discussion. Delegates heard these innovative changes will require frameworks and stewardship to ensure their arrival and implementation can create value and not discord.

AGIC remains the key Australian grain industry event of the year providing experts discussing topical business and industry issues and importantly opportunities for networking across industry.



The Australian Grains Industry Conference Asia 2024



AGIC Asia 5-7 March 2024

AGIC Asia 2024 was held in Jakarta (Indonesia) and Shanghai (China) in March 2024.

Delegates made the most of the opportunity to interact - face to face - under the industry theme of *'Reconnecting and Building Value'*.

Delegates joined AGIC Asia 2024 from across Asia and Australia, and enthusiastically connected, networked and discussed the topical issues with colleagues, potential customers and suppliers. It was acknowledged the opportunity for suppliers and customers to connect and communicate as an industry is so important in developing cross-industry leadership and culture.

AGIC Asia 2024 provided an impressive line-up of local and Australian speakers that provided some instructive and interesting insights including the promotion of trade between Australia and the region sans a critical component of food security and the importance of connecting supply with demand.

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

AGIC Asia events continue to grow and be well attended by both flour and feed millers with the virtual platform offering a broader reach to communicate the important messages of value in Australian grain from quality, reliability and safety across the Asian region and globally.





FINANCIAL PERFORMANCE & POSITION (EXTRACT)

Financial policies

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

Financial position

The company has generated a surplus of \$625,511 as compared to a surplus of \$426,947 in the previous year. Net equity at 30/6/24 is \$2,696,038.

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

The following factors contributed the financial accounts:

- Strong production levels and consequently stronger supply chain throughput have generated buoyant industry conditions in 2023/24
- Training and Development margin was stronger due to good participant volumes (likely in response to better seasonal/industry).
- While conference and event income was higher than previous years, with return to in-person events, resulting in increased support from sponsors and delegates, and effective cost management.
- Staff and Director travel and accommodation costs have returned to more normal (pre-COVID-19) levels.

The following information was extracted from the financial statements of Grain Trade Australia Ltd for the year ended 30 June 2024 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 2024

	2024	2023
	\$	\$
REVENUE	3,060,243	2,568,775
Interest revenue calculated using the effective interest method	126,487	55,539
EXPENSES		
Direct expenses	(850,478)	(603,131)
Employee benefits expense	(875,757)	(721,445)
Depreciation and right of use assets	(50,118)	(74,952)
Rental and lease costs		-
Consultancy and legal expenses	(115,100)	(141,903)
Travel and accommodation	(199,417)	(193,620)
Special projects	(161,337)	(185,623)0
Other expenses	(286,294)	(272,074)
Finance costs	(17,732)	(4,618)
Total expenses	(2,561,219)	(2,197,366)
SURPLUS/(DEFICIT) BEFORE INCOME TAX EXPENSE	625,511	426,948
Income tax expense	-	-
SURPLUS AFTER INCOME TAX EXPENSE FOR THE YEAR	625,511	426,948
Retained earnings at the beginning of the financial year	2,070,527	1,643,579
RETAINED EARNINGS AT THE END OF THE FINANCIAL YEAR	2,696,038	2,070,527

Grain Trade Australia Ltd

Statement of financial position

As at 30 June 2024

	2024	2023
	\$	\$
ASSETS		
Current assets		
Cash and cash equivalents	708,797	587,711
Trade and other receivables	324,016	286,743
Contract assets	37,910	46,967
Other financial assets	3,131,736	2,351,247
Prepayments	301,335	162,526
Total current assets	4,503,794	3,462,340
Non-current assets		
Right-of-use assets	243,292	81,199
Total non-current assets	243,292	81,199
Total assets	4,747,086	3,543,539
LIABILITIES		
Current liabilities		
Trade and other payables	191,036	194,130
Contract liabilities	1,438,757	1,027,993
Lease liabilities	40,706	87,283
Employee benefits	110,136	119,070
Total current liabilities	1,780,635	1,428,476
Non-current liabilities		
Lease liabilities	218,102	7,709
Employee benefits	52,311	36,827
Total non-current liabilities	270,413	44,536
Total liabilities	2,051,048	1,473,012
Net Assets	2,696,038	2,070,527
EQUITY		
Retained earnings	2,696,038	2,070,527
Total Equity	2,696,038	2,070,527

Grain Trade Australia Ltd

Statement of changes in equity

For the year ended 30 June 2024

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

2024	Retained earnings	Total equity
	\$	\$
Balance at 1 July 2023	2,070,527	2,070,527
Surplus after income tax expense for the year	625,511	625,511
Other comprehensive income for the year, net of tax	-	-
Total comprehensive income for the year	625,111	625,111
Balance at 30 June 2024	2,696,038	2,696,038

Grain Trade Australia Ltd

Statement of cash flows

For the year ended 30 June 2024

	2024	2023
	\$	\$
Cash flows from operating activities		
Receipts from customers (inclusive of GST)	3,683,134	3,006,303
Payments to suppliers and employees (inclusive of GST)	(2,854,801)	(2,477,710)
Interest received	45,998	21,641
Interest on leases	(17,732)	(4,618)
Net cash from operating activities	856,599	545,616
Cash flows from investing activities		
Investment in term deposits	(700,000)	(1,014,695)
Net cash used in investing activities	(700,000)	(1,014,695)
Cash flows from financing activities		
Repayment of lease liabilities	(35,513)	(80,918)
Net cash used in financing activities	(35,513)	(80,918)
Net increase/(decrease) in cash and cash equivalents	121,086	(549,997)
Cash and cash equivalents at the beginning of the financial year	587,711	1,137,708
Cash and cash equivalents at the end of the financial year	708,797	587,711

GTA MEMBERS

Membership List as at 30 June 2024

ORDINARY MEMBER (TRADING)

Level A1

(over 7 Million Tonnes)

CBH Group
GrainCorp Australia
Viterrra Australia

Level A3

(3-5 Million Tonnes)

Cargill Australia

Level A4

(1.5-3 Million Tonnes)

ADM Trading Australia
Arrow Commodities
Australian Grain Export P/L
Bunge Agribusiness Australia
Louis Dreyfus Company
Emerald Australia

Level B1

(1.0-1.5 Million Tonnes)

CHS Broadbent
ETG Commodities
George Weston Foods
Manildra Group
Riordan Grain Services

Level B2

(500,000-1 Million Tonnes)

Centre State Exports
Inghams Enterprise P/L
J K International P/L
Ridley Agriproducts
Riverina (Australia)
Wilmar Gavilon P/L

Level B3

(250,000-500,000 Tonnes)

Allied Pinnacle
Brahman Commodities
Boolah Farms P/L
Cofco International Australia
Demeter Grains
K M & W M Kelly & Sons
Quadra Commodities
Robinson Grain Trading

Level C1

(over 10 employees,
under 250,000 Tonnes)

Agracom
Agrisk (Market Check)
Adams Australia P/L
AGT Foods Australia
Associated Grain
t/a Agrocrop Processing Australia
Australian Food & Fibre Processing
Australian Fresh Milk Holdings
BFB P/L
Blairs Produce Company
Castlegate James Australasia P/L

COPRICE

Darwalla Milling Co P/L
DDT Holdings
Deckert Group P/L
Esperance Quality Grains P/L
Fletcher International Exports
Fodder Link P/L
Hanlon Enterprises
Hazeldenes Chicken Farm
IGH Commodities
Inari Australia
Irwin Stockfeeds
Itochu Australia Ltd
Jerilderie Grain Storage & Handling
Laucke Flour Mills P/L
Lawson Grains
LPC Trading P/L
Malteurop Australia P/L
MC Croker
MSM Milling P/L
Namoi Cotton Ltd
Newcastle Agri Terminal
Pentarch Agricultural P/L
Premium Grain Handlers P/L
Queensland Cotton Corporation
Quattro Ports
Reid Stockfeeds P/L
Rex James Stockfeed
Rivalea (Australia) P/L
- Animal Nutrition
SunPork Farms Feed Mills
ThriveAgri P/L
TSS Grain (Tasmanian Stockfeed
Services)
Unigrain P/L
Viridis Ag
W B Hunter P/L
Wilken Grain
Woods Grain P/L
XLD Commodities

Level C2

(under 10 employees,
under 250,000 Tonnes)

Access Grain P/L
Aditi UVG
Aditya Birla Global Trading (Australia)
Advantage Grain P/L
Agmark Commodities
Agri Om Australia P/L
Agri-Oz Exports (Aust) P/L
Agromin Australia P/L
Alliance Grains
Arya Pulses Australia P/L
A T Waterfield & Son P/L
Australian - Asian Agricultural
Exports (AAAX)
Australian Choice Exports P/L
Australian Grain Storage
Australian Growers Direct P/L

Australian Mungbean Company P/L
A W Vater & Co
Baker Grain
Boort Grain Co-Operative
Broun & Co P/L
C & S Trading P/L
Carpendale Agri P/L
Carson Stockfeed P/L
Chester Commodities
C K Tremlett P/L
CL Commodities
Coorow Seeds
Cory Johnston (Aust) P/L
Craig Tyack Grain Trading
Defiance Maize Products P/L
Direct Commodities
East Coast Stockfeeds
Ellerslie Free Range Farms P/L
ETG Processing P/L t/a Wimpak
Export Import Australia
Export Trading Group Australia P/L
Fanmac Logisitics P/L
Feed Central P/L
Findlays Barellan
Forest Enterprises Development
& Consulting (FEDC)
Gold Star International P/L
GO Resources P/L
Grainforce P/L
Grain Link WA P/L
GrainTrend P/L
Grenfell Commodities P/L
GV Grain & Fodder
Hartree Partners (Australia) P/L
Harwood Grains & Stockfeeds
Horizon Commodities P/L
HX Food Group (Aus) P/L
Jatlee Australia
J W Koek & Company
Kangaroo Island Pure Grain
KB Agri Services P/L
Kennett Rural Services P/L
Lachlan Commodities P/L
Lane Grain P/L
Laragon Almond Processors P/L
Mallon AgCommodities
Mandala Trading
Marina Commodities (Australia)
Matthews Transport & Grain Traders
Max Grains P/L
Mckenzie Ag Services
McNaughts Grain & Fertilizer P/L
Melaluka Trading P/L
Mellco P/L
Nandaly Grain Co-Operative
Network Grains P/L
Northbound Trading P/L
t/a WA Lupins
Origin Grain P/L
Outlook Commodities

Pacific Global Sprouts P/L
 Parkinson Bros
 PB Seeds
 Pearson's Grain
 Peters Commodities
 Pinnacle Grains P/L
 Plum Grove
 Pure Foods Eggs P/L
 QS Commodities P/L
 Quirindi Grain & Produce
 RP Grain P/L
 Rural Logic (Aust) P/L
 Shannon Bros Bulk Storage P/L
 Silo Bag Grain (NSW QLD) P/L
 Societa Cofica
 Southern Grain P/L
 Southern Grain Storage P/L
 Spagicon Australia
 Standard Commodities Australia P/L
 Sudima Australia
 Sun Euro Australia
 Tamma Grains Australia P/L
 Tiller Commodities P/L
 TRC International
 Trentham Grazing P/L
 t/a Godde's Grain & Fertiliser P/L
 Ulusoy Asia Pacific
 Universal Commodity Management
 Ward McKenzie
 Waterfall Australia
 Watsons Bulk
 WHG Oceania P/L
 Wirrinourt Transport & Trading
 WW Agri P/L
 ZTC Australia

TRANSPORT OPERATOR

Crawfords Freightlines P/L
 Gehrke Grains & Transport P/L
 Hamilton Contracting (NSW) P/L
 Horne Ag Logisitics P/L
 Pacific National (NSW) P/L
 SEAWAY Intermodal P/L

BROKER

Medium

Fox Commodities P/L
 Grain Brokers Australia
 Horizon Grain Brokers P/L
 Pure Grain Network P/L
 Quest Commodities P/L
 Rain Agribusiness
 StoneX Financial
 Teague Australia P/L

Sole Operator

A C Grain
 Allied Grain P/L
 Cogeser (Australia) P/L

Farm Tender
 Lotema P/L
 Mallon Commodity Brokering
 McDonald Pelz Australia
 Perkins Commodity Brokers
 Wardi Broking
 Woodside Commodities P/L

CORPORATE

Large

ASX Limited
 Australian Grain Technologies
 Barrett Burston Malting Co
 BoortMalt Asia Pacific P/L
 CIS Control Union Australia
 Commonwealth Bank of Australia
 NSW Ports
 Sanitarium Health Food Company
 Symbio Laboratories

Medium

AgriDigital
 AgriFood Technology
 Amspec Australia
 Australian Superintendence
 Company (ASC)
 Clear Grain Exchange
 Foss Pacific
 HFW
 Holding Redlich
 Intertek
 Mars Petcare Australia
 t/a Mars Birdcare
 Oldendorff Carriers Melbourne
 PSC Griffith Goodall Insurance Brokers
 Qube Logistics (SB) P/L
 t/a Qube Agri
 SBA Law
 SGS Australia
 T-Ports

Small

Advance Trading Australasia
 Ag Scientia
 AgVise (WA) P/L
 Aperture Ag P/L
 Basis Commodities
 BSM Global
 Cloudbreak Grain Marketing
 Delta Agribusiness
 E P Integrated Commodities
 Farmanco Marketing P/L
 FARMARCO Australia P/L
 Finesse Solutions
 Flexi Grain P/L
 Futari Grain Technology Services
 Goldstar Commodities
 Graintec Scientific
 Grainx
 Greenoaks Agriculture P/L

Harvestcheck P/L
 Hay Plains Grain Storage P/L
 IKON Commodities
 Indyn
 Lachstock Consulting
 Longbridge Commodities
 MarketAg P/L
 McMullen Consulting
 Mercari P/L
 Mirfak P/L
 National Grower Register
 OMIC Australia P/L
 Perten Instruments
 Pinion Advisory
 Planfarm Marketing P/L
 Priag Marketing Pty Limited
 Primal Foods Group
 Profarmer and Australian Crop
 Forecasters
 Rise Agribusiness
 Saputo Dairy Australia
 SGA Solutions P/L
 Sizer & Cogill t/a NQ Bulk
 Ten Tigers
 TE Storage & Logistics P/L
 TT Club Mutual Insurance
 Ultimate Global Trading P/L
 Wattletree Consulting

INTERNATIONAL AFFILIATE

CIS Commodity Inspection Services
 Grains Middle East Trading DWC-LLC

INDUSTRY ASSOCIATION

AEGIC
 Grain Growers Limited (GGL)
 Grain Industry Association of WA
 (GIWA)
 Grain Producers Australia Ltd (GPA)
 NSW Farmers Association
 Stock Feed Manufacturers' Council
 of Australia (SFMCA)

MERCHANT ASSOCIATION

Grain Industry Association of SA
 (GIASA)
 Grain Industry Association of VIC
 (GIAV)
 Grain NSW
 Queensland Agricultural Merchants
 (QAM)

LIFE MEMBERS

Mr Mervyn May
 Mr Christopher Kelly
 Mr Geoff Honey
 Mr Terry Deacon



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AUSTRALIA**

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