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To: Larissa Taylor
Subject: GIMAF update July 2017



GIMAF Update July 2017

The Grains Industry Market Access Forum is very active on a range of fronts, as usual. China dominates the reports in this update, although with GIMAF representatives visiting Vietnam and Indonesia as well this year there is news on many key markets.

CHINA SNAIL ISSUE LATEST

Senior representatives from the Department of Agriculture and Water resources (DAWR) visited China in mid-June to continue discussion on quarantine issues with barley (amongst other issues).

While the level of concern about snails appears to have abated a little and notwithstanding ample evidence of the efforts being made by our industry, there is no doubt that AQSIQ is still not satisfied that Australia is applying adequate controls to minimise snails in barley cargoes in particular. This concern was supported by the example of two additional 'Notifications' of barley shipments containing snails in the first half of 2017, although these shipments were not

rejected and the exporters involved were not sanctioned by China.

In order to resolve the issue AQSIQ has sought to send a senior technical delegation to Australia in late August to review snail management in the production environment and within the supply chain. In order to ensure that this visit provides the necessary assurances to AQSIQ that Australia is very serious in its intent to minimise snails in grain cargoes to China, GIMAF and DAWR will be seeking the assistance of growers, storage and handling providers, exporters and researchers to provide a comprehensive overview of our management efforts and positive results of implementing snail research outcomes.

Other positives from the DAWR meeting with AQSIQ were the immediate approval and registration for two additional fodder packing plants and the progress of a protocol for horse feed towards finalisation later this year.

GIMAF FORUM

The Forum held its latest meeting in Canberra on 04 July 2017. Key outcomes of this meeting were:

- To continue the efforts working with DAWR to resolve the snail issue in barley to China and to ensure that best efforts are applied to ensuring a comprehensive program is developed and executed for the AQSIQ delegation in late August
- To seek an opportunity to discuss the finalisation of a canola and a sorghum protocol with AQSIQ during their visit
- To endorse a project to investigate the distribution of the additional pests of quarantine concern to India and testing methodologies that can be applied
- To support the continued funding of GIMAF from the Industry Equalisation reserve for another three years, matched by a project with GRDC

CHINA IMP UPDATED

As part of the industry strategy to address China's concerns a GIMAF working group has updated the Industry Management Plan that supports the China Wheat and Barley Protocol.

The essential change from the original version of the IMP is that it clearly defines the control points used by industry to manage quality and quarantine requirements of wheat and barley exports to China, in particular the responsibility of exporters to select stocks that meet Chinese quarantine requirements.

The new IMP will come into effect on 1 August 2017 and all parties should ensure they understand the changes. Read or download a copy from the GIMAF [website](#).

CHINA TRADE VISIT BENEFICIAL

GIMAF visited China as a participant in the AGIC program in early March. In addition to speaking at the conference, GIMAF worked with Grain Trade Australia, AEGIC and GGL for numerous meetings in Shanghai, Qingdao and Beijing with Chinese Government representatives, industry associations, various trading companies and Australia's agricultural counsellors at the Australian Embassy.

As always, first hand, in-country meetings provide perspectives and greater understanding of nuances that are very difficult to glean in any other way.

Amidst the enormous volume of information gained perhaps the three key points were:

- Food security is the overriding driver for China and it seeks to manage production and imports through a range of policy and market instruments that can take years to meet objectives
- Animal feed product imports are of much greater interest than products for human consumption, as demand increases for animal proteins
- The more Australian industry understands about China's technical quality, quarantine and policy requirements, including the central and regional government structures that manage them, the better Australia will be able to target and successfully supply market needs.

The knowledge gained from this visit is already being applied in GIMAF's ongoing dialogue with DAWR around China issues.



Cheryl Kalisch-Gordon (GGL), Rosemary Richards (GTA), Tony Russell (GIMAF), Barry Large (GIMAF) and Pat O'Shannassy (GTA) following the meeting with officials from China's State Administration of Grain

VIETNAM SUCCESSFUL ROUNDTABLE

Associated with AGIC Vietnam in early March, GIMAF worked with Grain Trade Australia, AEGIC, GGL and Australia's agricultural counsellor for Vietnam to

hold roundtable discussions in Hanoi with government officials around various aspects of the grain trade, including quarantine.

The visit was very positive, with good feedback on Australia's reputation for supplying quality, clean grain.

INDONESIA RELATIONSHIPS BOOST

Indonesia, Australia's largest wheat market, was the setting for the final in the AGIC Asia series of conferences on May 16. Following the pattern established earlier, GIMAF worked with Grain Trade Australia, AEGIC, GGL and Australia's agricultural counsellor in Jakarta to conduct a roundtable discussion at the Australian Embassy with Indonesian plant quarantine officials and major flour millers.

These sessions are about building on relationships and are thus highly valuable – listening to any concerns, discussing ongoing issues and highlighting future opportunities or changes.

INDIA'S PHYTOSANITARY REQUIREMENTS

India presented a new phytosanitary challenge in late 2016 by requiring all wheat imports to meet quarantine standards of 'seeds for sowing', which require freedom from a range of quarantine pests.

New inclusions on the list were:

Ephestia elutella - Chocolate moth

Trogoderma variable - Grain dermestid

Erwinia rhapontici - Rhubarb crown rot

Pseudomonas fuscovaginae - Sheath brown rot

Magnaporthe oryzae subsp. triticum - Wheat blast

The vast majority, if not all of the wheat sent from Australia to India is intended

for processing, not sowing. Unfortunately India takes the view that there is a chance of diversion of some imports away from the processing supply chain, so they have proposed these measures.

Part of the challenge comes from the fact that some of the proposed pests are already present in India, so do not meet the international definition of a quarantine pest and should not be included.

Possibly due to the highly restrictive nature of these new quarantine proposals and the fact that India still requires some wheat imports, the implementation date of the requirements has been deferred twice already this year. However, the threat of implementation requires our industry to understand the impact and whether we can meet the requirements through practical testing procedures and knowledge about the regional distribution of the pest of concern.

GIMAF is proposing to undertake a review of the prevalence of the pests and the ability to assess the presence in grain presented for shipment.

AUSTRALIA'S AGRICULTURE COUNSELLORS

The Department of Agriculture and Water Resources has staff operating as agriculture counsellors in 16 Australian Embassies around the world, with over 30 people working on market access and development.

Eleven of these offices are in key Asian or Middle Eastern markets and the postings typically last several years, so GIMAF seeks to brief all new counsellors individually before they leave.

Counsellors from all the embassies were recently in Australia for group meetings, with GIMAF invited to participate in an industry briefing on 8 June.

The various roundtable discussions described in earlier articles were commonly

organised with assistance from the counsellor in each country – confirming once again the importance of relationships and local knowledge.

ABOUT GIMAF



GIMAF Executive Manager Tony Russell and GIMAF Chairman Barry Large at Qingdao port in China on March 10. Barry is a grain grower in Western Australia nominated to the GIMAF board by Grain Producers Australia.

The Grains Industry Market Access Forum is a forum of grains industry representative groups who provide a single voice and point of contact in advising DAWR on market access for Australian grains, seed and fodder.

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