



2012 – 2013

ANNUAL REPORT



GIWA
Grain Industry Association
of Western Australia



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ABOUT GIWA

The Grain Industry Association of Western Australia (GIWA) was formed in 2008 after an identified need to merge a number of associations, including NACMA WA, Oilseeds WA, the Western Oat Alliance, the Western Region Barley Council and Pulse WA, to form one body which represents the interests of those in the Western Australian grain supply chain. GIWA's purpose is to grow the value and profitability of the whole Western Australian grain industry.

Today, GIWA has seven Councils including GIWA Wheat Council, GIWA Barley Council, GIWA Trade Council, GIWA Oilseeds Council, GIWA Pulse Council, GIWA Oat Council and GIWA AGI Council.

GIWA aims to be the voice for the WA grains industry through:

- Leadership and self regulation
- Facilitating communication and information exchange
- Providing solutions for grain supply chain issues

Some of the key initiatives and activities undertaken by GIWA include:

- Hold industry information and networking events
- Produce seasonal monthly WA Crop Reports
- Attend government policy and trade meetings and briefing on behalf of the industry
- Communicate industry news and information
- Review grain industry standards
- Undertake projects of value to the WA grain supply chain

The industry based projects GIWA currently manages include:

- Crop Updates on behalf of Department of Agriculture and Food Western Australia (DAFWA) and Grains Research and Development Corporation (GRDC)
- Grain Storage Project on behalf of GRDC
- COGGO Research Fund on behalf of Council of Grain Grower Organisations (COGGO)
- Onfarm QA Project on behalf of DAFWA

For further information about GIWA visit www.giwa.org.au



CHAIRMAN'S REPORT

The Grain Industry Association of WA (GIWA) has taken some major steps forward during the 2012-13 financial year. First we settled in to our new home at the Australian Export Grain Innovation Centre (AEGIC) which has brought many benefits to both organisations through the improved communication and cross pollination of ideas and knowledge.

The Australian Grain Institute (AGI) has now come on board to be our seventh Council with its core business of capacity building and industry networking. Our other six councils have also been very active as you will read in each of their reports.

GIWA as an organisation itself has still been evolving as it is now five years on from our inception. The original GIWA Business Plan was set for 2008-2013 and hence was time for us to step back from the day to day operations and conduct a much need business review.

A key area of the review was to also reaffirm the purpose of GIWA. Our purpose is something that we use as our cross check on every issue we tackle.

The new GIWA purpose has been set as:

“Grow the value and profitability of the whole Western Australian grain industry”

Through:

- Leadership and industry self-regulation
- Facilitating communication and information exchange
- Providing solutions for grain supply chain issues

To support the strategic focus and activities of GIWA it is essential that GIWA has good governance and business strategies in place. The business strategies underpin the focus of GIWA to continuously improve its services to its members and the WA grains industry.

The GIWA Executive has reviewed key areas of Governance along with the development of four key strategies under the headings of Membership, Relationships, Communication & Engagement and Finance.

Having good governance and process along with these core strategies form the foundation of how we do our business going forward and give us a much clearer direction and framework to work with. The grain industry strategies and focus is still set by each of our members through their involvement with the Councils.

GIWA activities are focused through committees, working groups and projects which add value to the WA grain supply chain. In addition GIWA, through its councils hosts regular forums.

A number of the GIWA members have been engaged in the Agrifood 2025 strategic review process co-ordinated by DAFWA which was focussed on engaging with the Western Australian agriculture and food sectors. The key outcomes of these workshops was to set a broad WA Agrifood goal that all of industry could work towards in its own way.

The Agrifood 2025 vision circulated to industry is “double the real term value of the Western Australian Agriculture and Food sectors by 2025”. I believe this will give us an industry goal that fits very well with GIWA's purpose and can form the basis for the review of many of the issues that are faced by the WA grain industry and will help us to create some solutions and a path forward.



As the Chair of GIWA I would have to say I am very proud of the GIWA team on what has been achieved in the past 12 months and see all the activities that GIWA has been involved in through our Councils, working groups, projects and various events either run directly by GIWA or in partnership.

None of this would have been possible without the dedication and enthusiasm to the job demonstrated by our Executive Officer Johanna Gastevich, our only full time staff member. Her organisational and logistical management skills have shone through as it is no easy task to keep such a diverse range of activities as well as committee members focused and on track. A huge well done and thank you from myself and all of the GIWA members goes out to Johanna. She has been very well supported by Ian Longson looking after Business Development, Policy and heading up several of our projects. Ian has always there to steady the ship when the waters have got a bit choppy and has been a great mentor and support to both the EO and Chair, thanks Ian.

Our newest member to the team is Shai Dunbar who joined us around this time last year. Shai has taken over the bookkeeping role and administration support. Shai has fitted in to the GIWA family very quickly and has contributed much more to the depth and skills of the team than we could have wished for. Coming from an eastern Wheatbelt family farming operation, she already knew a lot of the strange language we often use in the grain industry that we take for granted.

GIWA would not be what it is without the passion and commitment of our members that volunteer their time and knowledge to the benefit of the whole industry.

I would like to make a special mention of the members that have served time on the GIWA executive and have recently stepped down or are doing so at this AGM.

Peter Metcalfe was one of our inaugural independent executive members has been instrumental in supporting the organisation during its early development. Peter has given great strategic input and guidance to projects that formed the part of what is now recognised as GIWA core business.

Crawford Taylor another of our inaugural independent executive members who has acted as the organisations treasurer for 5 terms and a key part of the GIWA management committee. Crawford has always been able to bring a very professional and objective view to the table which has been critical especially when emotions run high during time of enthusiastic debate.

Andrew Roberts has served on the GIWA Executive for a couple of years as the Chairman of the Oats Council. Andrew's honest and "down to earth" approach to issues and discussion at an executive level has been very valuable.

Matthew Sheriff has served on the GIWA Executive for two years as well. In his role of Chair of the Trade Council he has done an excellent job of getting the trade members and the council re-focused on some key issues and has also stepped up in many other roles within GIWA's committees and working groups. We wish Matt all the best in his new role outside of the grain trade, but do hope that his involvement in GIWA will still remain as a link in from the grain production input supply side of the industry.

Thank you to the GIWA team and members for making my role as Chair very easy and enjoyable,

Jon Slee
Chair



EXECUTIVE OFFICER REPORT

It was a bumper year for GIWA. The early part of the year was spent preparing for the Grains Summit hosted by GIWA. The Summit was an opportunity for key players within the grains industry to identify the priority areas we need to focus on to build an international competitive grains industry.

The only way we can build our industry is to work collaboratively with other peak bodies. The Summit gave GIWA a great opportunity to strengthen its ties with national bodies. Over the past 12 months we have been engaged with national bodies such as the Australian Oilseeds Federation (AOF), Pulse Australia, Grain Trade Australia and the Australian Fodder Industry Association (AFIA) just to name a few. We make sure that our issues are heard at a national level (and all too often our state based issues are national issues too!) and that we contribute to outcomes that benefit the whole supply chain.

The Grains Summit also gave our Councils an opportunity to identify what their priority areas were going to be for the next 12 months. Knowing these, gave structure and purpose to many of our Council meetings. Council Reports highlight many activities over the past 12 months. Our thanks must go to our Council Chairs and our many volunteers who give their time effortlessly to ensure we have a vibrant grains industry in Western Australia.

This Annual Report also gives an update of GIWA's major projects. The 2013 Agribusiness Crop Updates was another successful event which was well received by industry. We were fortunate enough to have a number of International speakers present who were in Perth for the International Herbicide Resistance Conference held the week prior.

For the first time, GIWA managed the COGGO Research Fund on behalf of COGGO. Though only in its first year, we were very pleased with the quality and calibre of projects seeking funding. Further details about projects being funded can be found in the Annual Report.

GIWA is also involved with the GRDC Onfarm Grain Storage project for the Western Region. The aim is to give practical advice to growers on the proper manner to store grain to ensure quality is maintained. The WA Manager, Ben White has spent the past 12 months meeting with some 600 growers to teach them about best practice.

GIWA appreciates the support provided by both Department of Agriculture and Food Western Australia (DAFWA) and Australian Export Grain Innovation Centre (AEGIC). It has been 12 months since GIWA has moved into the AEGIC offices, located on the DAFWA site. AEGIC and GIWA have worked closely together in a number of areas including the monthly Crop Report, noodle wheat and the Wheat Quality Forum. We look forward to strengthening the relationship in the future.

GIWA's staff also grew over the past 12 months with the appointment of Shai Dunbar as our part-time Administration Officer. Shai has brought great energy and enthusiasm to the office and is a valuable member of our team. My colleagues Ian Longson and Alan Meldrum bring great experience and sage advice. I must say it is privilege for us to be working on behalf of GIWA members.

The next 12 months sees GIWA embark on its next 5-year business plan. Our focus will be on growing the value and profitability of the whole Western Australian grain industry. This can only be achieved with the support of our members, industry and Government. GIWA welcomes the opportunity to bring industry together and support the growth of the WA grain industry.

Wishing you all a record harvest in 2013/2014 and beyond

Johanna Gastevich
Executive Officer



COUNCIL REPORTS

AGI COUNCIL

The Australian Grain Institute (WA) became a GIWA Council in October 2012, and since then I have had the privilege of being the GIWA representative.

The purpose of the AGI Council is to build effective and sustainable capacity within the West Australian grains industry.

The AGI Council's mission is to facilitate and support effective capacity building within the West Australian grain industry by developing strategies to build and attract capacity, supporting precompetitive information sharing and promoting the grain industry as a whole to enable a robust and sustainable future.

The AGI Council's key roles are to:

- Facilitate effective and sustainable capacity building projects
- Co-ordinate industry networking opportunities
- Facilitate precompetitive information sharing

In the past 12 months, the AGI Council, in conjunction with GIWA, has supported the following events:

- July 2012: Breakfast event, featuring futurist AnniMac, on Global Trends Impacting Agriculture. Held in conjunction with HARVEST – Young Agri-Food Professionals
- October 2012: Breakfast event, featuring Colin Tutt who gave a pre-harvest update. This was held in partnership with Grain Growers Limited.
- October 2012: Extraordinary General Meeting, to ratify joining GIWA as a Council, followed by a sundowner.
- February 2013: Crop Updates breakfast event, featuring Professor Philip Westra from Colorado State University, who discussed recent developments in the United States wheat industry.

The capacity building issue has long been a focus of the AGI, and the Council has made a strong effort, in conjunction and with support of the CBH Grower Advisory Council (GAC), to take the issue beyond talk and into action. A workshop with key industry players, including the GAC, AAAC, GRDC, UWA, DAFWA and others was had in August 2012, which determined the focus on the grains industry in WA, and supported the AGI's efforts moving forward.

The AGI Capacity Building project seeks to identify the knowledge required to develop a model or framework, and apply the tools/ techniques/actions to build the model and embed it within the grains industry.

Industry support is required to develop solutions and fund a comprehensive and feasible project.

In May 2012, the AGI commissioned literature review into current capacity building in the WA grains industry. The report confirmed: The rural workforce is declining at a considerable rate; those that are working in the industry will increasingly require more intensive training and skills development and; traditional sources of labour and employment pathways for the industry are changing with fewer students based in rural areas pursuing tertiary education, let alone studies in agricultural based disciplines.

It made the following recommendations: make the WA grain industry the primary focus; have a body that is solely responsible for addressing the issues; liaise with stakeholders at a national, agricultural level but let the local industry drive the issue; ensure all key WA grain industry commercial participants are part of the solution.

The AGI Council has taken this and developed a project scope. From here, the capacity building project will:

- Identify current work: scope, scale and impact
- Identify current gaps & potential trends, potential drivers and limits to current programs.
- Engage stakeholders in the 'capacity building conversation', ensure buy-in and a relevant & rigorous outcome.
- Identify strategies and build a model. Immediate strategies will address obvious and immediate gaps. A self-sustaining model will develop long-term & on-going industry capacity.
- Action plan: A detailed methodology to roll out strategies and develop model.
- Measures of Success: High level success will ensure on-going access to job-ready and skilled people for a sustainable grains industry.

In the current year, the AGI Council remains committed to ensuring the success of this project, and continues to engage with stakeholders to do so. Further, it will continue to offer, and partner in, events to encourage networking and pre-competitive information sharing for all participants in the WA grains industry.

Susan Hall
AGI Council Representative



COUNCIL REPORTS

BARLEY COUNCIL

Normal attendance at the GIWA Barley Council Meetings is between 30 and 40 members who represent the entire Barley industry from pre breeders to end users (we all enjoy a Beer!). These meetings run like forums and are focussed on big picture barley issues like understanding the process for developing new varieties of Malt Barley.

It was recognised at the spring and autumn meetings that there are too many issues raised that don't achieve an outcome on the day. At our last autumn meeting a Barley Management Committee was formed to deal with the day to day business before the Barley Council. Until now we have formed small committees to deal with the bigger issues like standards and rationalisation of the number of varieties received. The Management Committee of nine consists of;

- Growers – Steve Tilbrook, Andy Duncan and Mark Adams
- R&D / farm consultant – Geoff Fosbery
- Breeder – David Moody
- Marketer – Tim Giumelli,
- Technical expert quality – Stefan Harasymow
- GIWA Executive Representative – Blakely Paynter
- Storage and Handler – Vince Moroney.

The management committee is able to co-opt industry members to assist with decisions such as Rationalization of varieties and Standards when required.

The following highlights some of the activities of the GIWA barley Council over the past 12 months:

New Varieties

With four new varieties accredited by Barley Australia as malt this year; Granger, Henley, Scope and Westminster, our meeting on rationalization of varieties became intense. Since Westminster does not appear suited to the Western Australian environment it was decided not to be recommended for 2014 planting.

Clearfield Scope Barley is closely related to Buloke but Barley Australia has followed tradition and will NOT allow these varieties to be co-mingled in storage. The Barley Council can see that growers have the chance to replace Buloke with Scope over a two year period and there will then be the opportunity to use the chemical 'Intervix' as another tool in the chemical toolbox. However, it may come at the risk of unintentional mixing of Scope and Buloke.

Purity Testing

The Barley Council has encouraged CBH Operations and Seednet, the license holder of Scope and Buloke, to collect samples of both variety segregations at harvest, and have them Purity tested, to lessen the risk of cross contamination.

With nine varieties now accepted as Malt in WA, the Barley Council urges all barley growers to be sure they know their varieties are pure.

GRDC has invested in Diversity Arrays Technology (DArT) to involve genetic ID to guarantee the purity of all barley varieties grown in Australia at an affordable cost.

Grain Drying

GIWA Barley Council did not support the proposed change to prohibit the use of grain dryers for malt barley that was under review by Grain Trade Australia (GTA) earlier this year. Grain drying is a routine practice used world-wide to manage moisture and is very effective provided the temperature and method used for drying are correctly applied.

The proposed change would have had a major impact on growers and the supply of Malt Barley from all of the higher rainfall areas of Australia as well as areas that are subject to harvest rainfall or coastal humidity that contribute to high moisture in grain at harvest.

Barley Symposium

The 16th Bi-annual Australian Barley Technical Symposium (ABTS) was held in Melbourne recently.

ABTS brings together all players from the barley industry from around the world to discuss genetics and genomics, technologies, pathology, agronomics and growing, adaptation, quality, malting and brewing, logistics, marketing and most importantly consumers. Scientists range from young to old and the sharing of enthusiasm and experience is exciting. Many thanks goes to David Moody and his team for organising and such a wonderful conference for the Barley industry to enjoy.

A feature of ABTS is the presentation of the "Rob Johnston Memorial Award" to a young scientist who has research originality and innovation, scientific merit, presentation skills, industry impact and knowledge of the Australian barley industry. The winner in 2013 was Dr Lee Hickey of the University of Queensland. His paper was 'Application of rapid introgression methodology in barley.'

COUNCIL REPORTS

WA Barley Standards

GIWA set WA Barley standards for 2014 last year to allow growers time to prepare. The standards have reverted to where they were traditionally before the deregulation of barley in WA. Screenings for Malt 1 is 20% through a 2.5mm screen Malt 2 is unchanged at 35% through a 2.5mm screen.

GIWA Barley Council looks forward to the future with optimism.

Malting Barley Variety Receival Recommendations

In August, 2012 the GIWA Barley Council released the Barley Variety Rationalisation recommendations for preferred Varieties in the 2013/14 season. The Rationalisation Committee consists of members from the whole Barley industry, with the recommendations being ratified by the GIWA Barley Council.

The completed document was distributed to all growers through the Barley Variety Sowing Guide 2014 and via consultants and marketers. This will give growers time before the 12/13 harvest to organise seed for 13/14.

The following table highlights Western Australian malting barley industry variety receival by Port Zone recommendations for 2013/14 harvest.

YES	Market preference for this variety in this Port Zone, but not necessarily at all receival sites.
Seasonal	Market acceptance for this variety possible if early seasonal break and there is market demand (discuss with your grain acquirer).
Limited	Limited segregation opportunities may exist subject to market demand and the availability of accredited malting varieties or because it is a new variety undergoing assessment.
NO	End-users and acquirers are not likely segregate or purchase grain of this variety from this port zone.

Port Zone	Geraldton	Kwinana		Albany		Esperance
(~% of total barley area)	-5%	-40%		-30%		-25%
		Western	Eastern	Northern	Southern	
Bass (b)	NO	Limited	NO	Limited	Limited	Limited
Baudin (b)	Seasonal	YES	Seasonal	YES	YES	YES
Buloke (b)	Seasonal	YES	Seasonal	YES	YES	YES
Commander (b)	NO	Limited	Limited	Limited	NO	NO
Gairdner (b)	NO	YES	NO	YES	YES	YES
Stirling	NO	Limited	Limited	NO	NO	NO
Vlamingh (b)	NO	YES	Seasonal	YES	YES	YES

Bass and Commander are in development stage in the market place while Vlamingh and Stirling are in decline. Hamlin will no longer be received as malt in Western Australia.

Steve Tilbrook,
Barley Council Chair



COUNCIL REPORTS

OAT COUNCIL

2012/13 for the GIWA Oat Council has been a year where significant steps have been taken to improve our oat industry. It has been a challenging year for oat growers for both the milling and export hay market. Quantity and quality throughout the state was varied with some marketing problems coming into play.

The Oat Council meeting on 5th March, 2013 saw Andrew Roberts step down and Will Carrington-Jones take over as Chairman. Andrew had been the Chair since 2007. Munro Patchett took over from Fiona Mackie who left us during the year and it was great to hear of the safe arrival of her baby girl Florence. I would like to thank both Andrew and Fiona for their excellent contributions to the Council.

During 2012 an important relationship was established formally with Australian Fodder Industry Association (AFIA) with the idea of collaborating on seminars particularly on export hay production and marketing. We hope that this partnership will expand with growers the real winners. Discussions have started with China to understand their specific needs and any opportunities that may be available in the near future to growers, breeders and accumulators.

This year marked the 10th year of a partnership started between WA oat growers, industry, DAFWA and SARDI. This was to become the Western Oat Alliance and then the GIWA Oat Council. I cannot emphasize how important this has been with the development of our industry. We have seen new oat and hay varieties bred which are suited to WA. I wish to acknowledge Pamela Zwer and Peter McCormack as they have been the people that have made this happen, together with their support team from DAFWA and SARDI.

Bannister has now been accepted with a milling classification and we have WA2332 being bulked up for valuation in 2013. WA2332, like Bannister, looks very good in trials so far.

We have also started oat variety rationalization. These new varieties will allow us to improve quality in the oat segregations.

York was the location of our first oat field walk and it was a great success. We hope to make this field day a regular event in partnership with AFIA and the launch of Oat Week.

To Johanna Gastevich as Executive Officer and Jon Slee our Chair of GIWA our thanks for all the work throughout the year.

Will Carrington-Jones
Oat Council Chair

TRADE COUNCIL

The 2012/13 financial year was a year of contrasts for the GIWA Trade Council. Through a strong collaborative approach – between all supply chain partners as well as industry support from agencies such as DAFWA, the Council progressed a number of issues, which will provide value back to growers for the ongoing future.

Major achievements included the ratification of the APWN segregation and flexibility around ratios by our major noodle wheat customers, developing a logical position around hectolitre weight, and assisting CBH operations with the refinement of the port capacity allocation system.

The Trade Council was also heavily involved in a number of workshop style activities aimed at informing and upskilling the industry. The highlight of these was the ACCC Deputy Chair workshop where issues such as port access, multi-national investment and how to create globally competitive supply chains were discussed.

Workshops were also held around developing a global supply chain benchmarking study with AEGIC, noodle wheat, malting barley, and some grower information sessions on sustainable canola, malting barley changes and on farm storage held at the 2012 Dowerin Field day. A number of social activities were held including a well-supported lawn bowls day and a corporate catamaran regatta.

Despite these successes members of the Trade Council continued to experience the extremely difficult trading environment that has been present in Western Australia for the last three years. Port access issues have made it uneconomical to export in bulk and have pushed up raw material costs for domestic processors and container exporters. As a result, throughout 2013 the WA grain export and processing industry has further rationalised with a number of players withdrawing and most rationalising staff levels. Whether this reduction in competition and service levels to growers is healthy for the viability of the entire supply chain from growers to end user customers remains to be seen.

Matthew Sherriff
Trade Council Chair



COUNCIL REPORTS

PULSE COUNCIL

The Western Australian pulse industry continues to face challenges; season and yield variability, reduced profitability compared to canola and reduced efficacy of weed control principal amongst many.

The challenge for the GIWA Pulse Council is to raise the awareness of the attributes of pulses that make the entire rotation more sustainable and profitable when viewed over the medium future, rather than just with an annual viewpoint.

The issues that require work include:

- Addressing weed control options in pulses; can it be done better with existing technology, and/or are there options that require investigation?
- Increasing demand and price for lupins by assisting the push for lupins as a human food
- Raising awareness of the advantages and diversity that pulses provide to the rotation
- Reviewing time of sowing knowledge to reduce the risk and yield variability of pulses.

Season update

The 2012 season finished on a good note, after starting very poorly in all bar the Esperance region. Spring rain enabled yields to be average to below average for lupins and field pea. Chickpeas were not planted in the Geraldton region because of the very late break.

The 2013 season, by contrast, started extremely well in all regions except for the east Kwinana zone. Most growers reported seeding conditions to be the best for many years, if not the best ever. The entire WA crop was planted in good time and establishment indicated high yield potential.

However, June was extraordinarily dry. From high potential, the WA crop plunged to very low potential. The dry June extended into July, creating a very poor outlook for yields.

Then it all changed. To date, rain in the last 8 weeks has been very much above average. While the east and north east districts have continued to experience a very poor season, the remainder of the wheatbelt is now contemplating at least average to well above average potential.

Lupin yields will be above average except where harvest efficiency was affected by the low height of some crops. Chickpea yields will be around 1.5 tonnes per hectare. Field pea yields in the Esperance region should be well above 2.5 tonnes per hectare.

Narrow leaf lupin

The lupin area in WA continues to decline. Lower profitability compared to canola, as for field pea, is a reason along with reduced weed control efficacy with herbicide resistance reducing the control rate and yield variability with adverse seasons.

Work continues to support efforts to place lupin onto the human food market, thereby increasing demand, price and grower profitability.

PBA Barlock, PBA Gunyidi and Jenabillup are now the preferred varieties for WA. PBA Barlock is suited to the west coast where Anthracnose is a threat. PBA Gunyidi is suited to most of the wheatbelt with good yields and improve pod retention over Mandelup. Jenabillup is preferred for the south coast where Bean Yellow Mosaic Virus can reduce yields in adverse seasons.

Chickpea

Desi chickpea production in Western Australia continues to be at a low level. After raised interest in 2011 with exceptional yields, the very late break to the season and subsequent drought of last year caused only a limited area to be planted to chickpea. In 2013, the area remains low with cashflow recovery foremost for most growers in the northern wheatbelt. Three new varieties were released last year; PBA Striker, Neelam and Ambar. Demonstration sites displaying the characteristics of each concluding in 2014 will show growers the potential that the chickpea industry has.

Field pea

The area of field pea in WA has declined slightly to about 55,000 hectares. Profitability compared to canola is a prime reason, particularly in the Esperance region, while the frost risk is paramount in the Great Southern and the production risk for field pea is regarded as too high.

PBA Twilight and PBA Gunyah continue to be the preferred field pea varieties for Western Australia. PBA Wharton has been released in 2013 for the Esperance region.

Albus lupin

Amira (WALAB 2014) was released last year. It provides better anthracnose resistance than Andromeda, flowers early and yields very close to that of the old variety Kiev Mutant. The area sown to albus lupin in the northern region should increase with this variety.

Rod Birch
Pulse Council Chair



COUNCIL REPORTS

OILSEEDS COUNCIL

Canola has taken another major step forward in the Western Australian grain industry this year with it now being the number two crop in the state when it comes to area planted as well as gross revenue back to the States grain industry. The 2012-13 production and harvest year was a challenging one for farmers and yet with all the challenges, canola production in the state hit a new record of 1.26 million tonnes.

Through the GIWA council survey and the Grains Summit the GIWA Oilseed Council has also identified a number of other issues such as herbicide management that are being picked up by the Australian Oilseeds Federation (AOF).

The big issues that face the Western Australian canola industry are national issues and GIWA has linked into the national bodies to make sure these are sitting high on the priority lists. Such issues include:

- Access for Canola to China – A whole of industry approach to this issue has meant that we have now re-gained access to three Western Australian port zones and we are working with the Chinese authorities on a project to support this ongoing access as well as getting access for those that are not currently on the approved list. Thanks needs to go out to AOF, GIMAF, DAFF, DAFWA and a number of industry players that have all made this possible.

- Industry advice on late season applications of paraquat – GIWA has worked with AOF, GPA, GRDC and Syngenta on getting an updated industry fact sheet out on this issue.
- European Union (EU) requirements under the “Renewable Energies Directive” R.E.D. – AOF is working with AEGIC (as requested by GIWA) to look at the development of some Australian values around the carbon footprint produced in an Australian canola production system. This is required if we want to maintain access to this market into the future.

Nick Goddard the AOF Executive Director presented at the GIWA Oilseed & Pulse Sundowner prior to the Grains Summit on the priorities and projects that the AOF is currently working on.

GIWA has also been involved via Alan Meldrum as our link into the National “Better break crops” project that is being run by AOF and Pulse Australia with funding from GRDC. The review of agronomy advice along with the development of the training modules has been the main focus to date and a series of Grower and Advisor target workshops are the next step. Thanks to Alan for all the great work you have done here and across the industry for the year.

Jon Slee
Oilseeds Council Chair



COUNCIL REPORTS

WHEAT COUNCIL

It is with great pleasure that I submit this annual report for the Wheat Council as its new chairman. I would like to take the opportunity to thank the immediate past chair Narelle Moore for guiding the Council through its development in the preceding few years and building a team of quality Council members.

In addition I thank Narelle for her role as a Council member and her valuable knowledge in the field of wheat quality, unfortunately for the wheat Council Narelle has decided to vacate her position and we wish her the very best. I would also like to acknowledge the contribution and departure from our Council of Phil Brooks. Phil has been a valuable member of the council representing the grain trade.

With the departure of two Council members, Council has approved the implementation of our selection process to seek candidates to fill the vacant positions. This process will be completed and successful candidates announced prior to our September meeting.

After the successful development of our Council membership the latter part of 2012 was devoted to review and restructure of the Council processes. This review and subsequent changes to the Wheat Council purpose and function document has led to a far more effective, efficient and functional Council.

Importantly, post the review process, this has allowed the council to move forward on the real purpose of addressing industry issues. As part of the strategy setting process 3 key issues were considered important. These are listed below with a summary of current outcomes;

1. Wheat Test Weight

In light of the proposed GTA decision to increase wheat test weight a period of consultation and information gathering was conducted to fully understand the process and rationale for change. Based on this information Wheat Council is supportive of the change on the basis that grower delivery standards remain unchanged.

2. Late Maturing alpha Amylase

Highlighted as a significant issue by a wheat council member, a period of information gathering and learning by all council members was conducted to fully understand the implications of this issue. A key finding was the need to bring the issue to the attention of the wider industry. This led to a well-attended LMA workshop at the annual Agribusiness Crop Updates which further led to again a well-attended and highly informative Wheat Quality Forum. The profile of this issue has risen to the point where an industry wide collaborative approach has now commenced.

3. Noddle wheat industry

The Wheat Council, via select member representation, provides ongoing support to AEGIC in reference to noodle wheat export development. A key role moving forward is for the Wheat Council to review and develop strategies for the future of the industry. It should be highlighted that this industry is at the crossroads with declining grower participation against steady demand from Japan and South Korea.

As we move to the conclusion of this reporting period Wheat Council will be carrying forward and finalising outcomes on these key issues. Our main planning meeting is set for 19th September where we will set in place the pathway to conclude these issues. Importantly this meeting will identify the next priority areas for consideration and set our strategic direction for implementation of solutions.

In conclusion I thank all Council members for their time, their timeliness in providing comment and information and their professional approach which has resulted in achieving effective outcomes for the West Australian wheat industry.

Sean Powell
Wheat Council Chair



PROJECTS

2013 AGRIBUSINESS CROP UPDATES

The 2013 WA Agribusiness Crop Updates was held from the 25th – 26th February, 2013 at Crown Perth. GIWA proudly convened the event on behalf of the two major funding partners, the Grain Research Development Corporation (GRDC) and the Department of Agriculture and Food Western Australia (DAFWA).

Just over 430 leading consultants, agronomists, advisers, researchers and growers attended the two day event. This year, the program featured topical issues including; varieties and agronomy, pest management, climate, farm productivity, weed management, plant nutrition, frost management, soil management and crop management.

The International Herbicide Resistance Conference was held a week prior and this meant that a number of International speakers were able to attend the Agribusiness Crop Updates. Those speaking included:

- Dr Harry Strek, Bayer CropScience, Frankfurt
- Prof Jason Norsworthy, University of Arkansas
- Prof Philip Westra, Extension Specialist, Colorado State University USA

In addition, the Australian Oilseeds Federation sponsored Philippe Dusser, Director - Economic and International Affairs, PROLEA France to attend the Updates.

Specialty focus forums were held in the afternoon of Day 2. The forums gave attendees and invited guests the opportunity to workshop or have further in-depth discussions on a number of topical issues. The topics included plant nutrition, managing fungal disease, dry seeding and Late-maturity alpha amylase.

There were a number of new features introduced for the 2013 event. These included:

- Introduction of Speakers Corner – this enabled attendees to have ‘one-on-one’ discussions with speakers, after their presentations, during the meal breaks.
- Introduction of the Event App – attendees were able to get information about sponsors, speakers, the program, complete evaluation and download papers presented at the Agribusiness Crop Updates via their smart phones or tablets
- Free wifi – attendees were able to access wifi at no charge.
- No printed proceedings – this year, a Program Book was provided that listed all the abstracts of papers presented at the Agribusiness Crop Updates. All papers were available on the GIWA, GRDC and DAFWA websites.

The 2013 event was well supported by a number of sponsors. Premium Sponsors for the event were CBH Group, Bayer and InterGrain. Supporting Sponsors included Australian Export Grain Innovation Centre, AGT, AWB, Back Paddock, Canola Breeders, COGGO, CRC Plant Biosecurity, Pacific Seeds, Perten, Pioneer, Seednet, Syngenta, and the Right Mind.

The 2014 Agribusiness Crop Updates will be held at Crown Perth from the 24th – 25th February, 2014.

2013 REGIONAL CROP UPDATES

For the first time, GIWA was involved in the running of the Regional Crop Updates. A total of 14 Regional Crop Updates were held throughout Western Australia with well over 800 growers, agribusiness and researchers in attendances.

The Regional Crop Updates were co-ordinated by local grower groups and received in-kind support from the Department of Agriculture and Food, Western Australia (DAFWA) and Grower Group Alliance (GGA).

The Grain Research and Development Corporation (GRDC) provided funding to each grower group to assist in financing each event.

Each Regional Update addressed local issues with program content developed by local growers and agronomists. In addition, each event provided an ideal opportunity for attendees to network with local growers, agronomists, researchers and GRDC representatives.



PROJECTS

COGGO RESEARCH FUND

GIWA was awarded the contract to manage the Council of Grain Grower Organisations (COGGO) Research Fund for 2012/13.

The COGGO Research Fund aims to invest in projects across the grain supply chain which have a direct benefit to Western Australian grain growers. This followed a decision by COGGO to outsource the management of its new research investment portfolio and to broaden the scope of its investments from its previous focus on long term plant breeding projects. The fund is intended to complement rather than compete with other organisations investing in research, development and extension.

An important COGGO objective is to fund projects seeking 'seed' funding for initial experiments or proof of concept, that may later be eligible for more extensive R&D and extension support.

The COGGO Research Fund is financed through the COGGO voluntary levy collected from Western Australian grain growers with the cooperation of grain acquisition and marketing companies.

GIWA's R&D Committee met in September 2012 to evaluate 23 project proposals and provided recommendations to the COGGO Board who subsequently awarded 9 projects funding for commencement in calendar year 2013. The successful recipients of COGGO Research Funds in 2013 for projects totalling \$476,000 in funding were:

- Corrigin Farm Improvement Group Inc (\$21,980) – Growing more profitable crops on Chemical Fallow
- Mingenew Irwin Group (\$20,000)-Increasing Cropping Returns on Red Loam Soils through Chemical Fallow

- Planfarm Pty Ltd (\$50,000) - Helping growers make better and 'independent' nitrogen decisions through the development of an in Paddock Nitrogen 'App' for Wheat, Barley and Canola
- South East Premium Wheat Growers Association (SEPWA) (\$20,600) - Following the finances of fallows with COGGO - multiple trials using a precision agriculture approach across the region, including the input from the Mallee Farm Improvement Group and RAIN.
- South East Premium Wheat Growers Association (SEPWA) (\$42,000) - Dealing with a Difficult Harvest a guide book for Western Australian grain growers
- University of Western Australia (UWA) (\$96,350) - Enhancing WA chickpea industry through targeted demonstration and extension of new ascochyta resistant improved varieties and lines in partnership with grower groups
- University of Western Australia (UWA) (\$100,000) - Development of web based tool to interpret and quantify spray coverage obtained from commercial pesticide applications
- WA Soft Wheat Growers Association Inc (WASWGA) (\$100,000) - WASWGA Intergrain Soft Wheat Breeding Extension Project
- West Midlands Group (\$25,000) - The Impact of Gravel on Crop Management

In April 2013 the GIWA R&D Committee met again to review the process and provide advice to COGGO on its future operation. The COGGO Board subsequently confirmed a contract for GIWA to manage this process again in 2013/14.

Bruce Piper COGGO Chair & Anne Wilkins and Bill Bowden WMG



PROJECTS

GRAIN STORAGE PROJECT

On-farm storage is being used increasingly by Western Australian growers to manage harvest logistics and provide expanded marketing opportunities.

GIWA has been sub contracted by a national company ProAdvice Pty Ltd to provide extension activities to provide grain storage information sessions in the Western Region for this Grains Research and Development Corporation (GRDC) project for three years commencing in 2012/13.

The aim of the project is to deliver practical advice on the economics and operation of grain storage options to ensure the quality of stored grain and maximise grower returns.

Grower groups, agricultural consultants, agronomists and grain agri-business companies in Western Australia were invited to host information sessions, on grower's farms.

The information sessions give practical information on the use of silos, grain bags, bunkers, pits and sheds to protect grain from insect damage and maximise return on investment. Growers were taken through the steps to prevent and control insects effectively utilising simple tools including storage hygiene, aeration and fumigation to control insects.

In 2012/13 600 growers received the latest information on grain storage techniques.





PROJECTS

ON FARM QUALITY ASSURANCE

GIWA was commissioned by the Department of Agriculture and Food Western Australia to examine the need for, and options for, on farm quality assurance (QA) programs for the benefit of the Western Australian grains industry.

To date domestic and overseas processing customers for grain appear to be satisfied with the quality control (and quality guarantee) of the accumulator and shipper, rather than concerning themselves with traceback to the farm and insisting on individual farms having on farm QA systems.

However, the situation is changing and at a meeting of marketers and purchasers of grain held in July 2012 in Melbourne the following conclusions were drawn:

1. Demand from customers for grain and suppliers of technology (mainly chemicals) for grain growers to have formal quality assurance and stewardship programs in place will increase.
2. There is likely to be a plethora of QA programs developed to meet customer demands for proof of compliance with food safety and quality, environmental and social sustainability criteria. In the main grain growers will be expected to demonstrate compliance with programs designated by the customer or the technology supplier.
3. Stewardship and On Farm QA Programs and tools should be developed within a national accreditation framework to build in consistency of terminology, measurement, monitoring and recording systems for quality attributes. Programs that meet these requirements would be recognised and branded as meeting the national accreditation QA framework.
4. The national accreditation framework should provide for a 'cascade' of modules or programs starting from self monitored best management practice guides, through stewardship programs (with and without auditing) up to third party audited food safety and quality On Farm QA programs. As far as possible all these programs should share a common platform and language..
5. A suitable national body should manage the national accreditation framework, with the development and operation of the stewardship and on farm QA programs left to appropriate industry organisations and companies.
6. The initial priority for the development of these programs should be on meeting compliance for legislated and market access requirements for chemical safety.
7. The proactive development of programs should be kept as simple as possible and should be built to respond to the actual or imminent demands of customers and technology providers, and not add in 'extra' attributes that are not currently or likely to be required in the near future.
8. The initiative to proactively develop a stewardship program for Australian grain growers is supported. This will enable the industry to have a platform and the tools ready to meet customer demands for quality assurance and to meet stewardship requirements for access to chemicals and technologies and to protect grain growers' rights to farm in environmentally sensitive locations.
9. Consideration should be given by the CBH Group to pass the CBH On Farm QA program on to a suitable national industry organisation to become the certification body and take over the marketing and development of this program to enable access by all grain growers and to capitalise on the value of this investment in a practical and proven On Farm QA program.

Throughout 2012/13 GIWA has continued to monitor and/or participate in the initiatives to address these points. These are principally:

- The development of a new vendor declaration form by Grain Trade Australia for use in purchasing grain from farmers;
- AusChem (Victoria's) purchase of Graincare® for use in proving compliance with stewardship conditions for access to certain chemicals.
- Grain Producers Australia's exploration of modules required for the voluntary adoption of basic stewardship programs for producers who require them to comply with customer requirements, market access conditions or to comply with requirements to access certain chemicals.

GIWA will prepare a final report on the project in October 2013 for DAFWA and the industry that will provide an update on the status of on farm QA and stewardship programs in Australia and suggest some options for the industry to further consider.



ACTIVITIES AND ISSUES

INDUSTRY CHANGES TO WA BARLEY RECEIVAL STANDARDS

During 2012 the annual review of Western Australian grain receival standards was undertaken with the focus on barley receival standards and all other standards being left unchanged. Well over 100 submissions were received from growers, grower groups, consultants, breeders, marketers and maltsters for consideration in this year's review process.

GIWA ratified a change to the Malt 1 Barley Standard to 20% screenings for the 2013/2014 season. There was be no change to the current Malt 2 Barley Standard (which remain at 35% screenings). It is important to note that this change applies to crops planted in the 2013 season.

The standard of 20% screenings is a reversion to the original Malt Barley standard that was in existence prior to the deregulation of barley marketing. The standard was relaxed to deal with a seasonal issue and was not adjusted back after that season.

Other proposed changes, such as increasing the hectolitre weight and altering the protein window for Malt Barley did not demonstrate that any extra value could be captured for the industry and these changes were not supported by GIWA.

GIWA also ratified a change in the method used to determine screenings by moving the number of screen shakes from 20 to 40 for all Barley receivals.

In years with high screenings, using the 20 shakes methodology was not delivering as accurate a result as was achieved by moving to 40 shakes in the test procedure. The basic principle on any test method is to use the most accurate measure available at receival point. It is important to note that this is a change to improve the accuracy of the results and is not a change in the receival standards for barley.

GIWA plays an important role in the industry's self-regulation of grain standards which are designed to ensure the value of the industry continues to grow. Any changes to receival standards are designed to result in a net positive gain to growers.

NEW MALTING BARLEY VARIETY UPDATE 2013

Four new malting varieties were accredited by Barley Australia in 2013. The newest malting varieties are Grange, Henley, Scope and Westminster, joining Bass and Commander as possible future alternatives to the established malting varieties Baudin, Buloke, Gairdner and Vlamingh.

With any new malting variety released, growers are advised to be cautious in their planting intentions until there are clear market signals or grow them as feed barley.

Growers should be aware that malting accreditation by Barley Australia does not guarantee that there will be market demand for the variety in Western Australia. Westminster, for example, will not be segregated in Western Australia as there is no market demand, as a consequence it will be binned and paid as feed.

International grain and malt market opportunities currently exist for Commander, whilst Bass and Scope are undergoing international market development as both grain and malt. Growers with seed of Grange and Henley should consider 2013 to be a seed production year. International market development of Grange and Henley will not likely be a possibility until after the 2014/15 harvest.

A large production of the non-malting variety Hindmarsh is expected in 2013. The industry is looking at opportunities that might exist for Hindmarsh, including the potential to supply low quality markets in China where high germination is the most important quality characteristic as well as the non-malting shochu market in Japan.

Further information is available on the GIWA website.



ACTIVITIES AND ISSUES

THE USE OF GRAIN DRYERS ESSENTIAL FOR WA MALT BARLEY INDUSTRY

The GIWA Barley Council recently prepared a submission in response to the proposed changes that were under review by Grain Trade Australia (GTA) to prohibit the use of grain dryers for malt barley.

Grain drying is a routine practice used world-wide to manage moisture and is very effective provided the temperature and method used for drying are correctly applied.

The proposed change was likely to impact growers and the suppliers of Malt Barley from all of the higher rainfall areas of Australia as well as areas that are subject to harvest rainfall or coastal humidity that contribute to high moisture in grain at harvest.

It is important to note that GTA Standards changes do not impact Western Australia, as WA standards are set by GIWA, not GTA. However, GIWA is keen to provide feedback to GTA in the setting of national grain standards and ensure that they reflect the market place and also, where possible, be standardised internationally.

Internationally, Canada, US, UK and France all allow the use of dryers on Malt barley and run a strong education program on the proper use so that germination is not reduced by the drying process.

As a result of industry feedback, GTA rejected the proposal to ban dryers for malt barley

WHEAT HECTOLITRE WEIGHT

GIWA supported Grain Trade Australia's recommendation to increase the test weight for all milling grades of wheat from 74 kilograms per hectolitre (kg/hl) to 76kg/hl for the 2013/2014 Season.

This change will still enable growers to continue to deliver milling wheat loads at 74 kg/hl while enabling bulk handlers to manage stacks to guarantee a minimum outturn of 76kg/hl to the trade. Central to the recommendation was the requirement to protect Australia's reputation as the preferred supplier of high quality milling wheat and to provide confidence to marketers to forge new markets for WA grain.

The guarantee to the trade of 76kg/hl on outturn will give the trade more confidence to participate in markets where the high hectolitre weight requirements exist

It is essential to GIWA that any recommendation endorsed do not adversely impact growers yet continues to improve quality standards to our customers.

ACTIVITIES AND ISSUES

NOODLE WHEAT

GIWA and the Australian Export Grain Innovation Centre (AEGIC) hosted a delegation from Japan Flour Millers Association (JFMA) and Ministry of Agriculture, Forestry and Fisheries of JAPAN (MAFF) for a Noodle Wheat Technical Workshop held in Perth from 22nd – 24th October, 2012.

The purpose of the workshop was to share information about Japan's noodle flour industry and Western Australia's noodle wheat industry and provide a seasonal update. During the workshop, the delegates met with all sectors of the noodle wheat supply chain from growers to exporters.

Japan relies on Western Australia for one-sixth of its annual wheat imports valued at around \$300 million annually. Japan's flour milling industry sources wheat for udon noodle manufacturing from the specially formulated 'ASW Blend', imported exclusively from Western Australia.

These workshop were an opportunity to articulate and gain greater understanding of industry issues influencing both countries. The Japanese flour millers emphasised the importance of stability of supply and consistent quality.

Over recent months, GIWA and AEGIC have been engaged with MAFF and JFMA to assess the need and/or opportunity to change the blend of Australian wheat shipped to Japan to deliver value to growers and end users. Japan agreed to maintain the ratio of noodle wheat for the 2012/2013 shipping period at a high level increasing demand. The opportunity for APWN inclusion in the ASW Blend was also discussed. APWN wheat will continued to be included as an optional component of wheat shipments to Japan this season with all parties agreeing to review the position for the 2014/2015 season.

GIWA and AEGIC continue to work together to develop information and communicate with the whole of industry about the requirements of this important market for Western Australian wheat.



ACTIVITIES AND ISSUES

GRAINS SUMMIT

GIWA hosted a Grains Summit on the 14th August, 2012. The aim of the Summit was to bring the Western Australian grain industry together to develop an action plan to best position the industry for a profitable future.

Approximately 40 industry delegates attended the day long Summit and represented a cross section of the grains industry including representation across the whole supply chain and the major commodity groups.

Prior to the Summit, GIWA Councils were surveyed to identify what were the short, medium and long term opportunities and threats influencing their commodity groups. This work was used to lead discussions on the day.

Participants were also asked to identify the priorities the grains industry needed to address in the future. From this, a number of priorities were selected and participants were invited to work-shop these further.

The priority areas examined included:

- Capacity building - How can the grains industry acquire the numbers, talent, skills and training necessary to deliver innovative solutions for agriculture in the future?
- Fragmentation of Industry representation – How can the grains industry develop a national united voice for the whole grains industry?
- Disconnect between consumers and the grain industry –

How can we engage with consumers and educate them about the agriculture production system?

- Increasing the rate of yield grain - how does the grains industry increase the rate of yield grain in order to feed the world?
- Promoting Australian Grain Internationally – how do we promote Australia as having an internationally competitive supply chain?
- Industry Good – how do we achieve a well-resourced, unified national grains industry body that represent the interests of the entire value chain?
- New market entrants – how do we attract more people to either purchase or remain on farms?
- Satisfying Market Demand – how can we increase the demand for Australian grain on international markets?

It was evident that one group alone could not address the identified priorities. The Summit reinforced the need to form and develop the scope for a peak industry grains body. The key roles of this body would be to develop market opportunities, promote Australian Grain internationally and co-ordinate the grains industry across the whole supply chain.

Developing such a body will require the support of all key players within the grains industry in partnership with State and National Government. GIWA continues to participate in discussions to progress the formation of a national peak body.

SEEDING SUCCESS

Seeding Success in 2012 had a change in format. This year, the focus was to get an overview from leading Agronomists of what was happening within each Port Zone and disease risks for 2013.

Some of the identified key strategies for the 2013/2014 harvest include:

- Nutrition management
- Weed control
- The use of new technology – such as Yield Prophet, soil moisture probes
- Improving APVMA processes which are seen as too slow
- Managing pests
- Dry sowing



ACTIVITIES AND ISSUES

WHEAT QUALITY FORUM

More than 90 Western Australian wheat producers, marketers and key industry stakeholders attended the Wheat Quality Forum hosted by the Australian Export Grains Innovation Centre (AEGIC), Wheat Quality Australia and GIWA.

This day-long master class featured a line-up of wheat quality experts from across Australia and provided insight into areas such as how wheat quality is determined and identified; the relationship between quality and functionality; an update on the issues currently confronting wheat quality in WA and an overview of the current quality requirements of Australian wheat's most significant markets.

The workshop aimed to deliver an understanding of the basics of cereal chemistry, which will better equip growers and traders to communicate with their customers about the type and quality of wheat they require

Featured speakers included cereal chemist, John Oliver, wheat breeders Lindsay O'Brien and Dr Steve Jefferies and market analyst Dr Nasir Azudin.

The forum built on the success of a similar workshop held in Melbourne by Wheat Quality Australia late last year, which attracted a large number of grain industry stakeholders from across eastern Australia.

The level of interest from forum participants demonstrated the need for continued communication about wheat quality issues.

AEGIC, Wheat Quality Australia and GIWA are committed to working with the grain supply chain to produce high quality Australian wheat for the international market.

BANNISTER APPROVED AS A NEW MILLING OAT VARIETY

The new oat variety, Bannister was approved as a Milling Variety in Western Australia for the 2013-14 season. This variety was developed by the National Breeding Program

In accordance with Commercial Acceptance Protocol for assessment of potential Milling Varieties, Bannister was commercially grown in Western Australia and was test milled at Quaker Oats Forrestfield facility.

The test at Quaker Oats indicated that Bannister has very good milling characteristics that allowed for high processing rates whilst still ensuring good quality. Nutritional testing also showed that fibre content is slightly better than other varieties but this will need to be verified with further testing.

Jon Slee, GIWA, Chair, Christine Hawkins, Wheat Quality Australia, Chair Robert Sewell, AEGIC, Chair and Wheat Quality Australia, Director



EVENTS

Global Trends Impacting Agriculture featuring Annimac, Futurist

Annimac explored the global trends that are impacting agriculture. Understanding these trends will enable all sectors within the grain supply chain to succeed in this changing environment. This breakfast was also supported by Harvest.

Pre-Harvest Update featuring Colin Tutt, General Manager, Operations CBH Group

Colin Tutt provided attendees with a pre-harvest update and gave a prediction for the 2012/13 harvest. In addition, Colin provided an update on changes to CBH arrangements to transport, store and ship the harvest. This breakfast event was also supported by Grain Growers Limited.

The US Wheat Industry featuring Prof Philip Westra, Extension Specialist, Colorado State University USA.

Prof Philip Westra presented an overview of the current issues for the US Wheat industry including: the future for wheat production in the US and the potential for further competition from corn and soy; and, the impact on US wheat industry of the deregulation of the Canadian wheat industry marketing arrangements. In addition, Philip reported on projects he was working on to improve the productivity of the US wheat industry, particularly in the areas of herbicide resistance to major wheat weeds.

Dowerin Field Day

For the first time, GIWA joined forces with a number of member organisations and organised a marquee for the 2012 Dowerin Field Day. Members participating included, GrainCorp, Gilmac, InterGrain and Quaker Oats.

A number of forums were also held during the two days including changes to receival standards, onfarm storage and noodle wheat. Many visitors to the marquee also received samples of Quaker Oats.

Oilseeds and Pulse Briefing

GIWA Pulse and Oilseeds members were invited to an exclusive briefing held by Tim Edgecombe CEO, Pulse Australia and Nick Goddard, Executive Director, Australian Oilseeds Federation.

This briefing provided members with an update of national pulse and oilseeds initiatives and programs being coordinated by both peak body groups. GIWA aims to ensure that its commodity groups are linked to national bodies.

Industry Breakfast – Key Areas For The Australian Agricultural Sector, Dr Michael Schaper, ACCC Deputy Chair

GIWA hosted an industry breakfast with the Agribusiness Association of Australia (AAA) featuring Dr Michael Schaper, Australian Competition and Consumer Commission (ACCC) deputy Chair. This was a rare opportunity for industry to hear directly from the ACCC.

Dr Schaper's address covered major developments in key areas of direct relevance to the Western Australian agricultural sector as well as the use of collective bargaining by primary producers, country of origin and food labelling, supermarket dealings with suppliers and the Horticulture Code of Conduct.

Crop and Grain Market Outlook 2012/13

GIWA supported the Stock Feed Manufacturers Crop and Grain Market Outlook for 2012/2013. GIWA Trade representatives from GrainCorp, CBH Group, Emerald and Aus-Oils identified the key supply and demand factors which would drive the commodity prices in 2012/2013.

York and Oat Grain and Hay Field Walk

The inaugural York Oat Grain and Hay Field Walk was supported by the GIWA Oat Council, Department of Food and Agriculture Western Australia (DAFWA). and South Australian Research and Development Institute (SARDI).

Over 30 growers plus industry attended the field walk which had Dr Pamela Zwer, National Oat Breeding Manager, talk about the field trials. Of particular interest was the newest Oat variety WA2332. After the field walk, participants were invited to a BBQ lunch and listened to a presentation by Ben White on onfarm grain storage.

Last Drinks on Swan

The Swan Brewing Company has been a part of WA's history for over 100 years. At the end of March, the Swan Brewery will closed its Canning Vale doors for the last time. The GIWA Barley Council hosted 'last drinks' at the brewery and had the opportunity to share stories about this WA icon while sampling some of the State's finest brew.



GIWA EXECUTIVE PROFILES

Jon Slee — Chair and Chair, GIWA Oilseeds Council

Jon is part owner of Aus-Oils and principal consultant for Oilseed and Protein Solutions and was previously the National Marketing Manager for Riverland Oilseeds. He is the Vice Chair of the Australian Oilseeds Federation (AOF) and is currently on the Federal committee for AOF. He is chair of the GIWA Working Group on Receival Standards.

He has worked in many roles in the grain industry giving him excellent knowledge of the grain industry in Australia.

Greg Kirk — Deputy Chair, Independent Executive Member

Greg Kirk, Managing Director of Planfarm Pty Ltd has been consulting to some of the state's leading grain growers for over twenty years. He has a keen interest in all things agricultural and in particular those unique characteristics that make the top performing farm businesses so successful. His firm provides management consulting, agronomy, grain marketing and property management services for both local and overseas investors across the state. He brings a wealth of agribusiness knowledge and experience to the GIWA committee.

Crawford Taylor — Treasurer and Independent Executive Member

Crawford Taylor is currently the State Manager for Rabobank in Western Australia which includes a staff of 50 located in 10 branches throughout WA predominantly within the wheatbelt.

Rabobank is a global leader in food and agricultural banking with operations in over 40 countries and has a co-operative structure. Crawford completed a Degree in Agribusiness from Muresk and is from a farming background at Tambellup in the Great Southern.

Will Carrington-Jones — Chair, GIWA Oat Council

Will Carrington-Jones farms south of Kojonup and west of Tambellup on a mixed sheep and grain property. His family moved there in 1957 from the eastern states and started developing the largely bush block. The cropping enterprise grows oats, wheat, canola and silage totalling approx. 1600 hectares.

Will has been a member of the Western Oat Alliance and then GIWA since 2006. He has worked as a grower representative on a number of grain collaborations the most recent being the High Rainfall Project out of Katanning

Sean Powell — Chair, GIWA Wheat Council

Sean Powell has studied and worked in the Western Australian agricultural sector for the past 25 years and has been Managing Director of the family owned company for the past 20 years. Sean holds and has held several board positions both in the private and government sector.

Sean has diversified agribusiness interests with business experience beyond the farm gate.

Rod Birch — Chair, GIWA Pulse Council

Rod Birch has spent his working life as a specialist grains grower in the mid-north region of WA. He owns and manages a family operation that has had much experience with multiplication and bulk up of new crop seed varieties with various breeding programs. An Industry accredited Quality Assurance program is in place to cover all production processes on farm.

Rod has held a number of industry positions and involvements throughout his career. He has a passion for agriculture and has always worked towards seeing maximum value captured from our farming systems whilst being a strong believer in robust R&D programs providing future prosperity.





Matthew Sherriff — Chair, GIWA Trade Council

Following graduation with an honours degree in agricultural science from the University of Tasmania, Matt commenced his career in agriculture working in horticultural crops on the North West coast of Tasmania as a contract researcher. Moving to Western Australia permanently in 2002, he focussed on broadacre cereals research before taking on a crop protection marketing role based out of Singapore. With responsibility for the field crops portfolio Matt travelled extensively throughout India, China and South East Asia for four years before taking up a commodity manager's position with GrainCorp in late 2009 before leaving in 2013.

Matt has recently been appointed National Technical & Marketing Manager at SACOA.

Blakely Paynter — GIWA Barley Council representative

Blakely Paynter is a Senior Research Officer at the Department of Food and Agriculture Western Australia (DAFWA). In his current role, Blakely undertakes research and analysis, combines it with data from other sources to develop technical information on the performance of new barley cultivars in response to changes in crop management and environment, technical data to support an improvement in grower profitability when growing barley by examining regionally specific issues that affect barley in the farming system, and tools / guides that assist growers, next users, breeders and the barley supply with decisions affecting barley production in Western Australia.

Blakely has been with DAFWA for 25 years.

Susan Hall — AGI Council Representative

Susan Hall is the Project Leader of the Grower Group Alliance and a member of the GRDC Western Panel. She was recently the Chair of HARVEST – Young Agrifood Professionals Network.

Susan is passionate about contributing to the development of a skills base for agriculture and has a keen interest in change management, leadership and capacity skills as well as social entrepreneurship and innovation

Mark Sweetingham — Independent Executive Member

Mark has 30 years of continuous involvement in the Australian grains industry with a strong research and industry development track record. He has internationally recognised expertise in crop protection, farming systems, crop genetics and plant biosecurity, and experience in grain food technology and bio-economic modelling. Mark is committed to increasing value to the Western Australian grains industry, in partnership with industry, through research, development and innovation activities.

Mark is currently the Acting Executive Director of the Grains Directorate at DAFWA

Gavin Bignell — Independent Executive Member

Gavin Bignell originally from a grain and sheep farm in Kojonup, WA, is now CBH Group's General Manager of Grower Services, a Director of DailyGrain and a member of a number of industry groups.

He has worked for both grower organisations and grain marketing companies. Gavin holds a Bachelor of Agriculture Science (Hons) and a Graduate Diploma in Applied Finance and Investment.





TEAM GIWA

Johanna Gastevich — Executive Officer

Johanna Gastevich commenced as the Executive Officer of GIWA in March, 2011. She has worked in the not for profit sector for the majority of her career and has over 10 years senior management experience.

Prior to joining GIWA, Johanna was Associate Director – Engineering Practice at Engineers Australia’s national office located in Canberra and previous to this was the Executive Officer of the Australian Council of Built Environment Design Professions (BEDP) Limited located in Melbourne. Johanna was also the inaugural Executive Officer of the Western Australia Sustainable Energy Association (WASEA) which she helped form in 2002.

Johanna has completed a Bachelor of Business in Marketing and Communications.

Ian Longson — Policy and Business Development

Ian Longson is currently providing policy and business development services to GIWA. Prior to June 2009 he was on the Executive team of the Department of Agriculture from 1995 to 2004, finishing up as Director General of the Western Australian Department of Agriculture and Food for five years from 2004 to 2009.

Prior to joining DAFWA, Ian was senior consultant and manager of the Perth Office of ACIL Consulting (now ACIL Tasman) and has also worked for the Dairy Industry Authority of Western Australia, the Asian Development Bank and early in his career as an extension adviser with the Western Australian Department of Agriculture in the South West.

Ian holds a bachelor degree in Agricultural Science from the University of Western Australia and a master’s degree in agricultural marketing from the University of Guelph in Canada.





Shai Dunbar — Administration Officer

Shai Dunbar started working part time for GIWA in October 2012 as their new Administration Officer. She also works part time with AusChem Training WA as their recently appointed Executive Manager. Shai comes from a farming background, brought up on a Wheat and Sheep farm near Marvel Loch, WA.

Prior to joining GIWA, Shai spent 9 months back on the family farm. Previous to this she was working for the Thirsty Camel Group in the head office for WA as Administrator/Retail Support for 5 years.

Shai has a Certificate IV in Business Administration, Certificate III in Financial Services (Accounts Clerical) and Certificate IV in Financial Services (Accounting).

Alan Meldrum — Industry Development Manager WA, Pulse Australia

Alan Meldrum commenced as the Industry Development Manager WA for Pulse Australia in 2005. Prior to this spent a number of years working at the Department of Agriculture and Food Western Australia (DAFWA) in various capacities at a number of research stations located throughout WA. In 2004 he joined COGGO Seeds and was appointed the Seed Production Manager.

Alan's current role focuses on supporting the growing interest in desi chickpea in WA and to support the lupin industry with timely extension. Alan also produces the monthly Crop Report for GIWA.

CONTACT

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A close-up photograph of a grass seed head, showing fine, golden-brown awns and a central spikelet. A large, semi-transparent green rectangular overlay covers the middle portion of the image, creating a layered effect. The text is positioned within this green area.

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