



GIWA
Grain Industry Association
of Western Australia

GIWA Annual Report

2019-2020





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giwa.org.au

Chair and CEO Report



Bob Nixon
Chair



Larissa Taylor
CEO

It is our pleasure to provide you with the annual report for the Grain Industry Association of Western Australia for the period 2019 and 2020.

As we approach the October 2020 GIWA Annual General Meeting, the impact of the COVID-19 crisis continues to reverberate throughout rural and urban communities, grain markets and food supply chains around the world. To date we consider the Western Australian grain industry to have been incredibly resilient and resourceful in the face of such far-reaching global disruption. Even without COVID-19 and the impacts on our labour, input and logistics supply chains, the West Australian grain industry has experienced a challenging set of trade and seasonal circumstances in the past 18 months. With a lack of finishing rains in 2019 and Australia's major export barley market China effectively closing due to anti-dumping tariffs imposed against Australia in May 2020, circumstances like these make pre-competitive information

sharing and collaboration through the GIWA member network even more valuable. To have pre-breeders and plant breeders working on industry supply chain solutions with growers, grower groups, researchers, agronomists, input service providers, processors, logistics service providers and grain traders, allows us to translate market signals effectively and efficiently back through long value chains in the export oriented grain supply chain. It was heartening to see this "collaboration DNA" shining through in the early days of industry responses to the COVID-19 emergency in March, April and May during seeding. The next test will come in getting the 2020 crop harvested and shipped out efficiently through whatever COVID-19 conditions prevail at the time.





Our sincere thanks go to GIWA's strategic partners and supply chain members. In the past two years, we estimate you have leveraged your GIWA financial member contributions in support of an effective and efficient Western Australian grain industry with more than 6000+ volunteered hours or 157+ volunteered weeks of industry expertise through the GIWA board, councils, committees, working groups and collaborative projects. Your contributions are significant and have a positive impact on the competitiveness of the WA export grain supply chain. Whilst COVID-19 is challenging the business models of member organisations like ours, it has accelerated us all into a new era of collaboration and virtual communication. There are now multiple more opportunities to connect with each other digitally in support of the amazing industry we work in. As we move into the next phase of national consolidation of industry good functions with the establishment of peak organisation Grains Australia, we urge you to keep contributing your pre-competitive volunteer expertise into those areas of the industry that matter most to you.

After three years as Chair of GIWA, it is time for me (Bob) to pass the baton on to other members of our very capable leadership group. I have thoroughly enjoyed working with all of you - GIWA members and stakeholders, the GIWA board, Larissa and the GIWA staff. From our family farming operation in Kalannie in WA's north-eastern wheatbelt, I've learnt an enormous amount about Western Australia's export grain supply chain in the process.

Wishing you all the best for a safe and healthy conclusion to the 2020 Western Australian grain season, and a set of circumstances we can confidently call a 'COVID-19 recovery' into 2021.

Bob Nixon, Chair **Larissa Taylor**, CEO



GIWA's Purpose

An effective and export-oriented Western Australian grain industry

The Grain Industry Association of Western Australia (GIWA) was established in 2008 in response to the deregulation of the Australian wheat market and the disbanding of the Australian Wheat Board.

GIWA is a not-for-profit, whole of value chain member industry association incorporated under the WA Associations Incorporation Act 2015.

Our purpose is to support an effective and efficient export-oriented Western Australian grain industry. GIWA facilitates communication and information exchange, industry good

functions, capacity building and grain supply chain solutions for the Western Australian grain industry.

Each year GIWA members leverage their financial contributions in support of an effective and efficient export-oriented grain industry with 1000s of hours of voluntary industry expertise through the GIWA board, commodity councils and industry working groups (standards, wheat, barley, oats, oilseeds, pulses, careers in grain).

GIWA is not a political advocacy group and we do not conduct technical research, development or extension activities.

GIWA's Members

GIWA is proud of its' 12 year history of collaborating with its' financial members up and down the Western Australian export grain supply chain, translating market signals back into decisions which support an effective and efficient supply chain.

Our 100+ members include researchers, plant breeders, seed cleaners and distributors, growers, grower groups, agronomists, farm business advisors, input service providers, domestic feed and food grain processors, bulk and container logistics service providers, grain accumulators and grain traders.



GIWA's "Industry Good" Functions

GIWA defines national "industry good functions" as:

- **Grain Standards**
- **Trade & Market Access**
- **Varietal Classification & Rationalisation**
- **Technical Market Insight & Education**
- **Foundation Research & Development in Support of Market Insight & Education**

Through funded service agreements with DPIRD and CBH, on behalf of its financial members GIWA provides state-based support for "some" of these national "industry good functions" in Western Australia. We also provide capacity

building and project services through the GIWA ABN, GIWA member network and GIWA commodity councils, which are not considered to be pure industry good functions.

Under these agreements with CBH and DPIRD, GIWA provides barley rationalisation and oat classification 'industry good' functions through the GIWA Barley and Oat Councils.

GIWA is the caretaker of coarse grain standards in Western Australia, managed through the GIWA Standards Committee, and collaborates closely with Grain Trade Australia who manage Australia's national grain trade standards.



GIWA's National Partners

GIWA partners with a range of national organisations. We are a member of Grain Trade Australia, the Australian Oilseeds Federation, Pulse Australia, the Stock Feed Manufacturing Council of Australia, the Australian Fodder Industry Association, and the GIWA Barley Council cooperates as the western regional committee of Barley Australia.

GIWA collaborates with the Australian Export Grain Innovation Centre, the National Working Party for Grain Protection, Wheat Quality Australia, the Grain Industry Market Access Forum and is a service provider to the Grains Research and Development Corporation. GIWA welcomes as members both national grower organisations Grain Growers Limited and Grain Producers Australia, and state grower organisations WAFF Grains Council and the WA Grains Group (WAGG).



Department of
Primary Industries and
Regional Development



GIWA's Capacity Building Functions

Under its service agreement with DPIRD, GIWA provides monthly seasonal crop forecasting, namely the GIWA Crop Reports. GIWA also supports inbound and outbound grain trade and investment activities and implements trade supply chain capacity building initiatives.

Through the GIWA Careers in Grain project, GIWA promotes the West Australian grain industry as a globally competitive and technologically cutting-edge place to work.

GIWA is a service provider to the Grains Research Development Corporation GRDC, running the peak annual grain industry research conference, the GRDC Grains Research Updates in Western Australia.

Servicing this contract requires a significant proportion of GIWA's human resourcing capacity.

In 2015, GIWA was the founder and has been a participant in the informal Food Alliance WA network of primary industries associations which collaborates with the Department of Primary Industries and Regional Development DPIRD: GIWA, WAFIC, WAFF, Vegetables WA, Wines WA, KPCA, Safe Farms WA, Buy West Eat Best, RASWA, Grower Group Alliance. From 2020, administrative support for the informal Food Alliance WA network is being provided by the WA Farmers Federation.

DPIRD COVID-19 Western Australian Grains Industry Forum

www.dpiird.wa.gov.au/covid19-grains-industry



Department of
**Primary Industries and
Regional Development**

On 23rd March 2020 GIWA initiated an emergency teleconference with GIWA supply chain members, the Stock Feed Manufacturing Council of Australia and Grain Trade Australia regarding COVID-19.

Shortly afterwards in response to the developing national COVID-19 emergency, GIWA supported executives from the Department of Primary Industries and Regional Development to establish a COVID-19 Grains Industry Forum for Western Australia. GIWA notes that nearly all participants in this COVID-19 Grains Industry Forum are GIWA members who did not hesitate to volunteer their time and expertise.

During these first weeks of COVID-19 in March and April 2020, the resilience and adaptiveness of the Western Australian grain production sector and regional communities was nothing short of outstanding.

Initial response efforts focused on supporting the Western Australian state government to include agricultural production and service providers as “essential services” for the purposes of movement of grain freight and logistics, chemical and fertilizer inputs, fuel, machinery, service providers and workers, ensuring the 2020 West Australian grain crop could still be sown in the period March – May 2020. Subsequent efforts in April 2020 focused on public health, supply chain, processing, logistics and farm business unit risk management protocols for movement of people, preventative hygiene and managing COVID-19 infections.

In 2020 GIWA also participated in the following national COVID-19 committees:
Grain Trade Australia COVID-19 Risk Management Committee
Grain Growers Limited COVID-19 Forum

Grain Standards

2020 GIWA Standards Review In a function inherited from the former statutory Grain Pool of Western Australia, through the GIWA Standards Committee GIWA is the caretaker of coarse grain standards in Western Australia. The GIWA Standards Committee has balanced representation through the production, processing, logistics and trading parts of the WA grain supply chain, and is chaired by Grain Trade Australia’s technical standards advisor Gerard McMullen. GIWA is a member of and collaborates with Grain Trade Australia. Grain Trade Australia controls national grade trade standard setting, with input from the Australian Oilseeds Federation and Pulse Australia.

GIWA reviews the Western Australian grain standards on an as-needs basis to ensure standards are fit for purpose to end use customer requirements. Documentation and Terms of Reference for the GIWA Standards Review 2020 can be found at

www.giwa.org.au/standards

www.graintrade.org.au/commodity_standards

The 2020 GIWA Standards Review resulted in no proposed material changes to tolerances for WA grains standards for the 2020 harvest.

None of the GIWA Standards Review 2020 submissions listed below, or the Committee's deliberations after the first and second round submissions period, resulted in any proposals for material changes to existing tolerances for the WA grain standards for the 2020 harvest.

There were however, requests for further information and research, and for the

reinstatement of a triticale standard for WA which was last published in 2016.

Submissions Six submissions were received in the First Round of Consultations, with 1 additional submission ** received in between rounds 1 and 2 from Stirlings to Coast Farmers. Of the seven submissions, 6 related to barley and 1 related to Triticale. No submissions were received relating to oats.

No.	Submission Received from	GIWA Standards Review 2020 Standards Issue	Committee Decision for Implementation	
			2020/2021	2021/2022
1	Weston Animal Nutrition	Request reinstatement of Triticale standard for WA (last published 2016 harvest). Support introduction of GTA Triticale Standard CSG50 (link below)	Yes	
2	Cargill	Support introduction of measurement and tolerance for Screenings in barley below a 2.2mm screen, as well as Retention on a 2.5mm screen	Measurement Only	Measurement Only
3	CBH Grain	Support phased introduction of measurement for Screenings in barley below a 2.2mm screen, as well as Retention on a 2.5mm screen Commitment to provide data for research project into FN/RVA and colour as quality indicator and measurement for malt barley storability As per change by GTA to feed barley nomenclature ie BAR1 and BAR2, consider revising WA origin feed barley nomenclature to reflect range of end-uses	Measurement Only Progress the research No Change	Measurement Only
4	GIWA Barley Council	Support introduction of measurement for Screenings in barley below a 2.2mm screen as well as Retention on a 2.5mm screen Support for research project into FN/RVA and colour as quality indicator and measurement for malt barley storability	Progress the research	Measurement Only
5	WAFF Grains Council	Request that colour as a quality parameter in the standard for barley be reviewed Support for research project into FN/RVA and colour as quality indicator and measurement for malt barley storability	Progress the research Progress the research	
6	Stirlings to Coast Farmers	Request that colour as quality parameter in the standard for barley be reviewed	Progress the research	
7	Barrett Burston Malting	Request for upper level protein tolerance in WA Malt 1 barley to be reduced from maximum of 12.8% to 12.2 %	No change	

www.graintrade.org.au/sites/default/files/file/Commodity%20Standards/2019-2020/TRITICALE%20STANDARDS%20201920.pdf

Note: industry practice is that bulk handlers may make changes to receival standards in response to seasonal conditions.

Trade and Market Access

Under its' service agreement with DPIRD, GIWA provides state industry support for inbound and outbound grain trade and investment activities and implements trade-oriented supply chain capacity building initiatives. On the state and federal government side, GIWA cooperates with DPIRD and DJTISI, the Federal Department

of Agriculture, Water and the Environment, Department of Foreign Affairs and Trade and Austrade. On the industry side, GIWA cooperates with the Grain Industry Market Access Forum GIMAF, the Australian Export Grain Innovation Centre and participates in the Trade and Market Access Committee of Grain Trade Australia.

China Barley Tariffs 2020

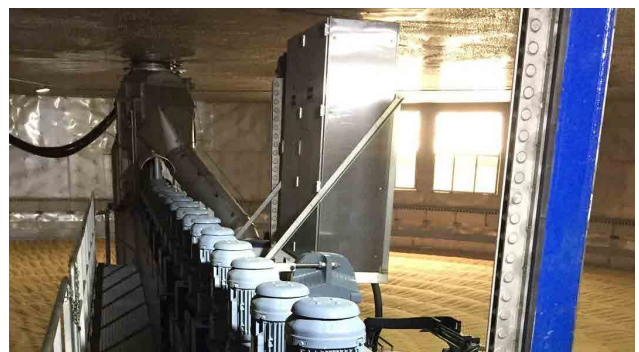
In the trade and market access space the grain industry's collective national effort in 2019 and 2020 was focused on defending Australian barley exports to China, worth AU\$1.4 billion (US\$960 million), which were targeted in November 2018 when China opened an anti-dumping investigation and December 2018 when China opened a countervailing duties investigation. The Australian barley trade to China effectively stopped in May 2020 when China imposed tariffs totalling 80.5 per cent.

The response to these tariffs is being led by the national China barley working group (Grain Growers Limited, Grain Producers Australia, Grain Industry Market Access Forum, Grain Trade Australia and the Australian Grain Exporters Council – a sectoral council of GTA). GIWA declines to comment on the factors contributing to these anti-dumping tariffs, other than to note that the immediate direct financial impact to the Western Australian export malt barley industry was approximately \$250 million in the May/June 2020 period when the malt barley price dropped from \$290 to \$245 per tonne in response to the tariffs.

In early September 2020 China went on to ban barley shipments from CBH Marketing and Trading, based on allegations of phytosanitary non-compliance from China's General Administration of Customs. Western Australian new crop barley is now effectively priced at or below the Saudi feed barley price. In the



May 2020 Crop Report, GIWA foreshadowed a 17 per cent reduction in barley plantings and expects a further swing away from barley plantings in preference to wheat for the 2021 growing season. Dispute resolution regarding the China barley tariffs is being led by the Australian government with support of the national China barley working group, through the appropriate World Trade Organisation processes, and could take three years or longer to resolve.



Indonesia-Australia Comprehensive Economic Partnership Agreement or IA-CEPA



Indonesia-Australia Comprehensive Economic Partnership Agreement

Through 2018 and 2019, GIWA was active in supporting national lead organisations Grain Growers Limited, Grain Trade Australia and AEGIC for the ratification of the new comprehensive economic partnership agreement with Indonesia, the IA-CEPA. The IA-CEPA includes new market access for 500,000 tonnes of feed grain (feed wheat, feed barley and sorghum) and a grain technical capacity building program, called the Australia Indonesia Grains Partnership. The timing of the final negotiations (2018), the IA-CEPA being signed (March 2019) and ratified (July 2020) coincided with high Australian domestic grain prices caused by the east coast drought and intense competition in Australia's traditional \$1 billion plus Indonesian instant noodle wheat market from cheaper Black Sea origin grain. Consequently, there was a significant decline in Indonesian imports of Australian wheat during the same period, the majority of which came from Western Australia.

In support of the IA-CEPA GIWA contributed to early drafts of the Australia Indonesia Grains Partnership, attended the IA-CEPA signing ceremony in March 2019 in Jakarta and the concurrent Australian Grain Industry Conference AGIC Asia 2019 event, made submissions to and appeared before the Australian Parliamentary Joint Standing Committee on Treaties in September 2019 and participated in meetings with DFAT and the WA state government. GIWA extended an invitation to the Indonesian Flour Millers Association (APTINDO) and Indonesian Feed Millers Association (GPMT) to visit Western Australia to participate in the 2019 GIWA Forum in October. This was the first time the Australian grain industry had hosted the Indonesian Feed Millers Association, which GIWA coordinated jointly with the Stock Feed Manufacturers' Council of Australia and the Australian Export Grain Innovation Centre (AEGIC).

Subsequently AEGIC was confirmed as the lead agency for the first tranche of capacity building service activities under the Australia Indonesia Grains Partnership in the IA-CEPA.



GIWA Forum 2019: ASEAN Food and Feed Grain Opportunities: Supporting the IA-CEPA

Both APTINDO the Indonesian Flour Millers Association and GPMT the Indonesian Feed Millers Association were key notes speakers at GIWA's flagship grain trade event the 2019 GIWA Forum, held at Optus Stadium on Wednesday 2nd October with over 170 member and stakeholder attendees.

The 2019 Forum was opened by WA's Minister for Housing, Fisheries, Veterans Issues, Asian Engagement, **The Hon Peter Tinley AM MLA**.

Keynote speakers were:

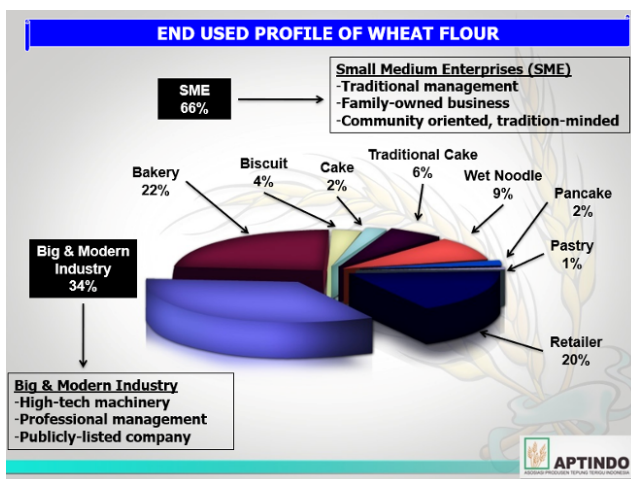
Mr Erwin Sudharma,

Deputy Director PT Indofood Sukses Makmur Tbk (Bogasari Flour Mills)
Representative, Indonesian Flour Millers Association APTINDO, and

Dr Desianto Budi Utomo,

Vice President PT Charoen Pokphand Tbk
Chair, Indonesian Feed Millers Association GPMT.

Mr Sudharma's keynote presentation "Growth and Partnership Opportunities in the Indonesian Flour-Milling Sector and ASEAN Markets" focused on understanding the opportunities the New Millennial Consumers presented in Indonesia's wheat flour milling sector. There are 155 million Generation Y and Z consumers in Indonesia, who in 2015 had an estimated purchasing power of \$38.2 billion – these are the experience conscious consumers driving the changes in the new end user profile of wheat flour in Indonesia.



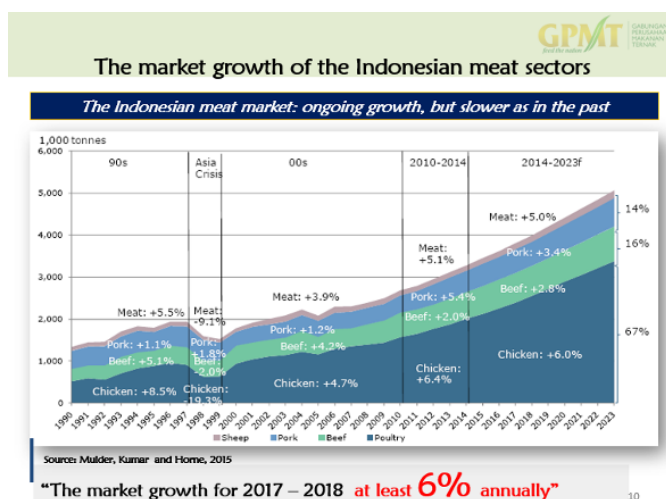
Dr Desianto Budi Utomo, The Hon Peter Tinley AM MLA and Mr Erwin Sudharma

Indonesia's New SME Customer Profile

No	Factor	Micro SME	Artisan/Boutique	Traditional	Modern
1	Size	Small	Small	Medium, Big	Big
2	Profile User	Gen X, Y, Millenials	Gen Y, Millenials	Gen X, Y	Gen X, Y
3	Management Style	Low	Good	Low	Good
	Branding	N/A	Own Brands	No Brand	Own Brands
	Marketing Strategy	Low	Good	Low	Good
	Distribution Network	Around community	Online	Good	Strength
	Product Presentation	Good	Super	Low	Good
4	Employee	Family Member	DIY, Family	Non Family	Professional
	Reason of Business	Hobby, Support Family	Hobby	Income for Living	Growing
5	Seasonal	Continue	Continue	Continue	Continue

Dr Utomo's presentation focused on "Growth and Partnership Opportunities in the Indonesian Feed-milling Sector and ASEAN Markets". The Indonesian demand for chicken meat and egg protein continues to be very strong, but the domestic poultry/ animal feed sector is looking for cheaper alternatives to regulated domestic corn:

As a COVID-19 postscript to this October 2019 presentation, the Indonesian Feed Millers Association GPMT reports that demand for poultry and eggs and therefore feed grains has been severely impacted in the first six months of 2020, by up to 30 per cent, making domestic feed grain prices cheaper. While this is a disincentive for the Indonesian feed grain sector to apply for import permits into the new market access for 500,000t of Australian feed wheat, feed barley and sorghum, it elevates the opportunity for Australia to partner in technical capacity building services with the Indonesian feed milling and flour milling sector through the COVID-19 recovery process.



Recommendation

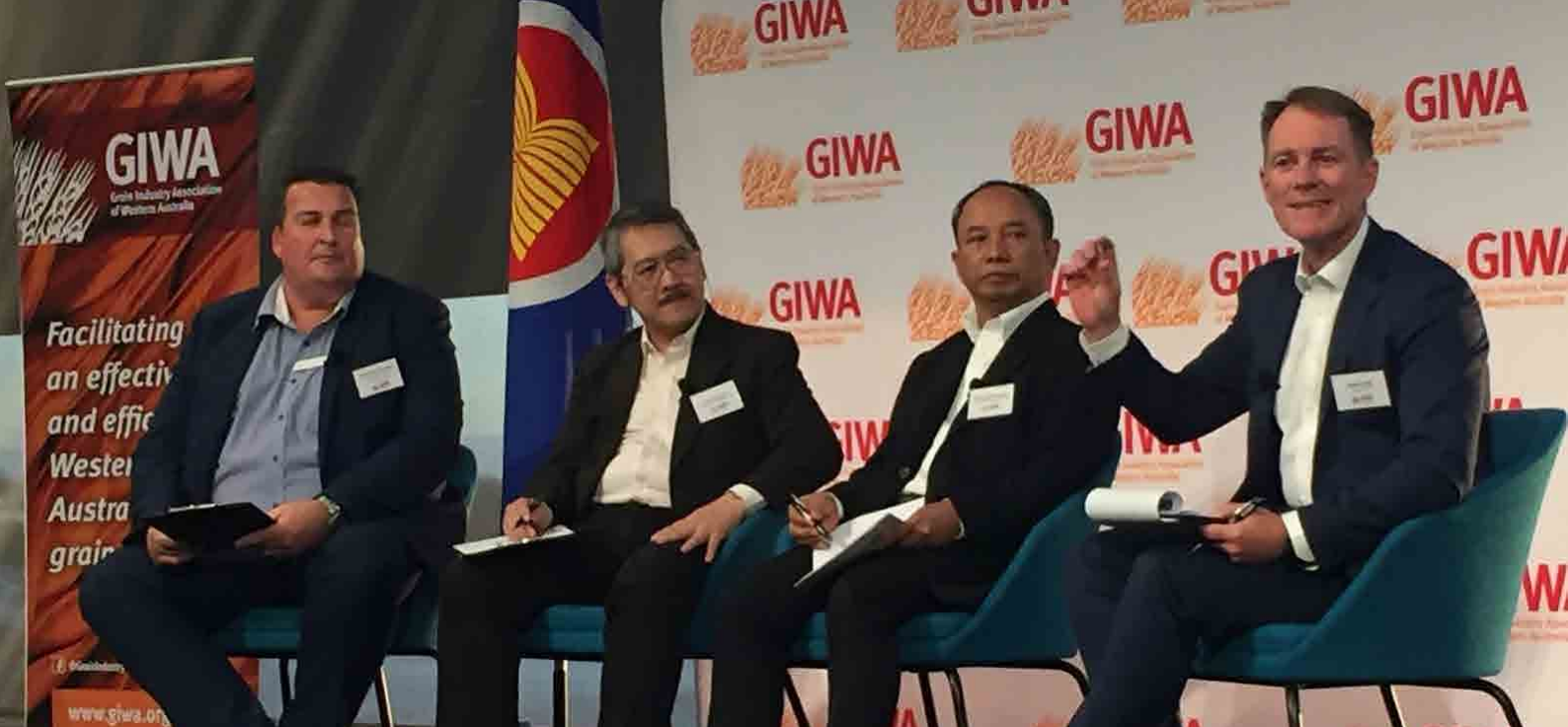
The (new) Government (BULOG) should have a national grain buffer stock (2 months).

It is necessary to validate the corn data of plant area and production also its availability.

Use of local ingredients should consider:

– Continuous supply – Stable quality – Competitive price

To lift the ban for importation of grains which can be used to substitute corn (wheat, sorghum, etc)



Inbound WA Visit Indonesian Flour Millers Association APTINDO and Indonesian Feed Millers Association GPMT, October 2019

Around the date of the October 2019 GIWA Forum, GIWA worked with DPIRD, the Australian Export Grain Innovation Centre and the Stock Feed Manufacturers Council of Australia to design a WA visit program for the Indonesian Flour Millers Association APTINDO and Indonesian Feed Millers Association GPMT to showcase:

- **AEGIC's existing portfolio of Technical Baking & Milling Training Seminars for the Indonesian flour milling sector**
- **Australian soft wheat breeding programs GIWA members (InterGrain and AGT) and plans for lower protein wheat varieties to be grown in Western Australia which will be suitable for South East Asian cakes, biscuits and snacks market segments**
- **Feed wheat and feed barley varieties, at InterGrain trial sites in the western Kwinana zone**
- **Inghams poultry feed technology**
- **Weston Animal Nutrition's animal feed technology**
- **The online SFMCA Certificate in Advanced Feed Milling and FeedSafe safety training**
- **Australian Sweet Lupin as a high value premium plant protein and as a stock feed ingredient**

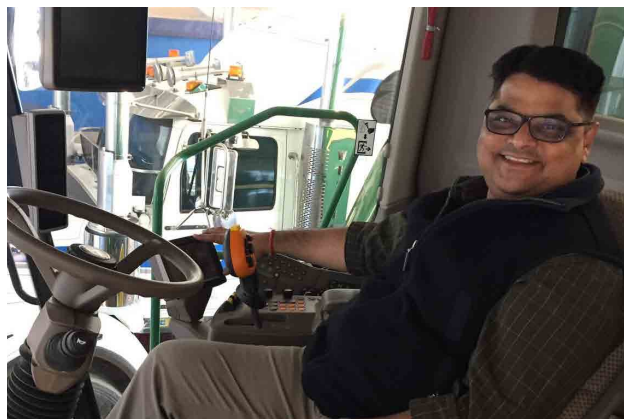


India Australia – Plant Bilateral Technical Delegation Indian Ministry of Agriculture and Farmers Welfare, hosted by DAWE Secretary Mr Atish Chandra, 13 – 16 October 2019

GIWA supported the federal Department of Agriculture, Water and the Environment, DPIRD, AEGIC and the Grain Industry Market Access Forum to host an inbound visit by Mr Atish Chandra, Secretary in the Indian Ministry of Agriculture and Farmers Welfare to discuss phytosanitary issues with Australia, including the issues of India-side recognition of phosphine fumigation of grain, particularly malt barley, and technical collaboration on the India side definition of weed seeds of concern.

With the support of the Australian federal government the Australian Export Grain Innovation Centre AEGIC also carried out several in-market technical programs with Indian maltsters in 2019. In May 2020 India subsequently recognised phosphine fumigation of Australian malt barley, the first step towards opening up a new Australian malt barley market to India.

For his first visit to Australia in September 2019, GIWA worked with the talented chefs



Mr Atish Chandra, Secretary in the Indian Ministry of Agriculture and Farmers Welfare

at Annalakshmi on Swan to host an industry dinner in Secretary Chandra's honour, including representatives of the Indian and Western Australian government, which featured North and South Indian vegetarian gourmet cuisine, Western Australian pulses (faba beans, lentils, lupins, chickpeas) and avocados (in support of market access for Australian avocados to India).

India Grain Finance and Storage Technologies Delegation Austrade and GIWA 17 – 21 September 2019

This bilateral India Australia grain industry engagement developed out of the India Economic Strategy initiative from the Australian federal government <https://dfat.gov.au/about-us/publications/Documents/government-response-to-an-india-economic-strategy-to-2035.pdf> and the March 2019 visit to Perth of Ambassador Anil Wadhwa the Indian government's top official in charge of India's Australian economic



development strategy. Ambassador Wadhwa participated in the WA Government's India Trade Forum coordinated by DFAT, Austrade, the WA Department of Jobs Science Tourism & Innovation and the Australia India Business Council WA, with his Australian counterpart former DFAT Secretary Ambassador Peter Varghese, author of Australia's India Economic Strategy (link above).

The Indian Grain Finance and Storage Technologies Delegation was coordinated by Austrade New Delhi and was to have been led by the Chairman of India's National Bank for Agriculture and Rural Development NABARD, Dr Harsh Kumar Bhanwala, in his first visit to Australia. Dr Bhanwala carries a cabinet secretary level position reporting through to Indian Prime Minister Narendra Modi. NABARD has AUD\$90 billion assets under management and is owned by the Reserve Bank of India. Unfortunately Dr Bhanwala had to withdraw from the delegation at the last minute.

Other delegates included: the CEO of India's National Commodity and Derivatives Exchange NCDEX Shri (Mr) Vijay Kumar, an Executive Director from the Indian Securities and Exchange Board SEBI Shri (Mr) Mr Nagendraa Parakh, the CEO of the Indian National Commodity Clearing Limited (NCDEX subsidiary) Mr Rajiv Relhan, and a delegation of 10 in total. This was the first time this senior group of Indian agricultural and commodities finance leaders had travelled overseas together.

The delegation visited Sydney for one day on Monday 16 September 2019 to meet with ASX, ASIC, EFIC, peak grain organisations Grain Trade Australia, Grain Growers Ltd, Pulse Australia and others.

From the 17 – 21 Sept 2019 the delegation visited Western Australia, hosted by GIWA with input from the Department of Primary Industries and Regional Development. The delegation toured various grain port, bulk and container export and up country storage facilities (from 300,000t to bespoke farm size 50t+), visited fumigation and sealing technology businesses, biosecurity testing laboratories, the Murdoch University stored grain research project, the UWA Institute of Agriculture and the UWA Business School's simulated financial trading room.

The delegation included the key stakeholders of the Indian commodities futures trading ecosystem, i.e. the financier (NABARD), the regulator (SEBI) and the users/operators (NCDEX and its subsidiary NCCL). The focus of the visit was to:

- 1. Understand Australian expertise in bulk grain management covering:**
 - a. storage*
 - b. testing*
 - c. treatment and*
 - d. transport*
- 2. Identify best practices and engage Australian bulk grain finance, storage and logistics technologies and processes which could be replicated in India**

GIWA understands that India side estimates up to 12 – 16 million tonnes annually of post-harvest food grain is lost through inefficient handling logistics. Australia considers the Indian futures grain trading ecosystem, with grain assets of around 1 – 3 million tonnes serviced by 9 warehouse service providers, to be a potential testing ground for Australian agricultural equipment, grain storage and technology service (AgETS) exports to India. Australia is committed to demonstrating to India that we are a reliable and sustainable supplier of safe, quality food commodities and high quality agricultural technologies – a collaborative and reliable food security partner for the production years where India is not able to satisfy food demand internally.

Subsequently on 4 June 2020 Prime Ministers Morrison and Modi signed a Joint Statement on a Comprehensive Strategic Partnership between the Republic of India and Australia. Section 9 Agriculture Cooperation and Water Management, Article 28 in the Joint Statement references the intent to explore the “development of a partnership on grains management and logistics to reduce post-harvest losses, rationalise costs and ensure farmer income is not affected by supply chain disruptions (particularly in light of the COVID-19 pandemic).”

28. Agriculture is an important pillar of the Australian and Indian economies with shared challenges and climactic conditions. Recognising the long history of collaboration in agricultural research, education, development and capacity building, it was jointly decided to continue building on our mutually beneficial agriculture relationship including through exploring the development of a partnership on grains management and logistics to reduce post-harvest losses, rationalise costs and ensure farmer income is not affected by supply chain disruptions (particularly in light of the COVID-19 pandemic).

29. Both countries noted that on market access issues, some progress has been made and they demonstrated their strong commitment to continue the negotiations.

30. Water security is a critical challenge for both countries and it was jointly decided to deepen policy and technical cooperation on mutually agreed activities to improve water management and sustainable economic development through the Memorandum of Understanding on cooperation in the field of Water Resources Management.

Joint Statement Extract

www.pm.gov.au/media/joint-statement-csp-republic-india-australia

GIWA will continue to contribute to the Department of Agriculture, Water and the Environment, Department of Foreign Affairs and Trade and the Grain Industry Market

Access Forum GIMAF, as this partnership proposal in grain storage technology and logistics is progressed.





*Celebrating 1 million+
tonne, customised noodle
wheat market from
Western Australia to
Japan and Korea*



ASWJ Noodle Wheat Industry Communications Protocol (AEGIC, CBH and GIWA) with Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) and the Japan Flour Millers' Association

In recognition of the importance of the 30 year old, 1 million + tonne, customised noodle wheat market from Western Australia to Japan and Korea, and the fact that Japan side purchase through a least cost tender system administered by the Japanese government, the Western Australian noodle wheat industry has an established communications protocol for annual consultations with Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) and the Japan Flour Millers' Association (JFMA).

The Australian Export Grain Innovation Centre faces Japan on behalf of the Western Australian state government and the national

grain industry, supported by major noodle wheat exporter and bulk handler the CBH Group, and the GIWA Wheat Council.

Annual information briefings take place in spring and during harvest regarding supply and quality, from which Japan determines the ASWJ blend ratio of percentage of ANW to APWN varieties, and the wheat protein band required by the Japan Flour Millers Association. GIWA supports this communications process by releasing industry communications to the West Australian grain industry, such as the January 2020 update:

Noodle Wheat Update Western Australia

This industry update is provided by the Wheat Council of the Grain Industry Association of Western Australia Inc (GIWA) under the Noodle Wheat Industry Communications Protocol between Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) and the Japan Flour Millers' Association (JFMA), and the Australian Export Grains Innovation Centre (AEGIC), CBH Group and GIWA, as at Monday, 20th January 2020.

Updated APWN segregation for ASW Blend to Japan: 80% ANW:20% APWN

- The blend ratio has been reviewed in January 2020. This change is a result of customer feedback and tighter Noodle wheat supply after a poor harvest.
- **The following blend ratio for ASWJ will apply from February tender and April 2020 shipment:**
80% ANW 1 & ANW 2
20% APWN
Min protein 10% / max protein 11.0%
(Min protein changed from previous 9.8%)
- Until September 2018, Japan imported Australian Standard White ASW blend traditionally made up of 60% ANW varieties and 40% APW varieties.
- New fit-for-purpose ANW varieties such as Ninja and Zen continue to replace the older variety Calingiri and have been well received in Japan.
- In 2018, JFMA requested alternative quality solutions for the APW component of the ASW blend to address colour and elasticity in udon noodles.
- APWN is an allowable grade in the Grain Trade Australia wheat standards.
- The APWN class was established 10 years ago by Wheat Quality Australia in recognition that the industry may need to protect the quality of the noodle blend. As the varietal composition grown in WA is changing, Japan are utilizing APWN classed varieties.
- **Twelve varieties** accepted into APWN are Mace, Bonnie Rock, Westonia, Wyalkatchem, LRPB Scout, Envoy, Chief, Devil, Havoc, Cutlass, Trojan and King Rock <http://wheatquality.com.au/>.





GIWA Forum 2020

Diversifying and Value-Adding Western Australian Grain

In response to COVID-19 and Western Australia's new grain market diversification priorities, GIWA's peak trade thought leadership event is scheduled for 7 October 2020, to be opened by Minister The Hon Alannah MacTiernan MLC, Minister for Regional Development; and Agriculture and Food, with:

- **Keynote address by Professor Ross Kingwell, AEGIC's Chief Economist, and panellists:**
- **Jason Craig, General Manager, Marketing and Trading, CBH Group**
- **Jon Slee, Director, Alba Oils**
- **John Orr, Director, Premium Grain Handlers**
- **Liam O'Connell, ED, Agribusiness, Food and Trade, DPIRD**

Varietal Classification and Rationalisation

Oat Varietal Classification

The GIWA Oat Council is responsible through its GIWA Oat Classification Technical Committee for the classification of food grade milling oat varieties in Western Australia. Milling oat classification in WA is carried out entirely at the expense of GIWA member companies and through pro bono industry resources.

In a January 2019 commercial milling trial by Pepsico Quaker Oats on behalf of the GIWA Oat Council, the SARDI National Oat Breeding Program oat variety 06204-16 “Bilby” met industry requirements in terms of physical milling characteristics and nutritional β -glucan content and was classified by the GIWA Oat Council as OAT1 milling grade.

Previously classified oat varieties by the GIWA Oat Council in 2017-2019 were:

Bilby	OAT1	February 2019
Kowari	OAT1	February 2018
Durack	OAT2	February 2017

grdc.com.au/resources-and-publications/all-publications/publications/2020/2020-western-australian-crop-sowing-guide

Wheat Varietal Rationalisation

Since 2017 the GIWA Wheat Council has been collaborating with Wheat Quality Australia regarding the suitability of new and older noodle wheat varieties for the ASWJ blend to Japan and Korea.

GIWA has communicated extensively with WQA regarding the older noodle wheat variety Calingiri, formerly widely planted in Western Australia. With superior yielding and quality ANW varieties now widely available, GIWA

supported Wheat Quality Australia's decision in the 2020 Master Varietal List to remove Calingiri for delivery as a food grade wheat in 2022 ie after 2 more harvests 20/21 and 21/22 Calingiri will only be eligible to be delivered as a feed wheat in WA from the 22/23 harvest onwards.

wheatquality.com.au

Barley Varietal Rationalisation

Since 2016 and in response to what were (pre COVID-19 and pre May 2020 China anti-dumping Australian barley tariffs) rapidly growing malt barley markets in China and other parts of Asia, the GIWA Barley Council worked with the malt barley supply chain in Western Australia to provide guidance to rationalise old malt barley varieties out of segregations in the bulk handling system.

The GIWA Barley Rationalisation process involves meetings with breeders, researchers, maltsters, traders and CBH Operations, before holding a public barley rationalisation forum for the whole barley supply chain, then writing up malt barley varietal receival recommendations for 2 harvests in the future or approximately 18 months out.

This is a guidance document only, to help communicate customer preference for malt barley varieties and reduce the number of varieties which have to be segregated in the bulk handling system. Thanks is due to lead author and GIWA Barley Council member, DPIRD's senior barley researcher Blakely Paynter.

www.giwa.org.au/barley-council

www.barleyaustralia.com.au

GIWA Malt Barley Variety Recommendations 2021/22

GIWA BARLEY COUNCIL

20 August 2020

Western Australian Malt Barley Variety Receival Recommendations for the 2021/22 Harvest

Summary 2021/22 Harvest

At the 2021/22 harvest, the following observations are relevant:

- The reduction in overall market demand for malt barley, associated with the tariffs imposed by China on the imports of Australian barley, favour the production of barley with a yield-feed focus rather than a malt-focus and result in a further reduction of the total area sown to barley in 2021. Fortunately, the dominant barley varieties, RGT Planet and Spartacus CL, grown in Western Australia can be received into malt segregations, ensuring we can still respond to any increased demand for malt barley should market conditions change. Maintaining a supply of the premium malt varieties, Bass and Flinders, is critical to domestic processors and key international customers during this period of reduced demand and expected lower market price.
- Bass and Flinders will be the preferred malt barley varieties sought by the trade for malting and brewing end-use in south-east Asia and Japan, with demand for RGT Planet and Spartacus CL increasing in different market sectors.
- La Trobe is the preferred malt variety supplied to Japan for the manufacture of shochu. Associated with reduced grower production of La Trobe, limited segregations will be available for La Trobe to maintain supply to this premium market and support the needs of domestic processors.
- The rapid adoption of Spartacus CL has continued, with Spartacus CL now the most popular variety sown across all four-port zones. Japan has proposed lifting the MRL for imazapyr from 0.1 to 0.7 ppm. Should this occur in 2021, there is potential to export Spartacus CL to Japan for the manufacture of shochu. Full acceptance of Spartacus CL for shochu in Japan will result in the phasing out of La Trobe after the 2021/22 harvest. If an import tolerance is implemented, shochu buyers will likely start making the switch over to Spartacus CL during the 2020/21 campaign.
- Scope CL has been phased out as a malt variety and will not be segregated after the 2020/21 harvest. Growers can continue to sow Scope CL for the farming system benefits it offers and deliver into feed segregations as there is no longer any international demand for the malt profile of Scope CL barley.
- Segregation opportunities for Bass, Flinders, La Trobe, RGT Planet, and Spartacus CL vary by port zone and for the Kwinana and Albany Ports, within a port zone (Table 1).

Table 1. Western Australian malt barley variety segregation recommendations by Port Zone for the 2021/22 harvest

YES	This is a recommended variety for this production zone.						
Limited	Limited segregations likely due to low production hectares, limited market demand, a new variety going through market development or phasing out an old variety.						
Niche	Subject to availability. Niche segregation only available if a marketer has sufficient tonnage to supply to a domestic or international customer. Marketers should contact CBH to negotiate niche segregation, and growers should contact their preferred marketer to determine availability.						
NO	Variety has been phased out, or marketers are not looking to accumulate this variety in this production zone.						

Port Zone	Geraldton	Kwinana			Albany		Esperance	Comment
		North (Midlands)	South	North (East)	North	South		
Malting varieties								
Bass (b)	NO	YES	Limited	NO	NO	Limited	NO	Stable market demand with an excellent malt quality profile
Flinders (b)	NO	NO	Niche	NO	NO	YES	Niche	Works well as a variety for post-malt blending and sugar-adjunct brewing
La Trobe (b)	NO	Limited	Limited	Limited	Limited	Limited	Limited	Stable market demand with a recognised quality profile
RGT Planet (b)	NO	YES	YES	NO	Limited	YES	YES	Market development for brewing end-use continuing
Spartacus CL (b)	YES	YES	YES	YES	YES	YES	YES	Market development for brewing and shochu end-use continuing

www.giwa.org.au



GIWA Crop Report

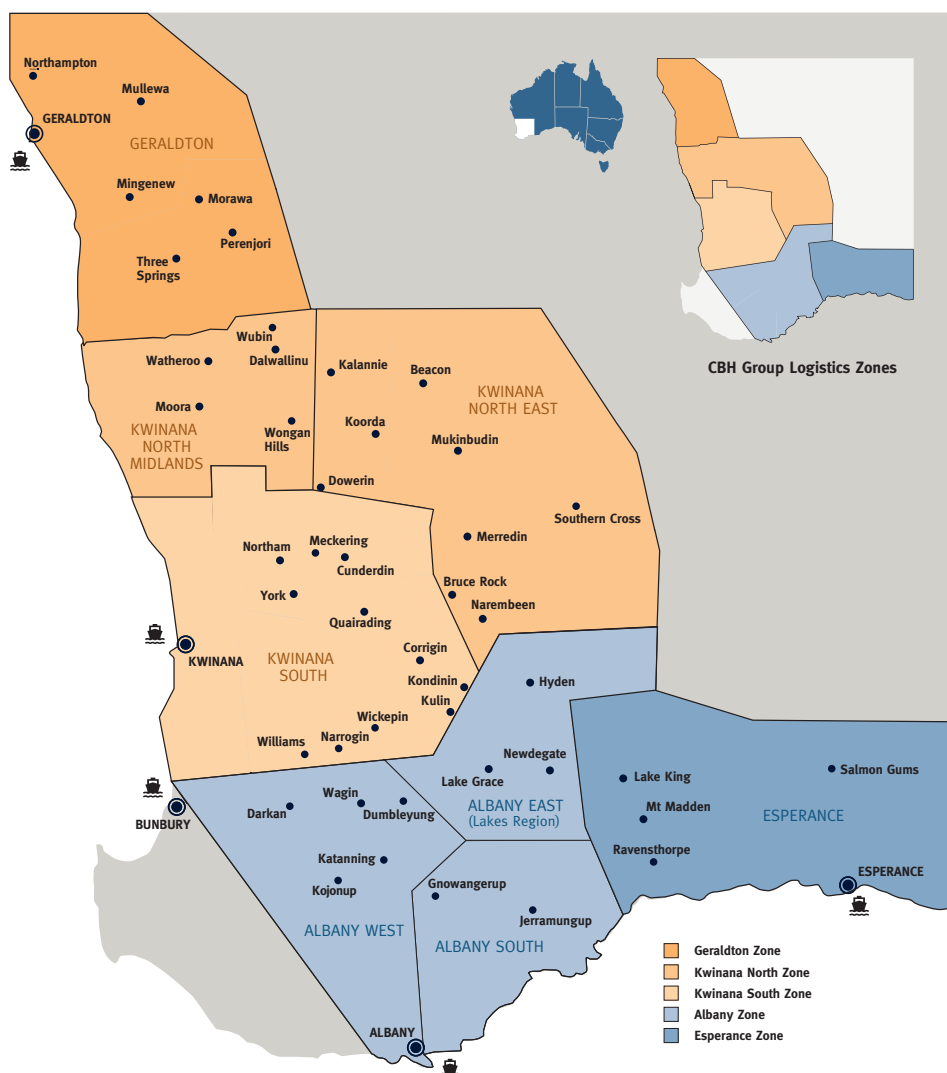


Funded through the DPIRD GIWA services agreement, GIWA produces 10 monthly Crop Reports documenting the progression of the Western Australian grain production from April through to December, and a Grain Season in Review Report each February. Supported by an expert panel of agronomists and authored by a highly regarded research agronomist, the GIWA Crop Report is referenced in state,

national and international crop-reporting and media distribution channels.

The GIWA Crop Report is a also major commercial communications tool reaching the Western Australian metro public, explaining the sophistication of agricultural production, impact of climatic conditions and the value of the \$6 billion + grain industry to the Western Australian economy.

GIWA Crop Report Areas





The 2019 West Australian Grain Season in Review: *“From One Extreme to the Other”*

2019 total WA grain production: 11.294 million tonnes, down on GIWA's five year average total grain production estimate of 15.29 million tonnes.

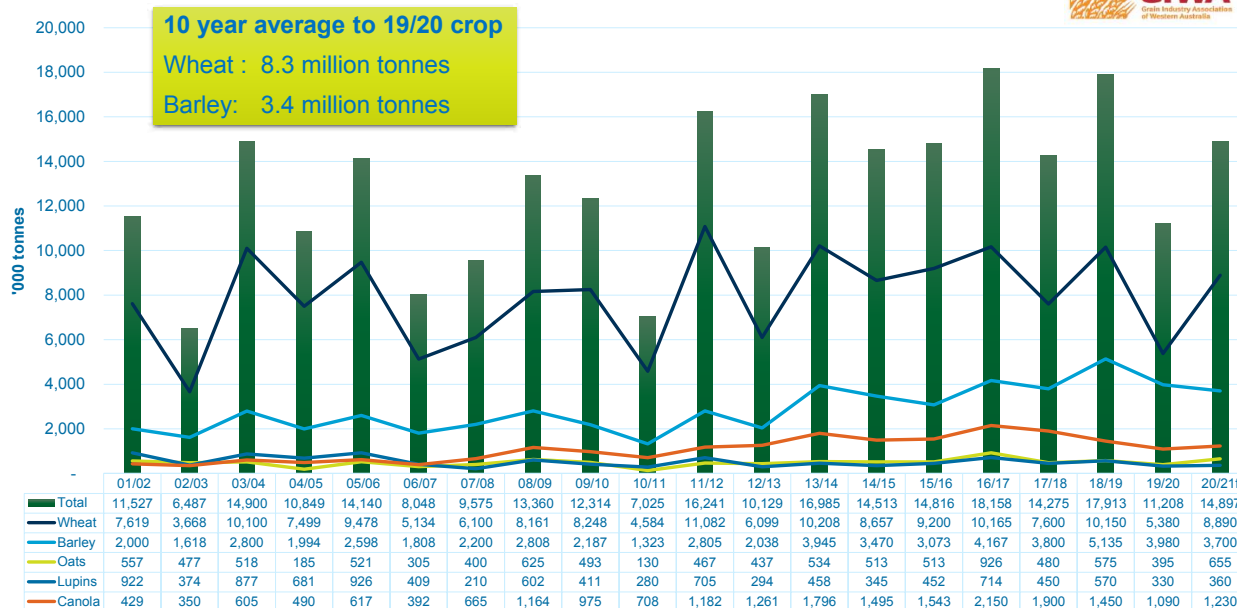
Across the WA grainbelt it was “one extreme to the other” in 2019, irrespective of your location. In the north of the state grain yields were more than 50 per cent below 2018 for all crops (except oats), and in some cases up to 75 per cent below 2018. Moving south in the state the combination of severe frost followed by very hot windy conditions resulted in unprecedented loss of production for some growers. This was most evident in the south coast where some growers had their “best ever” result due to the lack of waterlogging, others had their “worst ever result” due to the lack of rain and frost. In traditionally higher rainfall regions of the south west, grain yields

were spectacular and grain quality excellent, with some regions returning the highest whole paddocks grain yields ever.

During the 2019 harvest, grain quality was “all over the place”, with some growers delivering into more segregations than ever before due to the range in protein and screenings. Having the ability to deliver into the number of segregations required (due to the wide range in grain quality) was a credit to the grain handling system in the State. Reflecting market signals, the lack of price spread for protein reinforced the message to mostly “grow for yield”.

Western Australian Grain Production 2000 - 2020

Historical Grain Production in WA



Source: GIWA Crop Report August 2020 <http://www.giwa.org.au/2020>

2019 Season GIWA February WA Crop Production Estimates (tonnes)

Port zone	Wheat	Barley	Canola	Oats	Lupins	Pulses	State Total
Kwinana	2,650,000	1,450,000	365,000	180,000	160,000	8,000	4,813,000
Albany	985,000	1,600,000	370,000	190,000	65,000	5,000	3,215,000
Esperance	850,000	700,000	285,000	10,000	15,000	15,000	1,875,000
Geraldton	1,060,000	105,000	97,000	15,000	110,000	4,000	1,391,000
Totals	5,545,000	3,855,000	1,117,000	395,000	350,000	32,000	11,294,000
Change from 2018	-45.4%	-25%	-23%	-31.3%	-38.6%	-3%	-37%

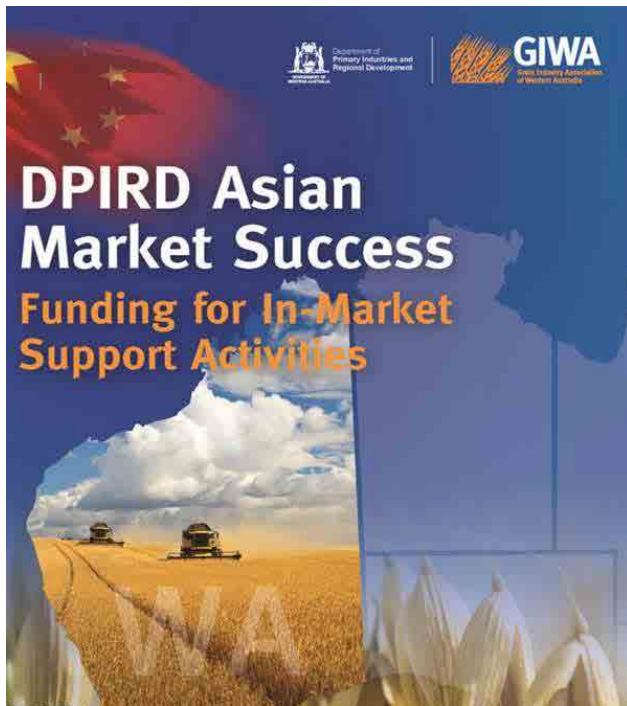
Note: the grain totals reported are for whole farm production. This includes on-farm seed and feed requirements as well as trade outside of the CBH network.

2019 Season GIWA February WA Crop Yield Estimates (tonnes per hectare)

Port zone	Wheat	Barley	Canola	Oats	Lupins	Pulses
Kwinana	1.01	1.88	0.91	1.05	1.33	1.33
Albany	1.89	2.35	1.76	1.18	1.65	0.63
Esperance	1.70	1.84	1.72	1.0	1.5	0.42
Geraldton	1.10	0.88	0.44	1.0	0.61	1.0
Averages	1.43	1.74	1.21	1.06	1.28	0.85

Capacity Building

DPIRD Asian Market Success Grant Program – GIWA Oat Delegation to China, July 2019



The GIWA Oat Council was the recipient of a DPIRD Asian Market Success grant in the first half of 2019 to better understand Chinese consumer preferences for Western Australian oats.

China is Western Australia's largest export market for all oat products, receiving \$152 million or 38% of all oats produced (total 575,000 tonnes) in 2018/19. In the past decade the Western Australian oat crop has shifted from being a sheep feed crop to a human food crop. Western Australian oats are highly regarded in China, Japan, Korea, Taiwan, India and other Asian markets for their cleanliness, safety and beta glucan health benefit. Australian oats dominate the rolled oat market in China, with more competition from cheaper origin oats such as Chile in the processed product segments such as granolas, cereals, bars and snack food. Three companies dominate the Chinese processed oat market ie Seamild, Pepsico (Quakers) and GoldenCrops.

With the DPIRD Asian Market Success funding the GIWA Oat Council was able to organise a pre-competitive delegation to China in July 2019 for 6 Oat Council members including plant breeders, growers, agronomic and technical quality researchers from AEGIC, SARDI National Oat Breeding Program and InterGrain to:

- i) promote the International Oat Conference 2020 which GIWA is now hosting in WA from 11 – 14 October 2021 (postponed from Oct 20 due to COVID-19)
- ii) understand Chinese sensory preferences for WA oats, building on the existing in-market work of AEGIC, and test the GIWA Oat Council's hypothesis that sensory criteria should be developed for the GIWA Oat Variety Classification process
- iii) understand the functional and nutritional oat food attributes valued by the Chinese market
- iv) understand opportunities for novel premium food and beverage usages for WA oats in the Chinese snack, lunch and dinner markets (beyond breakfast), organic market, premium and gift giving market
- v) understand investment drivers for Chinese customers of WA oats to attract capital into value-adding oat food and oaten hay processing
- vi) promote Western Australian oaten hay to the Chinese dairy sector, and assess any interest in wheat and barley fodder, and lupins for feed (all three of these feeds currently do not have market access to China) at the Tianjin China Dairy Expo, July 2019



As a result of the DPIRD Asian Market Success grant, the GIWA Oat Council confirmed that it is not necessary to incorporate sensory evaluation criteria (taste, aroma, texture, mouthfeel) into the GIWA Oat Variety Classification process – beta glucan levels of minimum 4% and current physical millability criteria are sufficient. Excellent customer feedback on key functional and nutritional attributes of Western Australian oats, including:

Some feedback that Australia is on the edge of acceptable beta glucan (accepted minimum 4%) and protein levels, and qualitative feedback that beta glucan had fallen in recent years

Customers concerns to demonstrate that they are meeting health label claims

Seamild feedback regarding a larger kernel size and requiring minimum 54kg/hectolitre weight

Pepsico feedback rating texture and appearance as more important than flavour and customers not wanting a 'sticky' product

Pepsico saying bigger oats are better, because they can use a large oat for more products, than if they receive small oats

Pepsico looking for higher protein, higher fibre, higher beta glucan products

All customers being sensitive to the issue of chemical residues, conscious of MRLs and relatively educated about the impact of spray drift versus dessication on residues in oats

All customers appreciated that glyphosate is not allowable as a dessicant on oats in Australia and this was perceived as a positive point of difference in the market



GIWA Wheat Industry Forum, June 2019

In June 2019, GIWA held a GIWA Wheat Industry Forum attended by 60+ grain industry researchers and executives in response to the escalating issue of low protein wheat being produced in Western Australia over the past several seasons. In July 2019 GIWA reported to Minister MacTiernan MLC, Minister for Regional Development; Agriculture and Food; Ports; Minister Assisting the Minister for State Development, Jobs and Trade at a second Ministerial discussion on the low protein wheat issue as follows:

1. Summary of Conclusions from the GIWA Wheat Industry Forum (June 2019)

- Develop a dual strategy food wheat as well as feed wheat
- Keep doing what we're doing well ie producing Australian Standard White ASW wheat (no minimum protein, intermediate to hard grain, value for either straight milling or blending) and Australian Premium White APW wheat (minimum protein 10%, good milling properties, balanced dough properties, good colour characteristics)
- Defend the markets for higher value customised Australian Noodle Wheat ANW (protein range 9.5% to 11.5% excellent for udon noodles, bright appearance, stake white to creamy colour, soft and elastic mouth feel)
- Test the niche high value opportunity part of the market ie soft wheats for cakes & cookies
- Further investigate the markets for feed varieties from available water usage

2. Actions from the WA Industry in Response to Low Protein Wheat (June 2019)

- **CBH/DPIRD/AEGIC collaborative project Dec 2017**
 - Analysis of initial CBH data set;
 - Proposed GRDC project to determine causal links 2018 (unsuccessful);
 - Analysis of 960 trials samples for wet gluten vs protein ratio Sep 19 finish
- **Industry value chain engagement (GIWA Wheat Forum June 2019)**
GIWA with Australian Crop Breeders Association, Wheat Quality Australia, AEGIC, GRDC, CBH, DPIRD, exporters
- **Genetics**
Genetic research into wet gluten, drivers for protein achievement, cellular activity / protein sub-units – InterGrain
- **New market development**
AEGIC to put a value on low protein wheat styles:
 - Breed and grow low protein soft wheat - win a share of the USA cake/cookie market
 - Increase market usage of low protein Udon noodle varieties across SEA/China
- **WQA to conduct a major review of classification**
Will reward growers for protein - CBH/IG/AEGIC
- **Method development**
Improve the reliability of wet gluten test – AEGIC
- **CBH supply chain cost initiatives**
Pursue a low cost operating strategy driven by asset utilisation and efficiency

3. Additional Investment Ideas from WA Industry to Address Low Protein Wheat

- **Udon noodle/ASF market expansion**
Increase the current investment – AEGIC
- **Identification of regional differences and opportunities**
For feed / soft / hard / other crops - DPIRD
- **Update data in the current decision making tools**
New varieties, agronomy, season, multiyear data - CBH/DPIRD
- **Agronomy projects that generate farming system approach**
Risk management of causal links – DPIRD
- **Grower education of the issue**
GIWA
- **Australia Indonesia Grains Partnership in IA-CEPA**
Build capacity in understanding food and feed uses for Australian wheat – AEGIC/ CGL/GTA/GIWA



GIWA Seeding Success 2019: Agronomic Seasonal Review

Offered under GIWA's Services Agreement with DPIRD, the GIWA Seeding Success industry event is a half day agronomic seasonal review, targeted at agronomists, farm business advisers, plant breeders, seed distributors and meteorologists, usually held on the third Thursday of November in Perth. For the past 3 years GIWA has also been collaborating with the AAAC (Australian Association of Agricultural Consultants) to offer an afternoon half day professional development workshop after the GIWA Seeding Success agronomic review.

GIWA Seeding Success facilitates an agronomic peer discussion about how the grain season played out and what the likely follow-on agronomic effects and management decisions will be into the next grain season climatic conditions played out.

As Western Australia's grain belt rainfall continues to decline and seasonal climate patterns are becoming more unpredictable, this seasonal agronomic review has become a critical reflection point in the grain industry calendar.

The **2019 GIWA Seeding Success Program** included:

Panel Discussion WA Seasonal Agronomic Review 2019: Crop Quality & Protein Impact

Michael Lamond, GIWA Crop Report Author (*Facilitator*)

Monica Field, Farm and General

Brad Joyce, ConsultAg

David Cameron, Farmanco

Presentation: Update on WA Crop Leaf Disease Resistance Status

Fran Lopez Ruiz, CCDM

Panel Discussion Managing Crop Disease Issues into 2020

David Pfeiffer, Synergy (*Facilitator*)

Fran Lopez Ruiz, CCDM

Trent Butcher, ConsultAg

Mark Lawrence, Farmanco

Presentation: Canola Phenology, Seasonal Variability and Maximising Canola Profitability

Rohan Brill, NSW Department Primary Industries

Panel Discussion "Canola: Is There A Yellow Ceiling in the WA System?"

Geoff Fosbery, ConsultAg (*Facilitator*)

Bill Moore, Elders

Darren Chitty, Landmark

Rohan Brill, NSW DPI

GIWA MRLs Chemical Compliance & Information Workshop 2019

GIWA partnered with the National Working Party for Grain Protection, APVMA and National Residue Survey to offer this MRL chemical compliance workshop targeted at agronomists in November 2019, to:

- increase industry knowledge of Maximum Residue Limits or MRLs and chemical regulations in Australia and internationally, in particular those impacting on WA export grain markets
- Discuss and agree on initiatives to improve industry practices and compliance
- Identify capacity gaps and agree on improved chemical residue communication and advocacy

Speakers

James Deller, Director Trade & Residues APVMA <https://apvma.gov.au/>

Gerard McMullen, Chair, National Working Party for Grain Protection NWPGP

Jenna Garwood, Assistant Director, Plant Programs, National Residue Survey, Department of Agriculture (NRS) <http://www.agriculture.gov.au/ag-farm-food/food/nrs>

Gordon Cumming, Manager Chemical Regulation GRDC <https://groundcover.grdc.com.au>

The MRLs Chemical Compliance & Information Workshop 2019 Program included:

Australian Regulatory Framework and Government's Role: James Deller APVMA and Jenna Garwood National Residue Survey

What is an MRL / How are they set Regulations

& Roles in Australia

- **Regulation development, MRL setting, trace back of chemical residue breaches Regulations & Roles in AUS and internationally**
- **Role of APVMA, FSANZ, State Governments**
- **Role of the NRS**
- **NRS Results**

Market Requirements in Australia and Overseas: Gerard McMullen, NWPGP

Regulations in Export Markets

- **Key market MRLs**
- **Trends in key markets**

Specific Chemical Issues for WA: Gordon Cummings GRDC

- **Glyphosate**
- **Haloxypop**
- **Imidazolinone**
- **Flutriafol**

Industry Use & Management of Chemicals: Gerard McMullen, NWPGP

- **Code of Practice elements**

Industry Communication & Actions from here: Gordon Cumming GRDC

- **Priority issues for WA**
- **Role of s/c participants in feedback on market requirements to chemical users/ re-sellers/agronomists**
- **Information sources/fact sheets**
- **What else is needed:**
 - Industry interaction
 - Industry management & tools
 - Communication (emails, meetings etc.)
 - Tools (codes, TDGs, fact sheets, web tools)
 - Government advocacy
 - Supply chain actions to meet market requirements

www.graintrade.org.au/nwpgp

Food Alliance WA DPIRD Trust In Primary Production, 2019

For the first time in 2019, GIWA also collaborated with industry partners across primary production sectors in Western Australia. Funded by DPIRD, GIWA, WAFF and WAFIC, and serviced on the GIWA ABN, in 2019 the informal Food Alliance of WA primary industry associations worked with Cannings Purple and AgKnowledge to conduct the inaugural survey of Western Australian metro food consumers to understand their perceptions of fishing and farming.

The WA metro food consumer survey found that they have high levels of trust and pride in farmers and fishers but do not feel informed or connected about farming and fishing. WA metro food consumers expect more information about the food production sector's environmental stewardship, and expect kids to be taught about primary industry food production at school.

The common issues highlighted by the survey participants in the Food Alliance WA 2019 DPIRD Trust in Primary Industries project were:

Food Alliance WA DPIRD Trust in Primary Production Project

FOOD ALLIANCE WA TRUST IN PRIMARY PRODUCTION PROJECT | FINAL REPORT | 2019

The case for collaboration: a heat map of common issues for WA primary industries

This heat map provides a visual summary of common issues between each primary industry sector to demonstrate where there are opportunities to align and collaborate on issues.

Issue	Broadacre cropping / Grain	Livestock	Pastoral	Dairy	Horticulture	Wine	Fisheries	Forestry	Honey
Resource access	Leased State land		Lease terms diversification				Access to fish stocks	Access to State resource	Access to State bushland
Water access	Clean water access	Livestock supplies	Aquifer / river access	Irrigation Stock supplies	Irrigation	Irrigation			
Ethical animal treatment		Husbandry Transport	Husbandry Transport	Husbandry Transport			Husbandry Transport		Husbandry Transport
Responsible pesticide use	Glyphosate access Residues / Off-target	Withholding periods Glyphosate	Withholding periods	Withholding periods Glyphosate	Glyphosate Withholding Off-target	Glyphosate access Off-target		Glyphosate access	
Waste	Produce Processing by-products	Manure / Feed Produce Processing by-products		Manure / feed Processing by-products	Produce Processing by-products	Produce Processing by-products	Produce Processing by-products		
Environmental impacts	Soil / water quality Salinity / acidification	Odour	Soil / water quality	Soil / water quality	Soil / water quality	Soil / water quality	By-catch Ocean waste	Deforestation	Native insects Dieback
Climate change	Changing rainfall and temperature patterns	Changing rainfall and temperature patterns	Changing rainfall and temperature patterns	Changing rainfall and temperature patterns	Changing rainfall and temperature patterns	Changing rainfall and temperature patterns	Changing sea temperature patterns	Changing rainfall and temperature patterns	Changing rainfall and temperature patterns
Biosecurity	Pest / disease incursion risks	Pest / disease incursion risks	Pest / disease incursion risks	Pest / disease incursion risks	Pest / disease incursion risks	Pest / disease incursion risks	Virus impacts	Dieback	Mite / disease risks
Food safety	Residues Contamination	Residues Contamination	Residues Contamination	Residues Contamination	Residues Contamination	Residues Contamination	Residues Contamination		
Labour	Exploitation Imported labour	Exploitation Imported labour	Exploitation Imported labour	Exploitation Imported labour	Exploitation Imported labour	Exploitation Imported labour	Exploitation Imported labour		
Health mandates	Residues, gluten	Reducing meat consumption	Reducing meat consumption			Reducing alcohol consumption	Farmed vs fished		
Plastics	Chemical drums Hay wraps	Chemical drums Hay wraps	Chemical drums Hay wraps	Chemical drums Hay wraps	Chemical drums Plastic mulch Packaging		Fishing gear		
Technologies (GM etc.)	GM, gene editing								

The project also contributed \$10,000 towards the national Agrifutures CSIRO/Voconiq Community Trust in Australia's Rural Industries 2020 survey, to expand the dataset for Western Australia in the national survey. Again, the national survey confirmed that Australians see their rural industries as stewards of the land and sea, with 86% of Australians strongly believing that environmental management is a shared responsibility across all Australian rural industries.

The Australian grain industry already has two voluntary codes of practice – the production sector Growing Australian Guide produced by Grain Producers Australia with advice on how to safely manage risks with crop inputs on farm <https://grainsguide.grainproducers.com.au/>, and the Australian Grain Industry Code of Practice produced by Grain Trade Australia <https://graintrade.org.au/grain-industry-code-practice> which describes industry self-regulation of processes through the grain supply chain to end users.

The collective survey results from both Agrifutures and Food Alliance WA are strong indicators from consumers that the Australian grain industry needs to accelerate efforts towards implementing a new national sustainability framework which complements the two codes above and which includes carbon economy transition targets, such as that proposed by Grain Growers Limited www.graingrowers.com.au/behind-australian-grain-insight-report





Quakers
Representatives



GIWA Oat Council “Oat Growth Priorities” 2020

In 2019, GIWA Oat Council members concentrated on securing funding and international support for the International Oat Conference 2020. In August 2020 the GIWA Oat Council also formed a working group to review and prioritise key actions in support of DPIRD’s 2020/2021 Business Case for the WA Oat Industry.

The GIWA Oat Council had already contributed to the DPIRD Oat Growth Case Study which was presented by DPIRD to Treasury in January 2020. Subsequently a GIWA Oat Council working group also supported the addition of DPIRD RD&E activities that will support the export fodder industry in Western Australia (the GIWA Oat Council includes food oat milling and export oaten hay members). Priorities for oat growth development (yet to be

published by DPIRD as at end September 2019) were identified across the 4 key areas of:

- 1. Pre-Production**
- 2. Production**
- 3. Supply Chains, and**
- 4. Capturing the Market.**



GRDC Grains Research Updates 2020



The GRDC Research Updates West is the premier grains research event in Western Australia - a two day event in Perth attracting over 650 participants and featuring national and international grains research is extended into the regions through several satellite Research Updates forums attracting more



than 250 people, held in collaboration with grower groups and rotating around Western Australia's grain belt. Founded and formerly known as the Department of Agriculture 'Crop Updates', this research conference is much loved by the Western Australian grain industry and has been running for over 20 years.

GIWA is contracted to GRDC to deliver the GRDC Research Updates Perth research conference and regional research events until 2024, ably coordinated by GIWA's Ian Longson and the media and administration team.

www.grdc.com.au

COGGO Council of Grain Growers Organisations Ltd



COGGO

GIWA is proud to be the service provider to the grower-funded research and early stage technology investments of COGGO Ltd, a service relationship which stretches back to 2012. COGGO Ltd plays a valued role in the grains research and development landscape in Western Australia. Grower members of COGGO levy themselves into a fund which allocates investment through a competitive annual grants process to early stage research projects, selected from proposals submitted by government and university research

organisations, grower groups or private entities. This WA grower directed investment is additional to levies paid into the Grains Research and Development Corporation and is fit for purpose to specific Western Australian cropping challenges. In 2020 COGGO invested a total of \$694,460 into seven projects

[www.coggo.net.au/
projects?page=projects-funded](http://www.coggo.net.au/projects?page=projects-funded)

GIWA and AOF: AusCanola 2018 to International Rapeseed Congress 2023

After an intensive year collaborating with the Australian Oilseeds Federation in 2018 to deliver the rebranded AusCanola research conference in September 2018 in Perth, GIWA oilseeds activities in 2019 were limited to running a joint Australian Oilseeds Federation and GIWA Oilseeds supply chain meeting in February 2019, immediately after GRDC Research Updates 2019, and including a discussion on the limitations of canola in the WA production system in the November 2019 GIWA Seeding Success Seasonal Agronomic Review. Planning is underway for another joint AOF GIWA Oilseeds supply chain meeting for February 2021.

AusCanola 2018 (the 20th biennial Australian Research Assembly on Brassicas, the first being run in Perth in 1977) successfully attracted 120+ national and international oilseeds researchers to Perth, including Australian and globally recognised researchers from the CSIRO, the University of Western Australia, Curtin University, the University of Adelaide, the University of Melbourne, the University of

Wollongong, the University of Queensland, state agricultural departments of Qld, NSW, WA, Agrifood Canada, Punjab Agricultural University, Chinese Academy of Agricultural Sciences, Alberta Agriculture and Forestry, University of Manitoba and others.

As part of GIWA's service in running AusCanola2018, a \$10,000 conference cash float was generated for the Australian Oilseeds Federation to contribute towards hosting the 16th International Rapeseed Congress in Sydney from 24-27 September 2023.



*AusCanola research conference
in September 2018 in Perth*



GIWA Barley Forum 2020

Over 200 GIWA Members and national barley supply chain stakeholders came together (in person and virtually) in Perth at the end of July in an expanded GIWA Barley Rationalisation Forum. The purpose being to discuss the impacts of the May 2020 China barley tariffs on malt barley production in Western Australia. The GIWA Barley Council thanks event partners' Barley Australia and the Department of Primary Industries and Regional Development. Participants were informed that the national China barley working group (Grain Trade Australia, Grain Growers Ltd, Grain Producers Australia, Australian Grain Exporters Council and the Grain Industry Market Access Forum) were working with the Australian government on a possible WTO appeal process against the tariffs. Speakers included:

Introduction

Lyndon Mickel, Chair, GIWA Barley Council
Industry Update Barley Australia & MBIBTC
Megan Sheehy, Executive Chair, Barley Australia

COVID-19 and China Barley Tariffs Impacts on Malt Barley and Malt S&D

Simon Robertson, Regional Merchandising Manager, Boortmalt Asia Pacific

China Barley Tariff Update from Industry Working Group (GTA + AGECE, GIMAF, BA, GGL, GPA)

Jason Craig, CBH Chief Marketing and Trading Officer

Australian and WA Malt Barley S&D

Drew Robertson, CBH Marketing and Trading Barley Trader

AEGIC Alternative Markets for Australian Malt Barley: India, Vietnam Technical Market Development

Mary Raynes, Barley Technical Manager, Australian Export Grain Innovation Centre AEGIC

Barley Chemical Residue & MRLs for Alternative Malt Barley Markets

Gerard McMullen, Chair National Working Party for Grain Protection NWPGP

Review of Barley Segregations in CBH Bulk Handling System Harvest 19/20

Craig McClure Head of Grain Technology, CBH Operations

Recap GIWA Malt Barley Varietal Recommendations 2020/21 (set pre-China Barley Tariffs)

Recap malt varietal rationalisation in Western Australia pre-China Barley Tariffs: **Lyndon Mickel** GIWA Barley Council Chair, **Blakely Paynter**, DPIRD, **David Moody**, InterGrain

Scenario Discussion: 2020/1 & 2021/22 WA Malt Barley Segregations (post-China Barley Tariffs)

Lyndon Mickel GIWA Barley Council Chair, **Blakely Paynter**, DPIRD, **David Moody**, InterGrain

Recap & Interim Conclusions: GIWA Malt Barley Varietal Recommendations 2021/22

Lyndon Mickel GIWA Barley Council

The malt barley scenario discussion with CBH Operations, maltsters, supply chain participants, exporters, growers and plant breeders at the **GIWA Barley Forum** resulted in **GIWA's recommendations for malt barley varieties for the 2021/2022 harvest**, which can be found above on page 24.



International Oat Conference 2021

In 2016 supply chain members of the GIWA Oat Council participated in one of two major international oat research conferences, held quadrennially, the International Oat Conference, which was held in St Petersburg, Russia. In St Petersburg, GIWA successfully bid to host the next International Oat Conference in Perth in 2020.

GIWA secured strong financial support from the Grains Research and Development Corporation, DPIRD, Business Events Perth (formerly Perth Convention Bureau) and GIWA oat industry supply chain members CBH, Blue Lake Milling, Pepsico Quakers, Unigrain, SARDI

National Oat Breeding Program, InterGrain, Demeter Cormack, Premium Grain Handlers and others to host the International Oat Conference 2020.

Regrettably due to COVID-19, GIWA and the International Oat Committee have postponed the International Oat Conference 2020 to 11th to 14th October 2021. As at September 2020 GIWA is already working on a potential plan B virtual conference format should that be required.

www.internationaloat.com

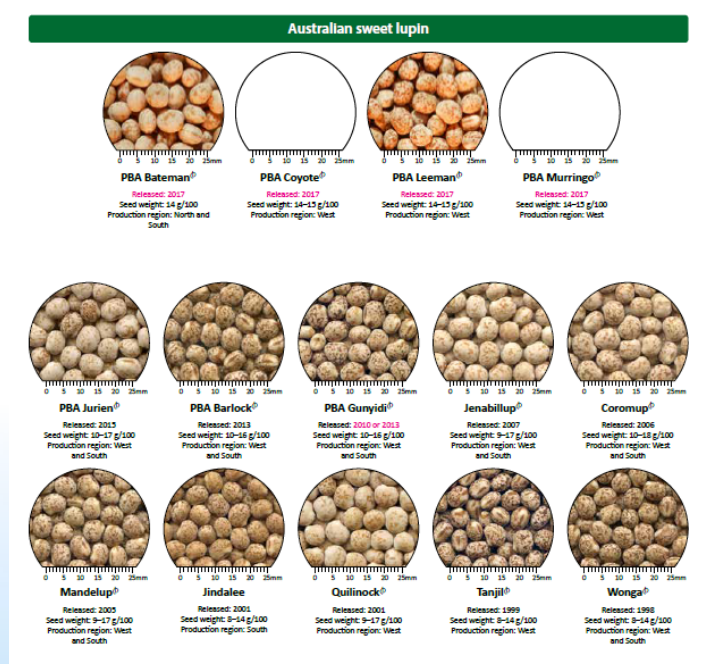


AGT GIWA Lupin Industry Field Day August 2020

In August 2020 GIWA partnered with member and Australia's largest plant breeder and lupin breeding company Australian Grain Technologies www.agtbreeding.com.au, to run a lupin industry field day and supply chain discussion in Northam Western Australia with over 70 researchers, breeders, agronomists, growers and exporters. Full presentations from the field day can be found www.giwa.org.au/events#8-2020. Conclusions from the AGT GIWA Lupin Industry Field Day were:

- A dual industry strategy is required to breed lupins for feed **and** lupins for food
- The target is to increase lupin tonnes in 7 years (2027) by 400,000 to 800,000t (2/3 of historical maximum tonnage), and
- To increase WA lupin tonnes in 15 years (2035) to 1.2m tonnes
- Both targets are realistic with the correct combination of yield and price
- Lupins for food is a niche market, developing from what we estimate to be a very low volume of less than 10,000t, and facing the challenge of being an “un-branded” protein
- However, with strong demand for plant protein globally, Lupins for food could possibly be the main driver of growth in the WA lupin industry in the long term
- In the short term, lupins for feed is currently where most of the current opportunities lie

www.pulseaus.com.au



GIWA Careers in Grain



Kayla Evans
Program Manager

The purpose of the GIWA Careers in Grain project is to attract, upskill and employ talented people into the Western Australian grain industry.

Over the past two years, the GIWA Careers in Grain project has participated in more than 45 careers events across Perth and the Western Australian wheatbelt, including school and tertiary careers events, field days, the Perth Royal Show and large scale public metro events such as the Careers and VET Expo at the Perth Convention and Exhibition Centre. Annually, GIWA Careers in Grain reaches more than:

- **12,000 high school students**
- **3,000 university students**
- **20,000 members of the Western Australian public**

The GIWA Careers in Grain project is consistently the only representative organisation for agriculture (not just the grain industry) in the career transition space. To our knowledge the GIWA Careers in Grain Program Manager is the only FTE in Australia to be on the ground, actively marketing agriculture to young people and engaging across high school year groups beyond the classroom. GIWA Careers in Grain does not conduct marketing and promotion activities in the primary school space.

GIWA Careers in Grain creates pathways for young people to enter the grain industry or upskill towards the next step in their career. In the 2019 – 2020 period we provided the following opportunities:

- **Over 40 tertiary student scholarships to attend the peak grain research conference, the GRDC Research Updates Perth**



Careers in Grain PROJECT UPDATE

Careers in Grain aims to Attract people to career opportunities within the grain industry, Upskill people who are both entering and working in the industry and Employ more high calibre people in a thriving sector worth more than \$6 billion to the Western Australian economy.

ATTRACT

- 45+** CAREERS EVENTS AND EXPOS ATTENDED
- 35K+** STUDENTS AND JOBSEEKERS REACHED ANNUALLY
- THE ONLY FTE ON THE GROUND OFFERING CAREER INFORMATION**

UPSKILL

Careers in Grain has been able to offer upskill opportunities to more than **150 early career professionals** in a range of areas.

- RESEARCH
- AGTECH
- HARVEST OPERATIONS
- AGRONOMY
- FINANCE AND ECONOMICS
- COMMUNICATIONS

EMPLOY

in response to COVID-19, GIWA and Careers in Grain subsidised places for jobseekers looking to gain work in the 2020 Western Australian harvest season on a 4-day Harvest Heavy and Farm Machinery Upskill Course with provider 2 Workin Oz.

- 36 SCHOLARSHIPS**
- \$26K+ VALUE**
- 64% EMPLOYMENT IN WA REGIONS**

Jobs in WA Food & Ag was set up as a temporary collaborative resource between industry and government in response to COVID-19 to provide jobseekers and employers with information about jobs in primary industries, where COVID-19 movement restrictions applied and seasonal labour for some primary industries was affected.

- **Over 10 student places to participate in the Australian Institute of Agriculture Talking 2030 Conference**
- **A bespoke three-day study tour for 8 high achieving tertiary students to the Great Southern grower group based Southern Dirt TECHSPO event in 2019**
- **Over 20 places for early career professionals to participate in a Building Shared Values, Communications and Trust in Agriculture workshop, run by Deanna Lush of AgCommunicators**

COVID-19 caused a pivot for GIWA Careers in Grain from April – July 2020 when Program Manager Kayla Evans was seconded to support the temporary Jobs in WA Food & Ag project. As the COVID-19 movement restrictions applied and international seasonal labour for some primary industries became heavily affected, Jobs in WA Food & Ag was set up as a temporary collaborative resource between industry (Food Alliance WA network members including GIWA), government (DPIRD) and job matching service provider Studium to provide jobseekers and employers with information about seasonal skilled and unskilled jobs in Western Australia's primary industries. In August 2020 Studium took over the servicing of the JobsinWAFoodandAg initiative and the West Australian state government launched the Work and Wander Campaign to promote regional and seasonal skilled and unskilled jobs to Western Australians.

From July in response to COVID-19 induced seasonal skilled and unskilled labour shortages in the Western Australian grain industry, GIWA Careers in Grain created a partnership with private skills trainer 2WorkInOz in York, investing more than \$26,000 to upskill 36 seasonal workers for the 2020-21 harvest season through a four-day unaccredited Harvest Heavy and Farm Machinery Upskill Program. Sixty four percent of the total participants who went through this course gained employment in regional WA, and of that 64%, 87% gained employment in the grain and agricultural industries. Encouragingly, more than 10 unemployed airline pilots completed this Harvest Skills training course and were found to have highly transferrable skills for driving headers.

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GIWA Careers in Grain

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GIWA's History

GIWA supports consolidation of “industry good functions” for the Australian grain industry and has done so since its formation in 2008. In mid-2020, GIWA welcomed the formation of the new peak industry body Grains Australia.

In 2008 when the Australian wheat industry deregulated, several small state-based industry associations consolidated to form the Grain Industry Association of WA or GIWA, with the merger of NACMA WA, Oilseeds WA, the Western Oat Alliance, the Western Region Barley Council and Pulse WA.

In 2011, the former Australian Grain Institute disbanded and rolled its' AGI Capacity Building Project into GIWA, funded by CBH, DPIRD, GRDC, University of Western Australia, Curtin University, Murdoch University, the CBH Grower Advisory Council, Rabobank, Emerald, Bunge

and Summit Fertilisers. Subsequently, the AGI Capacity Building Project became the GIWA Careers in Grain project in 2017, with the aim of attracting, upskilling and employing people in the WA grain industry.

In 2014 the former Grower Group Alliance project, originally funded by GRDC and hosted at UWA, transferred onto the GIWA ABN to be funded by DPIRD Royalties for Regions Funding. In 2018-19 the Grower Group Alliance project transitioned off the GIWA ABN to be funded by DPIRD in a new NFP grower group collaboration with DPIRD.

In 2018, the former Lupin Society of Australia disbanded and gifted residual funds to GIWA to be used for lupin industry development.

GIWA Team



**GRAIN INDUSTRY ASSOCIATION
OF WESTERN AUSTRALIA (INC)**

ABN 81 881 249 684

**FINANCIAL STATEMENTS
FOR THE YEAR ENDED 30 JUNE 2020**

Perth | Northam | Merredin | Narrogin | Wagin | York | Beverley

www.byfields.com.au

come grow with us

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)

ABN 81 881 249 684

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FOR THE YEAR ENDED 30 JUNE 2020

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GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)**ABN 81 881 249 684****PROFIT AND LOSS STATEMENT****FOR THE YEAR ENDED 30 JUNE 2020**

	2020	2019
	\$	\$
INCOME RECEIVED		
GIWA Membership	85,239	75,590
COGGO - Stage 3	30,836	23,634
DPIRD/GIWA Service Agreements	-	37,500
CiG Capacity Building Project	209,109	188,136
DPIRD - GGA Project	103,032	355,579
GGA Events	14,830	27,191
GGA Other Sponsorship CBH	10,308	20,588
GGA Admin Payment to GIWA	-	38,600
GIWA Interest	357	1,245
CiG CB Bank Interest Online ACC	1,394	3,991
CiG Admin Payment to GIWA	30,000	30,000
Onfarm Storage	160,000	175,475
Miscellaneous Income	14,062	9,593
GGA Annual Forum Sponsorship	-	4,500
GGA Sponsorship GRDC	-	1,500
GRDC National Investment Forum	113,500	31,501
RU2018 - Registrations	-	(3,929)
GIWA Forum - Sponsorship	5,000	8,000
DPIRD Industry Consolidation	225,000	112,500
DPIRD Asian Market Success Oat	38,945	-
DPIRD GIWA Food Alliance Project	170,000	-
AusCanola 2018 Conference Registration	-	74,442
AusCanola Sponsorship	-	40,000
AusCanola AOF Float	-	10,000
RU2019 - GRDC Contract	-	327,962
RU2019 - Registrations	-	172,964
RU2019 - Sponsors/Exhibitors	-	95,250
RU2020 - GRDC Contract	282,500	-
RU2020 - GRDC Out of Pocket	391,563	-

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)**ABN 81 881 249 684****PROFIT AND LOSS STATEMENT
FOR THE YEAR ENDED 30 JUNE 2020**

	2020	2019
	\$	\$
RU2020 - Sponsors/Exhibitors	30,360	-
CBH Group Industry Consolidation	100,000	50,000
GRDC Regional Soil Constraints	111,925	-
GRDC RU20 Registrations	182	-
GIWA Forum Registration	9,577	-
	<hr/>	<hr/>
	2,137,719	1,911,812
Jobkeeper Subsidy	9,000	-
Cashflow Boost	61,593	-
	<hr/>	<hr/>
	2,208,312	1,911,812
	<hr/>	<hr/>
	2,208,312	1,911,812
EXPENSES		
Accountancy Fees	6,150	8,595
Advertising & Promotion	64,109	65,586
AusCanola Expenses	7,768	18,452
Annual Leave Provision	(11,311)	4,605
Audit Fees	3,714	4,000
Bank Charges	1,510	1,654
Bookkeeping Fees	8,740	-
Catering	190,673	227,393
Computer Software & Support	15,278	19,413
Conferences & Seminars	69,744	72,452
Depreciation	3,726	3,139
Donations & Sponsorship	28,302	11,134
Fringe Benefits Tax	4,765	-
Insurance	6,019	7,352
Legal Expenses	-	6,400
Loss on Sale of Assets	1,973	-

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)**ABN 81 881 249 684****PROFIT AND LOSS STATEMENT
FOR THE YEAR ENDED 30 JUNE 2020**

	2020	2019
	\$	\$
MOTOR VEHICLE EXPENSES		
Cleaning	356	356
Fuel & Oil	2,833	4,224
Parking	1,577	1,830
Vehicle Leases	18,789	18,817
	<hr/>	<hr/>
	23,555	25,227
Postage & Stationery	15,497	11,993
Rent Paid	10,269	16,671
GGA Management Fee GIWA	-	38,600
Memberships	6,361	13,195
Staff Expenses	2,739	6,964
Sub Contractors	498,492	339,950
Subscriptions	9,719	6,907
Superannuation	41,839	56,330
Telephone	16,198	19,437
Travelling Expenses	131,028	115,047
CiG Project Administration & Reimbursements	32,785	30,000
Wages	414,795	596,221
Research Update Costs	127,317	71,933
Venue Hire	47,566	44,658
	<hr/>	<hr/>
	1,779,320	1,843,308
NET SURPLUS	<hr/>	<hr/>
	428,992	68,504
Retained surplus at the beginning of the financial year	638,112	569,608
Cumulative adjustment upon adoption of new accounting Standards AASB1058 and AASB15	162,500	-
RETAINED SURPLUS AT THE END OF THE FINANCIAL YEAR	<hr/> <hr/>	<hr/> <hr/>
	1,229,604	638,112

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)**ABN 81 881 249 684****BALANCE SHEET****FOR THE YEAR ENDED 30 JUNE 2020**

	<i>Note</i>	2020 \$	2019 \$
CURRENT ASSETS			
Cash and cash equivalents	2	1,436,392	1,676,669
Trade and other receivables	3	356,991	15,442
Other current assets	4	7,697	50,143
TOTAL CURRENT ASSETS		<hr/> 1,801,080	<hr/> 1,742,254
NON-CURRENT ASSETS			
Plant & Equipment - at Cost		12,359	22,098
Less Provision for Depreciation		(4,994)	(14,774)
TOTAL NON-CURRENT ASSETS		<hr/> 7,365	<hr/> 7,324
TOTAL ASSETS		<hr/> 1,808,445	<hr/> 1,749,578
CURRENT LIABILITIES			
Trade and other payables	5	86,484	92,891
Funds in trust	6	341,495	742,949
Deferred revenue	8	120,285	243,738
TOTAL CURRENT LIABILITIES		<hr/> 548,264	<hr/> 1,079,578
NON-CURRENT LIABILITIES			
Trade and other payables	5	10,000	-
Provisions	7	20,577	31,888
TOTAL NON-CURRENT LIABILITIES		<hr/> 30,577	<hr/> 31,888
TOTAL LIABILITIES		<hr/> 578,841	<hr/> 1,111,466
NET ASSETS		<hr/> <hr/> 1,229,604	<hr/> <hr/> 638,112
MEMBERS' FUNDS			
Retained surplus		1,229,604	638,112
TOTAL MEMBERS' FUNDS		<hr/> <hr/> 1,229,604	<hr/> <hr/> 638,112

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)

ABN: 81 881 249 684

STATEMENT OF CHANGES IN EQUITY

FOR THE YEAR ENDED 30 JUNE 2020

	2020	2019
	\$	\$
EQUITY		
Retained Surplus	638,112	569,608
Cumulative Adjustment Upon Adoption of New Accounting Standards AASB1058 and AASB 15	162,500	-
Current Year Surplus	428,992	68,504
TOTAL EQUITY	<u><u>1,229,604</u></u>	<u><u>638,112</u></u>

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)

ABN 81 881 249 684

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 JUNE 2020

1

Income tax

As the incorporated association is a not-for-profit association in terms of subsection 50-5 of the *Income Tax Assessment Act 1997*, as amended, it is exempt from paying income tax.

Property, plant and equipment

Each class of property, plant and equipment is carried at cost or fair value less, where applicable, any accumulated depreciation and impairment.

Property, plant and equipment is depreciated on a straight-line basis over the asset's useful life to the Association, commencing when the asset is ready for use.

Employee benefits

Provision is made for the association's liability for employee benefits arising from services rendered by employees to the end of the reporting period. Employee benefits that are expected to be wholly settled within one year have been measured at the amounts expected to be paid when the liability is settled.

Employee benefits expected to be settled more than one year after the end of the reporting period have been measured at the present value of the estimated future cash outflows to be made for those benefits. In determining the liability, consideration is given to employee wage increases and the probability that the employee may satisfy vesting requirements. Cash flows are discounted using market yields on high quality corporate bond rates incorporating bonds rated AAA or AA by credit agencies, with terms to maturity that match the expected timing of cash flows. Changes in the measurement of the liability are recognised in profit or loss.

Goods and services tax (GST)

Revenues, expenses and assets are recognised net of the amount of GST, except where the amount of GST incurred is not recoverable from the Australian Taxation Office (ATO).

Receivables and payables are stated inclusive of GST.

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)

ABN 81 881 249 684

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 JUNE 2020

Revenue and other income

The association has applied AASB 15: Revenue from Contracts with Customers (AASB 15) and AASB 1058: Income of Not-for-Profit Entities (AASB 1058) using the cumulative effective method of initially applying AASB 15 and AASB 1058 as an adjustment to the opening balance of equity at 1 July 2019. Therefore, the comparative information has not been restated and continues to be presented under AASB 118: Revenue and AASB 1004: Contributions.

The association has elected to apply AASB 1058 retrospectively only to contracts that are not completed contracts at the date of initial application. The adjustment to opening retained surplus on 1 July 2019 was an increase of \$162,500 with a corresponding decrease in deferred revenue.

Operating grants, donations and bequests

When the association receives operating grant revenue, donations or bequests, it assesses whether the contract is enforceable and has sufficiently specific performance obligations in accordance with AASB 15.

When both these conditions are satisfied, the association:

- identifies each performance obligation relating to the grant - recognises a contract liability for its obligations under the agreement;
- recognises revenue as it satisfies its performance obligations.

Where the contract is not enforceable or does not have sufficiently specific performance obligations, the association:

- recognises the asset received in accordance with the recognition requirements of other applicable accounting standards (eg AASB 9, AASB 16, AASB 116 and AASB 138);
- recognises related amounts (being contributions by owners, lease liability, financial instruments, provisions, revenue or contract liability arising from a contract with a customer); and
- recognises income immediately in profit or loss as the difference between the initial carrying amount of the asset and the related amount.

If a contract liability is recognised as a related amount above, the association recognises income in profit or loss when or as it satisfies its obligations under the contract.

Sales revenue

Events, fundraising and raffles are recognised when received or receivable.

Revenue from contracts with customers

Revenue is recognised at an amount that reflects the consideration to which the incorporated association is expected to be entitled in exchange for transferring goods or services to a customer. For each contract with a customer, the incorporated association: identifies the contract with a customer; identifies the performance obligations in the contract; determines the transaction price which takes into account estimates of variable consideration and the time value of money; allocates the transaction price to the separate performance obligations on the basis of the relative stand-alone selling price of each distinct good or service to be delivered; and recognises revenue when or as each performance obligation is satisfied in a manner that depicts the transfer to the customer of the goods or services promised.

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)

ABN 81 881 249 684

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 JUNE 2020

Variable consideration within the transaction price, if any, reflects concessions provided to the customer such as discounts, rebates and refunds, any potential bonuses receivable from the customer and any other contingent events. Such estimates are determined using either the 'expected value' or 'most likely amount' method. The measurement of variable consideration is subject to a constraining principle whereby revenue will only be recognised to the extent that it is highly probable that a significant reversal in the amount of cumulative revenue recognised will not occur. The measurement constraint continues until the uncertainty associated with the variable consideration is subsequently resolved. Amounts received that are subject to the constraining principle are recognised as a refund liability.

Interest Income

Interest income is recognised using the effective interest method.

All revenue is stated net of the amount of goods and services tax.

Cash and cash equivalents

Cash and cash equivalents comprises cash on hand, demand deposits and short-term investments which are readily convertible to known amounts of cash and which are subject to an insignificant risk of change in value.

GIWA Lupin Industry Good Funds

On 10th May 2018 GIWA was gifted \$48,513.34 in residual industry good funds from the disbandment and cessation of operation of the former Lupin Industry Society of Australia. The funds were recorded as revenue in the 2018 Financial Year.

GIWA undertook to "ringfence" these funds for industry good supply chain development of the Australian lupin industry, which is centred in Western Australia. Before COVID-19, GIWA had been investigating attracting a major lupin breeding research conference to Western Australia with the intention of partnering with Pulse Australia (as GIWA did with the Australian Oilseeds Federation in rebranding and running AusCanola2018, the former Australian Research Alliance on Brassicas ARAB). To date GIWA has participated in a Ministerial roundtable on lupins for food in July 2020, conducted a lupin supply chain industry forum in August 2020 with plant breeder Australian Grain Technologies, the lessee of the former DPIRD lupin breeding program, and proposes to allocate funds to the national Grains and Legumes Nutrition Council of Australia (of which AEGIC is the foundation shareholder) for a lupins promotional campaign. In the event of industry consolidation the GIWA Board would continue to recognise any residual funds from the original 2018 Australian Lupin Society gift of \$48,513.34 as morally allocated for the purpose of lupin industry development.

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)

ABN 81 881 249 684

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 JUNE 2020

Provisions

Provisions are recognised when the association has a legal or constructive obligation, as a result of past events, for which it is probable that an outflow of economic benefits will result and that outflow can be reliably measured.

Critical accounting judgements, estimates and assumptions

The preparation of the financial statements requires management to make judgements, estimates and assumptions that affect the reported amounts in the financial statements. Management continually evaluates its judgements and estimates in relation to assets, liabilities, contingent liabilities, revenue and expenses. Management bases its judgements, estimates and assumptions on historical experience and on other various factors, including expectations of future events, management believes to be reasonable under the circumstances. The resulting accounting judgements and estimates will seldom equal the related actual results. The judgements, estimates and assumptions that have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities (refer to the respective notes) within the next financial year are discussed below.

Coronavirus (COVID-19) pandemic

Judgement has been exercised in considering the impacts that the Coronavirus (COVID-19) pandemic has had, or may have, on the incorporated association based on known information. This consideration extends to the nature of the products and services offered, customers, supply chain, staffing and geographic regions in which the incorporated association operates. Other than as addressed in specific notes, there does not currently appear to be either any significant impact upon the financial statements or any significant uncertainties with respect to events or conditions which may impact the incorporated association unfavourably as at the reporting date or subsequently as a result of the Coronavirus (COVID-19) pandemic.

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)**ABN 81 881 249 684****NOTES TO THE FINANCIAL STATEMENTS****FOR THE YEAR ENDED 30 JUNE 2020**

	<i>Note</i>	2020 \$	2019 \$
2 CASH AND CASH EQUIVALENTS			
GIWA Everyday Account (2494)		801,428	640,608
GIWA Saver Account (2507)		293,469	293,113
CiG Transaction Account (6896)		7,843	29,023
CiG Saver Account (6909)		332,321	520,927
CiG Debit Card (2212)		1,331	654
GGA Transaction Account (4309)		-	192,344
		<u>1,436,392</u>	<u>1,676,669</u>
3 TRADE AND OTHER RECEIVABLES			
CURRENT			
Accounts Receivable		282,122	15,442
Cashflow Boost Refundable		19,415	-
ATO Activity Statement Account Running Balance		42,178	-
GST Refundable		13,276	-
		<u>356,991</u>	<u>15,442</u>
4 OTHER ASSETS			
CURRENT			
Prepayments		7,697	50,143
		<u>7,697</u>	<u>50,143</u>

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)**ABN 81 881 249 684****NOTES TO THE FINANCIAL STATEMENTS****FOR THE YEAR ENDED 30 JUNE 2020**

	<i>Note</i>	2020 \$	2019 \$
5 TRADE AND OTHER PAYABLES			
CURRENT			
CBA Credit Card		1,263	11,913
Accounts Payable		53,727	31,536
Accrued Wages		16,310	18,158
PAYG Withholding Payable		7,096	12,928
Superannuation Payable		8,088	13,546
GST Payable		-	4,810
		<u>86,484</u>	<u>92,891</u>
NON-CURRENT			
International Oat Conference - Float to be Paid		10,000	-
		<u>10,000</u>	<u>-</u>
6 FUNDS IN TRUST			
CURRENT			
CiG Transcation Account		7,843	29,023
Growers Group Alliance		-	192,344
CiG Account		1,331	655
CiG Capacity Building Project		332,321	520,927
		<u>341,495</u>	<u>742,949</u>

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)

ABN 81 881 249 684

NOTES TO THE FINANCIAL STATEMENTS

FOR THE YEAR ENDED 30 JUNE 2020

	<i>Note</i>	<i>2020</i> \$	<i>2019</i> \$
7 PROVISIONS			
NON-CURRENT			
Provision for Annual Leave		19,242	30,553
Provision for Doubtful Debt		1,335	1,335
		<u>20,577</u>	<u>31,888</u>
8 DEFERRED REVENUE			
CURRENT			
Revenue Received in Advance		120,285	243,738
		<u>120,285</u>	<u>243,738</u>
9 RETAINED SURPLUS			
Retained surplus at the beginning of the financial year		800,612	569,608
Cumulative adjustment upon adoption of new accounting standards AASB1058 and AASB 15		162,500	-
Net surplus		428,992	68,504
		<u>1,229,604</u>	<u>638,112</u>

10 EVENTS OCCURRING AFTER THE REPORTING DATE

No matter or circumstances have arisen since the end of the financial year which significantly affected or may significantly affect the operations of the association, the results of those operations or the state of affairs of the association in future financial years.

11 STATUTORY INFORMATION

The registered office and principal place of business of the association is:

Grain Industry Association of Western Australia (Inc)
3 Baron Hay Court
South Perth

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)

ABN: 81 881 249 684

COMMITTEE'S REPORT

FOR THE YEAR ENDED 30 JUNE 2020

Your committee members submit the financial report of Grain Industry Association of Western Australia (Inc) for the financial year ended 30 June 2020.

Executive Committee members

The names of the committee members throughout the year and at the date of this report are:

Bob Nixon	Chairperson
Ash Wiese	Deputy Chairperson
Neil Hooper	Treasurer

Principal Activities

The objects of the Association are:

- a) To be an effective communication forum and catalyst for the entire Western Australian grain industry in order to promote and safeguard the industry's long term interests;
- b) To carry out, promote or assist in activities of any kind associated with the development, growing, handling, processing, promotion and marketing of Grains and grain derivatives; and
- c) To represent the West Australian grain industry as necessary, receive and communicate important information at all levels, address common issues across the supply chain, encourage the sustainable production & supply of quality grains from all crops, retain strong linkages to other national and state based grain bodies and provide a forum for industry self- regulation as deemed necessary.
- d) Provide support on behalf of the Western Australian grain supply chain for national "industry good" functions ie standards, trade & market access, varietal accreditation and rationalisation, market insight and

Significant changes

No significant change in the nature of these activities occurred during the year.

Operating result

The surplus of the Association for the financial year amounted to \$428,992.

Signed in accordance with a resolution of the members of the Executive Committee.



..... Mr Bob Nixon - Chairperson



..... Mr Neil Hooper - Treasurer

Dated 30 September 2020

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)

ABN: 81 881 249 684

STATEMENT BY MEMBERS OF COMMITTEE

The committee has determined that the association is not a reporting entity and that this special purpose financial report should be prepared in accordance with the accounting policies outlined in Note 2 to the financial statements.

In the opinion of the committee the financial report:

1. Presents fairly the financial position of Grain Industry Association of Western Australia (Inc) as at 30 June 2020 and its performance for the year ended on that date.
2. At the date of this statement, there are reasonable grounds to believe that Grain Industry Association of Western Australia (Inc) will be able to pay its debts as and when they fall due.

This statement is made in accordance with a resolution of the committee and is signed for and on behalf of the committee by:


..... Mr Bob Nixon - Chairperson


..... Mr Neil Hooper - Treasurer

Dated 30 September 2020

**INDEPENDENT AUDITOR'S REPORT TO THE MEMBERS OF
THE GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA (INC)**

Opinion

We have audited the financial report of the Grain Industry Association of Western Australia (the Association), which comprises the statement of financial position as at 30 June 2020, the statement of financial performance for the year then ended, and notes to the financial statements, including a summary of significant accounting policies and other explanatory information.

In our opinion, the accompanying financial report presents fairly, in all material respects, the financial position of the Association as at 30 June 2020, and its financial performance for the year then ended in accordance with the accounting policies described in Note 1 to the financial statements and the financial reporting requirements of the *Associations Incorporation Act 2015*.

Basis for Opinion

We conducted our audit in accordance with Australian Auditing Standards. Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Financial Report* section of our report. We are independent of the Association in accordance with the ethical requirements of the Accounting Professional and Ethical Standards Board's APES 110 *Code of Ethics for Professional Accountants* (the Code) that are relevant to our audit of the financial report in Australia. We have also fulfilled our other ethical responsibilities in accordance with the Code.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Emphasis of Matter – Basis of Accounting

We draw attention to Note 1 to the financial report, which describes the basis of accounting. The financial report has been prepared to assist the Association to meet the requirements of the *Associations Incorporation Act 2015*. As a result, the financial report may not be suitable for another purpose. Our opinion is not modified in respect of this matter.

Responsibilities of the Executive Committee for the Financial Report

The Executive Committee of the Association is responsible for the preparation and fair presentation of the financial report in accordance with the financial reporting requirements of the *Associations Incorporation Act 2015* and for such internal control as Executive Committee determines is necessary to enable the preparation and fair presentation of a financial report that is free from material misstatement, whether due to fraud or error.

In preparing the financial report, the Executive Committee is responsible for assessing the Association's ability to continue as a going concern, disclosing, as applicable, matters relating to going concern and using the going concern basis of accounting unless the Executive Committee either intends to liquidate the Association or to cease operations, or has no realistic alternative but to do so.

The Executive Committee is responsible for overseeing the Association's financial reporting process.

Auditor's Responsibilities for the Audit of the Financial Report

Our objectives are to obtain reasonable assurance about whether the financial report as a whole is free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with the Australian Auditing Standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of this financial report.

As part of an audit in accordance with Australian Auditing Standards, we exercise professional judgement and maintain professional scepticism throughout the audit. An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial report.

The procedures selected depend on the auditor's judgement, including the assessment of the risks of material misstatement of the financial report, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation of the financial report that gives a true and fair view in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control.

The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.

An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by the Directors, as well as evaluating the overall presentation of the financial report.

We conclude on the appropriateness of the Board's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Centre's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial report or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Centre to cease to continue as a going concern.

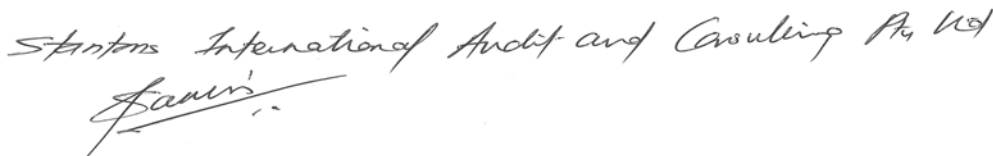
We evaluate the overall presentation, structure and content of the financial report, including the disclosures, and whether the financial report represents the underlying transactions and events in a manner that achieves fair presentation.

We obtain sufficient appropriate audit evidence regarding the financial information of the business activities within the Centre to express an opinion on the financial report.

We communicate with the Board regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

Yours faithfully

STANTONS INTERNATIONAL AUDIT AND CONSULTING PTY LTD
(Trading as Stantons International)
(An Authorised Audit Company)

A handwritten signature in black ink, appearing to read 'Samir Tirodkar', is written over a faint, larger handwritten signature that reads 'Stantons International Audit and Consulting Pty Ltd'.

Samir Tirodkar
Director

Perth, Western Australia
30 September 2020

Acknowledgements

GIWA thanks our valued service providers:

*Byfields Business Advisers
Commonwealth Bank of Australia
Stantons International Auditors*

And our colleagues and wonderful landlord the
Australian Export Grain Innovation Centre AEGIC



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