



2014-2015

ANNUAL REPORT

GRAIN INDUSTRY ASSOCIATION OF WESTERN AUSTRALIA





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About GIWA

The Grain Industry Association of Western Australia Inc (GIWA) was formed in 2008 at the time the Australian wheat market deregulated, after a need was identified to merge a number of Western Australian associations which provided 'industry good' functions, including NACMA WA, Oilseeds WA, the Western Oat Alliance, the Western Region Barley Council and Pulse WA.

The business of these former state organisations was subsequently serviced by GIWA's commodity councils (Wheat, Barley, Oats, Pulses, Oilseeds, Trade). As a not-for-profit industry association, GIWA also became the caretaker of coarse grain standards in Western Australia (formerly administered by the Grain Pool of WA), with paid members from throughout the Western Australian grain value chain, from plant breeders, to growers, input and service providers, accumulators and traders. GIWA became a member of Grain Trade Australia, and in 2013 added another Council, the GIWA AGI Council, after the merger of the former Australian Grain Institute with GIWA to focus on capacity building and skills development in the grains industry.

GIWA's purpose is to grow the value and profitability of the whole Western Australian grain industry through:

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

GIWA's activities are conducted through member-based commodity councils, working groups and independently funded projects which add value to the WA grain value chain. GIWA hosts regular communication, information exchange and capacity building workshops and forums in WA.

GIWA is a co-tenant of the Australian Export and Innovation Centre (AEGIC) in South Perth, and consults regularly with the state Department of Food and Agriculture WA, and with national industry and research bodies such as AEGIC, Grain Trade Australia, the Grain Market Industry Access Forum, the National Working Party on Grain Protection, Wheat Quality Australia, the National Residue Survey, Pulse Australia, the Australian Oilseeds Federation, the Grains Research and Development Council, Grain Growers Limited and Grain Producers Australia

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

Introduction

Chairman's Report



It is with great pleasure that I present my inaugural chairs' report for the Grain Industry Association of Western Australia Inc, after a 2014-2015 WA harvest of 14.5 million tonnes, the fourth largest grain harvest on record, 95 per cent of which was exported.

I pay tribute to my predecessors for their vision in founding the Association in 2008 when Australia's grain market was deregulated, and acknowledge the contributions of immediate past Chair of four years (from 2011-2014), Jon Slee, Director at AusOils, and his predecessor GIWA's inaugural chair, Tony Critch. Under Jon's tenure GIWA moved through a pioneering phase of development, to reach the point we have today with 'industry good' member participation from throughout the WA grain value chain in our Councils (Wheat, Barley, Oilseeds, Pulse, Oat, Trade and AGI Council) and a robust caretaker function for Western Australia's grain standards.

Immediately after GIWA's 2014 AGM, the GIWA Management Committee (Jon Slee, Greg Kirk Managing Director of PlanFarm, and myself) initiated a process of internal review to identify how we could improve our not-for-profit systems and processes. Not surprisingly after operating for 6 years on very modest resources, and growing to include project management as well as member-based services, areas of improvement were identified such as human resource policies and procedures and stakeholder management systems. The implementation of a stepped change program to address these areas for improvement continues, reflecting GIWA's maturation into what is now considered a medium-sized not-for-profit industry association, governed by the Associations Incorporations Act 1987, shortly to be replaced by the updated state legislation, the Associations Incorporations (Bill) Act 2014, administered by the Department of Commerce.

In March 2015, the GIWA Executive endorsed a capacity building approach to GIWA's operations for the next period, focussing on growing both its human resource and revenue base to underpin capacity. GIWA is at a cross-roads in its growth cycle, with higher demand to address industry issues, including national industry issues, and a growing local cost base. The impetus for reform in grains industry representation at a national level is also growing. Given

this scenario, GIWA has a choice of two growth pathways. The first is to minimise its cost base and hence its capacity to achieve industry good outcomes and participate in any reform pathway. While this is the safest and least risky pathway, the GIWA Executive acknowledges that this constrains GIWA in being able to deliver additional meaningful industry good outcomes on behalf of the Western Australian grain industry.

The second and riskier pathway, is to increase GIWA's capacity to deliver industry good functions to an increasingly contested grain industry in WA, one with a shrinking footprint of directly funded state government research, development and extension services. This pathway requires the two essential resources of human capacity and revenue. The GIWA Executive and Management Committee are currently focused on developing strategies to achieve increased human resource capacity and increased revenue. This means identifying, attracting and incentivising personnel who match the needs of the organisation, and maintaining and growing GIWA's revenue base.

Much like other state and regional chambers of commerce and industry associations, GIWA's membership revenue component will most likely always comprise a relatively small proportion of total revenue. The greater proportion of revenue needs to be sourced from commercial project activities. GIWA continues to find innovative ways to generate revenue and maintain capacity to attract and service independently funded projects. In this regard the Grains Research Development Corporation (GRDC), and the Department of Food and Agriculture WA (DAFWA), are two of GIWA's key stakeholders.

Ultimately GIWA must maintain its vigilance and relevance to the needs of the grains industry. GIWA must be an organisation capable of self-assessment and not one that exists for existing's sake. The agricultural sector is generally too fragmented with many historic representative



CHAIRMAN'S REPORT

organisations, and while GIWA currently has a legitimate purpose and function, our intent is always to be open to the possibility of integration and streamlining of these representative activities.

The highlight for GIWA in FY 2014-2015 was the release in February of the *WA Grains Industry Strategy 2025+* report. Commissioned by the Department of Agriculture and Food Western Australia, the strategy was facilitated by GIWA on behalf of the WA grains industry, with the aim of identifying strategic actions that could double the value of the Western Australian grains industry by 2025. Over 100 submissions, workshops and qualitative interviews with stakeholders throughout the Western Australian grain value chain produced eight key overarching strategies, and additional tactical commodity-specific strategies, to underpin the vision of doubling the value of the Western Australian grain industry by 2025. First and foremost is the need for a competitive and efficient grain supply chain infrastructure, from paddock to port. Details of the strategy can be found in the following pages.

The eight key strategies of the *WA Grain Industry Strategy 2025+*, and commodity specific actions, now inform the voluntary work of the GIWA Councils. Western Australia is the only state to have produced such an industry strategy in the grains sector, an important tool for informing government policy, commercial investment and voluntary industry good functions in our increasingly competitive export-oriented grain market.

Already the *WA Grain Industry Strategy 2025+* has achieved some success with the announcement of State Royalties for Regions funding for the installation of three Doppler radar stations in the WA grain belt and the installation of new mobile communication towers to increase mobile telephone coverage across the state.

Another issue identified in the *WA Grains Industry Strategy 2025+* was the constraint to industry growth of a lack of people seeking a career in agriculture, and the lack of access to skilled industry personnel. In response to this issue and after two years of development, in January 2015 the GIWA AGI Council commissioned the AGI Capacity Building Project, the appointment of an AGI Capacity Building Project (Funders') Board and the appointment of the project's inaugural executive officer Dr Manjusha Thorpe. The WA grain industry is fortunate to have such a well-resourced project which will, over a three year period to end 2017, examine current skills and education in the industry and map out a sustainable capacity building model for future competitiveness. The project is funded by 12 organizations; key funders being the Grains Research and Development Corporation (GRDC), Department of Agriculture and Food Western Australia (DAFWA) and Cooperative Bulk Handling (CBH); major funders being Curtin University, the CBH Growers Advisory Council (GAC) and Murdoch University; additional funders being Bunge, Emerald Grain, Muresk Institute, Rabobank, Summit Fertilizers and the University of Western Australia (UWA).

In bringing this project to fruition, GIWA acknowledges the leadership and persistence of former Australian Grain Institute members, who in 2012 became members of the merged GIWA AGI Council, particularly the efforts of Dr Andy Crane, CEO of CBH and Chair of the GIWA AGI Council and AGI Capacity Building Project Board.

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Part of GIWA's charter to the grains industry in WA is to set, maintain and review grain quality standards for all grains other than wheat (national Grain Trade Australia standards). As part of GIWA's internal systems review and in response to a request from the GIWA Barley Council, in 2015 GIWA commenced a review of WA's barley standards. This is the first in a systematic review of all WA grain standards to ensure they are fit-for-purpose to market demand, and align GIWA's standards setting processes with those of Grain Trade Australia.

In early 2015, in a collaborative effort, the GIWA Wheat Council commissioned the Australian Export Grain Innovation Centre to provide an industry discussion paper on the Western Australian noodle wheat industry. The GIWA Wheat Council has been tracking the long term sustainability of the noodle industry since the 2010 harvest and has become increasingly concerned with the volatility of both production and pricing of noodle grain. The historical development of the Japanese and Korean Udon noodle wheat market out of Western Australia has been a remarkable story in the sense of a differentiated and customised market existing within a bulk international commodity marketplace.

But since the deregulation of the Australian wheat market in 2008, the Japanese noodle wheat market has become vulnerable to a complex situation of stable demand and government controlled purchasing from Japan, variable supply from WA and free market pricing from the trade, and competition for growers' planting decisions from higher-yielding, higher-priced hard wheat varieties such as Mace, a result of the privatisation of plant breeding in Australia during the past decade. These Japanese and Korean noodle wheat markets hold significant importance in terms of Australia's trade and more broadly in the geopolitical relationship with our trading partners. I urge industry to consider this report and the complex factors which affect noodle wheat planting and pricing, and provide feedback and suggestions which the GIWA Wheat Council and AEGIC can share with the domestic grain industry and our Japanese trading partners.

Finally to all our members, GIWA thanks you for your membership and volunteer support for our industry-good services. We encourage you to engage with your grain industry's long term health through the GIWA Councils, GIWA Executive, GIWA Management Team, and GIWA Staff.

We wish you all a safe and prosperous harvest for 2015-2016.

Sean Powell
GIWA, Chair



Chairman's report



Chief Executive Officer's Report

The 2014-2015 year was one of achievement and evolution for the Grain Industry Association of WA (Inc).

The 2014-2015 year saw GIWA's not-for-profit business model continue to evolve beyond membership services through the voluntary GIWA councils (Wheat, Barley, Oilseeds, Oats, Pulses, Trade and AGI), expanding to include a mix of administration and project management services for six projects, including:

- the DAFWA GIWA Trade & Development Partnership;
- the COGGO Research Fund;
- the GRDC On-farm Storage Project
- the Grower Group Alliance (formerly supported by the University of Western Australia and now funded by DAFWA);
- the GIWA AGI Council's AGI Capacity Building Project; and
- the DAFWA GRDC WA Agribusiness Crop Updates (now known as GRDC Research Updates, Perth).

While GIWA's membership base remains stable (the 100+ members include plant breeders, researchers, growers, consultants, service providers such as input providers and banks, state farming organisations, accumulators and traders), at the end of FY 2015 over 90 per cent of GIWA's revenue was sourced from projects and project administration.

This evolving not-for-profit 'industry good' business model reflects a trend towards collaborative industry projects with independent governance structures, branding and funding sources which still require a legal, risk-management, human resource, financial and administrative 'home'. This model supports the virtual and physical WA grain industry 'hub' concept which GIWA, DAFWA and the Australian Export Grain Innovation Centre (AEGIC) are pursuing by being co-located in the DAFWA premises at 3 Baron Hay Court, South Perth.

Of particular note in 2014-2015, after two years of development, was the commissioning of the GIWA AGI Council's AGI Capacity Building Project, the appointment of an AGI Capacity Building Project (Funders') Board and in January 2015 the appointment of the project's inaugural Executive Officer Dr Manjusha Thorpe.

In addition to the open autumn and spring industry consultations supported by the GIWA Councils (Barley Variety Rationalisation, Perth, July 2014; Oats Forum, York, September 2014; Barley Spring Forum, Esperance, September 2014; Pulses and Oilseeds Forum, Perth, October 2014; Barley Autumn Forum, Perth, March 2015), in 2014-2015 GIWA also conducted consultative meetings with national bodies Grain Trade Australia (of whom GIWA is a member and with whom we collaborate closely as the caretaker of grain standards in WA), Grain Producers Australia and Grain Growers Limited. In July 2014 GIWA ran events in Perth with the Grain Industry Market Access Forum and the Export Finance Insurance Corporation. These interactions with various national entities in the grain industry are becoming increasingly important to GIWA as our organisation supports reform and rationalisation of industry good functions at a national level, and collaboration on technical grain function and quality research, trade standards, phytosanitary and chemical residue management, market access, free trade agreements and technical barriers to trade.

In the last year of a three year contract, GIWA had the privilege of being the conference convener for the 2015 GRDC DAFWA WA Agribusiness Crop Updates, attended by over 600 grain industry participants on 23rd and 24th February 2015 at Crown, Perth and by over 500 participants at 12 regional locations throughout Western Australia in March 2015.



CEO'S REPORT

Subsequently GIWA was also successful in its bid to continue as conference convenor for the future rebranded event — the GRDC Grains Research Updates, WA — for the next three years through to 2018. GIWA looks forward to supporting the strategic RD&E objectives of the GRDC, DAFWA, Western Australian grower groups and the wider WA grains industry through this vital knowledge sharing forum.

Finally, in 2014–2015 GIWA's staffing situation changed and the GIWA team's payroll expanded on several fronts, reflecting the additional project services. Ian Longson continued to provide GIWA with business development services and project leadership for the *WA Grain Industry Strategy 2025+* and the GRDC DAFWA WA Agribusiness Crop Updates, ably assisted by Pulse Australia's Western Region Manager Alan Meldrum in producing the GIWA Crop Reports. GIWA's Executive Officer Johanna Gastevich took 12 months

maternity leave with her first baby, a daughter Grace, and I covered for her during her absence. The Grower Group Alliance farewellled Susan Hall as Project Leader (retaining her services on the GGA Strategic Advisory Group) and welcomed Rebecca Wallis into her promotion as the new GGA Project Leader, and Tom Lamond into the role of GGA Project Officer. The AGI Capacity Building Project appointed Manjusha Thorpe as Executive Officer, newly returned to Australia from completing her PhD at Cambridge University. GIWA was also very fortunate to have the administrative support of both Shai Dunbar and Alyce Lang throughout the year.

Larissa Taylor
CEO, GIWA



CEO report



WA Grains Industry Strategy 2025+

Under the State Government's 'Seizing the Opportunity' initiative the Minister for Agriculture and Food, the Honourable Ken Baston, MLC, challenged the industries in the WA agricultural sector and DAFWA to work to double the value of the sector over the next decade.

DAFWA invited GIWA to manage this process and engage with the WA grain value chain to develop a strategic plan for doubling the value of the industry by 2025.

The strategy was developed over 2014-2015, starting with a series of 'bottom up' workshops with representatives from across the grain value chain for wheat, barley, canola, oats and pulses during July 2014 to identify the key opportunities and constraints to growth. The ideas generated from these workshops were then released to industry in a draft report during October 2014. Following the release of the draft report comments were invited from industry participants and the key strategy actions road tested with major companies and national and state organisations involved in the WA grains industry. The final report was released by the Minister for Agriculture and Food at the WA Agribusiness Crop Updates during February 2015.

The strategy can be viewed in two documents – one dealing with the eight key strategy actions for the whole of the WA Grains Industry and one dealing with the specific commodity strategy actions for wheat, barley, canola, oats and pulses. These can be accessed on the GIWA website at <http://www.giwa.org.au/announcements/wa-grains-industry-strategy-2025-1>

Actions called for under the eight major strategy industry wide initiatives included:

- A comprehensive least-cost pathway analysis of the process for getting grain from farm to export port (updating the 2009 Strategic Grain Network Review report), including a full analysis of road funding requirements and a true economic comparison of rail and road costs.

- An examination of the need for grain infrastructure in the Kwinana Area, including grain processing, container packing and an intermodal transport hub servicing the Fremantle Inner harbour, and a future Fremantle Outer harbour port facility.
- Continuing the impetus to streamline export clearance and chemical registration processes.
- Support for market choice for farmers and consumers to choose whether to use genetically modified products, and the repeal of current State legislation in favour of uniform national legislation relating to food safety and the environmental impact of all production technologies.
- Pre-competitive promotion of Australia's reputation for supplying high value grain markets, supported by classification, quality standards and biosecurity measures to ensure market access.
- Continued emphasis on identifying value adding processing opportunities on shore and off shore, including looking at the feasibility of a consolidated grain processing hub in WA.
- Government investment to provide Doppler radar facilities and improved mobile communication services throughout the grain belt to enable the full utilisation of technology available to maximise grain growing productivity.
- Addressing the skills shortages, training and capacity building needs of those working in the WA grains industry.

Other recommendations included actions to build farm business resilience and support for the priority setting processes under the GRDC.



WA GRAIN STRATEGY

Since the release of the strategy there has been considerable progress in a number of areas addressed in the Strategy:

- The AGI Capacity Building project was officially launched during April 2015, following the appointment of the inaugural Executive Officer, Dr Manjusha Thorpe during March 2015 and a substantial financial commitment from across industry and the education sector. This project is aimed at ensuring ongoing access to job ready and skilled people for a sustainable grains industry. The Project will focus on systematically identifying and targeting the workforce requirements of the grain industry in WA. A gap analysis is currently underway to determine the priority actions.
- During June 2015, the State Government announced a \$23 million investment in Doppler radars for WA's agricultural region to improve weather intelligence for farms and emergency services. This will provide much-needed radar coverage with real-time weather information to help transform the way Western Australian grain farmers do business. The project will see the WA government providing funds from the Royalties for Regions program for

the Bureau of Meteorology to install and maintain Doppler radars at three sites across the agricultural region.

- GIWA has provided industry leadership and support for the repeal of the *WA Genetically Modified Crops Free Areas Act 2003* and the amendment of the *WA Gene Technology Act 2006 to be in lock-step with the Commonwealth Gene Technology Act 2000*. GIWA believes co-existence to ensure growers and consumers can exercise their choice to respectively utilise these new technologies and choose to consume products, with or without these technologies, has been the core principle adopted by the WA grains industry and should continue to be delivered through industry self-regulation. This will still provide for health and environmental concerns to be met before GM traits can be released, but would provide for lower cost adoption pathways for GM crops, while still providing security and market choice to consumers.
- Support for the on-farm code of practice entitled '*Growing Australian Grain – safely managing risks with crop inputs and grain on farm*' developed by the Australian grain industry to support Australia's reputation for supplying high value grain markets, supported by quality standards and biosecurity measures to ensure market access. This is designed to complement the codes of practice already adopted by Grain Trade Australia members to self-regulate the transport, handling and marketing of Australian grain to ensure the reputation for Australia as a supplier of grain quality is maintained.



WA grains strategy



Wheat Council Report

In the 2014-2015 production season we have seen the continuation of stable wheat production from a state perspective although as always there were regions of very high production and those that again missed out.

At a farm enterprise level businesses have generally traded at good profits with further consolidation of farm debt resulting in this sector stabilising and returning to good levels of business health. Grain traders and marketers on the other hand have endured a tough trading year with the West Australian grains market remaining very competitive. Wheat breeders have expanded their operational footprint in Western Australia, with AGT appointing a barley breeder to their Northam node. The AGT hard wheat variety Mace continues to account for approximately 70 per cent of Western Australian wheat production.

Access to high value markets

For bulk commodity markets such as wheat there are few opportunities to differentiate and customise. The West Australian industry has had a unique role in developing such an opportunity in the form of the Noodle Wheat Industry and those within the industry are well aware of the opportunities and challenges of this market. Clearly the noodle industry is at a pivotal point in its history, with the focus of wheat breeders turning much of their breeding effort to hard type varieties, this has led to the introduction of many high performing types in the category. As a result and due to the additional profitability and lower risk of these varieties uptake and adoption of hard varieties has resulted in a considerable increase in the proportion of the state's crop now devoted to APW and Hard production.

The challenge for the West Australian Noodle industry is to ask itself "where to from now". In recent years the marketplace has seen massive swings in both production and price both to the benefit and detriment of the industry. With in-elastic demand from the

marketplace it has been difficult to match production and pricing levels such as to stabilise production and pricing at reasonable levels. Earlier in 2015 the GIWA Wheat Council commissioned AEGIC to provide a report on the current state and challenges of this sector with the report recently being released along with a call to industry to provide comment and written submissions.

It is important for industry to consider this issue thoroughly as the noodle industry constitutes an important trade component with trading partners Japan and Korea.

If the WA grains industry concludes that noodle wheat production is in decline, and this decline ultimately results in the demise of the noodle wheat trade, what, if any, actions should be taken now to stem this decline?

As such I call on our industry to engage in this process and give it our foremost attention. Whatever the final outcome of this industry consultation, the outcome should be one that has been considered, consultative, planned and well-communicated, both to our customers and more broadly to the industry.

Sean Powell

Chair, GIWA Wheat Council

Barley Council Report

The GIWA Barley Council meets four times per year, hosts two open forums each year in autumn and spring, and hosts a variety rationalisation meeting each year during the winter. These forums are open to GIWA members and guests at no charge, bringing together the barley community in Western Australia to discuss market trends, new variety development and plant breeding, variety rationalisation, the latest developments in barley agronomy and RD&E, standards, seasonal and receival issues.

The 2014 GIWA Barley Spring Forum was held in Esperance, and the 2015 GIWA Barley Autumn Forum was held at the South Perth Yacht club.

The GIWA Barley Council is well represented by the barley supply chain and its members include:

Growers — Steve Tilbrook (Chair), Mark Adams and Lyndon Mickel

Farm consultant — Erin Cahill, AgVivo

Breeder — David Moody, Intergrain

Marketer — Drew Robertson, CBH Barley Trader

Technical expert quality — Stefan Harasymow, AEGIC Head of Barley Quality Laboratory

R&D and GIWA Executive representative — Blakely Paynter, DAFWA (also sits on the GIWA Executive)

Storage and Handler — Vince Moroney, Country Quality Manager CBH

A warm thanks to the contributions of grower representative Andy Duncan from the Esperance Port Zone who stood down after 3 years' service from the GIWA Barley Council in 2014-2015 to take up a position on the GRDC Western Panel.

During 2014-2015 the GIWA Barley Council worked towards a number of strategic actions highlighted in the *WA Grains Industry Strategy 2025+*.

These include:

Access to higher value markets

GIWA Barley Standards Review

The GIWA Barley Council spent 2014 refining its process to review Barley Standards in 2015. The aim was to ensure a

process which is open, fair and transparent. Barley Australia would prefer Western Australia to conform with Grain Trade Australia barley standards however growers and industry believe we should have standards in WA that are fit for purpose for our export market, always bearing in mind there is a difference between End use and Delivery standards.

The results of the 2015 GIWA Barley Standards Review will be available to industry in early 2016.

Efficient and competitive supply chain

Malt Variety Rationalisation

During 2014-2015 the GIWA Barley Council worked with the WA barley industry to make recommendations for growers to adapt their sowing programs with a reduction in the number of Malting Barley stacks in the following years' harvest, to leave room for new improved varieties to fit into the system.

The transition of the Western Australian malting barley industry away from Baudin, Buloke, Gairdner and Vlamingh is nearly complete:

- Buloke, Gairdner and Vlamingh have been phased out as segregated varieties (the 2015-2016 harvest will be their last)
- Production volumes of Baudin may not be enough to support segregation opportunities after the 2016-2017 harvest
- The phase out of the food variety Hindmarsh will begin in 2016, with very limited segregation opportunities expected after the 2016-2017 harvest.



During the 2016–2017 harvest:

- Bass, La Trobe and Scope CL will be the main malting barley varieties segregated
- Baudin and Commander will have limited segregation opportunities
- Flinders and Granger are new to the market with limited segregation opportunities
- Hindmarsh segregations will be reduced in line with the expected decline in hectares sown, following its replacement with varieties that have improved agronomic and/or processing capacities.

The aim is to ensure that Western Australian barley remains competitive and the favoured option in international markets.

Focussed R&D

The GIWA Barley Council is continually encouraging researchers and breeders to reduce head-loss in new varieties. GRDC are investing heavily in frost research and the GIWA Barley Council supports this and also the investigation of post-flowering frost which can be damaging to barley.

Finally, the GIWA Barley Council endorses GIWA's financial support for the Council's activities: its incorporation, insurance, meeting record management, event, catering and printing costs, communication costs and the considerable time of the GIWA staff — thank you GIWA.

Steve Tilbrook

Chair, GIWA Barley Council



council reports



Pulse Council Report

The West Australian pulse industry remains largely unchanged from 12 months ago in terms of production volumes, with the exception of the Australian Sweet Lupin planted area which has increased by around 12% to 313,000 hectares. The outlook is promising, however, with improved prices offered for all pulses across the board. Lentils, chickpeas, lupins, faba beans and field peas are in strong demand internationally.

Competition for area from other crops, principally canola, remains a challenge for WA Pulse production, albeit with some encouraging signs for pulses beginning to emerge. Crop rotation benefits and profitability are showing some positive prospects for 2016 production.

The 2014 production year was a mixed bag for the state with Southern Zones recording good production and quality. The Northern Ag Zone experienced dry conditions in June/July 2014 resulting in a significant yield penalty. Lupin production was down to 540,000 tonnes as a result. Field peas followed suit with estimated production at 35,000 tonnes. Chickpeas and faba bean production remained low at 5,000 tonnes, despite demand strong for the new crop.

Diseases like Anthracnose presented a problem for the Albus Growers of the Midwest region with yield losses recorded of 5%. Green immature lupin grains were also an issue for Australian Sweet Lupin growers at harvest time in the Geraldton region due to the late spring rain events.

Sclerotinia disease carryover from canola to lupins and vice versa appears to be a challenge in the high rainfall, high production areas.

The GIWA Pulse Council worked towards a number of strategic actions highlighted in the WA Grains Industry Strategy 2025+.

These include:

Access to high value markets

2015 saw the International Lupin Conference in Milan Italy showcase the future trend in Lupins for Human Consumption. Although commercial product development has been slow, there is a confident move to include Lupin products for Nutraceuticals and Functional Foods.

The GIWA Pulse Council continues to support the initiatives in plant breeding and adaptability of new pulse crops for the growing human food protein market.

2016 is the 'International Year of Pulses', where Pulse Australia and the GIWA Pulse Council will assist with promotion and extension activities to drive WA market initiatives.

Focussed R&D

Total lupin area of production has improved in the 2015 growing season with estimated at 313,000 hectares. This is a 12 per cent increase on 2014. Yield expectations from growers are less than optimistic with the dry spell of June causing some flower abortion. The Australian Sweet lupin price outlook is promising at \$320-\$350 per tonne expected due to the USD/AUD currency benefits.



The new lupin variety PBA Jurien has been showcased at local field days with very significant yield improvement qualities over existing varieties. Although this variety may not attract protein conscious buyers the livestock industry will find this variety acceptable.

High protein good quality Angustifolius varieties are attracting attention from European Food markets and Asian aquaculture markets. A high yielding and higher protein variety may be released in coming years which will boost the quality of lupin grain for this market.

Albus lupin production looks similar to 2014, despite an increase in the sown area, with similar flower abortion concerns reported by Agronomists and growers. Market demand remains positive at 30,000 tonne for the North African market. Prices for Albus in 2015 remains uncertain due to currency/demand/production/political concerns.

In June 2015 the GIWA Pulse Council applied for a federal Department of Agriculture small exporters grant to assist Western Australia pulse growers to develop new food markets for pulses, and awaits the results of this application.

Brian Pover
Chair, GIWA Pulse Council



Oats Council Report

The 2014-2015 year has fared much better than the 2013-14 year for both oat and export hay growers in Western Australia. Weather conditions have been more favourable, particularly to the oaten export hay industries, and good quality milling oats have been delivered to both domestic and exporting marketers.

It was pleasing to see a crop of approximately 190,000 tonnes delivered to the CBH system forward sold and supporting prices in excess of \$300. As demand from food grade oats in China increases, this bodes well for increased plantings and price support for milling oats that have never been seen in past seasons.

Significant tonnage was exported on the export hay front again, with a reasonable increase expected again for the 2015/16 season.

In September 2014, the GIWA Spring Oat Forum was held in York for the second year in a row and was well supported. The trials were a highlight and thanks go to the Boyle family for hosting such an informative field walk.

At the March 2015 GIWA Oat Council meeting, all of WA's major oat exporters and marketers were in the one room for the first time ever (CBH, Quakers, PGH, Unigrain, Narrakine, Gilmac). This was a great achievement and can only help with the future of our industry. It was also with great sadness that two of our original Western Oat Alliance members, Joe Naughton and John Sydenham from DAFWA, were farewelled. Their contributions both to the Western Oat Alliance (WOA) and the GIWA Oat Council have been invaluable and they have worked on the biggest advances in both the milling and export hay industries that have been seen to date in our state. Sincere thanks and may your retirements be active and happy.

The GIWA Oat Council continues to benefit from the generous participation of Pamela Zwer and Peter McCormack from the National Oat Breeding Program at SARDI, and welcomed two new farmer members this year, Anna-Lisa Newman from Newdegate and Shaun Wittwer from Narrogin. Also joining were Mick Gleeson from Unigrain and Shauna Stone from Grains Research Development Corporation (GRDC).

The GIWA Oat Council worked towards a number of strategic actions highlighted in the *WA Grains Industry Strategy 2025+*.

These include:

Efficient and competitive supply chain

During 2014-2015 the GIWA Oat Council with overall industry support progressed the realignment of the OAT2 segregation. CBH Group provided support and assistance in communicating this new milling only segregation to growers.

The GIWA Oat Fact Sheet is an excellent guide designed to assist growers with their planting decisions www.giwa.org.au/oat. It is focused on growers who are re-entering oat production as well as new growers, and will be updated annually or as necessary.

Focussed R&D

The GIWA Oat Council has also progressed a minor use permit for the use of Trifluralin with all Oat crops in WA. This has been a challenging task and will be in place for the 2016 cropping year.

Effective option of tailored knowledge

Agronomic packages for low, medium and high rainfall areas for both grain and hay were examined by the Council and promoted through the GRDC and DAFWA funded Oat Agronomy Extension Program. The Council urges any growers considering planting oats for the first time to do thorough research on their agronomic strategies at least 18 months in advance of harvest.

New varieties Williams and Bannister continue to progress with a low rain fall or early maturing variety looking like being the next variety release. This would have a significantly shorter growing period than any previous variety and the GIWA Oat Council looks forward to supporting and communicating this varietal option to the industry.

Will Carrington-Jones
Chair, GIWA Oat Council



Oilseeds Council Report

During 2014-2015 WA was once again the largest canola production state in Australia with around 1.5 million tonnes. The area planted for 2014-2015 was a record but unfortunately due to unfavourable weather conditions in many areas the crop did not reach its full potential, which at first showed production promise close to the two million tonnes mark.

At an industry level the past 12 months were momentous with the development and ratification of both the *WA Grain Industry Strategy 2025+* and the *Australian Oilseeds Federation (AOF) 2025 Strategic Plan*. The GIWA Oilseeds Council has and will continue to work closely with the AOF to deliver against these strategies. The AOF will take the lead role on any national based issues whereas GIWA will focus on issues that are only state based.

During the year, the Oilseeds Council held a number of successful workshops and meetings.

- **October, 2014** — Oilseed Council and Pulse Council held a joint meeting, followed by a site visit to Alba Edible oils (the only vegetable oil refiner in WA). Thanks to Ashley Palmer from Alba for hosting a very entertaining and informative tour of his plant. Issues discussed at the meeting included the review of the Oilseeds 2025 strategy documents, review of current crop agronomy issues as well as some market access updates around the EU and China.
- **November, 2014** — the GIWA Seeding Success workshop was once again held with key industry agronomists. Some of the issues covered included sclerotinia management strategies, late season weed control, pod shatter and harvest management.
- **February, 2015** — the GIWA Oilseeds Council hosted an AOF Meeting in conjunction with the 2015 GRDC DAFWA WA Agribusiness Crop Updates, and a technical workshop on the AOF soxlet oil extraction held at CBH. At the AOF meeting, Peter Norris, Synergy Consulting, provided an overview of the canola variety 'Yetna' which he had bred for

WA. Also presenting was David Peake, Bayer, who outlined the initial trial results for shatter tolerant canola trials held in WA.

The GIWA Oilseeds Council worked towards the following strategic actions as highlighted in the *WA Grains Industry Strategy 2025+*:

Access to higher value markets

Accessing and maintaining high value markets for WA canola has been a key focus over the past 12 months.

Currently the European Union (EU) is Western Australia's number one market for Canola and has been paying a premium compared to other export destinations. A large proportion of these exports are going to processing plants for the production of biodiesel.

The use of canola in biodiesel production will be soon impacted by EU policies on emissions reduction, with the introduction of higher thresholds for greenhouse gas emission savings. Effective from 1 January 2017, greenhouse gas emission savings for bioenergy production in the EU must be at least 50% of the mineral based equivalent. The current saving threshold is 35%. Furthermore, from 1 January 2018 the emission savings need to be at least 60% for new biofuel facilities.

[Continued page 18.....→]

[Continued from page 17.....→]

The AOF has worked closely with the Australia Export Grain Innovation Centre (AEGIC) to develop a project that will give us the data that is need to maintain access to this market. The major trading companies have agreed that a whole of industry approach on this is best and are co-funding this with AEGIC.

Our second largest market for WA Canola is currently China, where we are supplying Canola under a temporary agreement which has port restrictions at both the Australia and China end. Albany Port Zone is one of the Australian ports which is currently restricted from exports to China which has resulted in lower prices being offered to growers in this port zone. GIWA and the AOF have been working with Tony Russell from the Grain Industry Market Access Forum (GIMAF) to maintain the current access and open up access for port zones such as Albany.

In February 2015 a delegation from China's AQSIQ (the Chinese government agency responsible for biosecurity) visited Australia to review the current restricted access program and initiate discussion on the development of a Canola protocol which would give both countries better certainty around the ongoing supply of Canola trade. We hope to have this protocol developed and signed off on within 12 months.

In March this year I visited both Hong Kong and Taiwan and met with Chinese oilseed processors. In Taiwan the AOF held a very successful workshop that was facilitated by Austrade with the Taiwanese oilseed industry. This was attended by around 50 delegates from crushing, refining, distribution and government. Taiwan hasn't been a traditional market for Australian oilseeds but due to some changes in Taiwan labelling laws and concerns over food safety this is likely to change. Initially we are likely to see an increase in exports of Australian canola oil but over time this may also become a market for Australian canola seed for processing.

Jon Slee

Chair, GIWA Oilseeds Council





Australian Grain Institute (AGI) Council Report

In response to concerns about diminishing workforce capacity in the WA grain industry, the GIWA AGI Council achieved a significant milestone in 2014-2015 with the commissioning of its keystone project the AGI Capacity Building Project. This project was conceived by the former Australian Grains Institute, before it merged with GIWA to form the GIWA AGI Council in 2013.

Two years in the planning, the AGI Capacity Building Project supports the GIWA AGI Council's two key objectives of:

- providing capacity building and workforce development solutions for the WA grains industry
- providing networking opportunities around career development and education in the WA grains industry.

The Project was formally launched in April 2015 at a function at the Matilda Bay Yacht Club at which the Chair of the GIWA AGI Council and AGI Capacity Building Project Board, Dr Andy Crane, CEO of CBH, and the project's Executive Officer Dr Manjusha Thorpe, presented.

The Project has established a funders' board which monitors milestones and advises the newly appointed project Executive Officer, Dr Manjusha Thorpe. Recently returned to Western Australia, Manjusha has spent 18 years working in engineering, project management, research and consulting roles in a range of industries, including the fertiliser and agricultural processing industries, living and working in Australia, the UK, Japan, Indonesia and Singapore. In 2014 Manjusha completed her PhD at Cambridge on identifying the knowledge, skills and training that enable the scale up and commercialization of new technologies. Throughout her secondary and tertiary education Manjusha carried out projects and conducted field trials on heating, drying and refrigerating stored grains. As with other GIWA allied projects, GIWA provides Manjusha and the AGI Capacity Building Project with its core not-for-profit legal, risk management, employment, financial and administrative services.

The grains industry has generously funded the AGI Capacity Building Project in excess of \$1.5 million over three years. Foundation funders of the Project include the Grains Research and Development Corporation (GRDC), the Department of Food and Agriculture WA, and CBH. Major funders include Curtin University, Murdoch University, Rabobank, Bunge, the CBH Growers Advisory Council, Muresk Institute, Summit Fertilizers, Emerald

Grain and the University of Western Australia. The AGI Capacity Building Project has a unique focus, over a three year time frame to 2018, to systematically identify, quantify and qualify the future workforce requirements of the grain industry in Western Australia, mapping out capacity building career pathways and skills based solutions for the industry. Deliverables for the project will include:

- A quantitative understanding of workforce supply and demand numbers for all components of the grain value chain in WA, both now and into the future, with effects such as climate change and changes in technology and farming systems factored into the equation.
- Designing and implementing a clear model of career progression in the WA grain industry that supports the training and up-skilling of potential and current participants who are needed to satisfy current and future workforce requirements.
- Reputation building to ensure that the WA grain industry is seen as a vibrant, exciting and profitable sector in which to work.

In addition to the launch of the AGI Capacity Building Project, in February 2015 the GIWA AGI Council also sponsored a corporate breakfast at the industry's peak conference, the (former) GRDC DAFWA WA Agribusiness Crop Updates (subsequently rebranded as the GRDC WA Research Updates). **The theme for the 2015 GIWA AGI Council breakfast was 'Maintaining and enhancing the competitiveness of Australian grain on the global market' featuring presentations from Australian Grains Innovation Centre (AEGIC) Chief Executive Officer David Fienberg and Chief Economist Professor Ross Kingwell.** The GIWA AGI Council is planning a further capacity building and networking functions for 2016.

Susan Hall

GIWA AGI Council Representative
GIWA Executive



Sean Powell, GIWA Chair and the Honourable Ken Baston, MLC, Minister for Agriculture and Food



ABOVE: Opening of the GRDC DAFWA 2015 WA Agribusiness Crop Updates

RIGHT: Blakely Paynter, Barley Senior Researcher, DAFWA, receives the 'Seed of Light' award from Peter Roberts, GRDC Western Panel Chair



2015 WA Agribusiness Crop Updates

More than 600 delegates attended the 2015 GRDC DAFWA WA Agribusiness Crop Updates events held during February, 2015 in Perth. The two-day program, hosted by the Grains Research and Development Corporation (GRDC) and the Department of Agriculture and Food, Western Australia (DAFWA), showcased the latest research, technology, market development and management innovations to improve the productivity and profitability of the WA grains industry.

The program featured both national and international speakers covering topics including the latest WA grains research and development results and cutting edge innovations such as cropping strategies to manage heat stress, frost and how to maximise water use efficiency. The event also provided updates on dealing with pests and diseases including rhizoctonia, crown rot and sclerotinia.

There were three international speakers who added depth to the 2015 program:

- Dr Dmitri Rylko, Director General, Institute for Agricultural Market Studies (Russia). Dr Rylko spoke about "The future prospects for export from Russia and the Black Sea countries"
- Dr Yan Lin, Chief Brewer, Tsingtao Brewery (China). Dr Lin presented on "China's malting barley industry – industry trends and future requirements".
- Dr Malcolm Morrison, Agriculture and Agri-food Canada (Canada). Dr Morrison focused on "Innovations underpinning yield improvements in the Canadian canola industry".

The featured national keynote speaker for the 2015 Crop Updates was one of Australia's most well-known and respected scientists, Dr Karl Kruszelnicki. In his opening address, Dr Karl challenged the audience about the Paleolithic anti-grain diet, climate change and other aspects of science in our everyday life. Dr Karl provided an intriguing perspective in to the science of grains.

The theme for the GIWA AGI Council breakfast was 'Maintaining and enhancing the competitiveness of Australian grain on

the global market'. It featured presentations from Australian Grains Innovation Centre (AEGIC) Chief Executive Officer David Fienberg and Professor Ross Kingwell. Professor Kingwell specifically presented on 'Canada's grain supply chains: observations and implications for Australia' which include insights into AEGIC's Canadian Supply Chain Report.

The sundowner event was held at Murdoch University on the Monday afternoon immediately preceding the GRDC DAFWA Agribusiness Crop Updates to view work being conducted at Murdoch University of relevance to the Australian grains industry.

GIWA appreciates the sponsorship support it received for the 2015 event. Platinum sponsors included: AEGIC, CBH Group, Commonwealth Bank, COGGO and Syngenta. Supporting sponsors were: Adama, AGCO, AgFarm, AEXCO, AgriPhar Crop Solutions, AgSafe, Drum Muster, Australian Grain Technologies, Back Paddock Company, BioScience, Clear Grain Exchange, Curtin University, FOSS, Grain Growers Limited, Intergrain, KILIC Engineering, Monsanto, Pacific Seeds, Perten, CRC Plant Biosecurity, Rural Business Development Corporation and SeedNet.

During 2016, the event will be known as the 2016 GRDC WA Grains Research Updates, Perth. This will be held from 29th February – 1st March, 2016 at the Perth Convention and Exhibition Centre. There will also be five GRDC Grains Research Updates held in regional Western Australia.



PROJECTS

Council of Grain Growers Organisations (COGGO) Research Fund

GIWA has a contract to provide services to the Council of Grain Growers Organisations (COGGO) to manage its COGGO Research Fund project.

The COGGO Research Fund invests in projects across the grain supply chain which have a direct benefit to WA grain growers. The focus is on 'catalytic' funding of local innovative research and development (R&D) projects that may then be eligible for more substantial funding from GRDC or from other funding sources.

To date there have been 28 projects funded in the three years that the fund has been operating in its current format. Applications come from research organisations, private companies and grower groups with the primary selection criterion of demonstrating a clear benefit to the WA grain grower. As a guide, COGGO anticipates funding projects in the range of \$20,000 to \$50,000 per annum and with a project life of one or two years.

During the 2014–2015 round of funding there were 30 proposals received, and after evaluation by the GIWA R&D Committee, the COGGO Board selected nine projects for commencement during 2015. These were:

- Australian Grown Superfood's project, *'Taking Quinoa from a subsistence crop to a broad acre crop for the WA wheat belt'*.
- The Fitzgerald Biosphere Group (FBG) project, *'Frost management options to increase wheat grain quality and yield and how these strategies impact on soil erosion along the south coast of WA'*.
- The West Midlands Group (WMG) project, *'Using farmer strips and electronic sensors to diagnose crop growth limitations'*.
- South East Premium Wheat Growers Association (SEPWA) project, *'Farm scale Wi-Fi – the future of data for WA grain farmers'*.
- Coorow Seeds & Agrarian project, *'Investigate the performance of an alternative oilseed crop, Camelina, in the Mid-West region. Assess the influences of environment and nutrition on the oil content, protein, oil quality and Omega 3 and erucic acid levels'*.

- Murdoch University, *'Refining remote sensing technologies to give real-time estimation of crop nitrogen status for application in precision agriculture'*.
- North East Farming Futures Group (NEFFG) project, *'On farm pH adjustment trials'*.
- Facey Group (FG), *'Incorporating lime to depth on duplex wheatbelt soils'*.
- Mingenew Irwin Group (MIG), *'Measuring, monitoring and understanding soil water holding properties to increase risk management, grower confidence and grain yield improvement, resulting in increasing returns to grain growers'*.

The COGGO Board has approved a new round of funding for the 2016 calendar year.



COGGO Research Fund Chair Chris Wilkins awarding research funding to the South East Premium Wheat Growers Association (SEPWA) for Farm Scale Wifi – the future of data for WA grain farmers

The Australian Grain Institute (AGI) Capacity Building Project

Following the appointment of Manjusha Thorpe as Executive Officer during January 2015, the Australian Grain Institute (AGI) Capacity Building Project was officially launched during April 2015. The project was established by GIWA's AGI Council in response to growing concerns regarding diminishing workforce capacity in the WA grains industry.

The project is funded by 12 organisations; the key funders are GRDC, DAFWA and Cooperative Bulk Handling Group (CBH). Major funders are Curtin University, the CBH Growers Advisory Council (GAC) and Murdoch University. Funding is also gratefully received from Bunge, Emerald Grain, Muresk Institute, Rabobank, Summit Fertilizers and the University of Western Australia (UWA).

Both industry consultation and a review of existing literature confirmed workforce capacity issues and highlighted that although some work has been previously carried out to address the issues, these efforts have tended to have a broad focus. That is, previous efforts have often focused on the agricultural sector as a whole and rarely the grains industry, let alone the grains industry in WA.

The AGI Capacity Building Project is taking unique steps, not only in targeting workforce capacity issues specific to the grains industry in WA, but in the systematic approach being adopted to identify problems and solutions.

The overall objective of the project is to provide ongoing access to job-ready and skilled people for a sustainable grains industry by building and implementing a comprehensive capacity building model for the WA grains industry. The project milestones that have been accomplished so far and that will lead ultimately to the project objective being achieved include:

- **Stakeholder mapping and communication planning** – identifying the numerous stakeholders for the project and designing and implementing a communication plan to promote engagement with the project.



*AGI Capacity Building Project Executive Officer,
Dr Manjusha Thorpe*



Grain industry supporters at the launch of the AGI Capacity Building Project, April 2015



- **Mapping the grain value chain for WA** — detailing every activity (from the pre-breeding phase through to grain being loaded onto an export ship) that contributes to grain production in WA.
- **Workforce capacity modelling** — the grain value chain is being used as the basis against which to quantify workforce capacity requirements. Research has been carried out by Manjusha Thorpe with the assistance of intern students from UWA. Further investigation is being carried out by third parties, who specialise in accessing data and performing workforce capacity modelling.
- **Marketing the WA grains industry** — working with an intern student from UWA to understand how to ensure that careers in the grains industry are views as vibrant, exciting and profitable.
- **Promoting the AGI Capacity Building Project** — linked closely with the previous activity; Manjusha Thorpe has presented in several forums on both the importance of careers in the grains industry and the progress of the project. Examples of settings in which presentations have been delivered include the AgConnectWA 2015 Annual Conference, Katanning Regional Skilling Workshop, Ag Inspiration Days in Manjimup and the 2015 Dowerin Field Day Careers in Agriculture Seminar.

The following milestones will be achieved in the near future:

- Presenting the findings of the workforce capacity modelling with project funding partners and the wider set of project stakeholders.
- Designing solutions to address the opportunities stemming from the findings of the workforce capacity modelling — the solutions will focus on building career progression pathways for the grains industry in WA and ensuring that the industry is seen as a vibrant, exciting and profitable sector in which to work. The solutions will be described in terms of their impact, how impact can be measured, implementation and progress measurement plans, cost and schedule of the implementation plans and how best to leverage off the work that others may be doing in a similar area. The solutions will be designed in consultation with project funding partners and the wider set of project stakeholders.
- Selecting the solutions that will deliver the greatest impact for the industry while complying with the project budget and schedule.
- Commencing implementation of the selected solutions.

Grains
projects



Dr Manjusha Thorpe presenting to WA Farmers



Dr Andy Crane, Chair of the GIWA AGI Council and AGI Capacity Building Board and Dr Manjusha Thorpe, Executive Officer of the AGI Capacity Building Project

Grower Group Alliance Project

The Grower Group Alliance (GGA) is a non-profit, farmer-driven organisation connecting grower groups, research organisations and agribusiness in a network across Western Australia.

The activities of the GGA are highly valued by grower groups, government and the wider industry, and act to add value to the activities of grower groups by maximising the opportunities for collaboration and information sharing.

GIWA has been contracted by the DAFWA to manage the GGA project from 2014-2018. The GGA is managed by a strategic advisory committee with representation from grower groups, research organisations and private agribusiness.

Over the past financial year the GGA has been seeking to deliver on its core project outcomes, and with increased staffing capacity, boost the level of support it provides to regionally based grower groups.

A brief overview of the major events and activities that the GGA have lead over the past 12 months follows.

Annual Forum 'Striving for Profitability beyond Agronomics'

The 2014 Annual Forum, held during August, attracted about 100 grower and industry participants to the conference which was focused on building grower group networks and partnerships in areas beyond on-farm agronomic research, development and extension (RD&E).

Lessons from cutting out the middle man in the horticulture supply chain, such as Carnarvon Bananas, were related to broadacre cropping, and Lake Grace grower Mark Pearce and AEGIC's Barry Cox offered a glimpse into shifting wheat markets in China.

Opportunities and future directions for funding caught the interest of grower groups, with a panel representing GRDC, DAFWA's Royalties for Regions and the Agricultural Produce Commission.

Victorian consultant Nigel McGuckian, was one of the highlights for the day taking the crowd on a journey through grower decision making. Nigel explained that farmers make complex and difficult decisions every day, with many variables, unknowns, uncertainties and risks, and don't give themselves

enough credit. He also highlighted the opportunity of learning through storytelling and the power of farmer discussion groups.

Yuna grower Erin Green impressed the audience by sharing how their farm business has adopted new technology, such as controlled traffic, developed a new business structure and the role of the Yuna Farm Improvement Group in supporting the community. Renowned speaker Mark McKeon closed the day discussing how to create more time, with his basic strategy to self-invest and achieve more.

The event was sponsored by CBH Group, AEGIC, Meat and Livestock Australia and Grain & Graze 3.

Executive Officer Meeting

During November the GGA hosted its annual Executive Officer (EO) Meeting which aimed to bring all larger group EO's or coordinators together to learn from each other, particularly around operational issues, and to discuss opportunities for collaboration. Key areas for discussion at the event included, group collaboration — structure/format for the future; DAFWA relationship managers; GGA Roles and Responsibilities; project/partner opportunities and trials databases.

Regional Meetings

GGA hosted its annual Regional Meeting series in Lake King, Katanning, Merredin and Dongara to encourage groups to come together and share experiences, develop networks and discuss new opportunities for collaboration. A total of 25 groups were represented across the meeting series.

As part of the meetings the GGA ran media training workshops facilitated by 2009 Nuffield scholar and former Country Hour presenter David Cussons. David gave groups a theoretical overview of how the media works and what makes news, then helped attendees develop media statement writing and interview skills.



Facey Group Executive Officer, Sarah Hyde participating at GGA's 2015 Annual Forum



Growers inspect a NVT at the WANTFA 2015 Spring Field day

Mark McKeon Roadshow

The GGA, with support from Partners in Grain and regional grower groups, sponsored Mark McKeon, a leading work-life balance speaker, to participate in a speaker roadshow through WA Wheatbelt.

Speaking at eight regional events, Mark highlighted importance of developing and maintaining a good work-life balance and encouraged growers to take time to recover from the stress of peak periods such as seeding and harvest.

With grain growing areas of WA experiencing increasingly unpredictable climatic conditions and margins decreasing, the business of farming is an inherently stressful one. With this in mind, Mark discussed how to create more time, with his basic strategy to self-invest and achieve more. His presentation also had strong links to building resilient regional communities.

Executive Officer Tour

Five grower group staff and GGA Project Leader, Rebecca Wallis, undertook a study tour through Victoria and South Australia to understand grower group business models.

One of the key findings of the tour was that there is no two grower group business models the same, they all have different strengths and strategies in how they service their grower members and extend information.

Following the tour the GGA is producing a set of case studies investigating the different business models of grower groups in WA, SA and Vic, that will be released during October 2015.

Australian Institute of Company Directors (AICD) Governance Training

With support from the CBH Group, the Australian Institute to Company Directors (AICD) delivered a one day Foundations of Not-for-Profit Governance workshop in Corrigin at end of June to grower group staff, committee and community board members.

Seventeen attendees were given comprehensive overview of the key concepts underpinning non-for-profit governance, as well as an in depth understanding into the key responsibilities of non-for-profit committee members and chairs.

The workshop was developed in response to many grower groups seeking to undertake governance training to boost their business capacity to ensure that they can deliver maximum benefit to their members.

Communications and Network Maintenance

The GGA continues to deliver a range of targeted communications to its stakeholders to better enable information sharing across the network as well as highlighting some of the unique activities of member groups. These communications include: a fortnightly calendar of events; monthly newswire; a new and improved website; and media support for groups.

GGA Staff also remain well networked through attendance at many grower groups and industry events and meetings throughout the year.

New staff join the team

Tom Lamond, GGA Project Officer, joined the team during January 2014 to focus on maintaining GGA's various communications outputs such as the website; monthly mail-outs; the fortnightly calendar and social media; as well as providing communications and extension support to groups.

projects

GIWA Grain Storage project 2014-2015

GIWA operated as the subcontractor in WA to deliver the GRDC grain storage extension project.

2014–2015 was the third and final year of the project which aims to extend grain storage information to assist growers and industry maintain the quality of grain in storage. In WA, Ben White undertook the workshop rollout; delivering 90 workshops over three years from as far North as Geraldton and South East to Beaumont. Total attendance numbers were 2103 over the three years. See Figure 1.

Information covered varied according to attendee requirements but predominantly focussed on seed retention as the purpose for the majority of WA grain storage. However in the last year of the project, there was some interest from growers in storing larger volumes of grain on-farm for domestic market delivery or alternative export markets outside the bulk handling system.

The protection of phosphine as an effective grain disinfectant is imperative to the cost-competitiveness of grain storage in WA. Workshops concentrated on the requirements for the safe and effective use of phosphine including the importance of silo sealing and methods for seal-testing silos used in WA to AS2628.

A focus on tools assisting maintaining grain quality in storage including hygiene and aeration are topics growers have requested at workshops as well as grain bag use, phosphine alternatives including controlled atmosphere storage (Nitrogen), insect identification and storage of oilseeds.

Outbreaks of Phosphine resistant insects in two locations in WA during 2014–2015 take the historical tally of detected outbreaks to eight. All outbreaks have been controlled by DAFWA staff or contractors to DAFWA.

The establishment of a grain storage hotline 1800 WEEVIL (1800 933845) and twitter accounts @1800weevil have been well patronised by WA growers in this last year of the project.

FIGURE 1 Workshop locations – Grain storage extension project





ACTIVITIES

Trade Enquiries

GIWA provides information and referrals for trade enquiries from existing and potential importers, exporters and start-up businesses.

During 2014-2015 GIWA assisted with some 30 substantive requests as well as fielding initial exploratory phone calls, attending briefings and organising site visits for visiting government and corporate delegations. These enquiries are, unless specifically requested that they not be, handled in cooperation with the Trade and Agribusiness Development Manager (Grains) from DAFWA and, where appropriate, with the relevant federal and WA State trade and investment promotion officers. During this period, enquiries were received for the potential sourcing of all types of grain, with the main demand coming for the China, from countries in every continent except North and South America.

The time taken to service these enquiries is considerable, but it is regarded as a necessary service to the grains industry in WA to ensure every opportunity to increase the demand for grain from WA is explored. All requested referrals are passed on to all the relevant companies that GIWA understands could be interested in the particular enquiry. Where possible, generic information is provided to the enquirers first to try and improve their understanding of the grain production and marketplace in WA and in order to improve the targeting of their request and reduce the amount of time individual companies need to spend answering basic and ill-informed requests for information or quotes.

activities





Market Access Forum

This day-long forum provided the grains industry with an update of international, national and State market access and biosecurity issues.

The day featured a number of local and interstate speakers. Key presentations included:

- GIWA Oilseeds Council Chair, Jon Slee who provided an overview of current and future grain market access issues for each commodity group.
- Tony Russell from the Grain Industry Market Access Forum (GIMAF), gave an overview of Trade Agreements from Japan, Korea and China.
- The importance of biosecurity and relevant issues from a State, national and international perspective were addressed by Professor John Lovett, CRC Plant Biosecurity,

John van Schagen, DAFWA and Michelle Allen, Biosecurity Council of WA.

- Rob Emery, DAFWA and Ben White, Stored Grain, gave a stored grain pest update.

Outcomes from the day were incorporated in to the *WA Grains Industry Strategy 2025+* report.

This event was hosted in partnership with DAFWA.

Market Access Update

During July 2014, GIWA hosted a Market Access Update featuring Tony Russell, Executive Manager, GIMAF and Leela Hanson, Director for Small to Medium Enterprises (SME's) for WA, South Australia and Northern Territory, Export Finance and Insurance Corporation (Efic).

Tony gave an update on recent GIMAF activities in helping to expand market access for Australian grains — such as the re-opening of canola trade to China; recent activities in Australia's largest wheat market, Indonesia, to ensure that quarantine concerns do not escalate and cause disruption to trade; and the review of the wheat and barley protocol to China being undertaken during 2014.

Leela provided an overview of the Efic's role in assisting exporting and processing companies.



EVENTS

Seeding Success 2015

Seeding Success enabled agronomists and consultants to be updated on the main issues experienced during the 2014 growing season.

Also discussed was the new wheat varieties being released during 2015 and an update on research being undertaken in the noodle wheat industry in WA.

DAFWA also released the MyPestGuide App. Users are able to report pests and diseases to DAFWA using the MyPestGuide app.

The event was proudly sponsored by InterGrain.

events

The Future of Extension for the Grains Industry

Mick Keogh, Executive Director of the Australian Farm Institute, was the special guest at an industry sundowner hosted by the AGI Council.

Mick recently completed a GRDC funded project looking at the future of extension in the grains industry. He reported on the key findings on the project and assessed extension systems in Brazil, United State of America and Denmark. He also undertook survey work with private sector crop advisors in Australia, reviewed where the public sector is up to, and provided recommendations about the future.

Sean Powell

Chair, GIWA/ Chair, GIWA Wheat Council

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

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

Greg Kirk

Treasurer and Independent Executive Member

Greg Kirk, Managing Director of Planfarm Pty Ltd, has been consulting to some of the State's leading grain growers for more than 20 years. He has a keen interest in all things agricultural and in particular those unique characteristics that make the top performing farm businesses so successful.

Greg's firm provides management consulting, agronomy, grain marketing and property management services for both local and overseas investors across the State. He brings a wealth of agribusiness knowledge and experience to the GIWA committee.

Jon Slee

Chair, GIWA Oilseeds Council

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

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

Will Carrington-Jones

Chair, Oat Council

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

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



EXECUTIVE PROFILES

Blakely Paynter

Barley Council representative

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

Susan Hall

AGI Council Representative

Susan Hall is an independent consultant delivering project management, stakeholder management, communications, extension and facilitation to the agricultural industry. She is passionate about contributing to the development of skills and capacity throughout the agricultural industry, particularly through her roles on the AGI Council, where she was a key driver to the AGI Capacity Building project, and on the GIWA Executive.

Susan has a MBA from the University of Western Australia and a Bachelor of Art (Communications) from Curtin University.

Mark Sweetingham

Independent Executive Member

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

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

Brian Pover

Chair, Pulse Council

Brian Pover originates from the Great Southern area of WA in a mixed farming enterprise west of Mt Barker. Previously he has been a Director and Vice Chairman of National Rural Independents. Business Owner and Agronomist of Rural Merchandise Business in Mid West for the past 20 years. Brian is currently farming 1000 hectares and is the Manager Director of Coorow Seeds which involves international and domestic grain trading and market development. He is a member of the Australian Seed Federation who continue production and distribution of new seed varieties and has been a member of Pulse WA for the past 10 years. Brian is married with three daughters who have all married midwest farmers with six grandchildren altogether.

Mark Narustrang

Independent Executive Member

Mark Narustrang is in Group Manager Strategy and Innovation at the CBH Group. He has worked in a number of roles within CBH over the last 10 years, prior to which, he worked in the Finance and Banking Industry. Mark has introduced CBH-wide frameworks relating to risk, project management and continuous improvement and facilitates the CBH, and its subsidiaries, Board and Executive in developing long term strategy.

He has a well-informed, strategic and analytical view of WA's internationally focused supply chain. Mark has a Bachelor of Business, is a CPA, a graduate of the AICD and is a Fellow of FINSIA.

Chris Wilkins

Independent Executive Member

Based in Badgingarra, Chris is an agronomic and agribusiness advisor who joined the GRDC Western Panel in July, 2013. He has 22 years of experience in WA's agricultural industry, including offering farm business, agronomy, farming systems and crop protection advice through his Vision Agribusiness Services company for the past 15 years.

Chris is also a Director of one of the State's leading agricultural consultancy businesses, Synergy Consulting WA, the Chairman of the Council of Grain Grower Organisations Ltd (COGGO) and a member of WA Agriculture Minister Ken Baston's Ministerial Agricultural Advisory Council.



STAFF PROFILES

Larissa Taylor

GIWA Executive Officer

Larissa Taylor started her career in the corporate sector in agricultural banking and has subsequently worked in executive development, business development, community development and executive officer roles.

Originally from a farming community in the Great Southern of WA, Larissa has lived and worked in Canberra, Sydney, Houston, Jakarta, Kuala Lumpur and Perth.

Larissa holds a Bachelor of Arts (Asian Studies) from Australian National University and a Masters in Business Administration from the AGSM, UNSW.

Ian Longson

Business Development

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

Prior to joining DAFWA, Ian was senior consultant and manager of the Perth Office of ACIL Consulting (now ACIL Allen) for 10 years and prior to that worked for the Dairy Industry Authority of Western Australia, the Asian Development Bank and early in his career as an extension adviser with the WA Department of Agriculture in the South West.

Ian holds a Bachelor degree in Agricultural Science from the University of Western Australia and a Master's degree in Agricultural Marketing from the University of Guelph in Canada.

Johanna Gastevich

Executive Officer (maternity leave)

Johanna Gastevich started a GIWA during 2011, taking on the role of Executive Officer. During 2014-2015, Johanna commenced maternity leave returning briefly to coordinate the WA Agribusiness Crop Updates with plans to return to a part-time capacity during August 2015.

Johanna has worked in the not-for-profit sector for the majority of her career and has more than 10 years senior management experience.

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

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

Shai Dunbar

Office Administration

Shai Dunbar started working part time for GIWA during October 2012 as the Administration Officer. She also works part time with AusChem Training WA as their Executive Manager. Shai comes from a farming background, brought up on a Wheat and Sheep farm near Marvel Loch, WA. Prior to joining GIWA, Shai spent nine months back on the family farm. Previous to this she was working for the Thirsty Camel Group in the head office for WA as Administrator/Retail Support for five years.

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

Dr Manjusha Thorpe

Executive Officer, AGI Capacity Building Project

Dr Manjusha Thorpe commenced as the Executive Officer for the AGI Capacity Building Project during January 2015. Manjusha has spent 15 years working in engineering, project management and consulting roles in a range of industries, including the fertiliser and agricultural processing industries. Most recently Manjusha completed her PhD on identifying the knowledge, skills and training that enable the scale up and commercialisation of new technologies.

Throughout her secondary and tertiary education Manjusha carried out projects and conducted field trials on heating, drying and refrigerating stored grains. Manjusha has lived and worked in Australia, the UK, Japan, Indonesia and Singapore and is applying her abilities and experience to building workforce capacity in the grains industry in WA.

Rebecca Wallis

Project Leader, Grower Group Alliance

Rebecca commenced as Project Officer of the GGA during July 2012, and moved into the role of Project Leader during July 2013. Prior to the GGA roles, Rebecca worked for DAFWA and CSBP. Her current role focusses on managing and coordinating the planning, implementation and monitoring of project activities to ensure delivery of outputs and project milestones, taking a strategic perspective to identify opportunities, and develop and maintain responsive statewide and national networks and alliances. Rebecca also sits on the APEN Management Committee as the WA representative and is a committee member of Harvest Young Agrifood Professionals Network.

Rebecca holds a Bachelor of Science (Animal Science) from the University of Western Australia, graduating during 2010 with 1st class Honours.



Tom Lamond

Project Officer, Grower Group Alliance

Tom Lamond commenced as the GGA project officer during January 2015. Having previously worked for Eurofins AgroScience an agricultural research service provider, Tom has a keen interest in agricultural extension, communication and policy development. Tom's key role at GGA is to work closely with Grower Groups and industry to build member groups capacity and ensure that groups access have the right information and the best solutions at the right time. He also provides communications and media support to member groups.

Tom holds a BA from Murdoch University in International Security Studies and Journalism.

Alan Meldrum

Industry Development Manager WA, Pulse Australia

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

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

staff profiles

Notes



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