

# GIWA EXECUTIVE OFFICER REPORT 2023 GIWA AGM



---

Wednesday, 4th October 2023

## GIWA Purpose and Strategy

GIWA's purpose is to promote an efficient and effective WA export grain industry.

GIWA's strategy is to facilitate communication and information exchange, industry good functions, capacity building and grain supply chain solutions for the Western Australian grain industry.

## GIWA'S Definitions Industry Good Functions

On behalf of its supply chain members, GIWA provides support for **pre-competitive, industry good functions** for the Western Australian grain industry through its core focus on:

- standards (GIWA is caretaker WA receival standards & works closely with Grain Trade Australia)
- trade and market access (GIWA participates in GTA Trade & Market Access Committee)
- grain varietal classification (GIWA classifies oat varieties in Western Australia)
- grain varietal rationalization (GIWA facilitates barley and oat varietal rationalization)
- phytosanitary, chemical residue, biosecurity and supply chain issues management
- pre-competitive trade and industry promotion
- industry engagement in grains RD&E
- value chain skills and capacity building

The GIWA Wheat, Barley, Oilseeds, Oats and Pulses Councils continue to pursue the objective of doubling the value of the Western Australian grain industry by 2025, detailed in the 2015 industry informed *WA Grain Industry Strategy 2025+*

## GIWA Board 2022/23

GIWA Board Members who led GIWA Councils in 2022/23 were:

- Lyndon Mickel, GIWA Barley Council
- Ash Wiese, GIWA Oat Council
- Pete Rees, GIWA Wheat Council
- Peter Bostock, GIWA Oilseeds Council
- Stephen Powles, GIWA Pulse Council

Other GIWA Board Members for the 2022/23 period included:

- Eamonn Lanagan, Treasurer
- Tress Walmsley, Independent, GIWA Deputy Chair
- Kellie Todman, Bulk Handling
- Kerry Regan, Research & Development
- Mark Narustrang, Independent

## Staff Changes

- Margie Walkerden joined as Bookkeeper (1 day/week) in October 2022.
- Nadia Geary joined as Administration Manager in November 2022.
- After 7 ½ years as Marketing and Communications Manager, Rachel Nash departed in June 2023 to take up a marketing and communications role with Summit Fertilisers.
- Amanda Collett joined as Marketing and Communications Manager in August 2023. Amanda came to GIWA from Wide Open Agriculture.

## GIWA Membership

Membership numbers dropped slightly in 2022/23 to end the year with 99 financial members plus 7 honorary members, which are organisations which GIWA has complimentary, reciprocal membership arrangements with. This slight drop in membership (down from 102 previously) was primarily due to 24 Individual Members who appeared to be representing businesses being invited to move to the Small Corporate category. Most willingly accepted this or had justifiable reasons to remain in the Individual category. A small number declined to renew.

## Key achievements in the 2022/23 year

### 1. GRDC Research Updates 2023

After considerable COVID related disruptions in preceding years, the 2023 GRDC Research Updates Perth conference returned to a fully face-to-face event. Attendance was just over 600, an all-time record.

Five regional Research Updates events were also conducted in March at Albany, Bencubbin, Dalwallinu, Hopetoun and Northampton.

GIWA's 5-year contract to deliver the GRDC Research Updates West events concludes in 2024. Research Updates is a significant source of revenue for GIWA and directly funds a significant portion of staff wages, as well as supporting some of GIWA's operational costs. We are therefore hopeful that GRDC continues Research Updates beyond 2024 and that GIWA is the successful provider.

### 2. GIWA/AEGIC Ministerial Grains Industry Dinner

The annual Grains Industry Dinner, co-funded by AEGIC, was held in February at Crown Perth in conjunction with the GRDC Research Updates, with Minister Jarvis, CEOs and Chairs of the major grain industry organisations, and senior DPIRD and staff present. This annual dinner provides a forum for Western Australian and national grain industry body leaders to meet, build relationships and discuss issues of national and state importance.

### 3. GIWA Breakfast

GIWA was unable to hold its annual GIWA Breakfast, timed to coincide with the GRDC Research Updates, in 2020, 2021 and 2022 due to COVID restrictions. We were therefore very pleased to hold the 2023 GIWA Breakfast at Crown Perth in February featuring keynote speakers Hon. Jackie Jarvis MLC and Michael Whitehead, Director of Agribusiness Industry Insights for ANZ. 93 people attended the Breakfast.

#### **4. Commodity Council Elections**

Following the formal appointment of five refreshed commodity Councils in 2021 and the commencement of a system where 1/3 of commodity Council member positions are declared vacant annually on an ongoing basis to encourage new members to join the Councils, this cycle of declared vacancies began in 2022. Nominations for places on all five commodity Councils were again publicly called for in August 2023, with most outgoing members renominating, and a number of new nominations received. The GIWA Nominations Committee reviewed nominations and drafted the new provisional Councils for endorsement by the GIWA Board and ratification by members at the 2023 AGM.

There were no changes to Chair or Deputy Chair roles apart from Peter Rees, Wheat Council Chair and Tress Walmsley, Wheat Council Deputy Chair both stepping down. Tracy Lefroy and Dion Bennett are now Wheat Council Chair and Deputy Chair respectively. Both Peter and Tress remain as Wheat Council members. GIWA thanks Peter & Tress for their time as Chair and Deputy Chair and welcomes Tracy and Dion into these roles.

#### **5. Standards Review**

GIWA again undertook a Standards Review process in 2023. This resulted in one submission being received from a grower group seeking a significant relaxation of snail tolerances for Canola receival standards. This was not supported. The Final Industry Advice Notice that provides additional detail can be found here <https://www.giwa.org.au/industry-hub/grain-standards/>

As a consequence of the 2022 Standards Review, the colour (brightness) standard for Barley will be removed effective as at the 2023/24 harvest.

#### **6. Renegotiation of CBH Agreement for 2023 - 2026**

GIWA has successfully negotiated a further Agreement with CBH, which demonstrates that GIWA continues to deliver value to CBH. This agreement is for two years, with an option for a third year, providing greater security and efficiencies than the previous cycle of two-year agreements, and has seen CBH's annual contribution to GIWA's operating increase from \$75,000 to \$100,000/annum. We are very grateful to CBH for its ongoing support, to Kellie Todman in particular, and to the many other CBH staff that contribute to GIWA's activities.

#### **7. GIWA Crop Report**

The GIWA Crop Report agronomic advisory panel and GIWA Crop Report consulting author Mike Lamond continue to make highly valuable contributions to GIWA's member services through the monthly GIWA Crop Report, which GIWA produces 10 times per year under its services agreement with DPIRD. The highly sought-after Crop Report is now made available to members approximately 24hrs before it is released to the media and the general public and must be accessed via the GIWA website. This allows tracking of how frequently the Crop Report is being accessed, and by who, giving us valuable information on who is using the Crop Report and potentially identifying people and organisations that can be targeted to become members of GIWA.

#### **8. Processed Oat Industry Growth Partnership**

The State Government has committed \$10.12 million over four years to the Processed Oat Industry Growth Partnership, referred to as the POP by industry stakeholders. This industry-led partnership will provide a foundation for the growth of the oat industry in WA, both in value and volume, over the next 20 years. GIWA, through the GIWA Oat Council, are the lead program partners and advisors, providing a communications portal between stakeholders. The POP aims to increase the WA production of processed oats, grain yield and hectares sown. Some additional information is available [here](#)

Eleven POP funded projects are now well underway, the 11<sup>th</sup> International Oat Conference was delivered by GIWA in October 2022 with POP funding support, a 2024 POP funded Nuffield Scholarship has been awarded, and POP Industry Grants are currently being negotiated with provisionally approved recipients.

To ensure that the oat industry is aware of and engaged with POP, GIWA held a POP Showcase on 27<sup>th</sup> September 2023 to which more than 60 oat value chain stakeholders attended.

## **9. OAT2022 International Oat Conference**

Originally planned for delivery in 2020 but thwarted by COVID-19, the 11th International Oat Conference was delivered by GIWA in October 2022. This consisted of a full-day Field Day at York, 3 days of Conference proceedings at Crown Perth, a Conference Dinner, and an additional day of optional workshops. 160 delegates attended in-person and 68 participated virtually, with delegates represented from Australia, NZ, UK, Europe, Canada, USA, South America and Asia.

The International Oat Conference was a major undertaking for GIWA, with COVID travel restrictions impacting delegates ability to travel and increasing the workload associated with delivering virtual presentations and live, virtual participation by remote delegates. Rachel Nash and Debbie Boxall are to be in particularly singled out for praise for the long hours they put in at night and on weekends preparing for and then running the event. Our thanks also go to Ash Wiese, the GIWA Oat Council and the friends of GIWA that formed the conference Program Committee and Steering Committee, who contributed many hours as volunteers. Excluding staff wages, the Conference netted \$226,000 which will contribute to GIWA's operating budget.

## **10. Barley Forum**

The 2023 GIWA Barley Forum held in July at the Ingot Hotel was attended by 60 in-person and virtual participants. The Forum discussed the global barley market outlook and key factors driving breeding, classification and agronomy. A facilitated session discussed the draft Malt Barley Rationalisation Plan (see below) and sought industry agreement on the Plan, and the day finished with presentations from a boutique, regional brewery and a whisky distillery. The Barley Forum received widespread rural media coverage.

## **11. Malt Barley Variety Rationalisation**

The GIWA Barley Council again undertook a malt barley variety rationalisation process to take effect in the 2024/25 harvest. The Malt Barley Variety Reveal Recommendations for the 2024/25 Harvest can be found [here](#)

Our thanks go to Blakely Paynter (DPIRD) for the considerable amount of work he puts into this each year.

## **12. Delegations and Consultations**

Now that COVID related travel restrictions have eased, national and international organisations have begun returning to WA. GIWA hosted delegations from and/or provided briefings to the following organisations in the last 12months.

### **Delegations:**

- 5 person delegation from the Japanese Ministry of Agriculture, Forestry & Fisheries (MAFF) in August 2022
  - Jointly received by GIWA, AEGIC & CBH
  - Focus was on quality (particularly as 2022 was shaping up to be a low protein year), continuity of noodle wheat supply, and dockage levels in noodle wheat shipments
- 14 person delegation from the Japanese Flour Millers Association (JFMA) and the Japanese Ministry of Agriculture, Forestry & Fisheries (MAFF) in May 2023

- Jointly received by GIWA, AEGIC & CBH
- Focus was on continuity of noodle wheat supply and dockage levels in noodle wheat shipments

**In-person briefings:**

- Hon. Jackie Jarvis, Minister for Agriculture & Food
- Indonesian Consul General (Perth), Listiana Operanata
- Australian Consul-General in Kolkata, Rowan Ainsworth
- Special Representative for Australian Agriculture, Su McCluskey
- POSCO (Korea)

**Virtual briefings:**

- State Treasury
- Commonwealth Treasury

### 13. Commodity Council Meetings and Events

The following GIWA commodity Council meetings and events, facilitated and supported by GIWA staff, were held in 2022/23:

- Wheat Council – 3 meetings, plus meetings over 2 days with a delegation from JFMA & MAFF
- Oat Council – 2 meetings, plus extensive involvement in the planning and delivery of the International Oat Conference and POP.
- Barley Council – 2 meetings, plus a Barley Forum
- Oilseeds Council – 3 meetings
- Pulses Council – 3 meetings

Among a raft of other issues dealt with by each Council in this reporting period, key issues addressed included;

- **Wheat Council**
  - Ongoing management of the relationship with the Japanese and Korean noodle wheat markets, with a focus on certainty of supply and reducing dockage.
  - Industry response to CBH's implementation of an ASW9 (ASW1 with >9% protein) trial grade for the 2022/23 harvest.
- **Barley Council**
  - Barley variety rationalisation and segregation planning.
  - Continued to pursue support to undertake definitive research on barley to determine an appropriate Falling Number or RVA standard that accurately predicts malt barley germination and storability.
- **Oat Council**
  - Ongoing involvement and input to the Processed Oat Partnership (POP) project
  - Continued to work closely with Grains Australia Ltd (GAL) and AEGIC to develop a fit-for-purpose oats classification system.
  - Proposed to GAL that GAL adopt a sub-set of the GIWA Oat Council as the inaugural GAL Oat Council
  - Lobbied GRDC to assist industry to increase the range of herbicides available to oat growers.
  - Improving the accuracy of planting estimates for oats for hay and oats for grain in the GIWA Crop Report
  - Continued planning for then delivered the 11<sup>th</sup> International Oat Conference
  - Successfully secured funding through POP to examine the relationship between hectolitre weight, thousand grain weight and CBH sampling methodology to find a better measure of grain quality.
- **Oilseeds Council**
  - Ongoing involvement in addressing growers' concerns regarding certainty and timeliness of hybrid canola seed supply.

- Managing increasing snail numbers in canola deliveries.
- Involvement in national response to leverage growers not to apply haloxyfop to canola as EU export market is at risk.
- **Pulse Council**
  - Working with DPIRD and lupin processors on the DPIRD Lupin Taskforce, which is assisting lupin food processors to collaborate in a pre-competitive manner to promote and market lupins for food.
  - Initiated discussions with CBH re. potential to aggregate pulses in the CBH system.

#### **14. Engagement with grain industry organisations and participation in events**

In the 2022/23 year, the GIWA Board and GIWA EO regularly interacted with grain industry organisations and attended relevant events as follows:

- Lyndon Mickel (GIWA Chair) and the GIWA EO attended the Australian Grains industry Conference in Melbourne in July 2022 and while there networked with a raft of industry representatives from organisations including GTA, GGL, GPA, GRDC, AOF, NWPGP, Pulse Australia, WAFarmers, NFF and various agribusiness companies.
- The GIWA EO participated in nine Grain Trade Australia Trade and Market Access Committee meetings. This included a special out-of-session meeting to formulate a national industry position on the use of haloxyfop on canola in light of tightening EU restrictions. In a unified response, Grains Australia, GTA, GIWA, GGL & GPA all urged growers not to use haloxyfop on canola as threatens exports to the EU.
- Regular in-person and phone meetings were held with Andrew Young (A/CEO), Richard Simonaitis (the new CEO), Megan Sheehy (GM, Classification) and John Ackerman (GM, Trade and Market Access) all of Grains Australia, with a focus on; GIWA's relationship with GAL; developing an oat classification framework; and proposing the GIWA Oat Council as the basis from which to build the GAL Oat Council.
- Peter Bostock (GIWA Oilseeds Council Chair) and the GIWA EO participated in a national virtual meeting hoisted by GGL on the canola hybrid seed supply issue.
- Lyndon Mickel (GIWA Chair and GIWA Barley Council Deputy Chair) attended the Australian Barley Technical Symposium in Qld in Aug 2022.
- Meetings with CBH Operations and Marketing and Trading concerning receival standards, security of noodle wheat supply, and financial support for GIWA.
- The GIWA EO and three members of the GIWA Board (Eamonn Lanagan, Peter Bostock and Kerry Regan) attended the AAACWA Outlook 2022 in Nov 2022.
- The GIWA EO met with the Logistics and Defence Skills Council re. workforce planning in Aug 2022.
- The GIWA EO met with the Food Fibre and Timber Industries Training Council in Aug 2022 re. workforce planning in the grains sector.
- The GIWA EO attended the UWA Institute of Agriculture Forum in July 2022.
- The GIWA EO and staff attended the Dowerin Field Days in Aug 2022 to network with other organisations attending.
- The GIWA EO attended the Grain Trade Australia Member Event with GTA Board members and stakeholders in Aug 2022.
- The GIWA EO met with the Executive Officer of the Stockfeed Manufacturers' Council of Australia and Jane Wardle from CBH to discuss sustainability drivers for grain and grain-based stock feed.
- The GIWA EO participated in an Agricultural Workforce Issues Roundtable Meeting in Oct 2022 convened by the State Training Board.
- The GIWA EO participated in the AOF AGM in Oct 2022.
- The GIWA EO represented the GIWA Board at the AEGIC 10 Year Celebration in Nov 2022.

- The GIWA EO met with the Executive Officer of the Stockfeed Manufacturers' Council of Australia and Ross Kingwell (AEGIC) to discuss AEGIC's proposed feed wheat project and related market insights portal.
- The GIWA EO met with Bob Klare of the US Grain Elevator and Processing Society <https://www.geaps.com/> in Jan 2023 to discuss potential collaboration.
- The GIWA EO attended a dinner hosted by the GRDC Chairman, Directors and MD to welcome the new agriculture Minister, the Hon. Jackie Jarvis in Jan 2023.
- Representatives from the GIWA Board briefed the new agriculture Minister, the Hon. Jackie Jarvis, on GIWA's role in Jan 2023.
- The GIWA EO attended a Grain Growers Limited dinner in Feb 2023 and networked with members of the Boards and senior staff of GGL, GRDC, AEGIC, Grains Australia, DPIRD and other industry organisations.
- The GIWA EO was invited by the Indonesia Australia Business Council to attend an event with the Australian Ambassador to the Republic of Indonesia, Her Excellency Ms Penny Williams PSM and Austrade Trade & Investment Representative to Indonesia, Rod Commerford, but was unable to attend.
- The GIWA EO participated in a briefing in Mar 2023 for Pulse Australia members on Pulse Australia's proposal to be absorbed by Grains Australia.
- The GIWA EO attended a dinner in May 2023 at the invitation of the Governor of the Reserve Bank of Australia and networked with the Board of the RBA and grain industry and business leaders.
- The GIWA EO attended a breakfast in May 2023 to launch evokeAg 2024 at the invitation of AgriFutures, and networked with AgriFutures, grain industry and business leaders.
- The GIWA EO met with the CEO Of the Agriculture Produce Commission in May 2023 to discuss the concept of raising a producer levy to fund services to the grain industry.
- Meetings with CBH Operations and Marketing and Trading concerning receival standards and security of noodle wheat supply were held in the lead up to the JFMA/MAFF delegation visit in May 2023.
- The GIWA EO met on 30 May 2023 with Dr. Shy Vishnumohan, Executive Officer for the newly formed WA Sweet Lupin Association, to discuss opportunities to collaborate and materials produced by GIWA that the Association wishes to host on its website.
- The GIWA EO met with Courtney Draper and Matt Yamamoto of AEGIC in May 2023 to plan follow up actions arising from the JFMA/MAFF delegation's visit.
- The GIWA EO and Marketing and Communications Manager met (virtually) with members of the International Oat Conference organising committee located in Canada, Germany and Chile to arrange the handover of the IOC website and collateral developed by GIWA to the organisers of the 2026 conference to be held in Chile.
- At the invitation of InterGrain, the GIWA Chair and EO and members of the GIWA Barley Council attended the launch of the new barley variety, Neo, in June 2023.
- Peter Bostock, GIWA Oilseeds Council Chair, participated in AOF meetings as GIWA's AOF representative.
- Steve Powles, GIWA's Pulse Council Chair, participated in meetings of the Lupin Taskforce.

## 15. COGGO

GIWA continued to provide administrative services to COGGO in 2022/23 and additionally GIWA has contracted to provide additional support to COGGO to promote projects funded by COGGO. This commences in February 2024.

### **Peter Nash**

Executive Officer

Grain Industry Association of Western Australia (GIWA)