



**GRAINS  
AUSTRALIA**



Grains Australia  
is an initiative of the  
Grains Research &  
Development Corporation

# YEAR IN REVIEW 2022

[grainsaustralia.com.au](http://grainsaustralia.com.au)

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# FOREWORD

It has been two years since Grains Research & Development Corporation (GRDC) established Grains Australia Limited on behalf of grain growers, with the aim of consolidating a range of critical industry good functions for the grains sector.

Dynamics in the marketplace have changed significantly and international markets and supply chain logistics continue to be volatile and challenging and are likely to remain that way into the future.

There has never been a more important time to have a collaborative and unified approach.

Grains Australia is leading the way for the industry and playing a core role in managing variety classification, market access, market information and education to enhance our national and international competitiveness and ultimately, ensure the grains industry's profitability.

In these turbulent times, it is imperative that we have an in-depth understanding of markets and classification preferences, and equally importantly that we have a mechanism for relaying that information back to the entire grains supply chain so our sector can proactively respond to industry trends and ensure Australian grain is well positioned.

Major gains have been made in these areas by Grains Australia since its inception and GRDC remains committed to ensuring this industry goods company continues to be a valuable investment and deliver genuine, tangible returns for grain growers.

I would like to thank the Board of Grains Australia for presenting a clear strategic plan for the organisation and in particular, Interim CEO Andrew Young for his collaborative approach in bringing to life the structure, team, Commodity Councils and delivered programs over the past 12 months.

We are looking forward to new CEO Richard Simonaitis starting in November 2022 and continuing to build on the momentum that is delivering significant benefits to growers and the industry.



**John Woods**  
Chair  
Grains Research & Development Corporation



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**Grains Australia Limited** wishes to acknowledge the **Grains Research & Development Corporation (GRDC)** for its funding. As the sole member (effective owner) of Grains Australia, it is GRDC's support that makes it possible for Grains Australia to deliver value to industry now and into the future.



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# INTRODUCING GRAINS AUSTRALIA

Grains Australia Limited is an initiative of GRDC.

Grains Australia delivers industry good services and functions on behalf of the entire grains value chain including classification, trade and market access, and market information and education to enhance competitiveness and productivity.

The operations and business of Grains Australia are governed by a skills-based Board of Directors that has a formal link with an Advisory Committee that includes representatives from GRDC, GrainGrowers Limited, Grain Producers Australia (GPA), and Grain Trade Australia (GTA).

## CONTENTS

<b>Chair's Report</b>	<b>4</b>
<b>Our Approach</b>	<b>6</b>
<b>Action Plan</b>	<b>7</b>
<b>Interim CEO's Report</b>	<b>8</b>
<b>Trade and Market Access Update</b>	<b>10</b>
<b>Classification Update</b>	<b>12</b>
<b>Information and Education Update</b>	<b>13</b>
<b>Board of Directors</b>	<b>14</b>
<b>Commodity Councils</b>	<b>15</b>



# CHAIR'S REPORT



**Terry Enright**  
Chair

I am pleased to report significant progress by Grains Australia this year, meeting the expectations of grains industry participants and our member organisation GRDC.

Following the departure of Grains Australia's inaugural CEO Jonathan Wilson in January 2022, the Board appointed Director Andrew Young as interim CEO to maintain focus on key functions, driving progress towards a stable functioning operational model.

Under Andrew's leadership the Grains Australia Strategic Plan 2022/23 to 2024/25 was developed in consultation with our Advisory Committee. This Plan details our goals and strategic priorities and has since been communicated widely across the sector and received positive feedback.

In terms of classification, we have maintained the market-driven grain variety classification systems for wheat and barley that came under Grains Australia with our integration of Wheat Quality Australia and Grains Industry Market Access Forum (GIMAF), and our merger with Barley Australia. We also have plans underway for classification systems for oats and pulses, which are priorities for the coming 12 months.

In trade and market access we've been focused on maintaining and improving market access, and consulting closely with government and industry.



Grains Australia is coordinating grain industry priorities for the federal Agricultural Trade and Market Access Cooperation (ATMAC) program and grants. We have integrated GIMAF and the National Working Party on Grain Protection (NWPGP) into Grains Australia's operations with further refinements to come.

A key achievement this year was the appointment of Richard Simonaitis as Grains Australia CEO, who starts on 1 November 2022. Richard brings significant industry experience to the organisation, having worked in senior management roles in the grain industry and in export-focused commodity industries, most recently leading the Australian Export Grains Innovation Centre (AEGIC). His in-depth knowledge of the industry and its participants mean he is well-equipped to take Grains Australia to the next level of value delivery.





Most importantly, I want to thank GRDC for supporting the activities of Grains Australia this year and into the future on behalf of grain growers and the wider industry. GRDC has committed to long-term funding of Grains Australia, which means we can move ahead with delivering on our mission. Along with the support of our Advisory Committee, GRDC's commitment to Grains Australia is critical to our ability to deliver value to the Australian grains industry at large.

To my fellow Directors, Company Secretary Jennifer Hindmarsh, and interim CEO Andrew Young, I extend my sincere thanks for your efforts. I also want to acknowledge our wider team who, having joined a new organisation and continuing to work mostly remotely, have maintained an exceptionally high standard of performance.

I would also like to acknowledge the steadfast support of the management and boards of the organisations who have embraced the formation and establishment of Grains Australia from the outset, namely GRDC, GTA, GPA and GrainGrowers. To the boards of Wheat Quality Australia, Barley Australia and GIMAF, my thanks for the cooperation and goodwill which facilitated the transfer of the respective operations to Grains Australia.

AEGIC has provided valuable input into Grains Australia programs, particularly to the market information and education service and the relationships with trade and market access initiatives, and I acknowledge the support of Chair Ron Storey and the Board of AEGIC.

There is an exciting future ahead for Grains Australia as we continue to develop and grow in order to maximise value for the entire grains industry, from growers to end users and everyone in between.

# OUR APPROACH



## MARKET INSIGHTS

- Trusted international and domestic market insights from all stakeholders
- Information exchange throughout the grains value chain



## MARKET DELIVERY

- Improved trade and market access
- Inform breeding programs of desirable traits and functionalities
- Customer and stakeholder education/value proposition delivered



## OPPORTUNITY ANALYSIS

- Research and competitor analysis to prioritise market opportunities
- Focus on stakeholder buy-in



## IMPLEMENT

Applied solutions across core functions:

- Classification system(s)
- Trade and market access
- Customers and stakeholders
- Technical functions, support and training





## INDUSTRY PRIORITIES

- Whole of industry approach to identifying priorities
- Clear market development strategies



# ACTION PLAN

 HORIZON 1	 HORIZON 2	 HORIZON 3
July to December 2022	January to July 2023	July 2023 to July 2025
<ul style="list-style-type: none"><li>• Establish Commodity Councils</li><li>• Complete Grains Australia team (people) and establish core culture</li><li>• Develop and implement Stakeholder Engagement &amp; Communication Plan</li><li>• Develop 2022/23 Annual Operating Plan and Budget</li><li>• Implement long-term funding agreement</li><li>• Implement fit-for-purpose HR, IT and financial systems and processes</li><li>• Integrate databases and optimise website and social media</li><li>• Complete integration of Barley Australia and Wheat Quality Australia</li><li>• Negotiate and finalise Service Agreement for Information and Education</li></ul>	<ul style="list-style-type: none"><li>• Develop 2023/24 Annual Operating Plan and Budget</li><li>• Classification concept for Pulses and Oats developed and accepted</li><li>• Implement systems and processes for:<ul style="list-style-type: none"><li>- Project workflow</li><li>- Reporting dashboard</li><li>- Data management plan</li></ul></li><li>• Engage with Pulse Australia on expansion of industry services and activities</li><li>• Engage with Australian Oilseeds Federation on industry good services</li><li>• Engage with Grains &amp; Legumes Nutrition Council on industry good services</li><li>• Membership assessment</li></ul>	<ul style="list-style-type: none"><li>• Classification concept for Oilseeds accepted</li><li>• Develop 2024/25 Annual Operating Plan and Budget</li><li>• Develop 2025/26 to 2027/28 Strategic Plan</li></ul>



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# CEO'S REPORT



**Andrew Young**  
Interim CEO

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Taking on the role of Interim CEO of Grains Australia at the start of 2022, the focus was establishing a strong culture and setting the new entity's strategic direction.

We started with defining our three-year Strategic Plan, which set expectations and clearly defined the role Grains Australia would play in the industry. We set goals including improving or maintaining access to high value markets, ensuring effective delivery of core business and technical functions, and supporting effective decision-making by the grains industry and its customers. All of which I'm pleased to say we are achieving and will continue to focus on in the coming 12 months.

In February 2022 we announced the appointments of two very experienced and competent leaders to our management team. Dr Megan Sheehy was appointed to the role of General Manager Classification and Dr John Ackerman to the role of General Manager Trade and Market Access.

Over the past 18 months we have officially transitioned Wheat Quality Australia into Grains Australia and the critical work of wheat classification has continued seamlessly with the 2022/23 Wheat Variety Master List announced in August.



In May this year we also announced our merger with Barley Australia was complete, meaning Grains Australia took responsibility for the technical functions associated with barley varietal classification, trade and market access, and information and education on behalf of the Australian barley industry.

Barley Australia's board members became the new Grains Australia Barley Council, to ensure ongoing oversight and continued delivery of key services to industry. A grower representative was then appointed in September to ensure diversity of experience and geography among the Council members.

In July 2022, following an open expression of interest process which considered applicants' skills, knowledge and experience as well as diversity, we announced the Grains Australia Wheat Council. Its representatives include wheat growers, grain traders, processors and handlers, and quality and technical experts.





These Commodity Councils are an essential element of industry input into Grains Australia, providing advice to the Board and executive to guide our strategic direction consistent with delivery of key outcomes. The next Commodity Council to be established is the Grains Australia Oat Council which will be announced in October 2022 following another open expression of interest process. We hope to establish additional councils for pulses and oilseeds in the coming 12 months.

Following detailed work on the projected requirements for Grains Australia to deliver on its strategic priorities, GRDC has committed to long-term funding, which gives Grains Australia and the industry the confidence to ensure future success and pursue ambitious goals. We are very grateful to GRDC for continuing to support Grains Australia and making it possible for us to deliver for industry.

I would also like to thank our Advisory Committee – GRDC, GrainGrowers, GPA and GTA – and other numerous industry stakeholders who have been part of the journey so far. From Wheat Quality Australia to Barley Australia, AEGIC, Pulse Australia, Australian Oilseeds Federation, Grain Industry Association of Western Australia (GIWA), the Department of Agriculture Forestry and Fisheries, the Department of Foreign Affairs and Trade and more.

Over the past 12 months, Grains Australia has firmly established itself and is in a strong position to deliver on its core objectives.

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# TRADE AND MARKET ACCESS UPDATE



**Dr John Ackerman**  
**General Manager,**  
**Trade and Market**  
**Access**

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In 2022 Grains Australia integrated several trade and market access functions, participated in over 20 industry events and engaged with stakeholders across the supply chain and government.

Operating as a function of Grains Australia, the Grains Industry Market Access Forum (GIMAF) continues to bring together peak industry bodies and other contributors in the grains, seed and fodder sectors. Meeting three times in 2022 so far, GIMAF has discussed changing market conditions and consolidated the industry's engagement with government.

In addition, Grains Australia has funded and overseen the National Working Party on Grain Protection (NWPGP) to coordinate and provide industry views to the Australian Government on chemicals that are in use for grains and associated products, as they relate to market access domestically and for exported commodities.

The NWPGP Australian Grain Storage & Protection Conference in June 2022, organised by GTA, was important in bringing together significant technical information, overviews from relevant government and industry bodies, and updates on programs to deliver improvements in trade and market access. This was critical given the grain supply chain has been under significant pressure with export shipping-based supply chains at capacity. Grains Australia will participate in the NWPGP Strategic Working Group, responsible for planning for the 50th Annual Conference, in 2023.



Grains Australia has taken the lead on coordinating grains industry projects under the Agricultural Trade and Market Access Cooperation (ATMAC) Program. The ATMAC Program funds projects focused on expanding trade for Australia's agriculture sectors. Grains Australia, working with related grains bodies, secured funding for six projects under ATMAC, with a total budget of approximately \$1 million. We continue to work with the Federal Government to secure further funding to improve market diversification frameworks and further investigate opportunities for grains in new and emerging markets.

Grains Australia is also participating in the Grain and Plant Products Export Industry Consultative Committee (GPPEICC), the principal forum for the Commonwealth Government to consult with grain, fodder, nuts, seed, and timber industries on export inspection and certification, export market access and other relevant issues.





Throughout 2022 Grains Australia has been pleased to engage with stakeholders from across the supply chain, industry organisations and government in order to get feedback on key priorities and where we can add the most value. We did this through one-on-one interviews, online surveys and speaking at or attending over 20 industry events. This process of stakeholder consultation has been incredibly valuable and means Grains Australia understands what stakeholders need from us and how they want our Trade and Market Access function to operate moving forward.

Priorities for the coming 12 months include continuing to support a coordinated approach to the maintenance and improvement of current markets and new market access, and increasing collaboration across the grains supply chain including improved consultative, advisory and communication structures. We are also looking forward to greater engagement and communication with end-users regarding the Australian industry's essential features, including its safe products, responsible

production practices, and sustainability credentials. This includes improved engagement with relevant government agencies to seek and ensure preferential treatment in our bilateral and multilateral agreements, and to remove costs caused by unnecessary measures.

Grains Australia understands the importance of sustainability in the sector and how the industry's approach into the future will have relevance to our trading partners. Therefore we are engaging in the discussions and working groups with industry and government to ensure we are able to best communicate Australia's approach and practices to governments and overseas partners.

We look forward to working closely with growers, processors, exporters, importers, the Australian Government, industry organisations and counterparts to continue to deliver value to the industry and our key stakeholders.

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# CLASSIFICATION UPDATE



**Dr Megan Sheehy**  
**General Manager,**  
**Classification**

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One of Grains Australia's strategic priorities is establishing and maintaining market-driven variety classification systems for grain commodities, and I'm pleased to report we have continued the excellent work of Barley Australia and Wheat Quality Australia in this area.

A highlight has been the seamless transition of the technical functions for the classification of barley and wheat as we merged these entities into Grains Australia. We are also in the process of establishing frameworks for the classification process through the Commodity Councils which ensure input from industry.

Classification delivers value to growers and the market by providing Australian commodities with the chance to compete on the global stage, with leading varieties that are fit for purpose and add value to the whole grains industry supply chain.

Grains Australia's next classification priority is establishing a national oat classification system which has commenced as part of a phased approach, working closely with GIWA, AEGIC, InterGrain and other key industry stakeholders. This initiative will also be guided and supported by the Grains Australia Oat Council to be announced in October 2022.

We are also working with Pulse Australia, and other major stakeholders, on development of an industry-first pulse classification system which provides an opportunity to improve consistency, create Australian 'branded' pulse classes which will support market differentiation and potentially deliver greater returns for growers.

It's been exciting this year to also present at and attend a number of industry events, from webinars for international audiences in China, Vietnam, Brazil and Ethiopia, hosted by AEGIC, to participating in the organisation of the internationally renowned Australian Barley Technical Symposium 2022 on the Gold Coast. In particular, it's been excellent to reconnect with industry in-person and hear from our stakeholders and the broader industry how Grains Australia can deliver benefits in the area of varietal classification.

In joining Grains Australia this year, I've seen first-hand the extensive opportunities our operating model provides for sharing knowledge across commodities, and securing the funding and resourcing required to deliver effectively back to industry.

I would like to thank GRDC for funding of Grains Australia and all the organisations who have supported us in delivering classification services, especially Barley Australia and Wheat Quality Australia through the integration process.

We look forward to continuing our critical work on building a solid framework for market-oriented classification systems that work for all grain commodities and are understood and supported across the value chain.



# INFORMATION AND EDUCATION UPDATE

Grains Australia's information and education function ensures that the Australian grains industry value chain has the market insights it needs to make informed decisions on industry good services. These research priorities provide critical education and raise awareness amongst industry stakeholders to support value creation.

It is the role of Grains Australia to analyse market and consumer trends to understand demand and identify priorities. This is achieved through:

- Accessing and sharing validated and trusted international and domestic market insights;
- Fostering two-way communication on market, customer and consumer opportunities;
- Prioritising programs based on market information; and
- Taking into consideration market learnings from Australian grains industry customers and consumers.

Simultaneously Grains Australia is responsible for ensuring technical support and training is available for customers and stakeholders. This requires clear understanding of the technical and market requirements of our customers and stakeholders, delivering relevant and accessible support and training and addressing any technical expertise gaps in the supply chain.

Grains Australia's information and education services are currently provided primarily by AEGIC, and we are grateful to be able to access its existing extensive capability while Grains Australia has been in its establishment phase. Working with AEGIC delivers alignment of key messages and priorities into Australia's grain markets and to industry stakeholders.

AEGIC is an initiative of GRDC and the Western Australian Government through the Department of Primary Industries and Regional Development (DPIRD). Its role is to increase value in the Australian grains industry by gathering, analysing and sharing the market intelligence industry needs in order to breed, classify, grow and supply grain that markets prefer.

Grains Australia gratefully acknowledges the significant contribution of AEGIC to our mission and thanks it for its ongoing support. In particular, the Board and management team, including Chair Ron Storey and CEO Richard Simonaitis, have backed the Grains Australia model from day one. We are hopeful that a new official relationship between Grains Australia and AEGIC will be formalised in the coming 12 months.

Each of the Grains Australia Commodity Councils includes at least one representative from AEGIC which means the organisation is integrated effectively into the Grains Australia structure and has a formal role in providing advice.



*Larisa Cato, AEGIC Wheat Quality & Technical Markets Manager and Grains Australia Wheat Council member demonstrating at a workshop with customers.*

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# BOARD OF DIRECTORS



**Terry Enright**  
Chair



**Catherine Cooper**  
Director



**Rebecca Reardon**  
Director



**Stuart Richardson**  
Director



**Andrew Young**  
Director and Interim CEO



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# COMMODITY COUNCILS

Grains Australia Commodity Councils provide advice to the Board to assist in developing Grains Australia's overall strategic direction consistent with its constitutional objectives. Each Commodity Council is a committee of the Board.

In 2022 Grains Australia established the Barley Council, the Wheat Council and the Oat Council will be announced in late October.

Grains Australia gratefully acknowledges the many organisations that support their team members' valuable contribution to our Commodity Councils by donating their time and travel costs.



## Grains Australia Barley Council

*(Left to right)*

- Jérémy Thiblet** (Malteurop Australia/New Zealand)
- Luke O'Connor** (GrainCorp Limited)
- Simon Robertson** (Boortmalt)
- Amanda Box** (SECOBRA Recherches)
- Jeff Stewart** (Lion Co)
- Mark Goldsmith** (Asahi Beverages)
- Haydn Kuchel** (Australian Grain Technologies)
- Simon Tickner** (Grower)
- Jack King** (AEGIC)
- Drew Robertson - Chair** (CBH Group)
- Paul Rigoni** (Barrett Burston Malting)

*Absent*

- Tresslyn Walmsley** (InterGrain)



## Grains Australia Wheat Council

*(Left to right)*

- Bruce Watson** (Grower)
- Julie Alvaro** (Grower)
- William Reid** (CBH Group)
- Dr Kirsty Germaine** (Mauri)
- Darryl Borlase** (ADM Trading)
- Haydn Kuchel** (Australian Grain Technologies)
- Alex Onus** (GrainCorp Limited)
- Matthew Madden** (Grower)
- Larisa Cato** (AEGIC)
- Alastair Falconer** (Grower)
- Claire Shadbolt** (CBH Group)

*Absent*

- William Syers** (Bunge)



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