



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



GRAINS AUSTRALIA

YEAR IN REVIEW

2024/25

grainsaustralia.com.au

FOREWORD

Nigel Hart

Managing Director
Grains Research and Development Corporation



As we reflect on the 2024-25 financial year, it is abundantly clear that Australian agriculture – particularly the grains sector – continues to face an evolving landscape shaped by global volatility and market pressures.

This is coupled with an increasing domestic focus on cost-of-living (trade-offs between price and drivers such as sustainability and nutrition) and growing pressure to respond to climate change. In short, the current environment brings threats and opportunities.

How can the grains sector survive and thrive in this era? We need to be adaptable, innovative and use scientifically-based evidence and robust market intelligence to support and inform on-farm decision making.

As an organisation, the Grains Research and Development Corporation (GRDC) has been proactive and responsive with strategic and well considered research, development and extension (RD&E) investments. We have a proud history and proven track record of investing in and driving initiatives that deliver impact and benefit for Australian grain growers.

In 2020 we established Grains Australia, demonstrating our commitment to ‘industry good’ initiatives that deliver efficiencies, improved connectivity across the value chain and provide us with greater influence in domestic and global markets.

Grains Australia is the cornerstone of a strategic and clear plan to bring a ‘Team Australia’ approach to market engagement. Five years on, the organisation has continued to effectively consolidate critical functions for the grains industry to enhance competitiveness and profitability, becoming the integral connector between what the market wants and what growers can provide.

International markets and supply chains continue to be challenging. Having a collaborative and unified approach to functions, such as grain variety classification systems, market analysis and information, as well as technical support, is critical to preserving, protecting and growing our market access.

GRDC remains the sole member of Grains Australia. Our investment on behalf of grain growers has continued to evolve and is now well supported by industry and is increasingly well recognised in the global marketplace.

This year we have invested significantly in Grains Australia projects addressing market diversification to continue to deliver tangible benefits for grain growers and the broader industry.

Recognising the imperative to future-proof our markets, Grains Australia led targeted trade missions to Southeast Asia, India, Central and Latin America and China – key regions for Australian grain exports and expansion. These efforts resulted in new collaborations and memorandums of understanding with critical trading partners.

These outcomes have only been possible because of our sector’s shared vision and willingness to adapt. The strong alignment and partnership between GRDC and Grains Australia have continued to deliver outstanding value, with GRDC’s strategic investment and support underpinning industry good initiatives that drive efficiency, connectivity and influence across the value chain.

Key activities, such as the transfer of GRDC’s membership of the Australian Export Grains Innovation Centre (AEGIC) to Grains Australia, has further streamlined industry operations, maximising the impact of our collective efforts for growers. In November, Grains Australia established the Oilseed Council, joining the commodity councils for wheat, barley, pulses and oats as well as the Grain Market Access Council (GMAC). This consolidation provided critical efficiencies for the industry, as well as ensuring Grains Australia has the insights to be responsive to emerging market trends and classification preferences.

As we look to the future, I would like to thank the Grains Australia Board, under the guidance of Chair Andrew Young, and the dedicated team led by Chief Executive Officer (CEO) Richard Simonaitis, for their tremendous progress over the past year. Grains Australia’s leadership and commitment are strengthening our competitive edge and securing enduring prosperity for the nation’s grain growers.

Going forward, GRDC has committed \$12 million a year over the next decade to streamline critical trade and market functions through the integration of Grains Australia and the AEGIC into a single entity working domestically and internationally across all grains. This is an increase of \$4.2 million on the current annual spend by GRDC in ‘industry good’ function and an integration designed to deliver what matters to growers.

GRDC is confident that, through this integration and other initiatives, Grains Australia will continue to deliver market security and sustainable growth. Together, as ‘Team Australia’, we are building a more resilient, innovative and globally connected grains sector – one that is ready to turn today’s challenges into tomorrow’s opportunities.

INTRODUCTION

Grains Australia’s purpose is to manage classification, market access, market insights and market education to enhance competitiveness and profitability across the grains value chain.

Value is generated for the Australian grains industry by working collaboratively with industry and government to establish priorities across these core functions which are outlined in the 2025/26 to 2027/28 Strategic Plan:

- Maintaining consistent, science based, value-driven varietal grains classifications
- Providing evidence-based market and consumer insights that inform decision making and improve the capability of the Australian grains industry
- Ensuring that technical support and training are available for customers and other stakeholders in the grains value chain
- Improving market diversification, reducing trade impediments and maintaining market access.

Grains Australia is an initiative of the Grains Research and Development Corporation (GRDC). GRDC leads investment in grains research, development and extension (RD&E) in Australia to create enduring profitability for grain growers.

In its capacity as a one of two members of the Australian Export Grains Innovation Centre (AEGIC), Grains Australia invests in AEGIC in support of industry-driven research, development and extension programs. AEGIC was formed as an initiative of the Western Australian State Government (Department of Primary Industries and Regional Development) and GRDC. Grains Australia replaced GRDC as a member of AEGIC in 2023.

Grains Australia and AEGIC integration will come into effect from June 2026 – to unify and strengthen ‘industry good’ services nationally. GRDC has committed \$12 million annually over the next decade to streamline critical grains industry good functions through the integration.

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In the spirit of reconciliation, Grains Australia acknowledges the Traditional Custodians of country throughout Australia and their connections to land, sea and community. We pay our respects to their Elders past, present and emerging, and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

CHAIR'S REPORT

Andrew Young

Chair



Grains Australia has a clear agenda to continue building on our achievements to date and to steer a long-term, collaborative program that delivers value to the industry.

This is possible thanks to our Member the GRDC which recently committed to continued investment into Grains Australia, enabling us to keep working collaboratively with industry and government to establish priorities across our core functions.

This continued commitment represents a historic investment in industry good services, the likes of which have not been seen before. Together with the transfer of AEGIC's industry good functions into Grains Australia by June 2026, it will ensure that industry funds and investments are maximised on behalf of the Australian industry and growers into the future.

I am thankful to the GRDC and AEGIC boards for their support and to AEGIC for working with us to facilitate a smooth transition.

I would also like to acknowledge the significant investment that the Western Australian Government has made into AEGIC since its inception in 2012. The WA Government will relinquish its membership of AEGIC from June 2026. Thank you also to Minister for Agriculture and Food Jackie Jarvis – we are grateful for the WA Government's support for our valuable grains industry.

Refreshed Strategic Plan

Guiding Grains Australia's path forward is our refreshed Strategic Plan which came into effect from 2025/26.

The Plan will help guide Grains Australia's course for the future and builds on the significant progress the organisation has made since its establishment.

This Strategic Plan reflects the changes to the environment in which Grains Australia operates, identified in consultation with stakeholders.

Importantly, Grains Australia's purpose remains the same – we remain committed to delivering value to the Australian grains industry by **managing classification, market access, market insights and market education to enhance competitiveness and profitability.**

The Strategic Plan includes a clear set of goals to guide its future activities:

- *Leading a Team Australia approach*
- *Optimising market access for Australian grains*
- *Prioritising Grains Australia investments and initiatives that will take the industry forward.*

These are underpinned by four strategic priorities and 10 strategic activities which are targeted at achieving the long-term vision and goals of Grains Australia. The Grains Australia team has developed actions and timeframes to guide the implementation of the Strategic Plan and is making good progress in delivering against the Plan.

Councils

Contributing greatly to the achievements of Grains Australia are our Commodity Councils and Grains Market Access Council (GMAC), which provide strategic advice to Grains Australia.

Our most recently established Council is the Oilseed Council, which was established late in 2024, with well-known agronomist and consultant Michael Lamond appointed as Chair.

The Expression of Interest process and selection of the new Oilseed Council members was carried out with the support of the Australian Oilseed Federation (AOF), with which Grains Australia has a Memorandum of Understanding (MoU), and I thank the AOF for collaborating with us.

There are almost 90 value chain individuals guiding the delivery of Grains Australia objectives, including about 65 in our Commodity Councils and GMAC, plus representatives on our classification technical committees for different commodities.

Industry support is reflected in the time and efforts invested by these external individuals from across the grains industry value chain, who are actively involved in contributing and guiding the core delivery of Grains Australia's objectives.

Strategic priorities identified by the Councils are now seeing industry-generated projects whose focus areas range from new national classification systems to market maintenance, market access, and market insights into future demand trends.



GRAINS
AUSTRALIA

STRATEGIC PLAN
2025/26 to 2027/28

CORE FUNCTIONS



CLASSIFICATION

Maintaining consistent, science based, value-driven varietal grains classifications



MARKET INSIGHTS

Providing evidence-based market and consumer insights that inform decision making and improve the capability of the Australian grains industry



MARKET EDUCATION

Ensuring that technical support and training are available for customers and other stakeholders in the grains value chain



MARKET ACCESS

Improving market diversification, reducing trade impediments, and maintaining access



VISION

Deliver value to the Australian grains industry



PURPOSE

Grains Australia manages classification, market access, market insights, and market education to enhance competitiveness and profitability



GOALS

Leading a Team Australia approach
(measured through an increase in the industry Net Promoter Score compared to a baseline in year zero)

Optimising market access for Australian grains
(measured through an improvement or increase in the value of Australian grain sold over time)

Prioritising Grains Australia investments and initiatives that will take industry forward (measured through the impact of individual projects, the value of co-investment attracted, and the pipeline of identified and agreed priority projects)

STRATEGIC PRIORITIES



INDUSTRY ENGAGEMENT

WHAT THIS MEANS

Providing leadership in the Australian grains industry in delivering the strategic direction it requires to maximise impact and value to grain growers and the broader grains industry.

ACTIVITIES

- **Engagement** - coordinate and consult with growers, the broader Australian grains industry, and markets to capture information to inform decision making
- **Communication** - communicate the role and value of Grains Australia to grain growers and the broader grains industry including how it aligns with AEGIC
- **Government engagement** - position Grains Australia as a unifying voice for the grains industry on matters relevant to its core functions



STRATEGIC PERSPECTIVE

WHAT THIS MEANS

Looking ahead to set the direction for the Australian grains industry built on evidence-based decision making that informs and prepares grain growers and industry for change.

ACTIVITIES

- **Priority project process** - develop a methodology to identify, prioritise and decide on the priority projects Grains Australia invests in including consideration of:
- **Sustainability** - identify and examine sustainability requirements in markets and providing the insights to assist industry to address them
- **Technology and innovation** - understanding technology and innovation opportunities and how they impact service delivery relating to the functions of Grains Australia



OPERATIONAL EXCELLENCE

WHAT THIS MEANS

Focusing on excellence in the timely delivery of the core functions of Grains Australia to maximise the value and impact to grain growers and the broader grains industry.

ACTIVITIES

- **Driving AEGIC alignment** - ensure AEGIC is strategically aligned to present a national approach to the core functions of Grains Australia
- **Council alignment** - align the Councils to the Grains Australia Strategic Plan to ensure their decision making creates outcomes that are of value to the Australian grains industry
- **Data strategy** - develop an approach to collect and analyse information to allow evidence-based decision making



ENDURING CAPABILITY

WHAT THIS MEANS

Investing in the organisation and people of Grains Australia to ensure it remains resilient and prepared to deliver impact and value to grain growers and the broader grains industry.

ACTIVITIES

- **Workforce development** - determine the investment requirements to continue to build a Grains Australia culture and a results-driven team with the tools, capacity and flexibility to respond to change
- **Co-investment** - explore opportunities such as co-investment and leveraging investment in key priorities
- **Delivery** - continuous focus on the effect efficient delivery of the functions of Grains Australia and how it can best serve the future needs of industry

I am pleased at the extent to which growers and industry have engaged with us, at the positive response we have received from export customers and their representative industry and government organisations, and at the high level of support we have had from the Australian Government and its agencies including the Department of Agriculture, Fisheries and Forestry (DAFF).

Board engagement

Industry support was evident in 2024/25 when the Grains Australia Board hosted small events for supply chain representatives and other industry partners in Perth and Adelaide.

It was valuable to talk one-on-one with local stakeholders about progress made in classification, trade and market access, market insights and market education, and to hear firsthand individual perspectives.

We will host a similar event for Victorian stakeholders coinciding with the Board's AGM in Melbourne in October 2025.

I am thankful to GrainGrowers Limited and Grain Producers Australia for their ongoing support.

I would also like to acknowledge Grain Trade Australia (GTA), with which we continue to collaborate closely, including in the important area of market access.

I would like to extend my appreciation to my fellow Directors in 2024/25 – Catherine Cooper, Andrew Earle, Rebecca Reardon, and Stuart Richardson.

I wish Andrew Earle well for the future after he stepped down from the Grains Australia Board to take up a role on the GRDC Board during the year. Andrew provided valuable contributions and insights while serving on our Board, and I thank him for his service on our Audit and Risk Committee and the three years he spent previously on the Advisory Committee during our establishment phase.

Finally, and most importantly, I pay tribute to Grains Australia's people, led by our CEO Richard Simonaitis, who have worked tirelessly to earn stakeholder respect, deliver on the organisation's strategic objectives and establish a culture of success.

I wish to acknowledge their hard work and the commitment of all the employees as we mark our five-year milestone and enter the next stage of our journey supporting the continued growth and prosperity of the Australian grains sector.

CEO'S REPORT

Richard Simonaitis

Chief Executive Officer



Grains Australia plays a unique role in the Australian grains industry, providing a point of national coordination on key functions.

These functions include classification, trade and market access, market education and market insights.

Their consolidation under one organisation in Grains Australia ensures a coordinated, efficient approach to the delivery of these industry good functions, and that we have the capacity to effectively respond to emerging market challenges and opportunities.

I am confident that opportunities for improved outcomes on behalf of the Australian grains industry and growers will be amplified thanks to GRDC's welcome continued investment into Grains Australia and AEGIC's integration into Grains Australia by June 2026.

I am grateful to GRDC for its continued commitment and look forward to facilitating a smooth integration of AEGIC's industry good functions into Grains Australia, supporting the long-term competitiveness and profitability for the sector.

Looking back at Grains Australia's achievements in 2024/25, I am proud of what our team has achieved with the support of our member organisation GRDC, industry and government.

MoU with Academy of NAFRA

One highlight for me was being present in Beijing, China for the signing of an MoU between Grains Australia, AEGIC and the Academy of National Food and Strategic Reserves Administration (Academy of NAFRA).

This MoU supports positive collaboration between the Australian and Chinese grains industries, fostering new projects that benefit both countries in areas such as grain quality, safety and processing knowledge and expertise.

The agreement reaffirms Grains Australia's dedication to fostering strong and mutually beneficial relationships and opportunities with China and consolidates a long-standing, valued relationship between AEGIC and the Academy of NAFRA and its scientists.

The Grains Australia-invested eLearning flour milling training platform, delivered by AEGIC and already developed for Indonesia, has been rolled out in China

via the Academy of NAFRA with the Chinese version attracting about 140 enrolments.

Strengthening relationships

Another of our valued trading partners is Indonesia, and in the past year Grains Australia co-invested in the Australia Awards Short Course on Grains Value Chain Leadership Program, linking Australia and Indonesia.

This fantastic initiative brought a strong group of 25 future leaders from Indonesia's grain industry to Australia to further their knowledge, skills and networks, and I was thrilled to engage with them during their visit.

Grains Australia co-invests in the program with the Indonesia-Australia Comprehensive Economic Partnership Agreement (IA-CEPA) Economic Cooperation Program (ECP) Katalis program and has again collaborated with industry to deliver the course.

Valuable bilateral opportunities have been fostered not just with China and Indonesia but with a range of valued trading partners during the year including India, Pakistan, Thailand, Japan and Central and Latin America.

Specifically, a focus for our Trade and Market Access team members has been to collaborate with industry and government to shape engagement approaches with key markets including China, with a focus on providing benefits for both countries.

We are thankful for the support received from Australian grains industry partners in shaping these proposed approaches.

Classification achievements

Significant achievements are being made by our Classification team in adding value to the industry supply chain by enabling differentiation of varieties based on quality characteristics desired by customers.

Our team continues its important work, in collaboration with industry, to develop varietal classification frameworks for crops for which frameworks have not previously existed.

Following the development of the first national varietal classification framework for oats, Grains Australia has been refining and developing frameworks for pulses including lentils, faba beans and lupins.



At the signing of the MoU with the Academy of NAFRA are, from left Grains Australia CEO Richard Simonaitis, Academy of NAFRA President Tan Bengang and AEGIC Executive General Manager Courtney Draper. Photo: Academy of NAFRA.

Industry engagement

During the year we enhanced our strategic engagement with Australian stakeholders, with a targeted presence at key events such as GRDC Grains Research Updates and AGIC Australia in Melbourne.

Grains Australia's Commodity Councils and GMAC have been making great progress in identifying and refining industry priorities aligned with Grains Australia's core functions. As a result, new projects aligning with these priorities have been initiated by Grains Australia in the past year.

I have been encouraged to see how proactive the Councils have been in seeking data sources to support and inform these priorities and cannot over-emphasise the value of the advice they provide to management and the Grains Australia Board.

Team capacity

To effectively deliver on our functions it is important to have sufficient capacity, and during 2024/25 it was great to have Sheree Krige come on board to proactively develop, lead and manage the agenda and operation of the Grains Australia Commodity Councils and GMAC.

We were also pleased to welcome to our team Project Manager Laura Skipworth, who is driving and overseeing project management delivery. Most recently, it has been great to have Rachel McElhone join our team in the role of Business Data Analyst. Rachel will be responsible for our data management.

Sheree, Laura and Rachel join a hard-working and dedicated team of employees and I am grateful for their efforts over the past year.

I sincerely appreciate the guidance and strategic oversight from our Board of Directors, including our Chair Andrew Young.

Grains Australia is strongly positioned to continue driving meaningful outcomes for grain growers and the broader Australian grains sector into the future.

I look forward to continuing this shared journey and driving impact together.



Grains Australia CEO Richard Simonaitis addressing the International Wheat Congress in Perth.

TRADE AND MARKET ACCESS UPDATE

Dr John Ackerman

General Manager, Trade and Market Access



Grains Australia's Trade and Market Access team focuses on strengthening global competitiveness and market resilience through targeted engagement and coordination, underpinned by an evidence-based approach.

Our key role in fostering a coordinated, national effort in trade and market access supports Grains Australia's objective of maintaining and improving access to global markets for Australian grains.

Our current priorities include:

- Supporting a coordinated, cross-industry approach to maintaining and expanding market access, including consistent messaging and shared priorities with government and industry stakeholders.
- Deepening collaboration across the grains value chain through enhanced consultative and advisory structures that promote shared intelligence and responsive action.
- Developing tools for greater understanding around the economics of non-tariff measures (NTMs) to provide improved evidence-based decision making.
- Fostering trust and mutual understanding with key trading partners through targeted in-market engagement and supporting inbound delegations, to align market positioning with global, regional and partner country expectations.

Grains Australia values the collaboration and consultation with our GMAC, our Commodity Councils, industry organisations and Government, which ensures a wide array of expertise and perspectives are considered in trade and market access matters.

Market engagement

Strong, constructive trading relationships are built on a shared understanding of Australia's entire grains ecosystem – from our production and supply chain systems to our export procedures.

In 2024/25, Grains Australia continued effective engagement with governments, industry associations, researchers and end users – both domestically

and internationally. In the past year, Grains Australia representatives and industry partners actively engaged in-market – for example, in Southeast Asia (Indonesia and Thailand), India, China and Japan.

Grains Australia was a Partner of GTA's 2025 Australian Grain Industry Conference (AGIC) Asia in Bangkok and Shanghai, with technical support from AEGIC, and at the inaugural AGIC India event in Mumbai.

Wheat protocol

A positive outcome of this focus on collaboration was the development of a wheat protocol to Indonesia, protecting significant value for Australian grain growers while assuring Indonesia of Australia's commitment to high biosecurity standards

Grains Australia played a key role in the development of the protocol alongside the DAFF.

We supported an Indonesian Quarantine Authority (IQA) delegation visit to Australia in November 2024, aiding logistics and coordination. During the visit, we worked with DAFF and industry, including GTA, to contribute technical input into the wheat protocol.

Australia's wheat trade to Indonesia is worth, on average, \$1.5 billion annually, highlighting the importance of the agreement.

Non-tariff measures

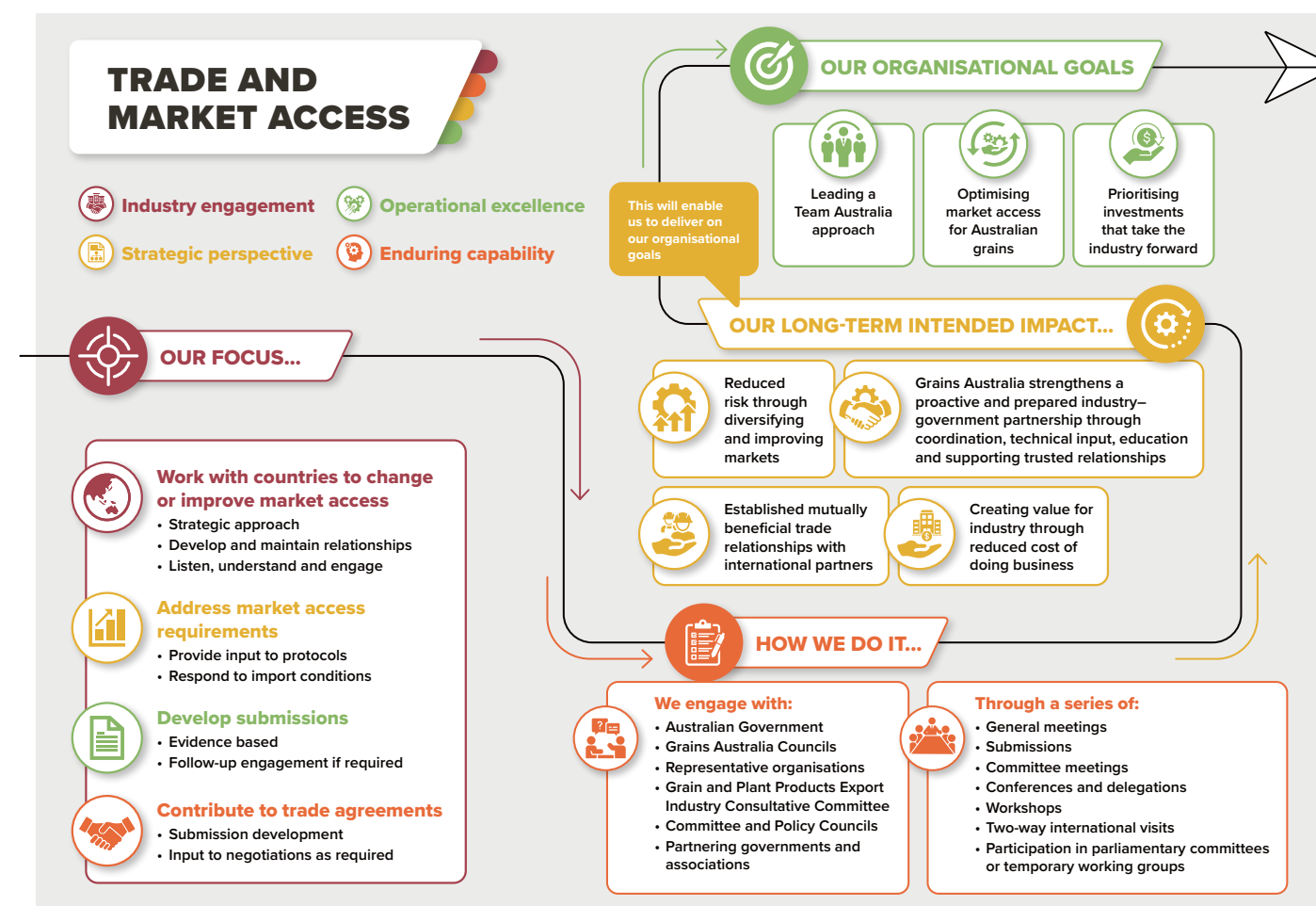
Reflecting our focus on prioritising strategic investments, Grains Australia continues to lead a significant initiative to move from a reactive to a proactive footing on NTMs (trade rules affecting market access). Our approach includes:

- Robust economic modelling to quantify impact.
- Tracking political, regulatory, and public drivers to reduce surprises.
- Supporting industry and government with evidence so domestic systems and export requirements are coordinated and focused.

This project, delivered by The Australian National University, is finding that non-tariff barriers (NTMs that become unnecessarily restrictive) can cause significant commercial impacts, eroding trade value and, in some instances, acting as the equivalent of a large hidden tariff.



Dr Ackerman addressing the GRDC Grains Research Update in Perth. Image: GRDC



CLASSIFICATION UPDATE

Dr Megan Sheehy
General Manager, Classification



Grains Australia's Classification team is focused on critical work building robust frameworks for market-orientated classification systems for all grain commodities that are understood and supported across the value chain.

Grains Australia's Classification team is focused on critical work building robust frameworks for market-orientated classification systems for all grain commodities that are understood and supported across the value chain.

This work contributes to industry outcomes such as:

- Supporting the production of high-quality grain that meets customer needs and strengthening confidence in the Australian grain supply chain
- Providing a consistent, science-based framework to guide varietal development.

In 2024/25, achievements have included establishing a Pulse Varietal Classification Technical Committee and completing an improved barley classification scoring system for the assessment of new varieties.

Wheat

Key wheat projects underway during the year included the development of a framework for the management of classification controls.

A review was undertaken of the soft wheat requirements for 'cookie' style end products, popular in Southeast Asian markets, utilising the new Framework for Introduction of New and Modification of Existing Wheat Classes.

The Wheat Variety Classification Panel (Panel) is well progressed in training two new associate members to ensure the availability of technical skills for the future of the Panel and the industry. In June 2025, Grains Australia coordinated a proficiency baking workshop in collaboration with AEGIC at its Sydney laboratories, as part of our Wheat Laboratory Proficiency Program.

Barley

The Malting and Brewing Industry Barley Technical Committee (MBITC) has been prioritising training for potential new committee members to assist with knowledge transfer and future industry skills.

A significant piece of work was completed with the MBITC to improve the classification scoring system used for assessing new varieties, and the new system will be adopted in 2025 assessments.

The Barley Council is also planning a review of the accreditation framework which will commence in late 2025.

The new format of the Malt Performance Summary was released in 2024/25, providing guidance on the malting quality potential of recently accredited malt barley varieties. These were translated into Chinese and made available to AEGIC for in-market engagement.

Oat

Three Oat Varietal Classification Technical Committee (OTC) meetings were held during the 24/25 year, and two new members joined the committee. Work continued regarding refinement of agreed processes and protocols for the oat classification framework with a revised Requirements document released. In the past year, two varieties, Koala and Minnie, were classified as milling oats by the OTC, bringing the total of varieties now classified under the established framework to three.

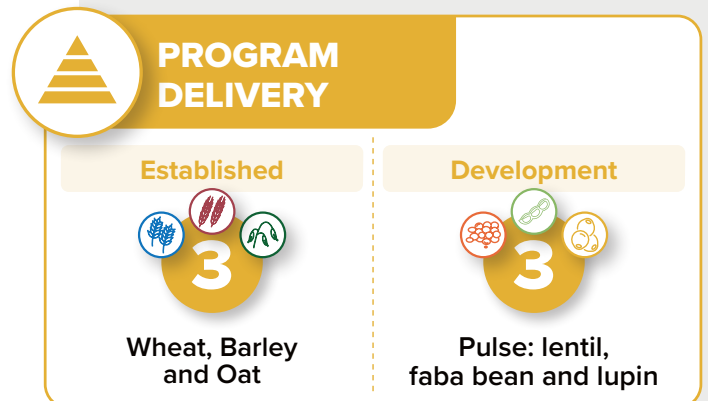
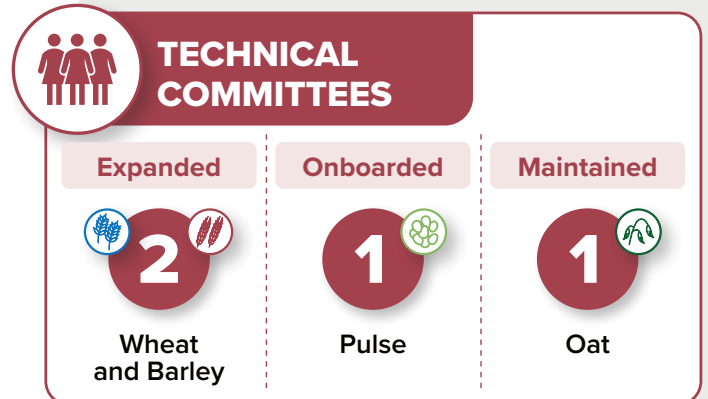
Pulse

The Pulse Varietal Classification Technical Committee (PTC) was established with the inaugural meeting held in April 2025. Grains Australia has been working closely with lentil breeders and the new PTC on refining the technical requirements for the new classification framework for lentils, with a view to implementing it in coming months.

A varietal classification framework has been established for faba beans and a framework is being developed for lupins.

Oilseed

Conversations have been underway with the new Grains Australia Oilseed Council regarding the potential for classification processes to be created for oilseed crops.



CLASSIFICATION

- Industry engagement
- Operational excellence
- Strategic perspective
- Enduring capability

WHAT WE DO...

- Technical committees**
 - Establish technical committees
 - Education and onboarding
 - Expansion of technical committees
 - On-going technical committee engagement
- Classification frameworks**
 - Engagement
 - Framework development
 - Framework review and refinement
- Classification requirements**
 - Support varietal testing
 - Refinement of classification requirements
- Assessment of varieties**
 - Assessment of varieties
 - Maintenance of classified varietal lists
 - Performance summaries (only barley)
- Training & education (wheat only)**
 - Design and implementation of proficiency testing
 - Workshops with laboratories

This will enable us to deliver on our organisational goals

OUR ORGANISATIONAL GOALS

- Leading a Team Australia approach
- Optimising market access for Australian grains
- Prioritising investments that take the industry forward

OUR LONG-TERM INTENDED IMPACT...

- Consistent, science based, value driven varietal grains classification are maintained
- Classification frameworks are strategic and support the production of the highest quality grain achievable within the markets "willingness to pay" and balanced with other key agronomic traits (e.g. yield and disease resistance)

INFORMED BY...

- Stakeholder mapping
- Data systems – sourcing appropriate data & access requirements
- Engagement with Grains Australia Councils
- Market insights and supporting technical research

MARKET INSIGHTS AND EDUCATION UPDATE

Market Insights and Market Education services are two of Grains Australia’s four core functions.

Through these functions, Grains Australia delivers value to the Australian grains industry by:

- Providing evidence-based market and consumer insights that inform decision making and improve the capability of the Australian grains industry (market insights)
- Ensuring that technical support and training are available for customers and other stakeholders in the grains value chain (market education).

Looking ahead, a primary focus will be on integrating AEGIC market insights and market education functions within Grains Australia, as part of the Grains Australia and AEGIC integration coming into effect by June 2026.

Grains Australia has already been working with AEGIC in an integrated way to drive better outcomes for industry and to present a national approach to the core functions of Grains Australia.

The core objective of the Market Insights and Market Education function is to analyse market and consumer trends to understand demand and identify priorities. This is achieved by:

- 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
- Taking into consideration market learnings from Australian grains industry customers and consumers.

Market insights

In 2024/25, new Grains Australia-invested market insights projects included two initiatives being delivered by AEGIC.

One is gathering information on Central and Latin America’s preferred barley quality and functional properties, with the aim of positioning Australian barley as the preferred choice in the region and diversifying markets for Australian barley growers.

Another is providing the Australian wheat industry with the latest objective insights into wheat quality preferences for one of Australia’s most valuable wheat export regions – Southeast Asia.

Market education

In the past year, Grains Australia instigated new Wheat Council-initiated projects including ‘Consistently ‘telling the story’ of Australian wheat to our customers’ which aims to assist Australian wheat industry representatives to provide customers with consistent and clear information about the quality of Australian wheat.

Another project ‘Optimising awareness of varietal classification, including its relationship with grades’ will inform industry participants on the benefits and value that classification provides to industry, and explain the relationship between classes and grades.

It has been rewarding to again support the Australia Awards Short Course on Grains Value Chain Leadership Program, linking Australia and Indonesia.

Together with the IA-CEPA ECP Katalis program, Grains Australia was a co-investor in this initiative which brought 25 future leaders from Indonesia’s grain industry to Australia for an intensive, two-week program across Australia.



AEGIC Wheat Quality & Processing Technician Cassandra Kok working with customers in the Philippines in December 2024. Photo: AEGIC

COMMUNICATION AND ENGAGEMENT

Grains Australia’s approach to communication and engagement helps to deliver on the organisation’s purpose which is to ‘manage classification, market access, market insights and market education to enhance competitiveness

and profitability’. This was achieved in 2024/25 through strategic engagement with key stakeholders and consistently communicating how Grains Australia is delivering impact in relation to its key strategic priorities.

2024/25 AVERAGE QUARTERLY METRICS



PROJECTS SNAPSHOT



PROJECTS

	Core function & End Date	Summary	Status
 Establishing minimum and maximum boundaries for colour for Japanese Udon noodles	Classification Sep 26	Enhancing breeding companies' understanding of udon noodle colour quality requirements, while providing Grains Australia with evidence to ensure market-driven development aligned with the Japanese market's needs.	NEW
 Optimising awareness of classification, and its relationship with grades	Classification Oct 25	Enhancing industry participants' knowledge and understanding on the benefits and value that classification provides to industry including growers, and explaining the relationship between classes and grades.	NEW
 Establishment of Lupin Varietal Classification Framework	Classification Early 2026	Establishing a national lupin classification framework adds value to the Australian lupin industry through enabling differentiation based on inherent quality characteristics desired by customers.	NEW
 Consistently 'telling the story' of Australian wheat to our customers	Market education Dec 25	Assisting Australian wheat industry representatives to provide customers with consistent and clear information about the high quality of Australian wheat, via the development of a communications strategy and resources.	NEW
 Wheat quality requirements - Southeast Asia	Market insights Jun 26	Building intelligence on wheat quality requirements in key Southeast Asian markets - Indonesia, Malaysia, Vietnam, Thailand and the Philippines. The insights gained will help in the review and refinement of wheat standards and guidelines for breeders.	NEW
 Customer preferences for Australian malting barley across LATAM	Market insights May 26	Gathering objective data on the preferred malting barley quality and functional properties in Central and Latin American markets, informing barley breeding strategies and market engagement activities.	NEW
 Barley quality preferences – China and Vietnam	Market insights Dec 26	Capturing data in China and Vietnam to build on analysis from surveys in Latin and Central American markets and deliver a comprehensive review of market requirements for the Australian industry.	NEW
 Understanding and prioritising non-tariff measures project – phase 1	Trade & Market Access Sep 25	The project aims to quantify the economic impact of non-tariff measures (NTMs) on the grains industry. It will analyse their effects and provide evidence-based modelling and policy recommendations for mitigating negative impacts and enhancing positive outcomes.	NEW
 Benchmarking Australian wheat quality and performance 'ATMAC'	Market insights Feb 27	Expanding the benchmarking of Australian wheat to further inform its competitiveness in international markets.	ONGOING
 Establishment of Faba Bean Varietal Classification Framework	Classification	The establishment of a national faba bean classification framework adds value to the Australian pulse industry through enabling differentiation based on inherent quality characteristics desired by customers.	COMPLETED
 Translation of online mill training to Mandarin	Market education	This project followed the development of an e-learning program for flour mill employees in Indonesia, in both English and Bahasa. This project translated the e-learning modules to Mandarin and delivered the program into China.	COMPLETED
 A new Australian export soft wheat industry	Market insights	New Australian soft wheat varieties were reviewed to ensure they met Southeast Asian quality requirements, thus helping to create more demand for Australian-grown soft wheat.	COMPLETED
 Market indices to identify future wheat and barley market opportunities 'ATMAC'	Market insights	A platform was established where wheat and barley market data and analysis can be visualised and interrogated, including relative rankings as opportunities for Australian grain growers and industry.	COMPLETED
 Identifying immediate Southeast Asian aquaculture markets with best fit for Australian grain 'ATMAC'	Market insights	The use of Australian grain in Southeast Asia's aquaculture production systems was analysed to determine customer needs, understand practical considerations and relative competitiveness.	COMPLETED
 AGIC Asia Thailand and India round table 'ATMAC'	Trade & market access	In-person engagements, particularly roundtable meetings, were held with senior local industry and government agencies in Thailand and India, in conjunction with the AGIC Asia 2025 events, to showcase the Australian grain value chain.	COMPLETED
 Reconnect technically with the Chinese malting and brewing industry on the quality of Australian barley	Trade & market access	This project focused on re-establishing the capacity of Australia to support enhanced use of Australian barley by the Chinese malting, brewing and distilling industries following the removal of the China barley tariff.	COMPLETED

*Agricultural Trade and Market Access Cooperation (ATMAC) co-investment



Wheat



Barley



Pulses



Cross-commodity

ACHIEVEMENTS



ACHIEVEMENTS IN 2024/25

- Playing a crucial role supporting DAFF in the establishment of a wheat protocol with Indonesia
- Building stronger trade relationships with key markets including Southeast Asia, India, China, Pakistan and Japan
- Signing an MoU with the Academy of National Food and Strategic Reserves Administration in China
- Investing in a strategic initiative to position Australia to deal proactively with 'non-tariff measures'
- Co-investment in Grains Value Chain Leadership Program, deepening relationships between Australia and Indonesia
- Establishing the Pulse Varietal Classification Technical Committee
- Refining processes and protocols for the oat classification framework
- Development underway of varietal classification frameworks for pulses including lentil, faba bean and lupin
- Improving the barley classification scoring system for assessment of new varieties
- Developing Malt Performance Summaries on the malting quality potential of malt barley varieties
- Developing a framework for the management of wheat classification controls
- Reviewing soft wheat requirements for 'cookie' style end products, popular in Southeast Asia
- Training associate members of the Wheat Variety Classification Panel to ensure succession of technical skills for the future
- Completing 2025/26 to 2027/28 Strategic Plan
- Developing Monitoring, Evaluation and Impact Assessment Framework to measure the impact of the new Strategic Plan
- AEGIC integration planning
- Planning to secure investment past June 2026
- Establishing the Oilseed Commodity Council, building on Grains Australia's MoU with AOF
- Commodity Councils and GMAC identifying industry priorities, informing new projects
- Eight new projects initiated aligning with priorities identified through Commodity Councils and GMAC
- Completion of seven projects aligning with priorities identified through Commodity Councils and GMAC
- Partner of AGIC Asia and strategic presence at AGIC Australia and Australian Grain Storage & Protection Conference
- Strategic presence at GRDC Grains Research Updates in Adelaide, Perth, Bendigo and Goondiwindi
- Hosting supply chain and industry partners at Board events in WA and SA to facilitate communication
- Recruitment of Council Manager and Project Manager

VALUE PROPOSITION



COUNCILS

Grains Australia’s Commodity Councils and the Grains Market Access Council (GMAC) are committees of the Grains Australia Board and provide advice, through the Grains Australia Executive, to the Board. This assists in determining Grains Australia’s strategic direction to create outcomes that enhance the value to the Australian grains industry.

Grains Market Access Council (GMAC)

- Lyndon Asser (Chair) – from 2025
- Brett Hosking (Chair) – to 2025
- Julie Alvaro*
- Rob Dickie
- Andrew Freebairn*
- Cheryl Kalisch Gordon
- John Minogue
- Luke O’Connor*
- Adrian Reginato
- Rosemary Richards
- John Stuart
- Michael Vaccari*
- Anne Wilkins
- Peter Wilson*



GMAC members are addressed by Su McCluskey, the then Special Representative for Australian Agriculture

**As well as industry representatives and experts from across the supply chain, GMAC includes one representative from each of Grains Australia’s Commodity Councils.*

Acknowledgement of in-kind support

Grains Australia thanks the individuals and organisations which have contributed to the operation of our Councils through in-kind support including their or their team members’ time and expertise. These contributions are significant and greatly enhance our Councils’ processes and facilitate Grains Australia’s effective engagement with industry. Ultimately, they can be used as leverage to access external funding opportunities where appropriate.

Wheat Council

- Haydn Kuchel (Chair)
- Julie Alvaro
- Darryl Borlase
- Larisa Cato
- Alastair Falconer
- Kirsty Germaine
- Matthew Madden
- Alex Onus
- William Reid
- Claire Shadbolt
- William Syers
- Bruce Watson

Pulse Council

- Peter Wilson (Chair)
- William Alexander
- Julia Hausler
- Kathi Hertel
- Sam Holmes
- Julie O’Dea
- Kathy La Macchia
- Nick Poutney
- Mark Schilling
- Janine Sounness
- Anne Wilkins

Barley Council

- Drew Robertson (Chair)
- Amanda Box
- Mark Goldsmith
- Jack King
- Haydn Kuchel
- Luke O’Connor
- Paul Rigoni
- Simon Robertson
- Jeff Stewart
- Jeremy Thiblet
- Simon Tickner
- Tresslyn Walmsley

Oat Council

- Ashley Wiese (Chair)
- Andrew Bolt
- Greg Carroll
- Sara Grafenauer
- Chris Karagiannis
- Jack King
- David Oates
- Michael Vaccari
- Tresslyn Walmsley

Oilseed Council

- Michael Lamond (Chair)
- Andrew Freebairn
- Rob Hall
- Lachlan Herbert
- Tom Mac Smith
- Jared Meredith
- Dan Morgan
- Grant Pontifex
- Maryann Salvetti
- Jon Slee
- Luke Strudwick



Oat Council members touring the PepsiCo Quaker Oats processing plant in Perth



Pulse Council members during a visit to Australian Grain Export's faba bean processing facility in South Australia

Members listed contributed to our Councils during part or all of the 2024/25 period.

BOARD

The Grains Australia Board sets strategic direction and monitors ongoing performance. It is governed by a Charter which sets out policies and procedures for the Board and Board Committees including the Audit and Risk Committee.

Grains Australia is grateful for the contribution made by director Andrew Earle, who stepped down from the Board to take up a role on the GRDC Board during the year.



Andrew Young
Chair

BA, GAICD, AMP (INSEAD)

Experienced non-executive director in leading agribusinesses based in Australia and Southeast Asia. Currently Chair Westpork Pty Ltd, Executive Chair Plum Grove Pty Ltd and Non-Executive Chair Cutting Cart Pty Ltd and Alterra Limited. Previously has held senior management positions at CBH Group, Austoc and Director of Interflour Group. Ernst and Young Entrepreneur of the Year 2016 Western region.



Catherine Cooper
Director

LLB, GDLP, FAICD

Experienced non-executive director in a broad range of sectors including agribusiness, biosecurity and sustainability. Current roles include Director of Australia Composites Manufacturing CRC, RACE for 2030 Energy CRC, SmartSat CRC and Shaw & Smith Pty Ltd, and Chair of Environment Protection Agency SA and Independent Audit Chair of Energy Consumers Australia.



Andrew Earle
Director - to 2025

GAICD, Diploma in Farm Management

Managing Partner of extensive farming operation 'Bullwarrie' in Queensland and NSW as well as a partner in a grain storage business. An experienced Board member, including serving as Deputy Chair on the Grain Producers Australia Board – to which he was first appointed as a director in 2013.



Rebecca Reardon
Director

B.AgEc (Hons) and GAICD

Broadacre farmer and experienced agribusiness professional and non-executive director. Current non-executive roles include NSW Farmers Association, NSW Farmers Industrial Association and Queensland Sugar Ltd. Former Director of Wheat Quality Australia Limited, NW Local Lands and Service and Grain Trade Australia, and former member of the Ministerial Wheat Industry Advisory Taskforce and Grain Producers Australia Policy Group.



Stuart Richardson
Director

B.AgSc, MBA, Grad Dip Applied Finance, MAICD

Experienced agribusiness professional, Executive Director Alvie Group Pty Ltd, Non-Executive Director of Australian Export Grains Innovation Centre (AEGIC) and Chairman of Turfbreed Pty Ltd. Former Director of Wheat Quality Australia Limited, with investments in agriculture, including horticultural industries and grain.

ADVISORY COMMITTEE

As Grains Australia has moved further from its startup phase to implementation, the formal role of the Advisory Committee ended on 3 October 2024 at the AGM. We thank the representatives from the following grain industry organisations for their guidance and support in 2024/25. Grains Australia continues to work with these important stakeholders directly.





Grains Australia
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