Connecting Markets to Growers

Annual Operating Plan 2026–27

GRAINS AUSTRALIA

GRAINS AUSTRALIA

Contents

Acknowledgement of country

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 respect to their Elders past and present and extend that respect to all Aboriginal and Torres Strait Islander peoples today.

Executive Summary

The Grains Australia Annual Operating Plan outlines the organisation's strategic priorities, investments and intended outcomes for FY27 and supports delivery of the 2025–2028 Strategic Plan. The plan reflects Grains Australia's continued focus on supporting Australian grain growers through strategic, coordinated industry-good activities that strengthen market access, grain classification systems, customer engagement and market intelligence capability, while improving alignment between domestic and international market requirements and Australian grain production systems.

FY27 represents an important year for the organisation, with the commencement of Grains Australia's new long-term investment agreement with GRDC. This strengthens Grains Australia's ability to deliver a more coordinated and connected approach across the grains value chain, bringing together capability across market access, classification, market intelligence, technical engagement and customer-facing activities.

The operating environment for FY27 continues to be shaped by increasing geopolitical uncertainty, evolving market access requirements (including accelerating sustainability and traceability) as well as intensifying global competition across grain markets. At the same time, customers are placing greater emphasis on grain quality, technical performance, reliability and supplier confidence. These changes are increasing the importance of government-industry collaboration, industry coordination, market responsiveness and evidence-based engagement across the grains sector.

To address these challenges and opportunities, Grains Australia will focus its FY27 activities and investments on the following strategic priorities:

- Strengthening market access capability, strategic trade engagement and long-term industry preparedness across priority export markets.
- Improving alignment between grain quality systems and evolving customer requirements.
- Enhancing customer engagement, technical extension and market intelligence to understand evolving domestic and international customer requirements.
- Supporting higher-value market positioning for Australian grain.
- Strengthening coordination and information flow across the grains value chain.

Activities delivered under this Annual Operating Plan support a coordinated "Team Australia" approach that brings together growers, traders, breeders, researchers, government and domestic and international customers to improve strategic industry alignment and long-term competitiveness.

Grains Australia will continue working collaboratively with GRDC, industry stakeholders and government to support market access, customer confidence and value creation for Australian grain growers. During FY27, the organisation will also continue strengthening governance, evaluation and organisational capability to support effective delivery, accountability and continuous improvement.

FY27 also represents an important step in Grains Australia's transition from a project and activity-based delivery model toward a more integrated, long-term capability platform supporting strategic industry coordination, market positioning and sustained value creation for Australian grain growers.

The FY27 Annual Operating Plan positions Grains Australia to respond to emerging industry challenges and opportunities while continuing to deliver industry-good outcomes that support the reputation, competitiveness and long-term value of Australian grain in global markets.

GRAINS AUSTRALIA

About Grains Australia

A stronger, more competitive grains industry.

Grains Australia is an industry-good organisation and an initiative of the Grains Research and Development Corporation (GRDC).

Grains Australia works across the grains value chain to improve market access, align what markets need with what Australia provides, and build long-term value for growers, industry and customers.

We deliver this through five integrated functions:

- Trade and market access
- Classification
- Market insights and engagement
- Market education and training
- Technical market solutions

Together, these functions enable a "Team Australia" approach that translates market intelligence and industry priorities into coordinated action, strengthening customer confidence, supporting informed industry decision-making and positioning Australian grain for long-term success.

Grains Australia is an initiative of the GRDC GRAINS RESEARCH & DEVELOPMENT CORPORATION

Working with GRDC

Grains Australia supports GRDC's *Grow Markets & Capture Value* strategic pillar (GRDC RD&E Plan 2023–28) through activities that strengthen market access, grain quality systems, customer insight and value creation for Australian grain growers.

This aligns with GRDC's focus on maintaining access to diverse markets, increasing value returned to grain growers and improving value chain efficiency.

As a wholly owned subsidiary of GRDC, Grains Australia delivers industry-good activities that complement GRDC's role under the Primary Industries Research and Development Act 1989 (PIRD Act), particularly where coordinated industry engagement and technical market activities are required.

FY27 represents the commencement of Grains Australia's new long-term investment agreement with GRDC, providing annual investment support for delivery of strategic priorities, core industry functions and industry-good activities across the grains value chain.

Under the *Grow Markets & Capture Value* pillar, FY27 priorities are focused on:

- Strengthening market access resilience and long-term regulatory preparedness across key export markets.
- Improving alignment between grain quality systems and evolving customer requirements.
- Enhancing technical engagement, education and customer insight across domestic and international priority regions.
- Supporting customer value and market positioning through technical engagement and market development initiatives.

Grains Australia's integrated approach further strengthens alignment with GRDC investment priorities through coordinated market development, technical capability and grain quality expertise delivered within a single industry-good organisation.

INDUSTRY COLLABORATION

Collaboration across the grains value chain is critical to maintaining the competitiveness, reputation and long-term value of Australian grain in global markets. No single organisation can independently address the evolving technical, regulatory and market requirements impacting the industry.

Grains Australia works collaboratively with growers, traders, processors, grain breeding companies, government, peak industry bodies, researchers and domestic and international customers. These relationships strengthen the exchange of information that supports industry decision-making and informs Grains Australia's activities.

Grains Australia also plays an important role in facilitating communication and information flow across the grains value chain. Through Commodity Councils, technical committees, industry consultation and stakeholder engagement activities, the organisation helps ensure market intelligence, technical information and industry perspectives are shared effectively to support informed decision-making, strategic alignment and coordinated industry action.

OUR OPERATING STRUCTURE

Grains Australia has five core functions through which it delivers value, each led by a General Manager reporting to the Chief Executive Officer.

- **Trade and market access** - leads strategic industry and government collaboration to maintain and expand access to global grain markets, strengthen long-term market positioning and support coordinated industry engagement on emerging trade and regulatory developments.
- **Classification** - maintains and strengthens Australia's grain classification systems across major grain crops to ensure they remain aligned with domestic and international market requirements and continue to support the reputation of Australian grain in global markets.
- **Market insights and engagement** - strengthens the industry's understanding of domestic and international grain demand, customer requirements and emerging market opportunities.
- **Market education and training** - improves customer understanding and utilisation of Australian grain through targeted education, technical extension and engagement.
- **Technical market solutions** - provides technical expertise and solutions that address market risks, support market competitiveness and ensure customers can confidently utilise Australian grain.

Our Board and Committees

The Board of Grains Australia sets strategic direction and monitors ongoing performance. The Board is governed by a Charter which outlines the Board role, responsibilities and governance procedures. It defines the Board's obligations and its relationship with members, employees, and stakeholders.

Grains Australia has established committees that assist the board in carrying out its responsibilities. Board Committees include:

- The Audit and Risk Committee.
- Director Selection Committee.
- Council Selection Committee.
- Commodity Councils and Grains Market Access Council (GMAC).
- Technical Committees, including the Malting and Brewing Industry Barley Technical Committee (MBIBTC), Wheat Variety Classification Panel (WVCP), Pulse Technical Committee (PTC) and Oat Technical Committee (OTC).

Commodity Councils and GMAC play a key advisory role to the Grains Australia Board and are an important mechanism for effective consultation with industry to ensure that we incorporate information and perspectives from across all commodities and the grains value chain into decision making processes.

All aspects of our performance and accountability are underpinned by robust corporate governance policies, procedures and planning frameworks that support effective decision-making, risk management and organisational oversight.

During FY27, Grains Australia will continue to strengthen its governance framework with an ongoing focus on risk management, financial controls, cyber security, policy alignment and organisational compliance.

Photo: the Grains Australia Oat Council engaging with industry

Strategic Direction

Grains Australia's purpose, vision, goals and values guide organisational decision-making, investment prioritisation and operational delivery.

Our Purpose

To manage grain classification, market access, market intelligence and market education activities that enhance the competitiveness and profitability of Australian grain.

Our Vision

To deliver long-term value to the Australian grains industry.

Strategic Objectives

These strategic objectives describe the long-term outcomes Grains Australia is seeking to achieve for the Australian grains industry.

Leading a "Team Australia" approach

Strengthen coordination, collaboration and alignment across the Australian grains industry.

Optimising market access for Australian grains

Support the maintenance and expansion of market access opportunities for Australian grain.

Enhancing the competitiveness and value of Australian grain

Support long-term grower value through improved alignment between domestic and international market requirements, grain quality systems and customer needs.

Our Values

Responsive

We depend on genuine and sustained stakeholder engagement and responsiveness to stakeholder needs and unforeseen events.

Inclusive

We work collaboratively with all industry participants in the grains value chain, both pre and post farmgate.

Proactive

We think and act ahead of anticipated events and emphasise planning and risk management.

Effective

We provide efficient and effective services to deliver value to the Australian grains industry.

Ethical

We make the right choices as an organisation, even when they may be difficult.

Transparent

We communicate honestly and openly with all our stakeholders.

GRAINS AUSTRALIA

Strategic Pillars

Grains Australia's strategic pillars provide the framework through which the organisation delivers its strategic objectives. Together, they guide organisational prioritisation, investment and delivery under the 2025–2028 Strategic Plan and provide a framework for activities across the organisation's five core functions and support coordinated delivery of industry outcomes.

INDUSTRY ENGAGEMENT

Strengthening customer and stakeholder relationships, collaboration and industry alignment across the grains value chain.

STRATEGIC PERSPECTIVE

Providing market intelligence and strategic insight to support industry decision-making and future competitiveness.

OPERATIONAL EXCELLENCE

Delivering coordinated, efficient and effective industry-good activities that support market access and grain competitiveness.

ENDURING CAPABILITY

Building organisational capability, strategic industry alignment and long-term industry value for Australian grain growers.

Building organisational capability, sustainability and long-term industry value.

How Grains Australia

Delivers Value

Grains Australia delivers value by connecting domestic and international market requirements with Australian grain production systems through a coordinated and continuous industry feedback loop.

Market intelligence, customer requirements, regulatory developments and technical challenges provide the foundation for understanding emerging opportunities, risks and industry priorities. Through strategic analysis and prioritisation, Grains Australia identifies areas where coordinated industry action can strengthen competitiveness, market access and long-term grower value.

These priorities are then considered through Commodity Councils, industry consultation and Grains Australia's governance processes, helping ensure activities remain aligned with industry needs, stakeholder perspectives and evolving market requirements.

Agreed priorities are delivered through Grains Australia's five core functions — trade and market access, classification, market insights and engagement, market education and training, and technical market solutions. By bringing these functions together within a single organisation, Grains Australia is able to translate market intelligence and industry priorities into coordinated action across the grains value chain.

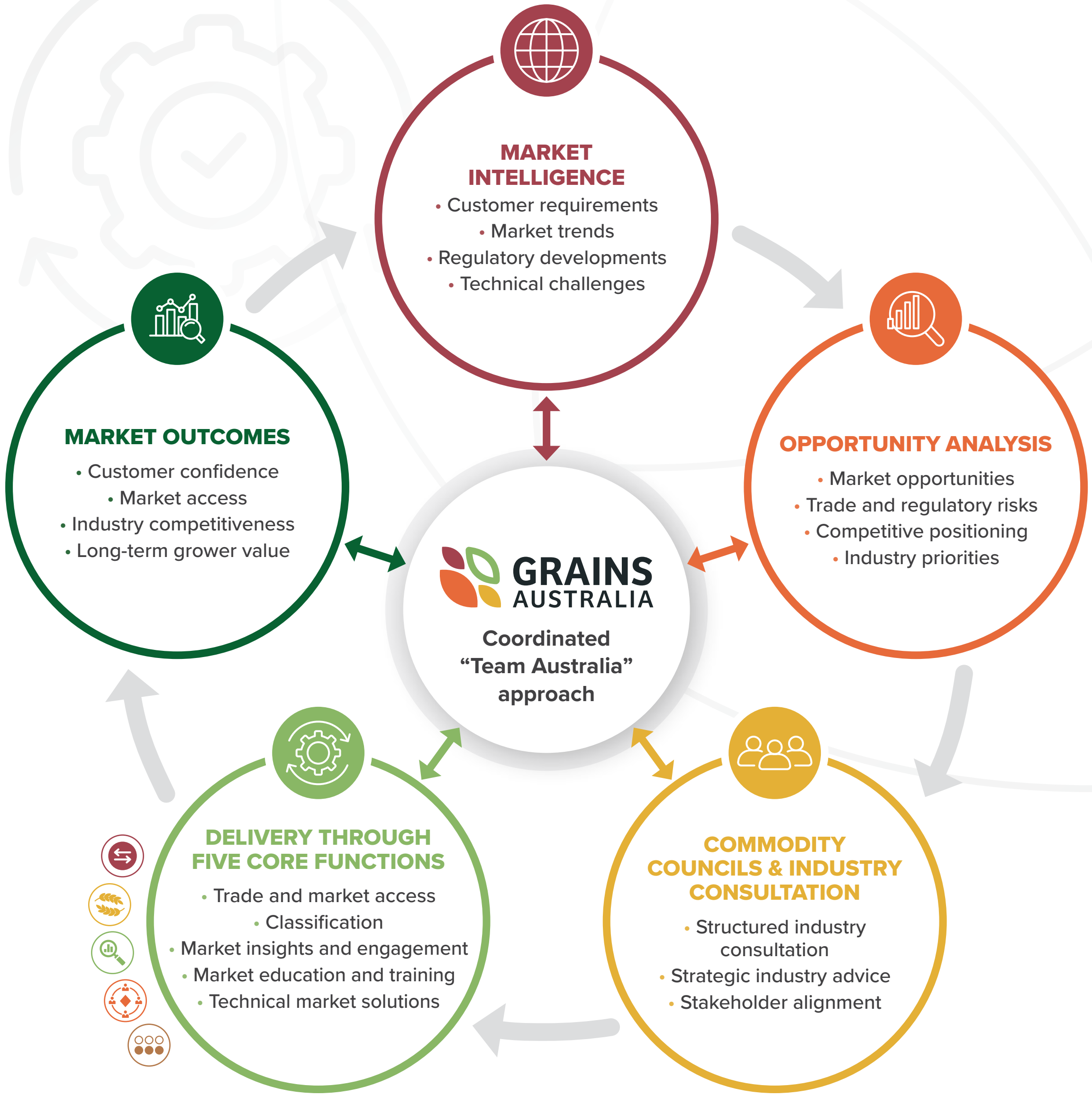
This integrated approach improves alignment between growers, traders, processors, breeders, researchers, government and domestic and international customers, strengthening the industry's ability to anticipate emerging challenges, respond to changing market requirements and position Australian grain for long-term success in global markets.

The continuous feedback loop enables:

- Clearer market signals across the grains value chain.
- Stronger industry consultation and stakeholder alignment.
- Better informed prioritisation of industry opportunities and challenges.
- Stronger technical engagement with customers.
- More coordinated delivery across industry-facing activities.
- Improved information flow and industry decision-making.
- Stronger alignment between market requirements and Australian grain production systems.

In turn, these activities support improved market outcomes, customer confidence, market access, industry competitiveness and long-term value creation for Australian grain growers.

The model strengthens the industry's "Team Australia" approach and supports more informed, coordinated and strategically aligned industry decision-making.



A CONTINUOUS INDUSTRY FEEDBACK LOOP CONNECTING MARKETS, INDUSTRY AND GROWERS

Market intelligence, industry consultation and coordinated delivery work together to strengthen market access, customer confidence, industry competitiveness and long-term value for Australian grain growers.

Operating environment

Key themes shaping FY27

Global trade becoming less predictable

Geopolitical instability, shifting trade relationships and ongoing economic uncertainty are increasing volatility across global grain markets. Supply chain disruption, freight pressures, changing trade dynamics and the growing influence of regional and bilateral trade arrangements continue to create a more complex and less predictable operating environment for Australian grain traders, customers and growers.

What this means for Australian grain:

Trade relationships are changing, customer expectations are evolving and growers are increasingly exposed to grain price volatility, market access disruption and shifting global demand dynamics.

FY27 focus:

Grains Australia's FY27 activities will focus on strengthening strategic market intelligence, technical trade engagement and coordinated industry capability across priority export markets.

Non-tariff measures are increasingly constraining grain trade

Non-tariff measures, inconsistent technical requirements and evolving regulatory frameworks are increasing the cost and complexity of global grain trade. In many markets, scientifically unjustified, unnecessary or duplicative measures are creating avoidable inefficiencies and additional compliance burden across the grain supply chain.

What this means for Australian grain:

Trade barriers reduce export competitiveness, constrain diversification opportunities and limit the industry's ability to maximise value returned to growers.

FY27 focus:

Grains Australia's FY27 priorities include strengthening technical market access capability, improving government-industry coordination on regulatory issues and supporting evidence-based engagement on trade and technical barriers impacting Australian grain.

Compliance expectations are becoming more complex

Maximum residue limits (MRLs), food safety requirements and market-specific technical standards continue to evolve across grain-importing markets, with increasing inconsistency between jurisdictions and growing complexity in compliance requirements.

What this means for Australian grain:

Increasing compliance complexity creates additional cost, uncertainty and market access risk across the supply chain, with potential impacts on grower returns and customer confidence.

FY27 focus:

Grains Australia's activities during FY27 will focus on improving industry awareness of changing technical requirements, strengthening engagement across government and industry on MRL-related issues and supporting alignment between market expectations and Australian grain quality systems.

Sustainability and traceability expectations are evolving

Domestic and international grain customers, regulators and food manufacturers are placing increasing emphasis on sustainability, emissions transparency, traceability and supply chain assurance. These expectations are increasingly influencing procurement frameworks, customer specifications and long-term market access requirements.

What this means for Australian grain:

Sustainability credentials are becoming increasingly important to maintaining market access, and the long-term attractiveness of Australian grain within some premium export markets; while emerging low-carbon and biofuel markets may also create new value-added opportunities across the grains sector.

FY27 focus:

Grains Australia's FY27 activities will strengthen market intelligence, customer engagement and government-industry coordination on sustainability-related market requirements and emerging assurance expectations.

Global grain markets remain highly competitive

Slowing global economic growth, food sector inflation and increased competition from other grain-exporting nations continue to pressure margins in importing markets. Customers are placing greater emphasis on value, supply reliability, technical performance, consistency and supplier confidence.

What this means for Australian grain:

Australian grain must continue competing on quality, consistency, technical performance and customer confidence to maintain market share and maximise value returned.

FY27 focus:

Grains Australia's priorities during FY27 will focus on strengthening grain classification systems, government-industry coordination on responses to evolving trade flows, customer engagement, technical market support and market education activities that reinforce the value and reputation of Australian grain.

Technology, data and AI are changing how grain markets operate

Rapid advances in digital systems, artificial intelligence and data capability are reshaping market intelligence, traceability, customer engagement and technical assessment processes across global grain supply chains.

What this means for Australian grain:

The ability to anticipate market trends, utilise data effectively and support evidence-based decision-making will become increasingly important to maintaining long-term industry competitiveness and market positioning.

FY27 focus:

Grains Australia's FY27 activities will continue strengthening market insight capability, data utilisation and information-sharing processes that support more informed industry and market responses.

Industry-government collaboration and coordination is increasingly important

In a resource-constrained environment, as global grain markets become increasingly interconnected and complex, alignment across growers, traders, breeders, researchers, government and international customers is becoming increasingly important.

What this means for Australian grain:

Fragmented responses reduce efficiency, weaken market responsiveness and limit the industry's ability to anticipate and adapt to changing customer, technical and market requirements.

FY27 focus:

Grains Australia will continue strengthening coordination across market access, classification, market intelligence, education and technical engagement activities to support a stronger "Team Australia" approach across the grains value chain.

Governance, evaluation and continuous improvement

Grains Australia maintains a structured governance and evaluation approach to promote strategic alignment, accountability and continuous improvement across the organisation.

These frameworks enable long-term strategic decision-making, industry stewardship and effective delivery across Grains Australia's core functions.

Governance processes provide oversight of strategic priorities, operational delivery, stakeholder engagement, risk management and industry investment decisions, ensuring activities remain aligned with industry priorities and evolving market requirements.

Grains Australia maintains a proactive approach to identifying, assessing and managing strategic, operational and industry risks that may impact delivery of organisational objectives.

Grains Australia's Monitoring, Evaluation and Impact Assessment (MEIA) Framework supports performance monitoring, reporting and organisational learning across core functions.

The framework currently covers the Classification and Trade and Market Access functions and will continue to evolve to reflect Grains Australia's broader organisational responsibilities and approach to industry delivery.

During FY27, Grains Australia will continue refining its monitoring and evaluation approach to improve visibility of industry outcomes, support evidence-based decision-making and strengthen accountability to stakeholders and industry partners.

Regular reporting, stakeholder engagement and strategic review processes will support continuous improvement and ensure activities remain responsive to emerging industry priorities, market conditions and regulatory developments.

Measuring success

Success will be measured by the value delivered to Australian grain growers and the broader grains industry through:

- Improved market access and customer confidence
- Stronger industry coordination and stakeholder engagement
- Improved alignment between domestic and international market requirements and Australian grain systems
- Effective delivery of strategic priorities and industry initiatives
- Strengthened organisational capability and responsiveness

Performance will be assessed through a combination of quantitative and qualitative measures, including stakeholder feedback, strategic reporting, industry engagement and ongoing monitoring and evaluation activities.

Monitoring and evaluation activities will continue to evolve as organisational capability develops and Grains Australia's integrated approach to industry delivery continues to mature.

FY27 strategic priorities and key activities

The FY27 delivery program reflects both ongoing strategic industry functions and targeted initiatives supporting Grains Australia's transition toward a more integrated and enduring capability model.

The following FY27 priorities and activities support delivery of the 2025–2028 Grains Australia Strategic Plan and reflect Grains Australia's focus on strengthening market access, grain quality systems, customer engagement and long-term industry competitiveness.

Activities are aligned to Grains Australia's strategic pillars and are designed to support coordinated industry capability, long-term market positioning and evolving market, regulatory and customer requirements across the grains value chain.

Industry engagement

Strengthening customer and stakeholder relationships through collaboration, technical engagement, coordinated industry engagement and alignment across domestic and international grain markets, while improving communication, market intelligence flow and industry responsiveness across the grains value chain.

Priority area	Initiative	Intended outcomes	FY27 delivery focus
Market engagement	Priority export market engagement program	Enhance long-term customer and stakeholder relationships, support market diversification and improve responsiveness to changing demand across priority export markets, while improving two-way market intelligence flow, grower and stakeholder feedback mechanisms and coordination across the grains value chain.	Deliver coordinated market engagement, technical activities and industry collaboration programs across China, North Asia, South Asia (India), Southeast Asia (Indonesia, Philippines, Vietnam, Malaysia, Thailand) and LATAM markets. Activities will include customer engagement across wheat, barley, canola and feed grain sectors. Activities include feed barley engagement in South Korea and engagement and market development activities supporting evolving feed grain demand such as canola meal markets.
Market access and trade	China Strategy	Support coordinated industry engagement, customer confidence and long-term market access in a strategically important export market, while strengthening strategic relationship management, market intelligence sharing and coordination with government, industry and representative stakeholders.	Operationalise the China Strategy through strengthened in-market relationship management, customer engagement, policy monitoring and strategic partnerships across Chinese grain, feed and food sectors. Activities will include Embassy and industry engagement, participation in priority regulatory and industry forums, monitoring emerging non-tariff measures and supporting market access opportunities for pulses and sorghum.
Technical market support	Technical extension and customer capability	Improve customer understanding of Australian grain quality, functionality and end-use performance to support grain utilisation, customer confidence and export competitiveness.	Deliver coordinated technical extension, customer capability and relationship-building activities across the milling, baking, noodle, malting and oat sectors across North Asia, Southeast Asia and China. Including, technical workshops, customer engagement and applied market support activities for wheat, barley and oats customers.
Market engagement	Consistent communication of the Australian wheat value proposition	Reinforce industry alignment and customer confidence through consistent communication of the quality, reliability and performance advantages of Australian grain.	Develop coordinated customer-facing communication materials, technical value proposition messaging and market support resources highlighting the quality and functionality advantages of Australian wheat and other Australian grain commodities.

Strategic perspective

Providing market intelligence and strategic insight to support future competitiveness and industry decision-making.

Priority area	Initiative	Intended outcomes	FY27 delivery focus
Market access and trade	Sustainability and market access capability program	Improve industry preparedness and coordinated responses to evolving sustainability, technical market access and regulatory requirements impacting Australian grain exports, while improving stakeholder alignment and coordinated industry positioning on emerging sustainability requirements.	Deliver activities to support trade negotiations, tariff and non-tariff measure monitoring, sustainability analysis, RED III preparedness and emerging low-carbon market opportunities. Activities will include development of NTM reporting capability, sustainability benchmarking, emissions analysis, stakeholder engagement and market access communication activities across priority export markets.
Market intelligence	Grain quality preferences and customer requirements analysis	Improve understanding of evolving customer quality and functionality requirements to support market responsiveness and better align Australian grain quality systems and export market expectations.	Deliver market intelligence, customer engagement and grain quality requirement analysis across wheat and barley markets in North Asia, Southeast Asia and China.
Market intelligence	Wheat quality requirements – Southeast Asia	Improve understanding of customer quality and functionality preferences across Southeast Asian wheat markets to support market responsiveness and alignment between Australian wheat classes and evolving end-use requirements.	Finalise analysis of wheat quality preference data across Indonesia, Vietnam, Philippines, Thailand and Malaysia, validate findings with international project partners and communicate outcomes to Australian industry stakeholders.
Strategic analysis and market prioritisation	Market mapping and strategic analysis	Improve industry understanding of global market opportunities, competitive positioning and emerging trade risks to support strategic prioritisation and investment decisions.	Deliver cross-commodity market mapping and strategic analysis assessing global market attractiveness, competitive positioning, customer demand trends and technical or market access constraints across priority and emerging export markets.
Market intelligence	Commodity market insight and engagement	Improve industry understanding of technical requirements, trade opportunities and changing market dynamics across wheat, oats, oilseed, pulse and barley export markets, while improving communication of market insights across the value chain and enhancing coordination with Commodity Councils.	Deliver commodity-specific market intelligence, customer engagement and technical opportunity analysis and communication of market intelligence across wheat, oats, barley, oilseed and pulse export markets, including activities supporting improved industry understanding of technical quality characteristics and market requirements for Australian canola.
Market development	Market engagement and grower value proposition for soft wheat alternatives	Support development of higher-value export market opportunities for Australian soft wheat and improve alignment between market requirements, classification systems and breeding priorities.	Deliver market benchmarking, technical customer engagement and industry consultation activities across Southeast Asia and North Asia to support evaluation of soft wheat quality requirements, classification development and market pathway opportunities for Australian soft wheat.

Operational excellence

Delivering efficient, coordinated and effective industry-good activities that support market access and grain competitiveness.

Priority area	Initiative	Intended outcomes	FY27 delivery focus
Market access and compliance	Grain quality assurance and compliance program	Support grain quality assurance, technical compliance and market access across Australian grain export supply chains.	Deliver routine grain quality testing, technical compliance monitoring, industry management plan activities and MRL communication activities, including GPPEICC port zone testing, canola blackleg testing, market monitoring and engagement activities supporting compliance with evolving export market requirements.
Market development and end-use capability	Value-added grain market development program	Support development of higher-value grain market positioning for Australian grain and strengthen understanding of end-use functionality and customer requirements across grain commodities.	Deliver technical market development, product functionality and customer engagement activities supporting oat, sorghum and specialised wheat market opportunities. Activities will include oat food application testing, sorghum food and beverage market evaluation and technical engagement with flour mills across Taiwan, South Korea and Japan to support development of higher-value specialised AH noodle wheat market opportunities for South Australian growers.
Grain quality and classification	Classification systems and varietal framework enhancement	Improve alignment between Australian grain classification systems, varietal frameworks and evolving domestic and international customer requirements.	Deliver classification framework development, implementation of varietal framework changes, technical benchmarking and customer quality analysis activities across wheat, barley, oats, chickpeas, lentils, lupins and faba beans. Activities will include assessment of Japanese udon noodle quality requirements, oat functionality, wheat quality benchmarking and development of classification and quality evaluation frameworks aligned with market and end-use requirements.
Grain quality and classification	Barley classification and SWOT analysis	Improve understanding of the competitiveness, effectiveness and future market alignment of Australia's barley classification system.	Deliver competitor analysis and SWOT assessment of Australia's barley classification system, including review of competitor country classification approaches and presentation of findings to Grains Australia Barley Council.

Enduring capability

Building organisational capability, strategic industry alignment and long-term industry value for Australian grain growers.

Priority area	Initiative	Intended outcomes	FY27 delivery focus
Industry competitiveness and strategic positioning	Australian Oats Competitive Leadership initiative	Strengthen the competitive positioning and premium value proposition of Australian oats through evidence-based benchmarking of quality, nutritional and processing performance attributes.	Deliver comparative benchmarking, technical analysis and industry engagement activities to assess Australian oats against Russian, Ukrainian, Chinese and Canadian competitors and develop technical, education and market-facing materials supporting Australian oats' competitive advantage.
Industry coordination and organisational capability	Integrated industry coordination and stakeholder engagement	Improve coordination, information-sharing and industry alignment across the grains value chain.	Strengthen whole-of-Grains Australia and relationship management engagement mechanisms, improve two-way market information flow, enhance Council engagement processes and improve communication and coordination with GGL, GPA, GRDC, GTA, AOF and grower stakeholders.

FY27 income and expenditure forecast

FINANCIAL OVERVIEW

The FY27 budget forecasts revenue of $14 million and expenditure of $13.3 million, resulting in a projected operating surplus of $678,912.

FY27 represents the commencement of Grains Australia's new long-term investment agreement with GRDC, providing annual investment of $12 million under the approved business case and supporting continued delivery of the organisation's strategic priorities across its core industry functions.

FY27 also reflects the first full year of delivery under Grains Australia's expanded operating structure, resulting in increased investment across core industry functions and strategic priorities.

Classification revenue is expected to remain stable following biannual fee reviews, while interest income will continue to support financial sustainability through prudent management of organisational reserves.

The FY27 budget also includes the delivery of existing RD&E and externally funded project commitments, contributing additional non-recurring project revenue during the year.

Staff costs remain the organisation's largest expenditure category, reflecting the specialist capability required to deliver Grains Australia's core functions, while the budget also incorporates additional occupancy and integration-related costs associated with organisational growth and operational integration activities.

Grains Australia is expected to maintain a strong financial position throughout FY27, supporting continued investment in strategic priorities, organisational capability and the long-term delivery of coordinated industry-good functions across the grains value chain.

FY26 FORECAST

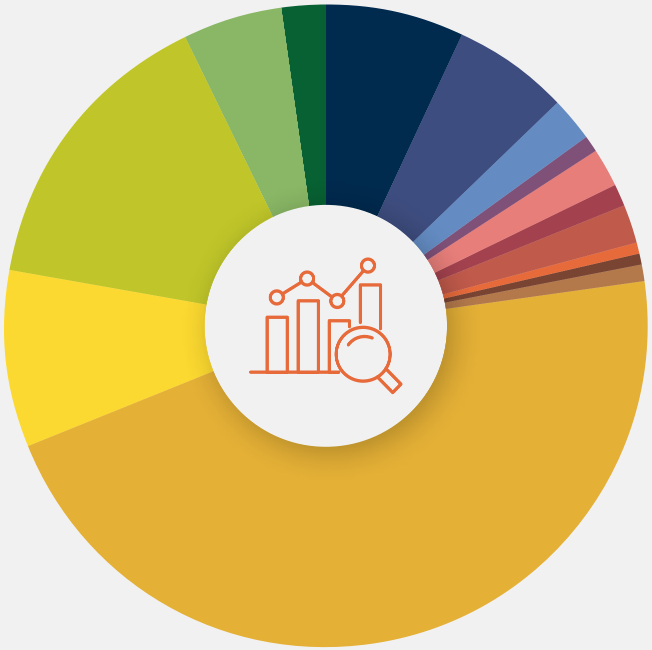
P&L	**FY26**
Revenue	$9,250,000
Expenses	$10,091,951
Operating Result	**($841,951)**
Cash Balances	
Cash at beginning of financial period	$4,391,695
Cash at end of financial period	$4,550,252
Net increase in cash held	**$158,557**

FY27 BUDGET

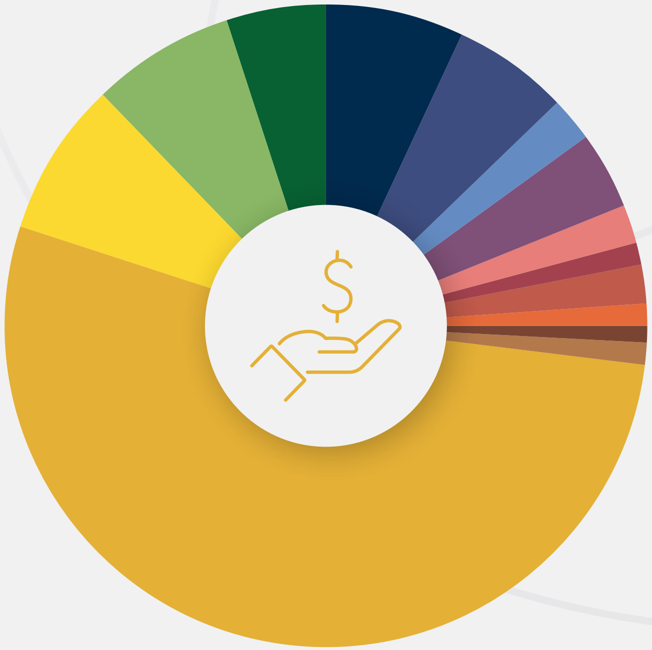
P&L	**FY27**
Revenue	$14,025,380
Expenses	$13,346,468
Operating Result	**$678,912**
Cash Balances	
Cash at beginning of financial period	$4,550,252
Cash at end of financial period	$4,929,913
Net increase in cash held	**$379,661**

EXPENDITURE BY CATEGORY

GAL FY26 FORECAST EXPENSES

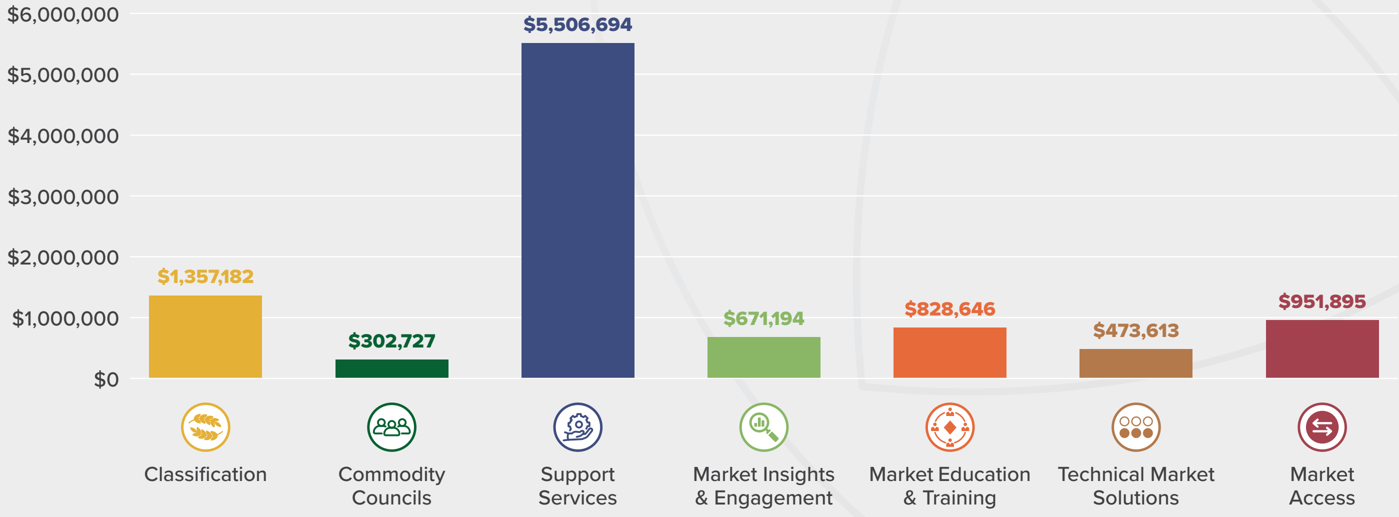


GAL FY27 BUDGETED EXPENSES

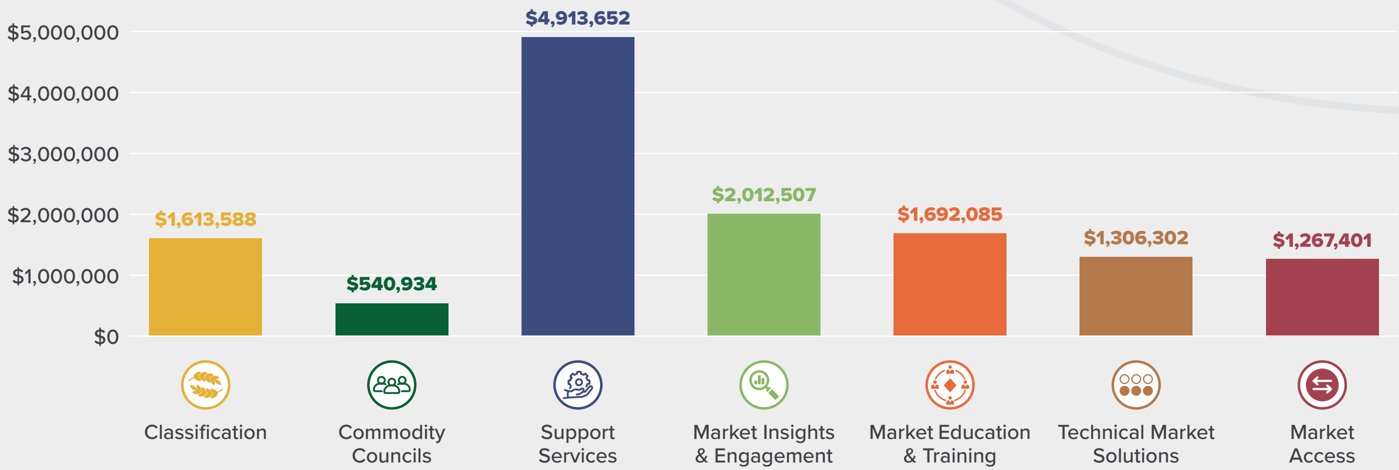


EXPENDITURE BY BUSINESS UNIT

GAL FY26 FORECAST INVESTMENT BY FUNCTION



GAL FY27 BUDGETED INVESTMENT BY FUNCTION



GRAINS AUSTRALIA

Grains Australia is an initiative of the

GRDC
GRAINS RESEARCH & DEVELOPMENT CORPORATION

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