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20th September 2023

The Committee Secretariat
The Joint Standing Committee on Trade & Investment
PO Box 6021
Parliament House
Canberra ACT 2600

Via Email: jsctig@aph.gov.au

Re: Inquiry into the Australian Government's approach to negotiating Trade & Investment Agreements

1.0 About GTA

Grain Trade Australia (GTA) is the focal point for the commercial grains industry within Australia. It facilitates trade and works to provide an efficient, equitable and open trading environment by providing leadership, advocacy, and commercial services to the Australian grain value chain.

GTA members are responsible for over 95% of all grain storage and freight movements made each year in Australia. Over 95% of the grain contracts executed in Australia each year refer to GTA grain standards and/or trade rules.

GTA members are drawn from all sectors of the grain value chain from production to domestic end users and exporters. GTA members are involved in grain trading activities, grain storage, grain for human consumption and stock feed milling. A list of GTA member is attached as an addendum to this submission.

GTA welcomes the opportunity to make this submission to the Inquiry into the Australian Government's approach to negotiating Trade & Investment Agreements.

2.0 Introduction

The Australian grain industry¹ is a major economic contributor in regional Australia and to export revenue, with annual value of production in 2022/23 forecast (excluding rice) to be a record \$30.7 billion at the farm gate and \$28.3 billion of exports², meaning the grain industry is the highest value industry in the agriculture sector, contributing more than 33% of Australia's agricultural gross value of production annually.

The industry achieved record summer and winter production in 2022/23 of 71.7 million tonnes (mmt) following two prior large crops with 68.0 mmt in 2021/22, and 59.9 mmt in 2020/21.

Trade and an efficient supply chain is vital for the Australian grain industry and regional communities, with the Australian grain industry being highly export oriented e.g., 65 -75% of grain is exported.

3.0 Trade Opportunities

Maintaining and improving existing markets in addition to opening new export market opportunities for Australian grains and products and reducing distortions in global markets are key priorities for the

¹ Grains include wheat, coarse grains, oilseeds, oilseed meals and pulses

² Source: ABARES, 2023

grain industry. In GTA's view successful bilateral agreements with importing countries has potential to provide a significant increase in export value to the Australian grain industry.

Trade of Australian grain in the global export markets is challenging, largely due to the tariffs, and increasingly non-tariff measures including technical barriers to trade, domestic price supports, subsidies on crop inputs (such as fertiliser, chemicals) and other protectionist measures that importing countries may apply.

GTA supports comprehensive and high-quality trade agreements with importing counties that provide improved market access outcomes for grain and grain products. However, for market access opportunities to be profitable for growers and lower risk for exporters, there needs to be a focus on comprehensive reform of both tariff and non-tariff barriers to trade. Non-tariff barriers remain a significant impediment and any trade agreement must include a focus on the development and implementation of a systematic approach to addressing these barriers.

Existing and future trade agreements will support a new wave of prosperity in grain trade and investment between Australia and importing countries. Several existing markets for Australian grain are opportunistic due to a range of domestic support and tariff policies and the negotiation of trade agreements may allow more diversity, certainty, lower risk and consequently growth in Australia's grain trade with these countries. Trade agreements will potentially boost opportunities for the Australian grain industry and support growth, development and trade opportunities for other sectors. Given the industry's significance and broad footprint, this provides significant benefit not only to Australia's economy, but importantly to rural and regional Australia.

4.0 Government & Industry Process

Historically GTA and the Department of Agriculture, Fisheries and Forestry (DAFF) and the Department of Foreign Affairs and Trade (DFAT) have enjoyed an excellent working relationship and share the common goals of supporting and facilitating trade. GTA has been an active contributor to Government trade discussions and the development of multiple Free Trade Agreements including recently ChAFTA IA-CEPA, A-UKFTA, EU FTA and AI-ECTA. During the development phase of these trade agreements GTA was able to engage and provide input into priorities for the grain sector.

GTA, in 2017, with funding support from the then Department of Agriculture, Water & Environment (DAWE), worked with the grains industry to undertake a major study to identify commercially significant non-tariff barriers or measures (NTMs) for the grains industry. This report was pivotal in establishing a baseline for NTMs impacting the grains industry and the industry continues to work closely with DAFF and DFAT to identify and address NTMS. The forementioned NTM report is still relevant today and is available on the GTA website or by contacting GTA.

The world has a wide range of non-tariff barriers or measures (NTMs) that hinder and distort trade. The impact of these NTMs include no/restricted market access, distorted supply/demand balances, and increased uncertainty, risk and compliance costs. It needs to be recognised these NTMs have broad impact across the value chain, impacting not only producers and exporters in origin countries, but also importers, consumers, and value-adding/processing industries in destination countries.

The Government should consider negotiating collaborative processes, such as strategic partnerships and agreements for technical exchange, collaboration, and capacity growth, into the bi-lateral agreements. These can assist to strengthen relationships, common understandings to assist in addressing NTMs, as a "bi-product" of the FTA. This will add additional value to industry from these bi-lateral trade negotiations.

GTA has also recently completed a project, funded by DAFF's ATMAC program, to develop a framework for a Strategic Grains Partnership between India and Australia. GTA sees this as a critical opportunity for implementation and progression of improved relationship and trade facilitation

between India and Australia's grain industries. GTA is working closely with DAFF and DFAT regarding the CECA negotiations in relation to a full Australia India FTA.

5.0 FTA Implementation

GTA, whilst supportive of Trade Agreements and Government's role, believes the opportunity associated with comprehensive trade agreement between trade partners can be weakened when the implementation and the operations of these agreements is not closely managed by Government in partnership with industry. Effective oversight and management of the trade agreements is critical to ensure the identified significant potential benefits for both countries are realised.

By way of example as part of the IA-CEPA agreement, GTA and the grain industry had established a well-constructed and considered implementation and extension plan for grain including engagement and training programs with Indonesian grain industry counterparts. However, as part of the IA-CEPA, the planning and implementation process was allocated to an independent consultant Katalis and the grain industry design plan became largely redundant and funds were consumed by consultants and bureaucratic processes rather than being spent on "front line" programs.

Similarly the IA-CEPA implementation has been frustrated through the inability for Australian feed grain to trade into Indonesia due mainly to internal Indonesian political policy. These are examples that whilst trade agreements are beneficial, some of the benefits are not realised when the implementation phase is not managed appropriately and in particular when the strong collaborative and cooperative working relationship between industry and Government that formed as part of the negotiations is not maintained in implementation. It is recommended that the Government and industry partnership approach should include both negotiation and implementation of trade agreements.

6.0 Conclusion

In terms of meaningful market access outcomes, we encourage the Australian Government to continue to proactively progress Free Trade Agreements and seek tariff-free market access for Australian grain. All trade agreements once executed must be implemented with due care and effort and this is best performed through a Government and industry partnership approach to ensure the benefits of the agreements are realised.

We believe there are realistic opportunities for the Australian Government and the grain industry through this collaborative approach to support and grow trade in Australian grain.

We encourage the inclusion of collaborative arrangements or strategic partnerships to strengthen trade relationships and assist in addressing NTMs as additional value to be derived from FTAs.

We thank you for the opportunity to make this submission. We request that you keep us updated on developments and progress in this important inquiry.

Please do not hesitate to contact GTA should you have any queries or should we be able to be of assistance.

Yours faithfully,

Pat O'Shannassy CEO, Grain Grade Australia



Membership List as of 5 September 2023

Website /Phone	Contact	Organisation
		Ordinary Member (Trading)
		Level A1 (over 7 Million Tonnes)
cbh.com.au	Mr Jason Craig	CBH Grain Pty Ltd
glencoreagriculture.com.au	Mr Philip Hughes	Viterra Australia Pty Ltd
graincorp.com.au	Mr Robert Spurway	Graincorp Operations Ltd
3		
0		Level A2 (5 - 7 Million Tonnes)
		Level A3 (3 - 5 Million Tonnes)
cargill.com.au 1	Mr Zsolt Kocza	Cargill Australia Limited
_		Level A4 (1.5 - 3 Million Tonnes)
adm.com	Mr Darryl Borlase	ADM Trading Australia Pty Ltd
emeraldgrain.com	Mr David Johnson	Louis Dreyfus Emerald Australia Pty Ltd
arrowcom.com.au	Mr Dominic Vanzella	Arrow Commodities Pty Ltd
bunge.com/agribusiness	Mr Stephen Bennett	Bunge Agribusiness Australia Pty Ltd
australiangrainexport.com.au	Mr Tim Martin	Australian Grain Export Pty Ltd
5		Level B1 (1.0 - 1.5 Million Tonnes)
manildra.com.au	Mr Peter Sloan	Manildra Group
broadbentgrain.com.au	Mr Steve Broadbent	CHS Broadbent Pty Ltd
riordangrains.com.au	Mr Mark Lewis	Riordan Grain Services
gwf.com.au	Mr Mark O'Brien	George Weston Foods Limited
4		Level B2 (500,000 - 1 Million Tonnes)
centrestateexports.com.au	Mr Jeff Voigt	Centre State Exports Pty Ltd
inghams.com.au	Mr Matt Clarke	Inghams Enterprises Pty Ltd
agriproducts.com.au	Mr Michael Reeves	Ridley Agriproducts Pty Ltd
riverina.com.au	Mr Gareth Stapleton	Riverina (Australia) Pty Ltd
07 3713 8700	Mr Matt Albion	Wilmar Gavilon Pty Ltd
jki.com.au	Mr Sandeep Mohan	J K International Pty Ltd
ž	Mr Peter McMeekin	ETG Commodities Pty Ltd
peter.mcmeekin@etgworld.com 8	WITTEEL MCMEEKIII	ETG Commodities I ty Eta
W. 1 ·	W D D	Level B3 (250,000 - 500,000 Tonnes)
alliedpinnacle.com	Mr Brett Duczmal	Allied Pinnacle Pty Ltd
cofcoagri.com.au	Ms Sara Pan	Cofco International
robinsongrain.com.au	Mr Gary Robinson	Robinson Grain Trading Co Pty Ltd
quadra.com	Mr Robin Cassar	Quadra Commodities Pty Ltd
brahmancommodities.com.au	Mr Michael Aikman	Brahman Commodities Pty Ltd
02 6754 0343	Mr Stuart Tighe	Boolah Farms Pty Ltd
fletchint.com.au	Mr Joe Masters	Fletcher International Exports Pty Ltd
kellygrains.com.au	Mr Matt Kelly	K M & W M Kelly & Sons
08 9410 5818 9	Mr David Oates/Barry Mansfield	Demeter Grains
		Level C1 (over 10 employees, under 250,000 Tonnes)
adamsaustralia.com.au	Mr Ian Mack	Adams Australia Pty Ltd
agracom.com.au	Mr Joe Hallman	Agracom Pty Ltd
02 9499 4199	Mr Brett Stevenson	Agrisk Management Pty Ltd
agtfoods.com/australia	Mr Michael Brittain	AGT Foods Australia
07 4662 1999	Mr Bhuvan Gandhi	Associated Grain t/a Agrocorp Processing Australia
australianfoodandfibre.com.au	Mr Peter Webb	Australian Food and Fibre
02 6344 8462	Ms Jill Smith	Australian Fresh Milk Holdings (AFMH)
bfb.com.au	Mr Shane Bird	BFB Pty Ltd
02 6025 4600	Mr Sean Blair	Blairs Produce Company
	Mr Ross Giovanetti	Castlegate James Australasia Pty Ltd
castlegatejames.com.au		
castlegatejames.com.au coprice.com.au	Ms Krissy Campbell	Coprice

Mr Chris Deckert Deckert Group Pty Ltd deckerts.com.au DDT Holdings Pty Ltd Mr Raieev Saraff ddtholdings.com.au **Esperance Quality Grains** Mr Neil Wandel members.westnet.com.au/egg Fodder Link Pty Ltd Mr Cameron Angel fodderlink.com.au Hanlon Enterprises Grain Mr Chris Coates hanlonenterprises.com.au Hazeldenes Chicken Farm Pty Ltd Mr Marcus Dingle hazeldenes.com.au Independent Grain Handlers Pty Ltd Mr Brad Bryant igh.net.au Irwin Stockfeeds Mr Bryan Irwin irwinstockfeeds.com.au Mr Ayush Rajvanshi Itochu Australia Ltd itochu.com.au Inari Australia Ptv Ltd Mr Karan Singh inariaustralia.com.au Rex James Stockfeed Pty Ltd Ms Natasha Davies/Samuel James jamesstockfeed.com.au Jerilderie Grain Storage & Handling Mr David Barlow 03 5886 0344 Laucke Flour Mills P/L Mr Roger Laubsch laucke.com.au Lawson Grains Pty Ltd Mr Angus Blair lawsongrains.com LINX Cargo Care Mr David Simpson linxcc.com.au LPC Trading Pty Ltd Mr Simon Langfield 02 6383 7222 Malteurop Australia Pty Ltd Mr Trevor Perryman 03 5277 1950 MC Croker Pty Limited Mr Greg Carroll crokergrain.com.au MSM Milling Pty Ltd Mr Peter MacSmith 02 6364 5999 Namoi Cotton Ltd Mr Shane McGregor namoicotton.com.au Newcastle Agri Terminal Mr Earl www.naterminal.com.au Mr John Orr Premium Grain Handlers P/L pgh.com.au Quattro Ports Mr Dave Allen quattroports.com.au Queensland Cotton Corporation Pty Ltd Mr Ashish Govil qcotton.com.au Mr Nick Reid reidstockfeeds.com.au Reid Stockfeeds Ptv Ltd Rivalea (Australia) Pty Ltd - Animal Nutrition Mr Andrew Philpotts rivalea.com.au Mr Mark Young SunPork Farms Feed Mills 08 8532 4434 ThriveAgri

TSS Grain (Tasmanian Stockfeed Services)

Unigrain Pty Ltd W B Hunter Ptv Ltd Wilken Grain Woods Grain Pty Ltd XLD Commodities Viridis Ag

Mr Charlie Brown thriveagri.com Mr Trevor Macleod tasstockfeed.com.au Mr Ervin Leong unigrain.com.au Mr Stewart Coombes 03 5821 5744 Mr Richard Wilken wilkens.com.au woodsgroup.com.au

Mr Bruce Woods Mr Lachie Stevens xldgrain.com.au Mr Chris Reeves viridisag.com

Level C2 (under 10 employees, under 250,000 Tonnes)

A T Waterfield & Son Pty Ltd A W Vater and Co Advantage Grain Pty Ltd Access Grain Pty Ltd

Aditya Birla Global Trading (Australia) Pty Ltd

Agmark Commodities Agri Om Australia Pty Ltd Agri-Oz Exports Pty Ltd Agromin Australia Pty Limited

Australian - Asian Agricultural Exports Pty Ltd

Australian Choice Exports Pty Ltd Australian Grain Storage Australian Growers Direct Pty Ltd Australian Mungbean Company Pty Ltd

Avoca Grain Storage Pty Ltd

Baker Grain

Boort Grain Co-Operative Broun and Co Grain Pty Ltd C & S Trading Pty Ltd C K Tremlett Pty Ltd Carpendale Agri Pty Ltd Carson Stockfeeds Pty Ltd Chester Commodities Pty Ltd CL Commodities Pty Ltd Coorow Seeds

Cory Johnston (Aust) Pty Ltd Craig Tyack Grain Trading Defiance Maize Products Pty Ltd Direct Commodities Pty Ltd

Mr Brad Waterfield Mr Kim Vater Mr Chris Nikolaou Mr Wade Humphreys Surva Jain Mr Richard Alcorn

Mr Francois Darcas Mr Rajni Patel Mr Mick Connolly Mr James Hunt Mr Matt Bailey

Mr Kishore Bulchandani

Mr Tom Lucas Mr Damien White Ms Julie Bartlett Mr Richard Baker

Mr Jon Bucknall Mr Charles Coventry Mr Craig Scholz Mr Andrew Tremlett Mr Andrew Kluck Mr John Carson

Mr Richard Black Mr Robert Lean Mr Brian Pover Mr Justin Fav Mr Craig Tyack

Mr Rodney Walker Mr Hamish Robertson

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vater.com.au

advantagegrain.com.au

accessgrain.com.au

agmark.com.au

agriom.com.au

03 9830 7021

aaax.ws

agromin.com.au

sunrice.com.au

03 5465 3633

02 9875 3919

bakergrain.com.au

brounandco.com.au

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08 8524 9050

0448 761 246

0429 601 201

0428 729 167

corson.co.nz

australianchoiceexports.com.au

ausgrowersdirect.com.au

australianmungbean.com.au

www.abgtrading.com

directcommodities.com.au

chestercommodities.com.au

clcommodities.com.au

coorowseeds.com.au

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Mr Srinivas Boyapalli

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TRC International Pty Ltd

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Transport Operator

Crawfords Freightlines Pty Lts Mr Phillip Davis crawfordsfreightlines.com.au Gehrke Ag Pty Ltd Mr Julian Gehrke, Nicholas Gehrke www.gehrke.com.au Hamilton Contracting (NSW) Pty Ltd Ms Jodie Hamilton hamiltoncontracting.com.au Horne Ag Logistics Pty Ltd Mr Jeremy Horne horneaglogistics.com.au Pacific National (NSW) Pty Ltd Mr Nick Ryder pacificnational.com.au SEAWAY Intermodal Pty Ltd Mr Bikash Ram seawayintermodal.com.au

Broker

Large 0

Medium

Fox Commodites Pty Ltd Mr Paul Cochrane foxcommodities.com.au Grain Brokers Australia Mr Jeff Winspear grainbrokers.com.au Horizon Grain Brokers Ptv Ltd Mr Ash Munro horizongb.com.au iGrain.com.au Pty ltd Ms Emily Fleming igrain.com.au Rain Argibusiness Mr Ian Grellman rainag.com.au StoneX Financial Pty Ltd Mr Stefan Mever intlfcstone.com McDonald Pelz Australia Mr Peter Geary mcdonaldpelz.com Pure Grain Network Pty ltd Mr Stuart Tighe puregrain.com.au questcommodities.com.au Quest Commodities Pty Ltd Ms Jayne Barker Teague Australia Pty Ltd Mr Tim Teague teague.com.au

Sole Operator

A C Grain Mr Adam Clarke 0400 065 763 Allied Grain Pty Ltd Mr Angus Wettenhall alliedgrain.com.au Cogeser (Australia) Pty Ltd Mr Robert Luetolf cogeser.com.au Farm Tender Mr Matt Henke farmtender.com.au Lotema Pty Ltd Mr Todd Lees lotema.com.au Mallon Commodity Brokering Mr Ian Mallon

Perkins Commodity BrokersMr Craig Perkins03 9645 6846Woodside Commodities Pty LtdMr Hamish Steele-Parkwoodcomm.com.au

Corporate

Large

ASX Limited Mr Ian Waddell asx.com.au/grainfutures Australian Grain Technologies Pty Ltd Mr Tristan Coram agtbreeding.com.au Barrett Burston Malting Co Pty Ltd Mr Dean Ganino bbmalt.com.au Boortmalt Asia Pacific Pty Ltd Mr Simon Robertson boortmalt.com Commonwealth Bank of Australia Mr Samuel Chambers commbank.com.au NSW Ports Mr Campbell Mason nswports.com.au Symbio Laboratories Mr Ian Nenke/Kristian Just symbiolabs.com.au

Medium

SGS Australia Pty Ltd

T-Ports Pty Ltd

AgriDigital Mr Henry McKay agridigital.io Agrifood Technology Pty Ltd Mr Rob Anderson 03 9742 0589 Amspec Australia Pty Ltd Mr Lee Shilvock amspecgroup.com Australian Superintendence Company Mr Andrew Parry 07 3391 8640 Commodity Inspection Services (Australia) Pty Ltd Mr James Saunderson commodityinspection.com.au Foss Pacific Pty Ltd Mr Phil Soderberg foss.com.au Holding Redlich Mr Geoff Farnsworth holdingredlich.com HFW Australia Mr Stephen Thompson hfw.com Intertek Ms Debbrah Millard intertek.com Mars Petcare t/a Mars Birdcare Mr Kurt Sosinki 07 3719 0100 Oldendorff Carriers Mr Ben Harper oldendorff.com SBA Law Mr Jeremy Rosenthal sbalaw.com

au.sgs.com

tports.com

Mr Scot Paterson

Mr Nathan Kent

Page 4 of 6

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Life Members Mr Mervyn May

Awarded 1998

Mr Christopher Kelly Mr Geoff Honey Mr Terry Deacon Awarded July 2015 Awarded July 2016 Awarded August 2019

4