



AUSTRALIAN GRAINS INDUSTRY FORUM REPORT - 31 March 2009 -

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Prepared by:

Document owner(s)	Organisation
Tara Taubenschlag	Grains Council of Australia Communications Adviser

Endorsed by:

Members	Organisation
Peter Woods	CEO, Wheat Exports Australia
Peter Reading	Managing Director, GRDC
Rob Delane	Executive Director, AQIS
Ron Storey	Grains Industry Consultant
Malcolm Batholomaeus	Grain Market Analyst and Commentator
Bill Murray	National Working Party on Grain Protection
Greg Fraser	Executive Director & CEO, Plant Health Australia
Geoff Masters	ABB Grain
Steve Jefferies	Australian Grain Technologies
Mark Laucke	President, Flour Millers' Council of Australia
Andrew Weidemann	Grain Grower Victoria
John Lovett	Managing Director, Lovett Associates

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1 GRAINS INDUSTRY REPORT PURPOSE

The purpose of this report is to provide the Australian Grains Industry Forum delegates and interested stakeholders with: 1) an overview of the Grains Industry Forum; 2) an outline of the outcomes from the Forum; 3) recommendations to progress some of the issues.

This report has been endorsed by members of the Grains Industry Forum Panel and grains industry representatives who comprise a cross section of the whole of industry.

Grains Council of Australia is committed to bring the Australian grains industry together to discuss critical whole of industry issues. As host and facilitator of the Grains Industry Forum, Grains Council has prepared this report with support and endorsement from the industry to outline the outcomes and recommendations from the three industry discussions sessions: Trade, Biosecurity and Quarantine, and Research and Development.

Grains Council will continue to work on some of the recommendations on behalf of the industry, however, encourages industry representatives to contact Grains Council should they wish to form a joint working party to progress specific proposals and/or recommendations.

Grains Council will convene another Grains Industry Forum within the next 12 months to update industry representatives on the progress of the recommendations and to discuss further issues relevant to the whole of industry.

2 BACKGROUND

The Grains Council of Australia hosted the Grains Industry Forum in Sydney on 31 March 2009 following recommendations from the past Grains Industry Leaders Summits (February 2008, October 2007, and March 2007). Industry representatives at the Grains Industry Leaders Summit recognised the need for the whole-of-industry to come together and recommended that the industry meet on a regular basis to discuss and work on resolutions for whole-of-industry issues.

With the significant change within the grains industry over the past 24 months following the liberalization of the wheat marketing arrangements, and with the domination of the 'GFCs' – the Global Financial Crisis and Global Food Crisis, there has never been a more critical time for the Australian grains industry to unite and work together on whole-of-industry issues.

The Grains Industry Forum focused on three critical areas within the industry:

- Facilitating Trade
- Biosecurity and Quarantine
- Research and Development

The dominant theme arising from each of the three sessions was the need for greater transparency within the industry.

3 FACILITATING TRADE

Grain marketing depends on complete and transparent market information, supply and demand. Transparency and sharing of information of grain stocks and needs to be discussed by all sectors of the industry to develop protocols on stock disclosure. It is critical that the whole-of-industry understands how the new liberalised market has worked during the 08/09 harvest, what areas need addressing, and how new challenges are to be met. The *Facilitating Trade* session of the Forum was timed to bring the industry together to discuss possible market failures and determine what action may be necessary.

The two hour session was chaired by Peter Woods, CEO of Wheat Exports Australia. Panel members included Ron Greentree - NSW grain grower, Ron Storey – Grains Industry Consultant, Malcolm Bartholomaeus – Grain Market Analyst and Commentator, and Geoff Honey – CEO Grain Trade Australia.

3.1 Facilitating trade in a more liberalized market

New legislation and wheat export arrangements commenced on 1 July 2008 under the *Wheat Exporting Marketing Act 2008*.

Wheat Exports Australia has accredited 23 companies to date [as at 31/03/09], and is currently in the process of auditing exporters on matters such as finances, risk management, systems and processes. Exporters must now apply for accreditation renewal from 1 April 2009 to 30 June 2009 and the bulk handlers ACCC access undertaking will need to be in place by 30 September 2009.

3.2 From farm to fork: how grain growers to end users are adjusting to the new marketing arrangements

The definition of market has now changed from country to customer. Differentiation of a product is needed to create a value add for the customers. Producers, exporters and marketers must now evaluate the customer's/end user's needs from the beginning of the production cycle in order to tap into particular markets.

Whilst growers have had some initial problems adjusting to the new marketing arrangements, customers are also having difficulties. Prior to the change in wheat export arrangements, customers were used to going to the one seller and now they have to educate themselves on multiple sellers and products. Education, brand awareness and differentiation of Australian grain needs to be directed both at the customer and the grower.

The commercial processes associated with buying and selling grain were quite successful in this first year of a changed marketing environment. Both the standards and contracting options worked successfully with no arbitrations arising from the harvest.

From an operational perspective, infrastructure issues need to be addressed.

3.3 Data overload vs. information vacuum

There has never been more data and information available in the grains industry than there is today; however, the data need to be converted to useful information and needs to be timelier in order to be relevant for stakeholders.

The need for data flow and transparency within the grains industry was highlighted to the Federal Government in the *Industry Expert Group's* (IEG) recommendations to the Minister in March 2008.

The Federal Government adopted this recommendation and charged ABARE and ABS with fulfilling this role. The first ABARE/ABS data report came after harvest in most states and was not updated frequently enough to be informative for grains industry stakeholders. The Grains Industry Forum delegates recognised the need for a more timely flow of the reporting of data information from ABARE/ABS for it to be of use.

It was discussed that market data and information needs to be more 'farmer friendly'. Growers now have a greater need to understand global production trends and seasonal market patterns and how they are impacting on the marketing of Australian wheat. Growers need to get good market signals – what the end user/customer wants, what they need to grow and how and when they need to sell, to assist them in making better business decisions.

Trading supply and demand data does not require a major change; however, it must include ALL major grains.

3.4 The need for greater transparency

The need for greater transparency was a recurring theme in most of the discussions throughout the *Facilitating Trade* Session. It was raised within the Forum that many growers believe that the current information flows are biased towards other value chain interests. For the market to work efficiently, disclosure of information is essential. If one party withholds data, market bias is inevitable. There was a lengthy discussion relating to change of title and hence who owns the data that is to be shared.

Prices shown to farmers must be consistent and comparable with each other, including between cash prices and pool estimates.

Consistency in freight charges between delivery points and between buyers is needed to ensure that growers are choosing the best price and that traders are buying grain when they should be.

The industry should be supportive of online trading and information platforms that deliver consistent market data on prices, sales bids, offers, inventory levels and sales volumes for the use of both buyers and sellers.

The need for an Industry Code of Conduct to be developed and adopted by the whole-of-industry was discussed by the Forum delegates throughout the day. The Government representatives within the Forum advised delegates that they were awaiting advice from industry as to whether industry wanted this to be developed.

An Industry Code of Conduct to ensure transparency in prices would greatly facilitate efficient transfer of grain from growers (sellers) to traders to exporters. This Code of Conduct should also include a "policy statement" from pool managers to describe the type of pool marketing product they are offering (e.g., hedged or unhedged, domestic or export pool, estimated time to final pool payout, etc).

3.5 Maintaining and sustaining a viable infrastructure system

One of the greatest challenges for the Australian grains industry is the ongoing sustainability and maintenance of an infrastructure system. It was noted by the Forum delegates that logistical constraints, lack of containers, rail transport, and bottlenecks at the port were ongoing issues that need to be resolved. Freely available information on these bottlenecks would assist both growers (sellers) and buyers, and prevent growers from making incorrect decisions based on assumptions on the viability of logistics requirements.

Infrastructure throughout Australia has been run down significantly over the past 15 years. It was agreed by the Forum delegates that both industry and Government need to invest in the supply chain, particularly rail infrastructure.

The consequence of not improving the current infrastructure system, and information about the capacity of the system at any point in time, will result in transport inefficiencies, increased greenhouse gas emissions, and market failure.

Any infrastructure investment must reflect the market realities which that infrastructure is to serve – in primarily domestic market regions a different solution will be required compared to dominant export flows. It must be fit-for-purpose to optimize investment.

3.6 Outcomes

Greater transparency is needed for the long term sustainability of the entire industry. There was clear a message from both the *Facilitating Trade* Panel and the Forum delegates that a flow of relevant and timely information is essential if informed business decisions are to be made.

It was noted that there were current limitations with the role of Wheat Exports Australia (WEA) including the restriction of their role solely to wheat and bulk exports. There was some discussion by the Forum delegates about the advantage of expanding the role of WEA to include all grains including both bulk and non-bulk exports.

With changes to stock and exports reporting, and with reporting to include all grains, the market will be better informed; there would be less risk and lower risk margin which will provide better outcomes for customers and growers.

ABS and ABARE have been charged with the collection, collation and distribution of stock data, however, the majority of delegates noted that this information needed to be more timely and with segregation by both port zone and grain-grade level in order to be of value to the industry.

There is an urgent need to address infrastructure challenges, particularly rail, with several delegates acknowledging that this was the greatest risk to their business.

3.7 Recommendations

1) That ABARE / ABS report stock data on all grains monthly, but within two weeks of the end of the month, not the current 6 weeks. It is also recommended that stocks held at individual locations by the BHC's and other significant storage providers be provided to ABS for collation, with disbursement of Stocks Reports monthly, not every three months. . During harvest it is recommended that deliveries be reported weekly at a port zone level and by major grades, at the beginning of each week covering the previous week. BHC stocks also to declare the volumes which are warehoused but not sold so that marketers other than BHCs can bid for warehoused grain (this will require growers to agree to aggregation of warehoused stocks for this purpose).

2) That market data and information be 'farmer friendly'.

3) That there be an annual grower census at the end of February to establish on farm stocks to be added to other visible stocks and that through the year surveys be conducted to verify calculated rates of disappearance in on farm stocks.

4) That all stocks and disappearance data be published on a state basis as well as on a national basis (or alternatively a regional basis matched to logical export zones).

5) That export shipments (both bulk and containerized) be reported weekly each Tuesday covering the week ending the previous Friday., and that nominations of vessels for bulk shipment be used as a measure of the forward commitments for bulk wheat exports.

6) That ABB Grain declare what type of grain is scheduled for shipping in their published shipping stem (as currently occurs with GrainCorp and CBH).

7) That industry representatives advise Government that a voluntary Code of Conduct is valuable, and that industry work together on the establishment of a Grains Industry Code of Conduct.

8) That Government be approached to support the development and implementation of an Industry Code of Conduct.

9) That industry works closely with Government to identify and address the critical infrastructure needs throughout the country to ensure the long term sustainability of the industry, and that systems be put in place to make sure that all industry participants are fully aware of logistical bottlenecks or excess capacity at any point in time. This infrastructure also needs to be fully accessible to ALL exporters and not favour the incumbent major infrastructure operators.

10) That education, brand awareness and differentiation of Australian grain be directed at the customer and the grower.

11) That the information recorded on weighbridge delivery tickets was strategically important to Crop Shaping, and that consideration must be given both to collecting this data, and to which entities this should be made available.

4 BIOSECURITY AND QUARANTINE

Australia has a unique opportunity to export to food hungry nations all around the world, particularly within the Pacific Rim where food demand is rapidly increasing. China has 20% of the world's population, but not enough land to satisfy its own consumption requirements.

AQIS has a key role in the export of Australian commodities, the AQIS Grain Industry Consultative Committee needs to provide a function where exporters and AQIS can resolve such issues as cost recovery, fumigation, and import requirements of grain customers. The grains industry must negotiate chemical residue limits and meet the requirements of importing overseas customers and maintain our market access through ongoing delivery of grains products with high phytosanitary standards.

In the 1980s almost 100% of grain was treated with contact chemicals to control insects, by 1995 the level had dropped to below 20% and today the levels are minimized through careful management and control measures.

Customers are very specific in their requirements and industry needs to work together co-operatively to maintain our already high reputation.

The *Biosecurity and Quarantine* session of the Grains Industry Forum was chaired by Rob Delane, AQIS Executive Director and Deputy Secretary of the Department of Agriculture, Fisheries and Forestry. Panel members included Greg Fraser – Executive Director and CEO Plant Health Australia, Geoff Masters – ABB Grain, Mike Gilbert – AQIS, and Bill Murray - National Working Party on Grain Protection.

4.1 Overview

The *Biosecurity and Quarantine* session focused on the increasing costs of exports including bulk charges, and the issue of phytosanitary certificates which have become increasingly essential in the market place. The importance of managing quarantine offshore, insofar that this is possible, was also emphasized.

4.2 Managing our biosecurity and quarantine risks

Biosecurity Australia is the agency that manages quarantine assessments and technical advice to enhance Australia's access to international markets. It manages all trade and market access issues and consults regularly with industry through the Market Access & Biosecurity Grains Industry Consultative Committee (MABGICC). This committee comprises of both industry and government and meets quarterly, with Grains Council of Australia acting as the Secretariat for the committee.

AQIS is the regulator and facilitator of border biosecurity and quarantine risk management in Australia. AQIS supports Australian quarantine integrity through appropriate border controls and post-entry quarantine arrangements. AQIS is responsible for issuing phytosanitary certificates, inspection of plants and plant products for regulated articles, inspecting transport unit to prevent the introduction and/or spread of pests, ensuring the phytosanitary security of consignments after certification, and the training and development of staff. It is critical for AQIS to manage biosecurity risks to ensure the integrity of export products and not the economic risks of trade..

The principal forum for AQIS is the AQIS Grains Industry Consultative Committee (AGICC) which meets four times per year. The AGICC committee provides a platform for industry's views, concerns and recommendations to be given consideration by Government.

4.3 Our phytosanitary environment

Over 30,000 Phytosanitary Certificates are issued by AQIS each year. Most importing countries now require Phytosanitary Certificates. Phytosanitary certificates protect plant and animal health status in order to facilitate trade.

Many trading partners are becoming more discerning and sophisticated in their phytosanitary (plant health) requirements. This requires on-going negotiation by Biosecurity Australia to ensure compliance with importing countries requirements—often seeking removal of unjustified pests/pathogens/weed seed. Since the changes to the wheat marketing arrangements the number of assistance requests has increased significantly as new marketers seek guidance on market access and certification matters.

4.4 Our international obligations

Australia's international obligations on biosecurity and quarantine issues are aligned with the WTO Agreement on the Application of Sanitary and Phytosanitary Measures (SPS Agreement), Codex/WHO Food Standards and the International Plant Protection Convention (IPPC).

4.5 Codex committee on pesticide residue

The Codex Alimentarius Commission is part of the United Nations FAO/WHO Food Standards Program. The Codex Committee on Pesticide Residues sets recommended international MRLs in an effort to harmonise world regulatory standards. Codex MRLs are recognised as the benchmark in international trade by the WTO in the Agreement on the Application of Sanitary and Phytosanitary Measures (SPS Agreement).

Grains representation at Codex has ensured that international MRLs have been maintained for five chemicals that are very important for the safe storage of grain in Australia including chlorpyrifos-methyl, dichlorvos, fenitrothion, methoprene and pirimiphos-methyl. The loss of Codex MRLs for these compounds would have posed serious difficulties for grain storage in Australia, and adversely affected the Grains Export Program.

4.6 Managing biosecurity and quarantine risks in Australia

Plant Health Australia (PHA) is the peak body in Australia providing national coordination to improve biosecurity across plant industries, capacity to respond to plant pest emergencies. The company is also custodian of the Plant Pest Response Deed.

Plant Health Australia is a membership based company, with Grains Council of Australia the appointed member for the grains industry. Grains Council works closely with PHA on the On-Farm Biosecurity communications, and as the industry point of contact in the case of an incursion.

The Cooperative Research Centre for National Plant Biosecurity, which has been strongly supported by entities along the grains value chain, coordinates the national biosecurity research effort.

4.7 National Working Party on Grain Protection

The National Working Party on Grain Protection was established 30 years ago and has a wide industry representation including GRDC, GCA, Pulse Australia, Flour Millers' Council, Oilseed Industry, Malting Barley Industry, Meat Industry, Stockfeed Manufacturers Association, Bulk Handling Companies, Marketing, Researchers, CSIRO, and the Dairy industry. The Federal Department of Agriculture, Fisheries and Forestry (National Residue Survey section), State agricultural departments, the APVMA and chemical companies are also represented on the National Working Party.

The wide representation allows NWPGP to consider many issues including market requirements, pesticide residue violations, National and International regulatory requirements, entomology, insect infestation trends, grain protectants, fumigants, physical control methodology, application technology, and extension. Over the past 30 years there has been a significant reduction in the use of grain protectants around Australia.

4.8 Biosecurity challenges and recommendations from the Beale Report

There were 84 recommendations made on biosecurity and quarantine issues within the Beale Report *One biosecurity: a working partnership*. The report outlined some of the key complexities with managing biosecurity risks today. These included:

- globalisation, which is integrating the world economy and increasing the volume and range of products traded internationally;
- population spread into new habitats and increasingly intensive agriculture, which increases the risk of zoonoses (that is, animal diseases capable of transmission to human populations) and complicates the ability to contain, and increases the impact of, a pest or disease incursion;

- the potential risk of agri-terrorism involving animal rights extremists or political terrorist organisations;
- increasing global movements of genetic material as farmers endeavour to increase productivity, which places particular demands on pre- and post border biosecurity services;
- climate change, which adds to the spread of pests and diseases
- an emerging shortage of highly qualified plant and animal pest and disease professionals
- physical constraints for border interception activities, especially at major passenger airports; and
- financial constraints, as governments allocate scarce revenue among many competing demands.

The Beale Report highlighted three core principles: biosecurity continuum, science-based assessments and shared responsibility. At the heart of the Beale Report recommendations is the reiteration and strengthening of the three core principles enunciated in the Nairn Report:

- the importance of having an integrated biosecurity continuum involving risk assessment and monitoring, surveillance and response pre-border, at the border and post-border;
- risk assessment reflecting scientific evidence and rigorous analysis; and
- shared responsibility, between the Commonwealth and state governments (note, in this report, 'states' is taken to mean 'states and territories'), and between businesses and the general community.

The review advocated independent science-based decision making:

- The biosecurity legislation should provide that Biosecurity Import Policy Determinations should be made by an expert and independent National Biosecurity Commission. The Commission's functions, basis of appointment and decision making rules should be specified under the biosecurity legislation. Its functions should include providing expert advice to the National Biosecurity Authority and the Government on biosecurity matters more generally.
- The Commission should include members with expertise in natural sciences related to risks of pests and diseases in plants, animals and humans, risk assessment and management, ecology, agricultural and food production and economic assessments. The Commission should comprise no fewer than seven and no more than nine members, including the head

of the National Biosecurity Authority.

- More training should be provided to biosecurity officials on principles of proper decision making and the types of conduct that may amount to offences against them or breaches of the Australian Public Service Code of Conduct.

A change in governance arrangements was proposed in the Report. The four components for new arrangements were: Government (Minister); National Biosecurity Commission – making scientific decisions; National Biosecurity Authority – carrying out day to day operations; General Inspector of Biosecurity – ensuring system integrity.

4.9 Outcomes

AQIS must manage biosecurity risks to ensure the integrity of export products not the economic risk of trade. AQIS Grain Industry Consultative Committee (AGICC) is the principal forum for AQIS to consult with all industry stakeholders on operational, policy and strategic issues. The Committee acts as a conduit for information exchange between the grains industry and AQIS. Market Access & Biosecurity Grains Industry Consultative Committee (MABGICC) identifies and prioritises market access requests. It was discussed by Forum delegates that whilst it would be ideal to consult more widely on AGICC and MABGICC issues, the current structures were working efficiently.

One of the challenges for organizations such as AQIS and PHA is how to instill a culture of biosecurity and quarantine, how to educate and disseminate information without causing panic and/or concern with growers, marketers, importers and consumers. Information flow and continual education to biosecurity specialists, farmers and the general population is critical to the long term and ongoing biosecurity risk management in Australia. In addition to the work of PHA Ltd, the CRC for National Plant Biosecurity promotes biosecurity education from primary school to post-doctoral training and has active community awareness programs. It is critical for the grains industry to take advantage of information and training which is on offer and to recognise itself as part of the food industry to effect cultural change on biosecurity issues.

4.10 Recommendations

- 1) That both industry and Government continue to invest in capacity building in biosecurity for both industry professionals and trainees (at all levels) including biosecurity specialists, farmers and the general public for the long term and ongoing safety of Australian biosecurity.
- 2) That the grains industry recognises itself as part of the food industry to effect cultural change on biosecurity issues.
- 3) That industry consolidates its position as a leader in biosecurity by promoting maximum cooperation between developers of policy and protocols, regulators, researchers, and industry participants.
- 4) That industry collaborates in efforts by regulators and others to raise community awareness of biosecurity issues and to promote community engagement in dealing with these issues.

5 RESEARCH AND DEVELOPMENT

Research and development is the cornerstone of the nation's agricultural success. Producing food in one of the world's toughest environments has been the challenge for Australia's farmers. With food security high on the global agenda, the world is looking to Australia to continue to produce food and grain has the critical role to play. Climate variability has its extremes in this country, yet the grains industry has adapted continuously to meet the challenge. Production of grain during this past decade of serious drought has been sustained through modern practices where total failures were the norm in the past.

New technology, particularly biotechnology is the next opportunity for grain. How the industry accepts these new technologies will be critical to producers who must keep their businesses sustainable. Plant breeders are challenged to keep ahead of pests and diseases and ensure that industry is not vulnerable to pests and pathogens that could compromise grain varieties in a single season as they have done in the past. More efficient water use and increasing input cost efficiency are on-going target for research and development.

The *Research and Development* session at the Forum was chaired by Peter Reading, Managing Director of GRDC. Panel members included Mark Laucke – Laucke Flour Mills, Dr Steve Jeffries - CEO Australian Grain Technologies, Peter Flottmann – CEO Grain Growers Association and Andrew Weideman - Victorian Grain Grower.

5.1 Strategic drivers of research and development

The Panel outlined some of the key strategic drivers in research and development. These include:

- the critical need to increase the speed of development and adoption of existing technologies (such as plant breeding, and farming practices);
- the importance of 'removing the shackles' from the biotechnology path to market;
- climate change is one of the significant challenges facing growers today. Research and development agencies must continue to provide a leadership role in climate change and impact assessment;

- research and development agencies must continue to increase effective communications to key stakeholders such as growers;
- the need to continue to drive Total Factor Productivity;
- the need to continue to demonstrate to stakeholders the impacts the RD&E has had on productivity, profitability and sustainability.

5.2 Information flows: the changing environment for growers

Over the past decade there has been a significant shift in how growers acquire information on R&D outputs. There are now multiple forums for information dissemination including farming system groups, field days, seminars / GRDC updates, trials, research organisations and other farmers. Local agronomists, consultants and agribusiness are also play an important role in the distribution of information.

One of the challenges research organisations and farmers face is the 'extension' of the research and development – assessing what is the critical information for farmers and adopting the most appropriate and efficient ways of getting the information out to them. Finding the middle ground between an information overload and an information void is critical to the success and uptake of research and development.

5.3 The future of wheat breeding

Due to advances in breeding technology and privatisation of wheat breeding, rates of genetic gain have never been greater, and the timeframes for developing new varieties has shortened. Over the past eight years the time from cross to release has gone from 13 years in 2000 to 8 years in 2008. Wheat breeding is also delivering 1.45% annual gains in productivity through improvements in grain yield alone over the past 30 years. There are also some other contributing factors to these improvements.

Whilst there is still some debate about GM, the adoption of GM will provide more options breeders and growers, particularly for traits that are difficult or impossible to express through traditional breeding.

The branding of Australia wheat, the integrity of grades, and international recognition is critical for its long term sustainability. There is a need for differentiation at the premium end of the market as breeders, traders and end users work much more closely to capture premiums from differentiation. With the changes in wheat marketing arrangements, the industry needs to be aware of the risk in mixed signals and a lack of coordination through multiple exporters. Research and development will need to focus on product differentiation and extension. A major issue for the future of Australian plant breeding is the recognition of the need for End Point Royalties, and the requirement for an effective royalty collection system. It needs commitment and engagement from whole of industry.

GRDC needs continued industry direction and support in order to remain at the forefront of research and development and as a global leader in promoting the development and deployment of cutting edge technologies.

5.4 Outcomes

The *Research and Development* Panel all expressed the need to be at the forefront in research and development with the ongoing challenges of climate change and in the ever changing world of grains. There was an agreement amongst both Panel Members and Forum delegates that the industry must continue its record of preparedness to embrace technological change as obtain well better understanding issues such as climate change. To attain both of these objectives, sustaining the industry's commitment to research and development is critical.

The Panel raised the concept of the grains industry changing its production focus with market orientation to go back to the customer/end user. There was further discussion about the need for there to be a focus on a 'value system' – a collection of value chains starting with the customer/end user. The forum participants discussed the need to understand and consider possible 'value adding' post farm gate research and development opportunities.

Three key drivers of research and development were recognized by the Panel and Forum delegates. These included; awareness, understanding and motivation.

5.5 Recommendations

- 1) That Grains Council of Australia works with GRDC on the development and communications plan around the National Research, Development and Extension Strategy.
- 2) That there needs to be increased emphasis on the uptake of outputs from research, development and extension and what motivates growers to adapt new technologies.
- 3) That the changing environment of wheat breeding in Australia include the recognition of the need for End Point Royalties and the requirement for an effective Royalty collection system.
- 4) The possible opportunities for value adding post farm gate R&D be explored.
- 5) That research and development agencies increase their leadership role in climate change and impact assessment.

6 ACKNOWLEDGEMENTS

The Grains Council of Australia would like to thank the Panel Chairs and Panel Members for their time and invaluable contribution at the Grains Industry Forum. The experience and knowledge of the Panel made the Forum a success. Grains Council would also like to acknowledge the contribution of John Lovett - Lovett Associates, and Caroline Rhodes – Wheat Exports Australia for their support in the preparation of this report. Finally, Grains Council would like to acknowledge the 95 delegates who gave up their time to attend the Grains Industry Forum.

7 REPORT APPROVALS

Prepared by Tara Taubenschlag,
Communications Adviser, Grains Council of Australia

Approved by Murray Jones,
Chairman, Grains Council of Australia