



GPA

Grain Producers Australia

2025 **Federal Election** **Priorities**



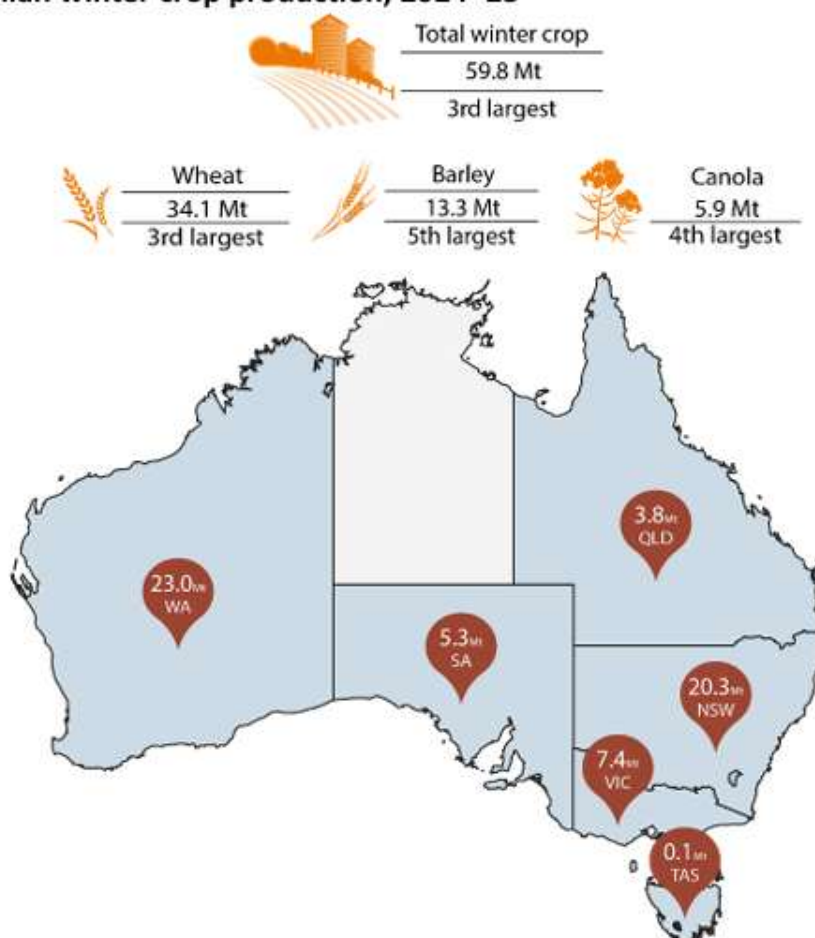
Grain Producers Australia – 2025 Federal Election Priorities

Introduction to GPA

GPA represents the interests of direct grower members, and State Farming Organisation members, with responsibilities for an estimated 24,500 levy-paying grain producers who produce broadacre, grain, pulse and oilseed crops throughout Australia's major cropping regions. GPA develops national policy for Australian grain producers, and advocates outcomes working with industry stakeholders – including governments – to deliver a more profitable, sustainable and globally competitive grains industry.

GPA's legitimate member representation includes specific responsibilities and roles, under federal legislation, representing all Australian levy-paying grain producers. These responsibilities on key industry matters also support the delivery of shared economic, environmental and community benefits. Grain producers contribute 1.02 per cent of their net crop sales in compulsory levies to support funding for the Grains Research and Development Corporation (GRDC) RD&E investments, Plant Health Australia (PHA) biosecurity prevention and emergency management, and National Residue Survey (NRS) for grain quality, integrity and market access matters. Current levy allocations are; 0.99pc to GRDC; 0.01pc to PHA; 0.015pc to NRS; and 0.005pc to the emergency plant protection response.

Figure 2 Australian winter crop production, 2024–25



Source: ABARES

Setting the Scene: Grain Producer Priorities

GPA's 2022 Federal Election Policy Priorities (12 below) was purposefully designed to seek non-partisan backing for initiatives and investments which can grow the industry's overall productivity and economic output. These priorities also support the National Farmers Federation's strategic goal of growing Australian agriculture to become a \$100 billion industry, by 2030. GPA's State Members also provide direct input into these strategic priorities and goals. For example, Grain Producers SA issued a State Election Priority Plan, in February 2022, which supports initiatives aimed at growing the local industry to \$6 billion value by 2030, guided by goals and initiatives in a strategic industry blueprint.

1. *Increase Supply of Skilled Workers on Grain Farms*
2. *Better Digital Connectivity to Boost Farm Productivity*
3. *ACCC to Conduct Study of Australian Grain Markets to Optimise Competition*
4. *Increase Government Investment in Local Manufacturing Initiatives*
5. *Grow Export Trade and Market Access for Australian Grains*
6. *High Level Strategic Analysis/Investment to Reduce Grain Freight Costs*
7. *Increased Focus on Preventative Biosecurity Measures to Protect Australian Grains*
8. *Improved Access and Application for Agricultural Pesticides and Technology*
9. *Remove Restrictive Grains Industry Red Tape and Costs*
10. *Improved Independent Oversight of Grain Levies*
11. *Strategic Taxation Reforms to Optimise Farm Resilience and Production*
12. *Sharpen Grain Farm and Community Focus of Sustainability and Resilience Programs*

Economic Growth

The table below shows the Australian grains industry has grown significantly, contributing \$81.15 billion in total gross value, over the past three years (2022-24), at an annual average of about \$27 billion. This \$27 billion represents almost double the industry's value, prior to the last federal election (\$13.8 billion in 2020-21). And this \$81.15 billion is more than 30pc of the annual average, for Total Value of Farm Production, that's been achieved in this same time frame (\$261 billion).

In March 2025, ABARES released its 2024-25 winter crop forecasts, estimating total production at 59.8 million tonnes – the third largest on record. Overall, this 59.8m/t grain crop represented a 26pc year-on-year increase from 47.5m/t produced the year before, at 27pc above the 10-year average of 47.1m/t.

In terms of specific grains, produced in season 2024-25, ABARES estimated wheat production to have increased by 31pc to 34.1m/t – 28pc above the 10-year average (to 2023-24). Barley production was estimated to have increased by 23pc to 13.3m/t – 17pc above the 10-year average. Canola production was estimated at 5.9m/t – 31pc above the 10-year average. Lentils were 1.2m/t, far above the 10-year average of 764,000 tonnes. The chickpea crop was estimated at a new record of 2.3m/t – about three times the 10-year average, of 784,000 tonnes. ABARES also forecast summer crop production to be slightly lower in 2024–25 – but this was 28pc above the 10-year average, at 4.7m/t.

National Grains Production/Output	TOTALS (2022-24)	2023-24	2022-23	2021-22	2020-21
Gross Value of Grain Production	\$81.15b	\$21.67b	\$31.1b	\$28.38b	\$13.8b
Total Grain Production (million tonne)	188.3m/t (ave 62m/t)	51 m/t	70.8 m/t	66.5m/t	55.8 m/t
Total Area Crops Sown (hectares)	-	24.3 m/ha	25.6 m/ha	25.4 m/ha	22.7 m/ha
Total Value Grain Exported	\$75b	\$21.8b	\$29.7b	\$23.5b	\$12.4b
Total Volume Grain Exported (million tonne)	140.1 m/t (46m/t ave.)	43.7 m/t	51.7 m/t	44.7 m/t	36.5 m/t
Total Value of Farm Production (TVFP)	\$261.2b	\$81.8b	\$91.5b	\$87.9b	\$68.3b
Grains Industry's Share of TVFP	31pc	26.5pc	34pc	32pc	20pc
Number of grains levy-payers (grains farms) * ABARES definition Estimated Value of Ag. Operations plus \$40,000	-	24,331	22,491	21,720	22,500

Figures from GRDC Annual Reports/ABARES (as per page (10-11))

Total grains, oilseeds and pulses (ABARES 2024–25 forecast)				
Production			Exports (July-June)	
Area ('000 ha)	Volume (kt)	Value (\$m)	Volume (kt)	Value (\$m)
26,273	64,512	25,830 (\$25.8b)	42,437	21,829 (\$21.8b)

Summary table – total grains, oilseeds and pulses (including both winter and summer crops). Reference, ABARES data tables 2 and 11 [Crop Data: Australian Crop Report: March 2025](#) and [Agricultural commodities: March Quarter 2025 – Statistical tables](#) Agricultural Commodities Report March 2025 [HERE](#) and Crop Report [HERE](#)

Australian Grains Industry: Economic Powerhouse

These numbers provide compelling proof that the Australian grains industry – led by the increased yield capacity, production efficiency gains and technology adoption of grain producers – sits at the forefront of the Australian farm sector's aspirational target of becoming a \$100 billion industry, by 2030.

And Australian grain producers are acting as the prime catalyst for driving this increased value, and the substantial shared benefits this growth generates for industry stakeholders. This directly increases direct contributions to the national economy. For example, more than 140m/t of grain was exported, from more than 188m/t produced on-farm, in this same three-year period (2022-24). Average annual national crop production for this three-year period was 62m/t, with 46m/t exported. The national Grains Industry's Share of TVFP (\$261.2 billion) in this timeframe was 31pc – up from 20pc in 2020-21.

Shared Beneficiaries

Other stakeholders benefitting and capitalising on this long-term on-farm productivity growth includes; bulk grain handlers and transporters; farm input suppliers (fertilisers/pesticides/fuels); agronomic services; farm machinery dealers/suppliers; research providers; and industry consultants. Feed lotteries (eg beef/chicken/pork) are also shared beneficiaries of this consistent productivity growth which further extends to those in the business of manufacturing and processing Australian grains, to meet various consumer, end-use purposes. For example; milling and baking food products; and brewing, distilling/spirits, soft-drinks, beverages etc (as per graphic on page-12). Other sectors with shared growth opportunities include; Sustainable Aviation Fuels and biodiesel/ethanol production.

GPA's 2025 Federal Election Policy Priorities provides genuine opportunity to support new policies, investments and initiatives that will continue growing the Australian grains industry's economic

contribution— whilst boosting other shared gains, including social and environmental – by backing our grain producers who grow the grain, to enable and initiate these significant value-adding benefits.



“Strong grain farmers are the primary catalyst for a strong and vitally important rural industry that’s at the forefront of contributing to our social and economic prosperity.”

– Grain Producers Australia Chair Barry Large.

This productivity growth also extends to the potential needs and services required, now and into the future, relevant to the size and volume of funding that’s increasingly being derived from grain producers’ levies; not limited to biosecurity protections, RD&E investments and grain product integrity/market access requirements. A core theme and focus of GPA’s policy advocacy – in the recent past and into the future – are clearly demonstrated by the fact (as recently reported [HERE](#)) GRDC’s financial resources recently exceeded \$1 billion, according to figures released in the 2025-26 Federal Budget.

“Over two-thirds of GRDC’s net resourcing comes from its opening balance or cash reserves, estimated to be \$688.4M from July 1. This is just over \$100M more than the 2024-25 actuals of \$587.46M as at 1 July 2024. This figure has been steadily growing at this rate for several years, depending on the size of Australia’s grain production.”

GPA will continue advocating and calling for policies and initiatives that increase value and returns for all growers, and shared beneficiaries such as government and industry, by modernising, optimising and future-proofing the grains levy-system’s functionality, capacity and investment potential.

“When You Have More Than You Need, Build A Longer Table Not A Higher Fence” – unknown author.

* Summary table – total grains, oilseeds and pulses (including both winter and summer crops). Reference, ABARES data tables 2 and 11 [Crop Data: Australian Crop Report: March 2025](#) and [Agricultural commodities: March Quarter 2025 – Statistical tables](#) Agricultural Commodities Report March 2025 [HERE](#) and Crop Report [HERE](#)

GPA's 2025 Federal Election Policy Priorities

GPA's 2025 priorities build on the 12 core themes advocated for in 2022. These priorities combine to further boost productivity growth for Australian grain producers and the national grains industry. This growth subsequently increases the shared benefits delivered for other industry participants (as described above) and for the environment, regional communities and national economy. The grain industry's broader economic impact and growth – due to increased farm productivity and grain yields – has also been vital to boosting long-term national tax generation. Numbers provided by AEGIC show the Australian grains industry has increased in value from \$4 billion in 1990, when the levy-system was first introduced, to now being valued at more than \$32 billion in recent record-breaking seasons. This significant on-farm and industry growth increases government's capacity to re-direct tax-payer funding into the delivery of fundamental public good benefits, and added investments into key national policy priorities, including; health, education, transport and infrastructure, and community safety.



– Grain Producers Australia Western Region Director and The Weekly Times Cropping Farmer of the Year Duncan Young.

GPA's policy priorities are reinforced by the strategic goals and initiatives, guided by representative roles and responsibilities, and values acting for members and all levy-paying grain producers. These values and principles are reflected in GPA's Strategic Plan which aims to boost productivity, sustainability and profitability for Australian grain producers, industry, and these shared benefits. The immediate impacts of seasonal challenges and variations – including supply and demand of essential inputs and global grain market fluctuations – remain at the forefront of growers' minds. GPA's 2025 Election Policy Priorities are designed to deliver outcomes that can better manage these business risks, whilst optimising opportunities to capture greater value and harness industry potential, to boost future productivity, profitability and sustainability, with shared benefits for all Australia grain producers, the grains industry, the environment, rural communities and the national economy.

Background

GPA's 2025 Federal Election policy priorities reflect recent survey results, capturing the views of Australian grain producers, combined with other consultation processes and analysis, including the NFF. GPA's grower priorities survey was conducted in January 2025, with results showing consistency in priority themes. In particular prime concerns about; increased compliance and costs of government red and green tape; escalating farm input costs and uncertainty over reliability and security of supply; inefficiencies in the national grains supply chain and rising freight/transport costs; and quality of grain market access and market competition/transparency. Grower policy priorities outlined in this document were also reviewed and ultimately endorsed by GPA Policy Council members.

Results – GPA 2025 Grower Policy Priorities

1. *Lower Farm Input Costs - Improve Local Supply/Manufacturing (45.1pc)*
2. *Access to Agricultural Pesticides (APVMA Reforms) (42.7pc)*
3. *Grains Industry Red & Green Tape – Regulatory Burden/Costs (36.6pc)*
4. *Improve Digital Connectivity and Reliability (31.7pc)*
5. *Grains Supply Chain – Reduced Freight Costs (24.4pc) and Grain Market Access & Trade (15.9pc) and Optimise Grain Market Competition - Pricing & Transparency (14.6pc)*
6. *Grain Producer Levies – Current Rates & Spending Priorities (13.4pc) and Stronger Biosecurity Protections & Capacity (15.9pc) and Taxation System Reforms/Opportunities (19.5pc)*

GPA 2025 POLICY PRIORITIES-ASKS

1. Lower Farm Input Costs - Improve Local Supply/Manufacturing

* Continue to advocate policies and investments to increase local manufacturing and the reliability and security of supply for essential farm inputs; especially fertilisers, fuels, pesticides and farm machinery.

* Advocate to maintain the diesel fuel rebate (Fuel Tax Credits) – based on adhering to the core taxation policy framework's principles; firstly, this fuel is not used for on-road purposes, and excise therefore cannot be applied for the purposes of funding roads. Any manipulation of this scheme cannot cause unintended consequences for legitimate off-road fuel users such as farmers.

* Continue urging government action to increase Australia's fuel supply and security, and subsequently reduce the vulnerability of Australian farmers caused by dependence on international supply chains for fuel supply.

* Continue advocating to support local manufacturing of green fertilisers and other new technologies that can reduce emissions, while ensuring grain producers continue operating, both profitably and sustainably. Especially in comparison to emissions of the exporting countries that Australian grains compete against, in global markets.

* Advocate funding to conduct cost-benefit analysis/report on local manufacturing needs and domestic production capacity for essential farm inputs, versus importing from other countries. In particular, provide comparative analysis on the over-reliance and risks of continuing to maintain key supplies, from external (imported) sources.

* Advocate funding to conduct cost-benefit analysis/report on consequences to Australian farmers and agriculture, of the EU Renewable Energy Directive (in particular Annex IX). This Directive supports accelerated development of advanced biofuels from non-food origin crops, and is likely to have supply and demand consequences, especially Australian canola exported to the EU. This analysis can also examine future benefits and incentives for domestic biofuels production, such as emission reductions, R&D and sovereign capability for key inputs.

Federal Government's Future Made in Australia Strategy has identified:

Low carbon liquid fuels

Sustainable aviation and diesel fuels will play a key role as the global and Australian economies transition to net zero, offering a decarbonisation pathway for many hard-to-abate sectors, including aviation, shipping and heavy transport. Australia's large landmass, advanced farming practices, access to renewable feedstocks, established supply chains and renewable energy potential are all assets in developing domestic production of low carbon liquid fuels.



2. Access to Agricultural Pesticides (APVMA Reforms)

* Continue to advocate support and appropriate resourcing to strengthen independent and scientific, evidence-based regulatory system operated by the Australian Pesticides and Veterinary Medicines Authority (APVMA).

* This advocacy includes calling for improved resourcing to support GPA's roles and responsibilities representing the industry-good needs of all grain producers, to ensure the APVMA's regulatory regime responds appropriately – when conducting current and future product reviews, and subsequent stakeholder consultations. Primarily, this can protect the integrity of local grain/food production systems, while maintaining market access. Especially to ensure review processes are proactive and can provide appropriate recognition where required, of any alternative products needed – and the priorities of growers – to maintain support for safe and efficient farming practices. This resourcing is also important for providing accurate and current information, to processes such as RD&E.

* GPA will advocate support for CropLife Australia's 2025 Election Policy Request: Future Oriented Pesticide Regulation – as per the pre-election briefing note provided to stakeholders (excerpt below).

Key Election Asks to Improve Farmer Access to Safe and Effective Crop Protection Products

Access to safe and effective crop protection products (pesticides) is critical to the productivity, environmental sustainability and international competitiveness of Australia's agricultural industry. They support the domestic food production that is essential to curbing cost of living pressures. The following commitments will position Australia to enhance its ability to attract investment in the commercialisation necessary to ensure Australian farmers have access to the suite of crop protection technologies that underpin their ongoing profitability and sustainability while improving community confidence in the regulatory system.

- *Government funding of the public good functions of the APVMA, through a commitment of \$8 million pa.*
- *Improve intellectual property protections for pesticides and biotechnology by:*

- o Creating a patent credit scheme for plant science innovations.*
- o Aligning data protection periods with international jurisdictions to support access to data.*
- *Fund the establishment of the Agvet Chemical and Technology Innovation Centre of Excellence at the University of New England (UNE) with a funding commitment of \$25 million over five years.*
- *Re-establish the Agvet Industry Collaborative Forum.*
- * Advocate for increased resourcing, relevant to GPA's representative roles and responsibilities for all grain producers, to conduct education, awareness and training programs and projects, relevant to this policy area; such as stewardship programs (ie spray drift management); recognition of the role of Maximum Residue Limits (MRLs) to support market access and growth; developing new crop biotechnology options; and community recognition of the environmental and shared benefits of new cropping technologies (ie better mouse controls).



– Grain Producers Australia National Policy Council at Parliament House in Canberra.

3. Grains Industry Red & Green Tape – Regulatory Burden/Costs

- * Advocate support for CropLife Australia's 2025 Election Policy Request (Future Oriented Pesticide Regulation) – especially as a means of improving regulatory efficiencies with the APVMA's operations and performance, and the role of grower compliance.
- * Advocate for new review/inquiry by the Productivity Commission into the Regulation of Australian Agriculture, especially to investigate matters relevant to the grains industry, and potential benefits of new (digital) technologies in helping to reduce red tape/compliance costs eg streamlining End Point Royalties/collections.
- * Advocate for independent review, by appropriate authority, of red tape and regulatory cost compliance, relevant to the national grains supply chain – to support harmonisation of rules (local, state and federal) and achieve efficiency gains – especially key areas such as vehicle and machinery movements, licensing, and market access.
- * Advocate these outcomes with project/funding from Federal Government's \$900 million Productivity Fund, that's designed to support national competition policy reform (micro-economic reform) and reduce regulatory barriers – this can also support improved efficiencies with chemical regulations, farm safety and biosecurity.

GPA has recently undertaken a professional, expert Active Ingredient Sustainability Assessment looking at the importance of all agricultural pesticides facing current APVMA reviews, specific to the grains industry's needs. GPA calls for ongoing policy support and necessary resourcing to follow through with implementing specific matters – relevant to the review's findings and the report's recommendations (as per the excerpt below) – to ensure the essential needs and standards of Australian grain producers are recognised and properly protected, to maintain sustainable and affordable production practices, based on the application of a science and rules-based agricultural trading framework.

Continue to advocate for a strong science- and risk-based global trading system

In the disruptive global geopolitical environment, long-established international trading rules and systems are under immense pressure.

Australia, as an export focused agricultural nation, respects and benefits from a strong science- and rules-based international trading framework, built around the World Trade Organisation (WTO) and other UN Agencies (e.g.: WHO and FAO). Recent indications from both the EU and the recently appointed US Secretary of Health and Human Services on possible new trade conditions relating to pesticides are concerning and may potentially be at odds with WTO rules governing technical barriers to trade.

The science- and risk-based decisions of individual nation's independent pesticide regulators need to be respected in line with WTO rules. Any maximum residue limits or import tolerances also need to be strictly based on science and evidence.

Any attempts by countries to apply domestic laws beyond their own territory and jurisdiction, that violate long-standing trading norms, should be strongly challenged.

It will be increasingly important for Australia to build alliances with other nations that share an interest in a global science- and rules-based agricultural trading framework.

Grains Australia has an important role to play in scaling up international outreach to encourage Australia's key grain trading partners to shape science- and risk-based frameworks for the regulation of ag technologies, including emerging biotechnologies.

Recommendations:

25. GPA should:

1. *strongly support the Australian government in taking a strong stance to ensure WTO-members respect international trading rules, and to closely monitor any attempts to impose additional trading constraints that undermine individual WTO-member's science- and risk-based regulatory frameworks for ag technologies,*
2. *play an active role in fostering alliances with grower groups in other grain trading nations that share an interest in a global science- and rules-based agricultural trading framework; and*
3. *encourage Grains Australia to scale up international outreach to encourage Australia's key grain trading partners to shape science- and risk-based frameworks for the regulation of ag technologies, including emerging biotechnologies.*



– Grain Producers Australia Northern Region Director Matthew Madden.

4. Improve Digital Connectivity and Reliability

- * Advocate policies to boost digital connectivity and reliability of access to essential communication services, including mobile and internet coverage; especially to improve the delivery of essential community support services, including fires, natural disasters and mental health.
- * Increased Funding for the On Farm Connectivity Program.
- * Implement Regional Telecommunications Review recommendations (in full) especially the Development of a Regional Telecommunications Strategy.
- * Continue advocating support for the delivery of new technologies and innovations that increase productivity and performance of grain farms, such as autonomous farm machinery.
- * Continue advocating support for the development and delivery of digital technologies and new innovations and programs that can help improve the delivery of community support services, for mental health in rural/farming communities – and required funding.
- * Advocate support for the ifarmwell National Proposal submitted to the Federal Government, calling for a: *'farmer-led approach to promoting wellbeing and preventing suicides in Australian agricultural communities'*. The Proposal's core initiatives – leadership from within the agricultural industry; collaboration between key organisations; evaluation to maximise impact and drive innovation and the co-design and delivery of a new farmer-friendly helpline; and reinforcement of key educational messages over at least a five-year period – reflect the core values of GPA's Farmer Mates Mental Health program, supported by key partners.
- * GPA calls for the next Federal Government to make an immediate investment of \$50 million over five years for mental health and wellbeing support, which includes the ifarmwell National Proposal and another from the National Centre for Farmer Health initiatives – as supported by a joint-statement [HERE](#)



– Grain Producers Australia Farmer Mates Mental Health Initiative National Ambassador Brad Hogg with representatives from program supporter Rural Aid.

5. Grains Supply Chain – Reduced Freight Costs and Grain Market Access & Trade and Optimise Grain Market Competition - Pricing & Transparency

- * Continue to advocate policies and programs that improve grain market oversight, to increase fairness and transparency of market competition, including submissions to the ongoing Wheat Port Code review – and the need to ensure effective, independent oversight, from any changes to the current regulatory regime.
- * Continue to call for an independent review of grain market competition and pricing, by the appropriate authority, such as the ACCC, Productivity Commission, ABARES etc, to protect growers' interests.
- * Continue to advocate fairness of market competition and protect producers from the consequences of 'creeping consolidation' in the ACCC's examination of proposed agribusiness acquisitions – especially potential consequences of the Elders proposed acquisition of Delta Agribusiness.
- * Advocate appropriate resources for Grains Australia, to advance the consolidation of industry good functions; especially to support technical expertise needed, to maintain and improve grain market access. Especially pre-competitive functions with in-market advocacy and engagement, to support removal of market access barriers.
- * Continue to advocate policy and programs, on sustainability, traceability and market certification, consistent with GPA's core strategic goals and values, to enhance grower returns and protections. For example, this ensures current production practices are recognised as world-leading, in producing high-quality, low emissions grains.
- * Continue to advocate GPA policy on renewable fuels and key incentives for grain producers, as feedstock providers; especially Sustainable Aviation Fuels and biofuels. Ensure land access arrangements include proper protections for farmers and land-holders, against non-strategic project development that impedes property rights and conflicts with standards required to achieve 'social licence' to operate by practitioners – especially in regards to community consultation processes.
- * Continue to advocate for more targeted funding, regulatory reforms and initiatives, to modernise and 'future-proof' the Australian grains supply chain and optimise value capture opportunities and efficiencies, to enhance Australia's reputation and competitiveness, in global export markets. This includes establishment of a National Taskforce, as advanced by GPA since 2022, to support necessary

collaboration – to boost efficiencies and reduce costs, by identifying supply chain pinch-points and required reforms and funding strategies needed – with the implementation of AEGIC report, *'Future-proofing Australian grain supply chains'* (May 2024 – excerpt below).

* Advocate funding and resource support for GPA to coordinate/manage delivery of a national grains industry event. This periodic 'Grains Week' event would be focused on optimising attendance and interests of all growers throughout Australia, along with industry stakeholders and international delegates, to showcase Australian grains production. This national grain industry event would also have the capacity to perform multiple 'industry-good' functions and investment growth opportunities including trade facilitation and stakeholder engagement on RD&E, biosecurity, etc. Support for this showcase can also be provided by seed funding from the Federal Government's budget allocation of \$23.8 million over three years (from 2025-26), "to sponsor agricultural trade events".

Executive summary

Purpose

This report examines ways to future-proof Australia's grain supply chains. We examine how Australia's grain supply chains are changing. What are their cost components? What are the opportunities for their improvement?

In compiling this report, we have collated and analysed a range of datasets and supply chain literature. We have engaged with a range of industry stakeholders seeking their practical insights and experiences as to how the capacity and cost-efficiency of Australia's grain supply chains might be further improved.

Key Trends

More grain now flows more quickly through grain supply chains across Australia. Through a variety of investments and coordination Australia achieved record exports of grain following record harvests in 2021-22 and 2022-23. Australia accounted for a record 13.7 per cent of world wheat exports in 2022-23. More grain is flowing through a smaller number of high capacity upcountry receival sites and many growers, particularly in eastern Australia, have increased their on-farm storage. Around 70 per cent of an average harvest in eastern Australia can now be placed in permanent storage on-farms in eastern Australia.

Need for Action

The capacity and export velocity of Australia's grain supply chains have increased remarkably in recent years, especially at key export ports. However, there remains many further opportunities for improvement. Ensuring that Australian grain can be produced and delivered to local and international customers more cost-effectively potentially improves the affordability of Australian grain and enlarges the geographical reach of Australian grain. It allows the Australian grains industry to benefit further from servicing local and premium-paying nearby markets or to maintain Australian production of grains with characteristics not easily or cheaply replicated by competitors. More affordable Australian grain helps serve the nutritional needs of overseas and domestic consumers.

In recent years Australia's grains industry has been an unintended beneficiary of the damaging impacts of the war in Ukraine and a huge lift in wheat imports by China. However, overseas competition in grain markets will eventually strengthen. Hence, the Australian grains industry needs to embrace further improvements that protect and enlarge Australia's strategic and geographical advantage in grain production and export.

(Excerpt, AEGIC report, pages 7 and 12)

6. Grain Producer Levies – Current Rates & Spending Priorities, Taxation System Reforms/Opportunities and Stronger Biosecurity Protections & Capacity

* Continue to advocate support for current and future projects and initiatives, relevant to GPA's legislated responsibilities, which seek to optimise the use and strategic investment potential of funding enabled by grower levies – including strengthening biosecurity protections and emergency response/preventative capacity, growing grain market access, RD&E programs, supply chain efficiencies, product integrity, MRLs etc.

* Advocate reforms to remove duplication of essential representative functions and responsibilities for levy-payers, to optimise fairness and equity, and while reducing the systematic impacts of 'free-riders' – ultimately boosting efficiencies in the provision of core 'industry good' services.

* Advocate policies that can increase value and returns to all growers, and shared beneficiaries such as government and industry, by modernising, optimising and future-proofing the grains levy-system's

operations and investment potential and capacity.

* Advocate dedicated funding to support GPA's independent oversight of grains levy-spending – especially independent analysis of the long-term returns to levy-paying growers, and other beneficiaries.

* Continue to advance the Australian Grains Industry Biosecurity Plan and optimise use of the resources needed to ensure the delivery of projects and outcomes, that will enhance national biosecurity capacity and expertise, specific to protecting the productive capacity and needs of all grain producers and industry stakeholders.

* Advocate policies and projects to improve the implementation and recognition of 'shared responsibility' across industry and communities; especially to ensure fairness and equity of actual costs, with validation of the actual economic contributions of all beneficiaries, to national biosecurity operations.

* Advocate funding from the \$6.4 million grant – provided to the University of Melbourne, to continue collaborative biosecurity research, by the Centre of Excellence for Biosecurity Risk Analysis program – to investigate ways to strengthen grain market access protections.

OTHER PRIORITIES (Identified in 2025 Grower Survey)

- Right to Repair – Farm Machinery & Technology
- Social License – Grain Production Integrity/Consumer Education/Land Use Conflicts
- Farm Labour Supply - Skilled Workers on Grain Farms
- Grains Sustainability Schemes & Programs
- Renewable Energy – Biofuels & Sustainable Aviation Fuels
- Improve Farm Safety and Community Resilience, Farmer Wellbeing and Mental Health

* Continue advocating support for the Government's commitment to develop a future national food security strategy: 'Feeding Australia'. This \$3.5 million commitment includes establishing a National Food Council, of industry and community experts, to advise on the plan's development and implementation – and to investigate the potential for a domestic biofuels feedstock industry: 'to support Australia's transition to net zero'. A key factor to this advocacy is this strategy's connection to policy recommendations made in the 'Feeding the Nation and beyond' report, from a parliamentary inquiry, tabled in November 2023.

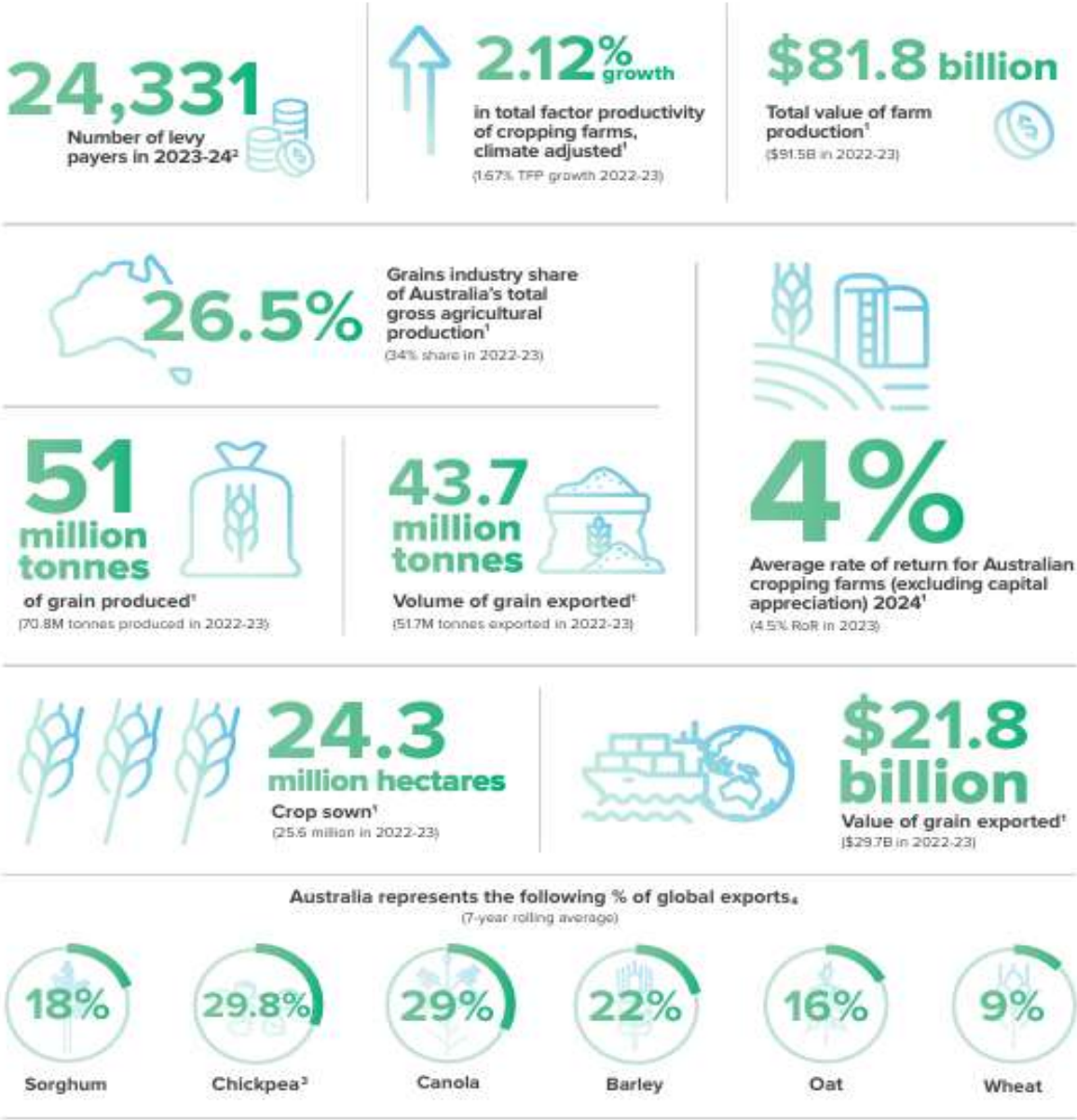
* Advocate inquiry to properly examine increasing concerns about moral hazard, anti-competitive conduct and misleading claims, under competition laws – relevant to pernicious consequences for membership income/markets for legitimate member representative groups, with democratic responsibilities. Noting relevance to levy-payer responsibilities – and legislative obligations – to ensure fairness and equity.

* GPA supports the intent of the policy position statement provided by AgForce, opposing the introduction of mandatory Scope 1, Scope 2, and Scope 3 emissions reporting.

'AgForce is committed to working with government, industry stakeholders, and the broader community to develop practical and effective solutions for reporting greenhouse gas emissions in agriculture. We believe that mandatory Scope 1, Scope 2, and Scope 3 emissions reporting should not be introduced until the appropriate frameworks, tools and assistance are fit for purpose, having been co-developed and agreed upon by Queensland's broadacre agriculture industries and our supply chain partners. This approach will ensure that the reporting requirements are feasible, accurate, and meaningful in supporting sustainable farming practices.'

AUSTRALIAN GRAINS INDUSTRY AT A GLANCE

Figure 1: Australian grains industry at a glance



1. ABARES 2024, Agricultural commodities: June quarter 2024, Canberra.
2. GRDC (2024), Grains Levy Payer Register, Confidential (unpublished). Based on unique ABNs with a total value of production >\$40,000 for financial year 2023-24.

3. FAO, 2024, FAOSTAT (2024) FAO of the United Nations: FAOSTAT Database. FAO data is in calendar years.
4. USDA, Grain: World Markets and Trade July 12, 2024, grain.pdf (comella.edu)



AUSTRALIAN GRAINS INDUSTRY AT A GLANCE

22,491
Number of levy payers in 2022-23¹



1.67%
growth

in total factor productivity
of cropping farms,
climate adjusted²
(1.54% TFP growth 2020-21)

\$91.5 billion

Total value of farm
production in 2022-23³
(up from \$87.9B in 2021-22)



34%

Grains industry share of
Australia's total gross
agricultural 2022-23¹
(32% share in 2021-22)



4.5%

Average rate of return for Australian
cropping farms (excluding capital
appreciation) 2023⁴
(4.5% RoR in 2022)

**70.8
million
tonnes**



Grains produced in 2022-23²
(66.5M tonnes produced in 2021-22)

**51.7
million
tonnes**



Volume of grains exported²
(44.7M tonnes exported in 2021-22)

**\$31.1
billion**



Gross value of grain
production in 2022-23³
(\$28.3B in 2021-22)

**\$29.7
billion**

Value of grains exported³
(\$23.5B in 2021-22)



**25.6
million hectares**

Crop sown in 2022-23³
(25.4 million hectares in 2021-22)

Australia represents the following % of global exports



Sorghum⁵



Chickpea⁵



Canola⁵



Barley⁵



Oat⁵



Wheat⁵

1. GRDC (2023). Grains Levy Payer Register. Confidential (unpublished). Based on unique ABNs with a total value of production >\$40,000 for financial year 2022-23.

2. ABARES, 2015-23, Farm Data Portal – Beta, 2023 data dashboard, Canberra, February. Updated 25/08/2023. Climate adjusted TFP was 1.67% for cropping Table C1 in productivity data 2021-22 v1.2.0.

3. ABARES 2023, Agricultural commodities: June quarter 2023, Canberra

4. ABARES 2022, ABARES Farm Data Portal – Beta Release, Canberra, March. CC BY 4.0. Updated 25/08/2023. 4.5% is the forecast RoR for cropping farms in 2023.

5. USDA, 2023. Downloadable data sets. Foreign Agricultural Service. PSD online.

6. FAO, 2023. FAOSTAT (2023) FAO of the United Nations. FAOSTAT Database. FAO data is in calendar years.



Australian grains industry at a glance



21,720 Number of levy payers¹



23.4 million hectares Crop sown²
(22.7m hectares sown in 2020–21)



62 million tonnes Grain produced³
(55.8m tonnes produced in 2020–21)

2.5% p.a Total grains industry productivity⁴



\$83.1b Total value of farm production in 2021–22
(up from \$68.6b in 2020–21)

5.7% Average rate of return excluding capital appreciation⁵
(3.8% rate of return in 2020–21)



\$19.1b* Gross value of production⁶
(\$13.8b in 2020–21)
* Number is derived from 3-year rolling average

Percentage of global grain exports by commodity:



WHEAT



BARLEY



SORGHUM



OATS



CANOLA



32.6% Grains industry share of total gross agricultural value⁷



44.3 million tonnes Grains exported⁸
(36.5m tonnes in 2020–21)



\$22.8b Value of exported grains⁹
(\$12.4b in 2020–21)

¹ Number is derived from Alpha in the Grains Levy Payer Register. It is assumed that each ABN represents an individual levy payer. GRDC is adopting a methodology that recognizes the number of levy payers rather than the previously reported number of grain farms.

² ABARES Annual Crop Report June 2022

³ ABARES Annual Crop Report June 2022

⁴ ABARES Agricultural Productivity Estimates

⁵ ABARES Farm Performance

⁶ ABARES Ag Commodity Statistics June 2022

⁷ ABARES Ag Commodity Statistics June 2022

⁸ ABARES Ag Commodity Statistics June 2022

⁹ ABARES Ag Commodity Statistics June 2022



The Australian grains industry in 2020–21



\$13.77b

Gross value of production



Australia's second-biggest winter crop on record



Highest yields on record for wheat, barley, canola, chickpeas, field peas and lupins



Grains are the second largest Australian agricultural industry by value, accounting for 27% of total gross value of production



\$12.4b

Value of exported grains

759

million tonnes
Global wheat consumption



22,500*

Number of grain farms



36,499

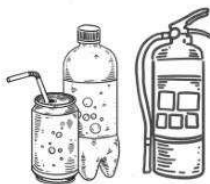
million metric tonnes
Volume of grains exported

*ABARES definition of grain farms since 2015–16 = establishments with an estimated value of agricultural operations (EVAO) of \$40,000 or more.



						
	Revenue	Expenditure	Operating result	Total assets	Total equity	Industry contributions
2020-2021	\$244.0m	\$203.6m	\$39.9m	\$324.6m	\$276.9m	\$157.3m
2019-2020	\$173.2m	\$218.7m	(\$45.9m)	\$279.3m	\$217.5m	\$95.8m
2018-2019	\$206.9m	\$206.5m	\$0.26m	\$297.3m	\$263.0m	\$114.1m
2017-2018	\$213.8m	\$219.8m	(\$6.5m)	\$268.2m	\$199.4m	\$117.3m
2016-2017	\$242.4m	\$227.7m	\$14.8m	\$307.2m	\$205.8m	\$139.4m

					
	Commonwealth contributions	R&D expenditure	Employee benefits	Suppliers	Number of projects
2020-2021	\$68.8m	\$168.9m	\$14.4m	\$12.1m	602
2019-2020	\$59.4m	\$182.4m	\$13.6m	\$16.9m	719
2018-2019	\$69.3m	\$174.0m	\$13.3m	\$16.6m	767
2017-2018	\$71.3m	\$192.1m	\$13.2m	\$10.5m	742
2016-2017	\$73.3m	\$198.1m	\$10.9m	\$11.6m	700



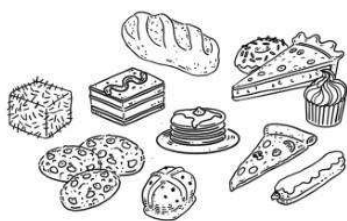
CARBON DIOXIDE (CO₂)

- Carbonated drinks
- Dry ice
- Domestic gasifiers
- Food refrigeration and packaging
- Fire suppression



NATIVE AND MODIFIED WHEAT STARCHES

- Fine paper, paper, and pulp
- Paper packaging and sacks
- Corrugated cardboard and boxes
- Adhesives
- Noodles and dumplings
- Sauces
- Confectionery
- Tortillas, soups, and savoury baked goods
- Bricks, plasterboard, cement, and other construction products
- Water clarifying and setting agent



FLOUR AND BAKERY MIXES

- Sweet and savoury baked goods
- Cakes
- Lamingtons
- Cupcakes
- Pancakes
- Biscuits
- Pastas
- Pizzas
- Breads
- Tortillas
- Noodles



MAKING THE MOST OF EVERY GRAIN

As a world-class advanced manufacturer, Manildra Group value-adds to 100 per cent of the Australian wheat grain – producing all-Australian food and industrial ingredients for a diverse range of specialty and staple products across the global value chain.



ETHANOL

- Alcoholic spirits and ready-to-drink brands
- E10 and E85 petrol
- Sanitisers and sprays
- Medicines and tablets
- Hairspray and other personal care products
- Solvents and detergents
- Coatings and lacquers
- Printing inks



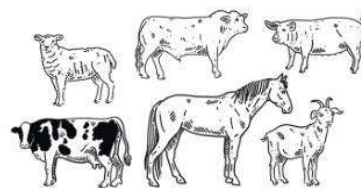
VITAL WHEAT GLUTEN AND MODIFIED PROTEINS

- Performance drinks
- Protein shakes
- Pet food
- Sweet and savoury baked goods
- Meat and dairy extender or substitute
- Plant-based products
- Aquaculture feeds
- Shampoo and other personal care products



SYRUP

- Brewing
- Confectionery
- Ice-cream, milkshakes and other dairy products



STOCKFEED

- Dried distillers grain and syrup (DDG-S) pellets for the livestock industry

GPA 2025 Grower Survey Comments

GPA's 2025 grower survey attracted candid and constructive feedback, reflecting strong desire for practical policies that address everyday pressures that are faced by farm businesses and rural communities. The following quotes capture core issues raised by grain producers, in survey responses.

Machinery, Fuel and Input Costs

"Anti-competitive moves made by large machinery companies to consolidate dealerships resulting in no competition within brand from adjoining dealerships."

"Cost and supply of Fuel."

"Long term look at electricity supply not just renewables (how much money is really been spent on solar/wind factories???)"

Biosecurity and Grains Levies

"Less regulations and less levies"

"Biosecurity is like Medicare – we all benefit, we should all pay."

"Yes. It's another cost passed onto the farmer. We pay enough levies."

"I was not happy with the levies collected going into govt 'consolidated revenue' as that removes govt accountability... The levy funds should be hypothecated & spent on biosecurity only."

"Yes, as farmers we seem to pay for everybody tax and our own it's unfair it's Australia's problem let everybody pay."

Infrastructure and Supply Chain Pressures

"More investment in roads and infrastructure to help with transport of grain. More investment in rail also."

"Rail has been abandoned, and regional roads are deteriorating at an alarming rate."

"I cannot see that cropping in our region would be sustainable at all if this infrastructure was to close all together."

"Railway line, keeping trucks off our roads and lowering freight costs."

"Cost and availability of containers in the port of Adelaide for hay, lentils and specialty grains."

Mental Health and Regulatory Burden

"Mental health cannot be looked at in isolation."

"A lot of the farmer mental health issues are created/worsened by social license issues and red and green tape."

"There needs to be a push to have secondary processing in rural areas to draw people in that will boost potential on-season labour and create a positive community atmosphere."

Land Use, Mining and Succession Planning

"Mining incursion on good farmland."

"The halting of destruction of rural livelihoods and industries for cheap political gains for the cities benefit."

"Succession – passing the farm down through generations under tax reforms. Many succession plans are not undertaken because of tax implications."

"Shire rates unfair calculations."

Climate Risk and Insurance

"More frequent extreme weather increases production risks significantly and will ultimately threaten the viability of grain production."

"This includes mitigating the ongoing decline in rural road networks due to increased frequency in flood/wet weather damage to unsealed roads."

Sustainability Credentials and Data Protection

"If we are going to need this data to access certain markets, then strong policy and support is required... and also to protect data security."

"No overseas country should be allowed to have a farmer's carbon footprint laid out in front of them. We need to keep that information here to use as a marketing tool later."

"ISCC form should be scrapped, no overseas country should be allowed to have a farmers carbon footprint laid out in front of them, we need to keep that information here to use as a marketing tool for later down the track."



Our Members





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