

The Australian Grains
Industry Conference

Asia 2019



CONFERENCE
PROGRAM

5 March 2019 - Jakarta, Indonesia

7 March 2019 - Shenzhen, China

www.ausgrainsconf.com/asia



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WELCOME

to the Australian Grains Industry Conference Asia 2019

The Australian Grains Industry Conference Asia 2019



AGIC Asia 2019 - China, Shenzhen

Venue: Kempinski Hotel, Shenzhen
Shenzhen Hai De San Dao Hou Hai Bin Rd,
Shenzhen, Guangdong, China, 518000

AGIC: Thursday 7th March 8.30am - 6.00pm

Hosted by:



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Australian Export Grains Innovation Centre



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AGIC Host Organisations



Grain Trade Australia (GTA)

Grain Trade Australia is a national trade organisation and has over 270 member organisations ranging from regional family businesses to large national and international trading/storage and handling companies. The role of GTA is to provide a framework across Industry to facilitate and promote the trade of Australian grain. GTA plays its part in the value chain by providing core products of Trading Standards, Contracts, Trade Rules, Arbitration and Dispute Resolution, Professional Development and advocacy for Market Access.

GTA's grain trading standards and contracts are used across the Australian grain industry. GTA Members operate within all sectors of the grain industry in Australia, as well as related commercial activities such as banking, communications, grain advisory services and professional services.



Australian Oilseeds Federation (AOF)

The Australian Oilseeds Federation is the peak industry body for the Australian oilseeds value chain that covers consumers of food, feed and industrial products. AOF members are responsible for production, marketing, shipping, processing and export of oilseeds and oilseeds products.

The AOF promotes the development of the industry and supports its growth through providing services to members, facilitating linkages between participants and encouraging the industry to work together for the betterment of all. The AOF also works closely with relevant government departments to grow and develop the export opportunity for seed, oils and meal.



Pulse Australia

Pulse Australia is the peak industry body that represents all sectors of the pulse industry in Australia, from growers and agronomists, through to researchers, merchants, traders and exporters. Pulse Australia is a not for profit, non-political organisation dedicated to the growth of the pulse industry in Australia, with exports playing a core role in that growth.

Pulse Australia acts as the focal point for liaison between the industry and government departments, both domestically and internationally, in areas such as pulse receipt and export standards, market access, tariffs, quarantine and other trade issues.

Pulse Australia's role in the development of a profitable and sustainable pulse industry will become more critical with the anticipated rapid growth in global demand for quality protein for human consumption.

The logo for HFW (Hogan Lovells WorldWide) is displayed in a white, stylized font in the top left corner of the image.

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China Conference Program

Thursday 7 March 2019

Kempinski Hotel, Shenzhen, Guangdong, China

9.00am - 9.30am	Registration
9.30am - 10.00am	MC: Stephen Thompson & Peter Murphy, Partner, HFW Opening/welcome presentations Andrew Goyder, Chair, Grain Trade Australia Jason Robertson, Australian Consul General Guangzhou
10.00am - 10.30am	Market outlook Jack Zhuang, CEO, AGLOOK <i>Global Special Crops Trade Mode Discussion & Solution</i> Zhenhai Yang, Secretary General, China Feed Industry Association <i>China feed market - trends and outlook</i>
10.30am - 11.00am	Networking morning tea break
11.00am - 12.00pm	Australian crop quality Wilson Kong, Regional Manager, CBH <i>2018/19 Australian crop quality: Western region</i> Lyndon Asser, Senior Commercial Manager, Glencore Agriculture Jonathon Evans, Barley Trader <i>2018/19 Australian crop quality: Southern region</i>
12.00pm - 1.30pm	Australian crop production capacity and outlook Hannah Janson, Head of Profarmer and Australian Crop Forecasters <i>Australian S&D and Australia's grain industry capacity and supply potential</i> David Cui, General Manager China, Graincorp <i>Changes in Australian Barley varieties</i> Andrew Goyder, Co-founder & Principal, Grain Link WA <i>Australian oats - where to now?</i>
1.30pm - 2.30pm	Networking lunch break
2.30pm - 4.00pm	Australian grain – improving nutrition for feed and food Brenton Hosking, Consultant, AEGIC <i>Australian sorghum for pigs: value and opportunity</i> Mark Tucek, Barley & Oat Quality Program Manager, AEGIC <i>Novel oats products</i> Sara Grafenauer, General Manager, Grains & Legumes Nutrition Council <i>Nutritional benefits of wholegrain consumption on population health</i>
4.00pm - 4.45pm	Working together to build cooperation and facilitate trade Rosemary Richards, Trade & Market Access Manager, Grain Trade Australia <i>Working together to address NTMs</i> <i>DAWR NTM video</i> Pat O'Shannassy, CEO, Grain Trade Australia <i>Australian grain value proposition for customers</i>
4.45pm	Summary remarks - Pat O'Shannassy, CEO, Grain Trade Australia
4.45pm-6.30pm	Networking function

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co-operative owned by
WA GROWERS



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GRAIN EXPORTER**

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all major commodities

we offer

**MULTI-ORIGIN
GRAIN SUPPLY & TECHNICAL
QUALITY SUPPORT**

and we ship to over **30 & 200**
COUNTRIES CUSTOMERS

The CBH Group is an integrated grain storage, handling and marketing co-operative owned and controlled by more than 4,000 Western Australian grain growing businesses. With over 90 years' experience in grain handling and marketing for wheat, barley, canola, oats and lupins – we provide first-class, multi-origin grain supply to our customers. On average we trade 9 million tonnes annually through our offices located in Australia, Hong Kong, Japan and Russia

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The Australian Grains
Industry Conference

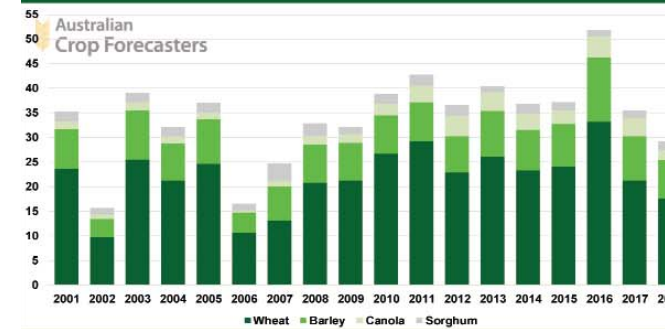
Asia 2019



Australian grains in profile

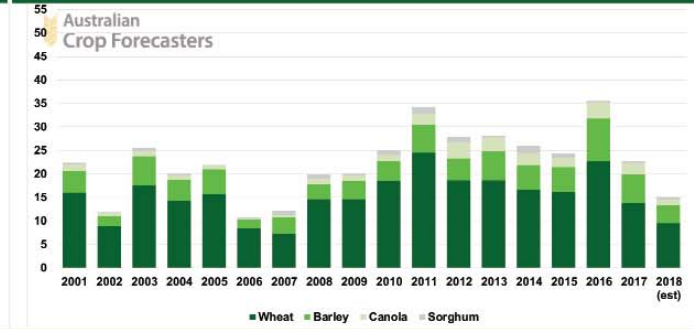
澳大利亚谷物概况

Australian major grain production (mmt)
澳大利亚主要谷物产量 (百万吨)



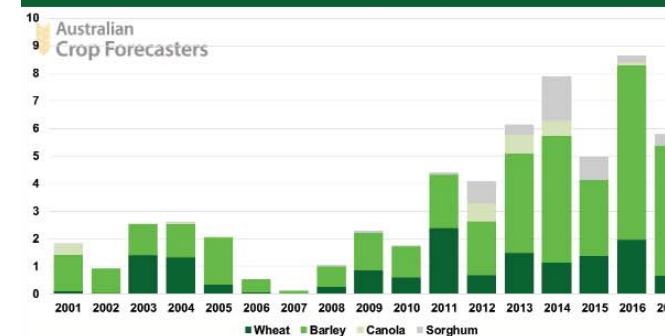
Dry conditions on the East coast saw below average Australian grain and oilseed production this season.
东海岸的干旱条件使得本季节澳大利亚谷物和油籽产量低于平均水平

Australian exports (mmt)
澳大利亚出口量 (百万吨)



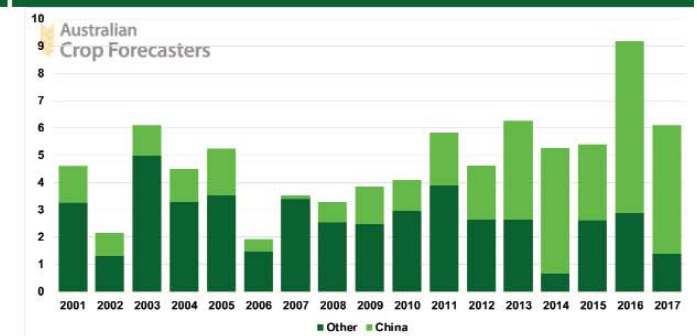
Due to below average production, Australian grain and oilseed exports will also be down this season.
由于低于平均水平, 本季节澳大利亚谷物和油籽出口量也将下降

Australian exports to China (mmt)
澳大利亚对中国出口量 (百万吨)



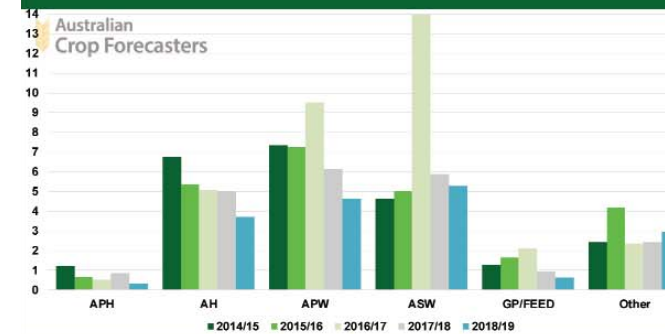
In recent years China has become a much larger importer of Australian grain and oilseeds.
近年来, 中国已成为澳大利亚粮食和油籽的更大进口国

Australian barley exports (mmt)
澳大利亚大麦出口



In fact, for the last five years China has been the largest importer of Australian barley.
在过去五年中, 中国一直是澳大利亚大麦的最大进口国

Australian wheat production by grade (mmt)
澳大利亚各品级小麦产量 (百万吨)



Another impact of dry conditions has been that a higher portion of the wheat crop has had a higher protein content.
干燥条件的另一个影响是小麦作物的较高部分具有较高的蛋白质含量

Australian FOB replacement values (USD/mt)
澳大利亚FOB替代价值 (美元/吨)



A shortage of feed grain on the east coast has pushed Australian wheat values to record/near record highs.
东海岸饲料粮短缺使澳大利亚小麦价格创下历史新高/接近纪录高位

charts prepared by Australian Crop Forecasters and Profarmer Australia



Increasing value for users of Australian grain across the world

AEGIC is a not-for-profit organisation that can help you optimise the value of Australian grain.

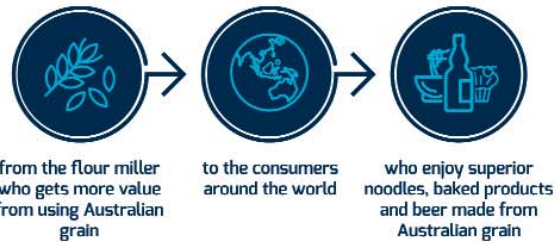
Our experts work with you to identify the grain quality attributes you need to make the best possible products for your consumers. This information helps the Australian grains industry breed, grow, classify and supply grain that meets your needs.

Contact AEGIC today to find out how we can increase value for you.

AEGIC helps by

- > **EMPOWERING** you with technical training, information and in-market support to enable you to optimise the value of Australian grain.
- > **IDENTIFYING** your future grain quality requirements so Australian grain continues to meet your needs.
- > **INNOVATING** to develop new products and technologies to support your use of Australian grain.

The benefits of AEGIC's work flow to everyone...



AEGIC is an initiative of the Western Australian State Government and Australia's Grains Research & Development Corporation

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With offices in Asia Pacific, the Middle East, Europe and the Americas, our international trade and commodities team provide a comprehensive local and international service, reflecting our long involvement in this field. HFW have a strong track record and in-depth understanding of the grains industry. Many of our lawyers have worked in this industry, both prior to and during their legal careers. This gives us the unrivalled experience and expertise our clients find value in. Our clients include local and international producers, trading companies, banks, investment funds, exchanges, governments and their agencies, brokers, insurers, trade associations and ship owners and operators.

www.hfw.com



Australian Export Grains Innovation Centre (AEGIC)

AEGIC is a not-for-profit organisation which seeks to increase value for users of Australian grain across the world. Our experts work with users to identify the grain quality attributes they need to make the best possible products for their consumers and optimise the value of Australian grain. This information helps the Australian grains industry breed, grow, classify and supply grain that meets the needs of users. The benefits of AEGIC's work flow to everyone – from the flour miller who gets more value from using Australian grain to consumers around the world who enjoy superior noodles, baked products and beer made from Australian grain.

Contact: Danielle Whitfield +61 (0)8 6168 9900, danielle.whitfield@aegic.org.au

www.aegic.org.au



CBH Group

The CBH Group is an integrated grain supply chain co-operative owned and controlled by approximately 4,200 Western Australian grain growing businesses. We are Australia's largest co-operative and a leader in the Australian grain industry, with operations extending along the grain supply chain from storage, handling and transport to marketing, shipping and processing. Our core purpose is to sustainably create and return value to current and future Western Australian grain growers.

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Glencore Agriculture

Glencore Agriculture is one of the largest buyers and exporters of Australian wheat, barley, canola, pulses, sorghum and cotton. We buy directly from growers with accumulation across WA, SA, Vic, NSW and Qld. Using our world-class marketing, storage and logistics network, with ISO 22000 accredited bulk storage systems and container packing facilities across Australia, we supply customers in Australia and overseas, including food and beverage manufacturers, animal feed manufacturers, consumer product processors, local importers and distributors and government purchasing entities. We are the largest importer of protein meals into Australia and supply product to a range of feed manufacturers and customers.

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50 years inspection and laboratory services for export and import of grains, pulses, oilseeds, meals and edible oils. Australian Superintendence Company (ASC) provides independent inspection and laboratory testing services. ASC's network of experienced local, quality inspectors provides Australia wide coverage and our laboratory is committed to ensuring accurate and timely analytical services.

ASC staff actively establish, implement and maintain our quality management systems that are involved in all facets of our inspection and laboratory services. ASC's commitment to quality provides clients, consumers, regulators and accreditation bodies, with the assurance that services and results are timely, reliable and accurate. Worldwide confidence.

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Australian Crop Forecasters & Profarmer Australia

Australian Crop Forecasters and Profarmer Australia empower agribusiness to make informed decisions with independent and timely information on the Australian grains industry.

For over 30 years Australian Crop Forecasters have been the leading provider of crop supply and demand information services. Profarmer provides market leading and timely price data and independent analysis. The businesses serve clients across the grains supply chain, from inside the farm gate through to traders and consumers in domestic and offshore markets.

For more information on available services or to request sample reports please visit www.cropforecasters.com.au or us at information@australiancropforecasters.com.au

AGIC China Speakers



Jason Robertson
Consul-General Guangzhou

Mr Robertson is a senior career officer with the Department of Foreign Affairs and Trade and was most recently Assistant Secretary, East Asia Branch. He has served overseas in Australian diplomatic missions in Beijing, Islamabad and Belgrade. He has also served with the United Nations Department of Peacekeeping Operations in Sarajevo, Pristina and New York. Mr Robertson holds a Bachelor of Arts (Hons) from the University of Queensland.



Lyndon Asser
Senior Commercial Manager, Glencore Agriculture

Lyndon has 29 years experience in grain trading, specialising in barley. He is currently the Senior Commercial Manager for Glencore Agriculture based in Melbourne with a focus on marketing barley and other products into Asia. As a member of the global trading team, Lyndon previously spent three years jointly heading up Glencore's global barley trading division in Rotterdam. Lyndon is president of the Australian Grain Exporters Council (AGEC), board member of Grain Trade Australia (GTA) and Grain Industry Market Access Forum (GMAF), and a member of the Australian Grain Industry Discussion Group (AGIDG). Lyndon joined the Australian Barley Board (ABB) in 1989 as a Treasury Analyst based in Adelaide, and has been with the company as it privatised and listed on the ASX, was taken over by Viterra in 2009 and then Glencore in 2012. In 1994, he moved from Treasury to set up ABB's "Other Commodities" trading desk, helping the company expand into canola and pulses. He moved to the Melbourne office in 1999 to trade domestic feed grains, and moved back to Adelaide in 2006 to head up ABB's barley trading division. With the increasing internationalisation of barley trading and the Viterra takeover, Lyndon moved to Viterra's global barley office in Geneva, Switzerland, in late 2011. With the Glencore purchase of Viterra in 2012, he moved to Rotterdam, The Netherlands, as joint head of Glencore's global barley trading operations. After three years in Rotterdam, Lyndon returned to Australia in 2015 to take up his current role.



David Cui
General Manager China, Graincorp

David has extensive experience in the grain industry in China. Over the past 25 years David has worked for COFCO and ADM and his responsibilities have included the barley, wheat and meal imports & exports. David has managed Chinese domestic trade of corn and wheat that has made him very familiar with the customer needs and benefits of import grain and feed ingredients. In recent years David has focused on barley for feed malting purposes.



Andrew Goyder
Chair, Grain Trade Australia & Co-founder and Principal, Grain Link WA

Andrew Goyder is a co-founder and principle of the Grain Link WA Pty Ltd business located in Western Australia. Grain Link WA is 20 years old this year. Andrew has also been involved in the Agricultural sector in WA for the past 40 years. He managed the family large mixed farming operations in Broomehill in the late 1970's until 1994 when taking a position with The Grain Pool of WA. Andrew then was SGB (Seed Grain and Biotechnology) Seed Production Manager before taking on State Manager roll in 1998. September 1999 he and two partners established Grain Link which is still operating successfully. Grain Link WA deals with all grain types however does specialise in Oats, Pulses, Wheat and Barley. Andrew is currently the Non-Executive Chairman of Grain Trade Australia (GTA) and had been an active GTA board member for four years prior to that. He has also had many roles within the Grains industry in WA and Australia. He is also an Arbitrator for GTA. Andrew is a member of Australian Institute of Company Directors as well as numerous other organisations. Andrew has attended and presented at a previous AGIC ASIA conference in Beijing where he gave an overview of the oats market and spoke of its health benefits and availability into the Chinese market.



Sara Grafenauer
General Manager, Grains & Legumes Nutrition Council

Dr Sara Grafenauer is the General Manager of the Grains & Legumes Nutrition Council. She is an Advanced Accredited Practising with experience over 20+ years in health, food industry (consulting and brand management) and tertiary education. Her PhD research focused on dietary patterns and dietary change in weight loss. She is a Fellow of the University of Wollongong providing lectures and research supervision. She has additional qualifications in Communications and Public Relations and significant work history leading marketing and communications.



Brenton Hosking
Consultant, AEGIC

Dr. Brenton Hosking graduated from the University of Adelaide and began his career in the university sector as a lecturer and researcher. He worked across species in the UK and SE Asia, as well as Australia. He then entered the commercial sector holding various sales and technical roles in the stock feed industry before taking a position with a biotechnology company in the PRC servicing the pig and poultry industries. Brenton has experience with SE Asian livestock industries and currently consults to interests in the Tasmanian dairy and grain industries.



Hannah Janson
Head of Profarmer and Australian Crop Forecasters

Hannah leads the commercial operation of leading independent grains information businesses Profarmer Australia and Australian Crop Forecasters.

Across the two brands, Hannah heads up a team of specialised agricultural commodity analysts to collect, collate and present data relating to pricing, supply and demand for Australian grains. The business services clients across the breadth of the supply chain, from inside the farm gate to offshore consumers.

Prior to joining Profarmer in 2012, Hannah worked in several agribusiness banking roles with Westpac.



CHINA AGRICULTURE OUTLOOK WEBSITE



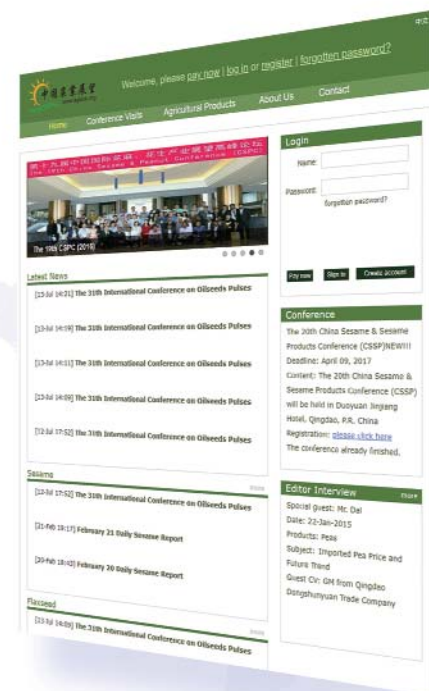
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AGIC China Speakers cont



Wilson Kong

Regional Marketing Manager-North Asia, CBH Grain Asia Ltd.

As Regional Marketing Manager Wilson is ultimately responsible for all CBH Grain marketing activities in China and Taiwan market. Wilson has worked with CBH for 7 years. He was working in Hong Kong office and managing the key account for Wheat, Barley, Oats and Canola customers in China and Taiwan. He is promoting Australian malting and feed barley into the China market. Before Wilson joined CBH, he has worked in Cargill for the animal protein department. He was promoting Australian Beef in China and HK market.



Peter Murphy

Partner, Holman Fenwick Willan

Peter specialises in international trade, commodities and shipping litigation and arbitration, acting for and advising a number of large trading companies based in Asia and Europe, banks, charterers, operators, owners, P&I Clubs and other insurers.

His trade and commodities experience includes coal (thermal and metallurgical), metals (iron ore, steel and aluminium), oil/petroleum, cotton and soft commodities (grain, rice, sugar, soybeans and coffee). In shipping, his experience includes a wide range of charterparty disputes (time and voyage charter), bill of lading and S&P disputes.

He is qualified to practice in both English and Hong Kong Courts and has considerable experience of arbitrations in Hong Kong, London and Singapore. His arbitration experience includes LMAA, ICC, HKIAC, FOSFA, GAFTA, LCIA and CIETAC arbitrations.
Should have picture on file



Pat O'Shannassy

CEO, Grain Trade Australia

Pat is the current Chief Executive Officer of Grain Trade Australia. He has previously been a Director of Grain Trade Australia and a past Director of the Australian Grain Exporters Association (AGEA) and Member of the Commodity Markets Council (USA).

Pat has vast industry experience, having spent more than 20 years in the grains industry in Australia and USA. He has a diverse experience across the entire value chain, with roles in management, grain origination, trading, trade policy and business strategy, gained from working for trade houses, financial institutions as well as customer service and information focused businesses.



Rosemary Richards

Trade & Market Access Manager, Grain Trade Australia

Rosemary is the principal of Bowman Richards & Associates (BR+A), a consulting firm specialising in providing strategic support to agribusiness firms. Rosemary is a passionate senior executive, communicator and industry advocate. Her experience in project management and strategic development extends across all facets of agri and food businesses. Since commencing her own consultancy and advisory business, Rosemary has assisted a range of public and private companies; industry organisations and government departments develop market and business growth strategies. Rosemary has also been an executive manager for a range of grains industry organisations including the Australian Oilseeds Federation, Australian Bulk Handlers Association and the Australian Grain Exporters Association.

Rosemary has extensive experience in the biotechnology sector including regulatory frameworks, protocol development for handling and marketing biotech crops, market analysis and advocacy.

Rosemary works as a consultant to Grain Trade Australia as the Trade & Market Access Project Manager and Manager for the Australian Grains Industry Conference events in Australia and Asia.



Stephen Thompson

Partner, Holman Fenwick Willan

Stephen Thompson is a partner of Holman Fenwick Willan and based in Sydney. Stephen specialises in non-contentious and contentious international trade matters with a focus on issues concerning the export of bulk and containerised commodities, international carriage of goods, marine insurance, ship sale & purchase and competition aspects relating to access to port and inland transport infrastructure. His clients include major international and domestic suppliers of soft and hard commodities, merchant banks, owners and operators of bulk carriers and users/suppliers of transport infrastructure. Stephen has also been mentioned in Chambers (Asia Pacific).



Mark Tucek

Barley & Oat Quality Program Manager, AEGIC

Mark has 20 years' experience in the Western Australian grain industry, including 12 years with Grain Pool of WA and CBH Group managing technical service delivery in support of overseas grain marketing activities. This experience provided broad insight into grain accumulation and storage, grain quality, customer requirements, and grain marketing. Mark also has executive management experience in plant breeding and seed commercialisation, allocation and management of primary industry research investments, and research into innovative grain processes and products.



Jack Zhuang

CEO of China Agriculture Outlook (China AGLOOK) & Dubai Commodity Exchange(DECX).

Master of Genes & Development in Shanxi Agricultural University and profession in Agriculture industry for 12 years. AGLOOK is a professional information consultative platform, providing consultation to our clients on the basis of effective integrating global agricultural market information and analyzing of large database. We have more than 1000 members from all over the world. On both www.aglook.org (English website)/www.aglook.net (Chinese website). AGLOOK involves almost the entire agricultural field such as pulses, grain, oils & oilseeds, feed, food, farm machinery, agriculture and animal husbandry, agriculture and sideline and so on. 100, 000 data related to over 80 varieties were provided annually. More than 20 varieties displayed on website, involved in laws and regulations, production, market reports, market forecast analysis, quotation, shipment, stock, business circulation, statistics, futures, supply and demand, conference news, buyer and seller lists, financial and economic news & more. We also have conference for importers and exporters meet together every year. Had organized 19 sesame conference successfully till now.

DECX is trade exchange platform, which are the newest and trendy agriculture trade mode service created by us, including finance for importers and exporters; stock and future cargoes exchange platform; Pricing center; Solve the default and quality problems; Building the uniform standards; Analysis the change of global trade by big data. It will change and innovate the traditional trade mode in the future. AGLOOK & DECX aims at building an leading agriculture information and trade platform. Using of clear professional resources, providing accurately, latest market information, E-business service and strong financing background for agricultural enterprises. Applying innovative trade model to all our members.

THANK YOU

for attending the Australian Grains Industry Conference Asia 2019.

We hope to see you in 2020.

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