



PILLAR 3:

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# BIOSECURITY & MARKET ACCESS

“To ensure we remain competitive on the world stage, we need to ensure we have continued access to our key markets.”

PILLAR CHAMPION STEPHEN BALL

# 2030 VISION

The South Australian grain industry will protect market access by being internationally recognised for assurance, traceability and diagnostic processes associated with the supply of high-quality grain.



Effective planning and response to incursions



Biosecurity systems and standards will provide enhanced market access for SA grains

This pillar recognises the importance of developing world's best practice for the supply of quality managed grain, which is critical to the ongoing viability of SA's grain sector.

Globally, the grain production environment is becoming increasingly competitive. Australia competes against countries that often have a much lower cost of production and shipping costs sometimes negate historical advantages relating to our close proximity to markets.

Australia, and South Australia in particular, has an excellent reputation for providing clean, green agricultural products and working closely with trading partners to ensure their needs are met. By continuing to uphold high grain hygiene standards, South Australian grain growers will continue to differentiate from global competitors and maintain access to a large range of markets across the world.

The exciting opportunities identified in the previous pillars will be meaningless if SA cannot maintain market access due to grain hygiene issues. All domestic and export markets for Australian grain have a low to nil tolerance level for chemical residues and contaminants.

As different logistic pathways and new storage infrastructure develops in SA, it will be important to ensure grain hygiene standards are maintained. All industry participants have a responsibility to ensure grain meets market requirements and is within physical, chemical and biological tolerance limits.

In addition, end users of South Australian grain will continue to demand even greater assurance of the integrity of their food and its provenance. The industry must ensure its current programs and resources are prepared to meet these future requirements or create the programs, structures and resources that will.

It is critical to the future of our industry that we also proactively manage and maintain Australia's plant health status. A biosecurity incursion, caused by insects, plant pathogens, weeds and other crop-damaging organisms, can have a major impact on grain production if not managed efficiently and effectively.

Biosecurity is a shared responsibility between government and industry and all participants in the grain supply chain have a role to play.

Ultimately, by ensuring the industry is responsive to the requirements of destination countries with a focus on quality assurance, traceability and food safety, ongoing market access can be assured for SA grain into the future.

## ALIGNED PLANS

The National Farmers' Federation (NFF), *2030 Roadmap*

Primary Industries and Regions SA (PIRSA), SA Government and Industry, Growth State - *Food, Wine and Agribusiness Draft Discussion Paper 2019*

Grains Research and Development Corporation (GRDC), *Research, Development and Extension Plan 2018-23*

South Australian Research and Development Institute (SARDI), *Strategic Plan 2018 - 2023*

Grains Industry Market Access Forum (GIMAF) *Strategic Direction (2011)*

Australian Export Grains Innovation Centre (AEGIC), *Australia's grain supply chain: Costs, risks and opportunities (2018)*

AEGIC, *Structural change in SA's grain industry (2019)*

Plant Health Australia, *2016-21 Strategic Plan*

# PILLAR 3. BIOSECURITY & MARKET ACCESS



PRIORITIES	TARGETS	PROJECT AREAS
<p>Develop feedback loops for non-commercially sensitive information to allow for better planning and response to potential pests, weeds and other market access issues which may disrupt trade.</p>	<p><b>1.1</b> Develop education campaigns that promote grain as food, not a commodity.</p> <p><b>1.2</b> Develop reporting systems to allow for the ability to trace issues back to the point of origin.</p> <p><b>1.3</b> Develop an industry group to be able to appropriately action and communicate plans and practices through the whole value chain.</p> <p><b>1.4</b> Strengthen partnerships along the grain value chain on pre and post-competitive market access issues.</p>	<ul style="list-style-type: none"> <li>• Establish an industry group to define what information is required and protocols to manage potential negative implications that may result from increased traceability.</li> <li>• Develop a communication plan for industry to clearly explain the difference between receival specifications, contract specifications, export specifications and importing countries' specifications.</li> <li>• Revamp the SA Grain Market Access Group to coordinate an industry and government response.</li> </ul>
<p>SA will proactively prepare, assess and respond to emerging market access issues relating to crop protection products.</p>	<p><b>2.1</b> Develop strong industry stewardship and communication capabilities regarding the use and management of crop protection products.</p> <p><b>2.2</b> Ensure coverage of the National Residue Survey (NRS) to all grain storage and handling facilities to capture new entrants.</p>	<ul style="list-style-type: none"> <li>• Support stewardship programs, research and trials which aim to reduce industry reliance on agri-chemicals.</li> <li>• Develop a communication plan for industry to minimise market access threats arising from pesticide misinformation.</li> <li>• Investigate the feasibility of a South Australian chemical application code of practice, similar to the South Australian Grain Harvesting Code of Practice, to support industry self-regulation.</li> </ul>
<p>Develop the capacity of plant health surveillance and diagnostics in SA (SARDI/Waite).</p>	<p><b>3.1</b> Boost SARDI/Waite capacity to respond to challenges regarding grain-related pests and diseases.</p> <p><b>3.2</b> Provide national capacity on grain-related pests and diseases.</p>	<ul style="list-style-type: none"> <li>• Develop high throughput accurate diagnostic and surveillance tools using the latest technology, to support the 'known not to occur' criteria required for market access.</li> <li>• Support the ongoing adoption of new and advanced diagnostic and surveillance tools throughout SA grain supply chain.</li> </ul>

PRIORITIES	TARGETS	PROJECT AREAS
<p>Improve the preparedness of SA's grain industry for plant pest or disease incursion(s).</p>	<p><b>4.1</b> Increase grain on-farm biosecurity capacity and awareness of industry programs led by Plant Health Australia (PHA).</p> <p><b>4.2</b> Develop an industry group including government to deal with ongoing or potential biosecurity issues with capacity and capability to deliver on objectives.</p> <p><b>4.3</b> Establish regular grain-focused incursion simulations with feedback on implications and actions, including on business continuity.</p>	<ul style="list-style-type: none"> <li>Review the PHA-funded Grains Farm Biosecurity Program to ensure relevance to the whole value chain in managing grain biosecurity and market access risks in SA.</li> <li>Assess other regions that currently have the climate SA is expected to have in 2030 to identify potential pests, diseases and plant health issues.</li> </ul>
<p>SA grain to have access to the world's best markets through maintaining high standards of grain hygiene, food safety and product quality.</p>	<p><b>5.1</b> Ensure growers are engaged with the market specifications and best practice compliance measures required to ensure access to the best markets.</p> <p><b>5.2</b> Develop industry management plans to establish whole of value chain protocols for managing biosecurity pests.</p> <p><b>5.3</b> Create and establish the minimum standards required while allowing commercial entities to establish their own value proposals.</p> <p><b>5.4</b> Develop the ability for the consumer to link food back through each step of the value chain.</p>	<ul style="list-style-type: none"> <li>Increase grower engagement and knowledge regarding market requirements, standards, quality assurance and compliance practices.</li> <li>Review current industry management plans in place to support market access of SA grain to key export destinations.</li> <li>Contribute to a nationally consistent framework for identifying product and production location.</li> <li>All grain deliveries – regardless of destination – to have a commodity vendor declaration attached, linking to production software and accessible as evidence of grain management.</li> <li>Assess and study what our competitors do to meet importing nations' and customer requirements, including areas of differentiation.</li> </ul>