

17 April 2014

## Agricultural Competitiveness White Paper

### 1. About Grain Trade Australia

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

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

GTA members are drawn from all sectors of the grain value-chain; from production to domestic end-users and exporters. GTA members are involved in grain trading activities, grain storage, grain for the human consumption and stock-feed milling industries.

GTA also attracts membership from organisations aligned to the grain value-chain in related commercial activities such as financial (banking, stock exchanges etc.); communications; grain advisory services and professional services (e.g. solicitors and accountants). The GTA membership list is **attached**.

Within this context, GTA provides comment for consideration on various issues that impact substantially on the ability of Australia to compete in the global grain market.

### 2. Submission

This submission will raise issues under the following broad categories aligned to the *Issues for Consideration* as detailed in the Issues Paper.

1. Developing technologies
2. Infrastructure development
3. Education/capacity building in the vocational/tertiary education sector
4. Employment - regulatory constraints
5. Trade and market access

## **Issue 1: Ensuring food security in Australia and globally**

- *What opportunities exist to expand agricultural production in Australia and how can we take advantage of them?*

Australian research institutions such as CSIRO, The Australian Centre for Plant Functional Genomics and AgriBio each have significant GM wheat collaborations and development programs. The Grains Research and Development Corporation supports many of these programs.

Also major global agricultural biotech companies such as Monsanto, Bayer CropScience and Pioneer have launched significant initiatives and investment in the development of GM wheat programs in countries such as USA, Canada and Australia.

The announcement by CSIRO of a new wheat variety (high-amylose) with human health benefits created by CSIRO-developed RNAi gene-silencing techniques demonstrates that these R & D programs are well established on the product development pipeline. Various industry stakeholders and technology developers have indicated however, that GM wheat may not be commercially available for between 8 – 10 years.

The introduction of GM canola in 2008 was a clear demonstration that:

1. The regulatory processes (OGTR) were appropriate and affective; and
2. The grain industry was able to deliver market choice to both grain producers and end users alike.

However, the uptake in biotechnology is subject to a perceived lack of support by consumers both in Australia and overseas.

Australia possesses the science and scientists; the regulatory approval processes and a grain handling and marketing system to produce, transport, store and market GM grain.

Uptake of this technology, along with other new plant breeding technologies will increase farm-gate values for grain producers, would be substantially enhanced by a clear and unequivocal announcement that the Government fully supports this technology and will actively work with the grain industry supply-chain and customers of Australian grain to ensure a timely and market sensitive adoption of the technology. This may necessitate the Government leadership, in conjunction with industry, in developing an industry-based adoption and marketing strategy.

The industry must continue to place strong emphasis on improving productivity. This is one of the most significant challenges facing the Australian grains industry.

From the mid-seventies to the late nineties, total factor productivity grew in excess of 3.0% per annum, which was well ahead of other agricultural industries in Australia and ahead of most other advanced grain producing countries. These advances were primarily driven by advances in farming practices including the development and adoption of minimum tillage; the use of grass herbicides; crop rotations and improved nutritional programs.

More recently productivity improvement rates have declined driven in part by adverse seasonal conditions but other factors have also contributed to the decline.

The Government through its contributions to GRDC has been focussing efforts on better understanding the reasons for the decline and designing RD&E programs to increase the rate of productivity improvements.

The recent commercialisation of wheat breeding in Australia is showing positive results in the rate of genetic gains for wheat which will be a major contributor to productivity growth into the future.

- *How can farm businesses, food manufacturers and the retail sector be more responsive to domestic and global food demand and better integrate into domestic and global supply chains?*

The sole task of Grain Trade Australia is to facilitate the commercial trade of grain across the Australian and international grain supply chain. GTA does not receive and indeed does not seek funding from sources external to the grain industry. GTA is therefore entirely responsive to the market signals from members as to the types of products and services required by its members in the facilitation of domestic and international trade.

The global grains industry is becoming increasingly competitive. An example of this is the rising importance of the former Soviet Union countries in international grain trade. In this changing global environment it is essential that the Australian grains industry supply chain can supply the market with grain in the quantities and product specifications that it requires.

In the same way, the management and investment in domestic and global grain supply chains is best left to market based investment decisions. The application of determinations on foreign investments based on a “national interest test” need to be applied judiciously based on sound arguments, devoid of emotive commentary.

## **Issue 6. Improving the competitiveness of inputs to the supply chain**

- *What skills including specialised skills and training, will be required in the future and how can these be delivered and uptake encouraged?*
- *How can we promote career pathways for the agriculture sector, including models to enable younger farm workers to gain broader industry experience?*

The Australian grain industry, at farm gate values alone, is worth circa \$8 billion without factoring in the value of inputs, employment and further processing in the sector. Given the substantive value to Australia it is somewhat surprising that there are no grain specialist tertiary or vocational (VET) qualifications that would support/encourage school leavers into or offer a career path to those in the industry.

In response to a market based need, in 2010, GTA developed and implemented a project to develop a grain industry specific professional development program. The GTA PDP now attracts over 500 participants per year from across the grain supply chain, mostly from the post farm-gate sectors.

The last component of this project was to gain accreditation for the courses and for GTA to be able to offer a Diploma in Grain Management which could also be offered to universities and agricultural colleges.

GTA has been working with Agrifood Skills Australia for over two years to develop and gain approval for this qualification.

GTA understands that Industry Skills Councils are funded by the Commonwealth to:

- facilitate the establishment of required training programs and qualifications to meet industry skills and training needs
- assist stakeholders navigate the overly complex vocational education and training system.

The Grains Industry and GTA have been poorly serviced by these arrangements to date.

After several failed attempts to engage with AgriFood Skills Australia in order to enlist their assistance to develop appropriate training arrangements and qualifications to support people working in the critical area of the commercial grain supply-chain, GTA needed to engage a consultant to undertake the required work to progress the development and establishment of a VET accredited course through the Australian Skills Quality Authority.

This action was necessitated by AgriFood’s apparent indifference to the needs and priorities of our industry sector and a reluctance to listen to and/or heed industry advice. The absence of industry endorsed and relevant training arrangements within the grain trading sector provides significant challenges to improve the competitiveness and the productivity of our workforce.

The Coalition Government’s determination to remove unnecessary red tape, ineffective bureaucracy and cumbersome processes, as well as simplify the training system, is to be applauded and fully supported. It appears that some ISCs may be a part of the problem rather than a solution in this critical area.

- *What irrigation, transport, storage and distribution infrastructure are required to support the food and fibre production systems of the future and how should this be funded?*

In average production years, at least 60% of Australia’s grain production is exported and Australia’s contribution to global exports will become increasingly important within the ASEAN and North Asian regions.

For the grain industry to be globally competitive, road and rail freight infrastructure must operate on a least cost basis. Numerous studies demonstrate that, particularly for rail freight, this does not occur, adversely impacting on farm-gate values to producers and our competitiveness in overseas markets.

Of all the issues identified in the Issues Paper, reduced freight costs to port would be the biggest single contributor to increasing the return at the farm gate.

To illustrate, the average bulk grain export vessel holds approximately 40,000 tonnes of grain. To load the average vessel exclusively by:

- rail requires just over 18 train loads (each of around 2,200 tonnes).
- road requires just under 900 truckloads (of an average 45 tonnes) – requiring at least 1800 individual truck journeys to the port.

Based on an average rail freight cost of ~\$0.10/net tonne kilometre (NTK), versus ~\$0.12/NTK for road freight – the difference in freight costs are:

<b>Journey length</b>	<b>Rail advantage over road (per tonne)</b>	<b>Saving per vessel (based on 40,000 tonnes)</b>
400km	\$8	\$320,000
500km	\$10	\$400,000
600km	\$12	\$480,000

A lower cost supply chain is also critical to ensure our competitive advantage, largely based on lower freight costs, into Asian markets is secured against increasing competition from Black Sea and North American exporters.

For instance, rail freight to port (on a NTK basis) in the eastern states is approximately \$0.10/NTK, which is more than 3x more expensive than the cost in Canada (\$0.03/NTK) as detailed below:

<b>Rail cost for a 400km journey</b>	
Eastern states	\$40/tonne
Canada	\$12/tonne

In recent years a number of grain bulk handlers and trading companies have demonstrated their preparedness to invest in above rail capacity. However, leadership from the Federal Government is required and GTA would support a comprehensive assessment of rail infrastructure to enable the faster and more cost effective movement of grain to export markets for the benefit of growers and the broader industry.

Funding for improvements to infrastructure would be on a similar basis to that required for the development of the airport to be constructed at Badgery’s Creek which was announced by the Federal Government on 15 April 2014.

GTA is seeking similar intervention by the Federal Government as clearly there is a role for Government in these sectors given the efficiency that their involvement can bring to the effective operation of the market. This will lead to reduced supply chain costs leading to improved farm gate returns.

**Issue 7. Reducing ineffective regulations**

- *How well do regulations affecting the industry meet their policy objectives?*
- *What opportunities are there to reduce ineffective or inefficient regulation?*

The competitiveness of any industry is a function of the availability and holistic cost of suitably qualified labour. The grain industry is no exception.

The overall cost of labour has a number of components:

- minimum wage structures, including minimum hour/shift structures and penalty entitlements;
- statutory leave entitlements; and
- the administrative burden of hiring and managing employees.

In our submission, Australia is not only a high labour cost country, it is also a high “red tape” economy, meaning the process of hiring and managing employees imposes a relatively heavy cost and administrative burden on employers. This is the case throughout the grain supply chain.

Further, some aspects of the grain supply chain are relatively seasonal, including within farming, transport and storage enterprises, around peak volume harvest periods. The current industrial relations system makes it expensive for firms to cost effectively hire labour for those peak periods without permanently impacting their cost base on a year round basis.

Further still, as mentioned elsewhere in this submission, the competitiveness of the export grain industry is constrained by access to port capacity due to lack of efficient road and rail infrastructures to deliver grain in the required time frames. In this sense, aside from increasing capacity, competitiveness can be increased by greater labour productivity.

To date however, the prospect of systemically linking employee remuneration increases or promotion to productivity has been controversial and largely unsuccessful.

Any initiatives which can sensibly and sustainably reduce the direct and indirect costs of labour, afford greater flexibility in hiring and allow productivity to be incentivised will in our view improve the competitiveness of the Australian grain industry.

### **Issue 8. Enhancing agricultural exports**

- *How can industries and government respond to the key challenges and opportunities to increase or enhance exports?*

Delivery of a quality product to an end user, domestic or export will ensure that Australian grain is recognised as a premium product able to compete on world markets based on its intrinsic properties. Also, Australia enjoys a natural freight advantage into Asian markets.

Therefore, into our largest regional export market the combination of a quality product plus a freight advantage is a formidable combination.

However, it would be foolish to expect this situation to continue unchallenged.

To Australia's historical competitors, i.e. Canada and the USA can now be added grain from Black Sea ports. Australia has a natural freight advantage, over Black Sea grain, into Asian markets however this "advantage" can be eroded should freight rates fall and the quality of product emanating from the Black Sea will only do one thing, improve. And as for Canada and the USA, quality improvement is embedded in their processes.

Therefore, it follows, that quality improvement must drive the behaviour of everyone involved in the Australian grain industry. For instance:

- What processes can the producer implement to ensure they deliver a "quality" product?
- Could a prior load in a trailer compromise delivery of a "quality" product.
- The rigor around the sampling & testing at point of receipt determine the grade of a load and ensure segregations are appropriate to ensure out turn of a "quality" product.
- Trading standards attached to the grain contract detail the customer requirements, detail a quality product.

The above are examples of the actions that are required across the Australian supply chain that ensure the ultimate end user receives product that suits their needs.

Grain Trade Australia recognised the cross supply chain challenges to ensure delivery to customers of a quality product and determined the need to develop the **Australian Grain Industry Code of Practice (Code)**.

The purpose of the Code is to describe practices that the grain industry use to ensure Australian grain and grain products meet domestic or export customer requirements. Customer requirements include those stipulated in contracts and regulatory requirements at the Australian State, Territory and Federal levels and international and overseas country level. There are also a range of industry standards that are covered under the Code.

The Code focuses on those common standards, operating procedures and documented processes. The Code assumes that all participants in the grain supply chain have in place established practices that ensure compliance with this Code.

By following the Code, all sectors related to the grain industry, governments, researchers and consumers will gain confidence that processes exist in Australia to successfully produce, store and supply grain that meets the expectations of the entire grain supply chain.



The grain industry is committed to self-regulation. This Code assists that purpose by providing a process that is transparent and which outlines minimum requirements of all involved in the Australian grain supply chain.

The Code of Practice has been developed to

- provide further guidance to industry and confidence to customers that the grain industry is committed to meeting its obligations of providing grain according to industry-recommended criteria as defined in this Code and according to those mandatory regulatory requirements.
- to cover all participants of the Australian grain industry. It has been developed to be applicable to all grain and grain products and applies to all stages along the supply chain. The Code has been designed to promote the use of best management practice by industry participants.

Industry recognises the value of formal Quality Assurance systems. While these have been implemented by some sectors of the industry, their widespread adoption has not occurred. Implementation of this Code may assist adoption of Quality Assurance systems at all stages of the supply chain.

As this Code is further developed and reviewed over time, GTA will develop:

- Technical Guideline Documents providing detailed information to industry on specific activities. These documents will assist implementation of activities as outlined in this Code; and
- Generic forms outlining data to be collected for various activities, to support those Technical Guideline Documents.

Industry will be encouraged to provide input into topics for inclusion and development of Technical Guideline Documents.

In conclusion, the Australian Grain Industry Code of Practice:

- was developed as a result of a call from GTA members, the broader grains industry and government;
- is a detailed description of the activities across the Australian grain supply chain that ensure the Australian grain industry delivers a quality product.
- enables end users, domestic and export, to buy with confidence understanding the quality systems in behind the Australian industry; and
- will encourage all industry participants to continually improve their processes.

Adherence to the requirements of the Code will be mandatory for GTA members from 1 July 2014.

- *How can the government take best advantage of multilateral and bilateral trade negotiations (including through the World Trade Organization and through free trade agreements (FTAs) to advance the interests of the sector?*
- *How can engagement between industry and government on market access priorities for Australian agricultural products be improved, including to inform negotiations on FTAs?*

The global grain trade, quite correctly, operates within a regulatory framework established by governments and international agreements, mostly set by UN agencies. These protocols were, in the main, established to protect food safety.

Also, many countries purchase their grain supplies via state owned/regulated buying agencies.

Australia has a proud record of compliance with internationally agreed protocols and it is incumbent on the Federal Government to continue to fund these lead agencies.

As organisation with support right across the grain supply chain, it is the intention of GTA to increase our engagement in Trade and Market Access activities during 2014/2015.

Currently, GTA places submissions to the following agencies on a regular basis to ensure that the global regulatory environment is appropriate and commercial sensitive.

<b>Government Department</b>	<b>Agency</b>	<b>Industry involvement/responsibilities</b>
Dept. of Agriculture		
	Codex Australia	Links to Codex Alimentarius Commission (Codex) which is the international food standards setting body recognised by the World Trade Agreements on Sanitary and Phytosanitary (SPS) and Technical Barriers to Trade (TBT) as being the reference point for food standards applied in international trade with the objectives of protecting the health of consumers and ensuring fair practices in the food trade.
	Agricultural Productivity Division	
	Crops, Horticulture and Wine	Advice to and interface with industry on Government policy. In recent years primarily on actives associated with the deregulation process of the export wheat industry. Currently: <ol style="list-style-type: none"> <li>1. Port Access Code of Conduct</li> <li>2. Wheat Industry Advisory Task Force</li> <li>3. Stocks Reporting – implementation of process</li> </ol>
	Trade & Market Access, Bilateral Engagement, & Regional Trade Negotiations	<ol style="list-style-type: none"> <li>1. Biosafety Protocol</li> <li>2. Trade Agreements</li> <li>3. Various issues/projects relating to outcomes of G20 Agriculture Ministers</li> </ol>
	National Residue Survey	Measurement and compliance with maximum Residue levels.
Dept. of Health	Office of the Gene Technology Regulator (OGTR)	Approval process for GM grain to be commercially released.
Dept. of Foreign Affairs and Trade		<ol style="list-style-type: none"> <li>1. Biosafety Protocol</li> <li>2. Trade Agreements</li> </ol>



- *What changes could be made to biosecurity arrangements, both in Australia and in other countries that would enhance global trade in agricultural products?*

The increasing release of commercial GM crops worldwide is causing issues particularly when the new events are not approved in major export markets. This issue is being addressed in the Global Low Level Presence Initiative which aims to encourage countries to adopt policies/processes to ameliorate the trade inhibiting affects that occur.

Australia via the Dept. of Agriculture as noted above, are active participants in this dialogue. GTA supports this involvement.

- *How do we provide the appropriate biosecurity controls at minimum cost?*

The outcomes of the Grain Export Certification Reform Program substantially changed the manner that DA Biosecurity and industry conduct their phytosanitary certification processes.

Systems were streamlined, flexibility in operation substantially increased and costs reduced. The program operates on a full cost recovery basis and currently has over \$16 million in over recovered funds in the Income Equalisation Reserve.

The operation of DA Biosecurity and the operation of the GPPEICC demonstrate world best practice.

GTA supports these arrangements.

### **Conclusion**

Grain Trade Australia welcomes the opportunity to further discuss this submission at a hearing.

Yours faithfully



Geoff Honey  
Chief Executive Officer

## Membership List as at 17 April 2014

Organisation	Contact	Website /Phone
<b>Industry Association</b>		
Agforce Queensland	Mr Wayne Newton	07 4699 5526
Grain Growers Limited	Ms Kamani Krishnan	graingrowers.com.au
Grain Industry Association of WA	Ms Johanna Gastevich	giwa.org.au
Grain Producers Australia Ltd	Mr Andrew Weidemann	grainproducers.com.au
NSW Farmers Association	Mr Justin Crosby	02 8251 1827
Victorian Farmers Federation	Mr Steve Sheridan	03 9207 5555
<b>Merchant Association</b>		
Grain Industry Association of SA	Mr Tim Mee	08 8395 3572
Grain Industry Association Of Victoria	Mr Terry Roche	giav.com.au
Grain NSW Inc	Mr Steve Fieldus	grainnsw.com.au
Queensland Agricultural Merchants Inc.	Mr John Francis	qam.org.au
<b>Ordinary Member (Trading)</b>		
Level A1 (over 7 Million Tonnes)		
Co-operative Bulk Handling Limited	Mr Jason Craig	cbh.com.au
Glencore Grain Pty Ltd	Mr David Mattiske	glencoregrain.com.au 2
Level A2 (5 - 7 Million Tonnes)		
Cargill Australia Limited	Ms Penne Kehl	cargill.com.au 1
Level A3 (3 - 5 Million Tonnes)		
Alfred C Toepfer International (Australia) Pty Ltd	Mr David Drabsch	08 8425 4944
Emerald Group Australia Pty Limited	Mr Brian Dalitz	emeraldgrain.com
Graincorp Operations Ltd	Mr Neil Johns	graincorp.com.au 3
Level A4 (1.5 - 3 Million Tonnes)		
PentAg Nidera Pty Ltd	Mr David Lengren	pentagnidera.com.au 1
Level B1 (1.0 - 1.5 Million Tonnes)		
Bunge Agribusiness Australia Pty Ltd	Mr Chris Aucote	bunge.com/Agribusiness
Gavilon Grain Australia Pty Ltd	Mr Matt Albion	gavilon.com
Louis Dreyfus Australia	Mr Phil Coffin	louisdreyfus.com.au 3
Level B2 (500,000 - 1 Million Tonnes)		
George Weston Foods Limited	Mr Mark O'Brien	gwf.com.au
Inghams Enterprises Pty Limited	Mr Greg McDonald	ingham.com.au
Plum Grove Pty Ltd	Mr Tony Smith	plumgrove.com.au
Queensland Cotton Corporation Ltd	Ms Lucy Watson	qcotton.com.au
Ridley Agriproducts Pty Ltd	Mr Michael Reeves	agriproducts.com.au
Riverina (Australia) Pty Ltd	Mr Jon Mulally	riverina.com.au 6
Level B3 (250,000 - 500,000 Tonnes)		
Agracom Pty Ltd	Mr Joe Hallman	agracom.com.au
Arrow Commodities Pty Ltd	Mr Dominic Vanzella	arrowcom.com.au

## Membership List as at 17 April 2014

Organisation	Contact	Website /Phone
Australian Grain Growers Co-operative Limited	Mr Steve Mellington	aggcoop.com.au
Centre State Exports Pty Ltd	Mr Jeff Voigt	centrestateexports.com.au
Chinatex (Aust) Wool Co Pty Ltd	Mr Jiling Lai	02 9957 2688
COPRICE	Mr Chris Nikolaou	coprice.com.au
JBS Australia Pty Limited	Mr Greg Kenny	jbsswift.com.au
Lempriere Grain Pty Ltd	Mr Jonathon Holdsworth	lemprieregrain.com.au
Mitsui and Co (Australia) Ltd	Mr Kane Fukuoka	mitsui.com
Riordan Grain Services	Mr Bradley Hogan	riordangrains.com.au
Special One Grain	Mr Peter Burke	specialonegrain.com.au
Touton Far East Pte Ltd	Mr Justin Fay	touton.fr
United World Enterprises Pty Ltd	Mr Jimmy Liu	uwetypical.com
Wilmar Gavilon Pty Ltd	Mr Matt Albion	07 3713 8700

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### Ordinary Member (Trading)

#### Level C (under 250,000 Tonnes)

A & B Grains Pty Ltd	Mr Rod Wolski	abgrains.com.au
A T Waterfield & Son Pty Ltd	Mr Brad Waterfield	03 5382 3725
A W Vater and Co	Mr Kim Vater	vater.com.au
Adams Australia Pty Ltd	Mr Ian Mack	adamsaustralia.com.au
Agmark Commodities	Mr Jack Vivers	agmark.com.au
Agri-Oz Exports Pty Ltd	Mr Francois Darcas	03 9830 7021
Agriex Australia Pty Ltd	Mr Kishore Bulchandani	02 9232 0690
Agrifoods Australia	Mr Rob Anderson	agrifoodsaustralia.com.au
AGRIGRAIN	Mr Jeremy Brown	agrigrain.com
Agripark	Mr John Randell	mgas.com.au/grainpacking
Allied Mills	Mr Joshua Lawrence	alliedmills.com.au
AMPS Agribusiness Group	Mr Stuart Maidment	ampsagribusiness.com.au
Associated Grain	Mr Todd Jorgensen	07 4662 1999
Auscott Ltd	Mr Peter Webb	auscott.com.au
Ausrealt International Pty Ltd	Mr Robin Luo	ausrealt.com.au
Australia Milling Group Pty Ltd	Mr Russell Greening	aumg.com.au
Australian Grain Export Pty Ltd	Mr Grant Roesler	08 8832 2800
Australian Grain Storage	Mr Matt Bailey	sunrice.com.au
Australian Growers Direct Pty Ltd	Mr Jamie Smith	graincorp.com.au
Avigrain Produce	Mr Dennis Ward	avigrain.com.au
Baker Grain	Mr Richard Baker	bakergrain.com.au
Barooga Agriproducts	Mr Andrew Leighton-Daly	03 5875 2202
Berriwillock Grain Storage Co-Operative Ltd	Mr Tony Bellinger	moulameingrain.com
Big River Feeds Pty Ltd	Mr Bjorn Ludvigsen	08 8532 4434
Blairs Produce Company	Mr Sean Blair	02 6025 4600
Blue Ribbon Seed and Pulse Exporters	Mr Stephen Donnelly	07 3720 1900
Boort Grain Co-Operative	Mr Tony Bellinger	03 5455 2600
Broun and Co Grain Marketing Services Pty Ltd	Mr Wally Broun	brounandco.com.au
Bungulla Farming Pty Ltd	Mr Brad Jones	08 9637 1164
C K Tremlett Pty Ltd	Mr Andrew Tremlett	08 8524 9050
Cameron Pastoral Company Pty Ltd	Ms Ross Stephens	07 4671 4144
Cascade Brewery Co Pty Ltd	Mr Roger Ibbott	03 6221 8316
Castlegate James Australasia Pty Ltd	Mr Dominic Hogan	castlegatejames.com.au
CHS Trading Company Australia	Mr Jon Bucknall	chsinc.com.au
Cleveland Agriculture	Mr David Titterton	02 6756 5004
Commex International Pty Ltd	Ms Mariam Boulos	02 9531 7341



# GRAIN TRADE AUSTRALIA

Membership List as at 17 April 2014

Organisation	Contact	Website /Phone
Coorow Seeds	Mr Brian Pover	coorowseeds.com.au
Cremer Australia Pty Ltd	Mr Brendan Macauley	cremer.de
D & M Stockfeeds	Mr Robert Danieli	dmstockfeeds.com.au
DA Hall and Co	Mr Bruce Holden	07 4695 5777
Dalby Bio-Refining Limited	Ms Leanne Pickard	dbri.com.au
Darwalla Milling Co Pty Ltd	Mr Gary Heidenreich	07 3822 0527
Deacon Seeds Company	Mr Terry Deacon	07 4662 3217
Deckert Group Pty Ltd	Mr Chris Deckert	www.deckerts.com.au
Defiance Maize Products Pty Ltd	Mr Rodney Walker	corson.co.nz
Demeter Cormack Pty Ltd	Mr David Oates	08 6389 0098
East Coast Stockfeed Pty Ltd	Mr Stuart Dolden	ecsf.com.au
Feed Central Pty Ltd	Mr Tim Ford	feedcentral.com.au
Fellows Nominees	Mr Paul Fellows	fellowsbulk.com.au
FertInvest Pty Ltd	Mr Preyesh Barar	fertinvest.com
Fletcher International Exports Pty Ltd	Mr David Wheaton	fletcher-international.com.au
Free Eyre Grain Pty Ltd	Mr Mark Rodda	free-eyre.com.au
Gavan Kerr Commodity Services Pty Ltd	Mr Gavan Kerr	03 97 695 164
Golden Harvest Grain Exports	Mr Chandru Hiremath	goldenharvest.net.au
Goldman Sachs Financial Markets Pty Ltd	Mr Nick Carracher	gs.com.au
Goodman Fielder Limited	Mr Alex Krzanic	goodmanfielder.com.au
Grain Direct Australia	Mr Sam Christensen	graindirect.com.au
Grain Link (NSW) Pty Ltd	Mr Paul Pearsall	02 6962 9500
Grain Link WA Pty Ltd	Mr Andrew Goyder	grainlink.com.au
Grainforce Pty Ltd	Mr Derek Larnach	02 6331 4880
Grainpro Pty Limited	Ms Angela Greenhalgh	grainpro.com.au
Greentree Farming	Mr David Brown	02 6751 1228
GrainTrend Pty Ltd	Mr Sanjiv Dubey	graintrend.com
Grenfell Commodities Pty Ltd	Mr Trevor Mawhinney	grenfellcomm.com.au
GV Grain & Fodder	Ms Joanne Harry	03 5828 3063
Hanlon Enterprises Grain	Mr Peter Gerhardy	02 6924 1781
Hassad Australia Operations Company Pty Ltd	Mr James Carson	02 8019 7150
Holland's	Mr Michael Holland	hollandbt.com.au
Iloura Resources Pty Ltd	Mr Hans Hol	iloura-resources.com
Independent Grain Handlers Pty Ltd	Mr Brad Bryant	igh.net.au
Irwin Stockfeeds	Mr Bryan Irwin	irwinstockfeeds.com.au
J K International Pty Ltd	Mr Sandeep Mohan	jki.com.au
James Stock Feed and Fertilizer Pty Ltd	Mr Adrian Moule	jamesstockfeed.com.au
Jerilderie Grain Storage & Handling	Mr David Barlow	03 5886 0344
K M & W M Kelly & Sons	Mr Chris Kelly	kellygrains.com.au
Kangaroo Island Pure Grain Pty Ltd		kipuregrain.com
Kennett Rural Services Pty Ltd	Mr Andrew Kennett	kennetrural.com.au
Lachlan Commodities Pty Ltd	Mr Tony Cogswell	02 6851 2077
Laharum Bulk Handling Co	Mr Donald Carter	03 5381 2666
Lake Grain Pty Ltd	Mr Derek Davis	lakegrain.com.au
Langdon Grain Logistics	Mr Adrian Murphy	langdongrainlogistics.com.au
Laragon Almond Processors Pty Ltd	Mr Mark Webber	laragon.com.au
Laucke Flour Mills P/L	Mr Roger Laubsch	laucke.com.au
LDC Enterprises Australia Pty Ltd	Mr Shane Taunton	07 3253 5999
LPC Trading Pty Ltd	Mr Simon Langfield	02 6383 7222
Mahony's Transport Services	Mr Anthony Foster	mahonystransport.com.au
Malteurop Australia Pty Ltd	Mr Jack King	03 5277 1950

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Organisation	Contact	Website /Phone
Mars Petcare Australia	Mr Mark Torrens	mars.com
Marubeni Australia Ltd	Mr Tom Tokunaga	marubeni.com
Matthews Transport and Grain Traders	Mr Neville Matthews	08 9831 1021
Max Grains Pty Ltd	Mr Jack Fahy	maxgrains.com.au
MC Croker Pty Limited	Mr Greg Carroll	crokergrain.com.au
Melaluka Trading Pty Ltd	Mr Simon Pritchard	melalukatrading.com.au
Moore Bulk Storage	Mr Daryl Moore	moorestorage.com.au
Moulamein Grain Co-Operative Ltd	Mr Tony Bellinger	moulameingrain.com
Mountain Industries Pty Ltd	Mr Kevin Bennett	mountainindustries.com.au
MSM Milling Pty Ltd	Mr Peter MacSmith	02 6364 5999
Murrumbidgee Grains Pty Ltd	Mr Peter Hassell	02 6937 9100
Namoi Cotton Co-Operative	Mr Shane McGregor	namoicotton.com.au
Nandaly Grain Co-Operative Ltd	Mr Tony Bellinger	03 5078 1217
Newcastle Agri Terminal Pty Ltd	Mr Jock Carter	02 4962 4006
Nhill Bulk Handling	Mr Michael Purchase	nhillbulk.com.au
Noble Resources Australia Pty Ltd	Mr Ian Dagleish	thisisnoble.com
Northern Riverina Grains Pty Ltd	Mr Tony Bellinger	03 5032 2553
Oakey Holdings Pty Ltd	Mr Gino De Stefani	oakeyholdings.com.au
OOMA Enterprises NSW Pty Limited	Mr Malcolm Berry	oomaenterprises.com.au
Origin Grain Pty Ltd	Mr Luke Mancini	02 9331 2711
PB Seeds Pty Ltd	Mr Peter Blair	pbseeds.com.au
PeaCo	Mr Shane Wall	03 5497 1766
Pearson's Grain Pty Ltd	Mr Darren Pearson	pearsonsgroup.com.au
Pentarch Grain Pty Ltd	Mr David Hanrahan	pentarch.biz
Peters Commodities Pty Ltd	Mr Michael Oxley	petcom.com.au
Phoenix Commodities (Australia) Pty Ltd	Mr Jogesh Virk	07 35 537 111
Preston Grain	Mr Andrew Kell	02 6977 1733
Premium Grain Handlers P/L	Mr John Orr	pgh.com.au
Pulse Association of the South East (PASE) Inc	Ms Leanne Burr	08 9071 3655
Quadra Commodities Pty Ltd	Mr Andrew Jackson	quadra.com
Quirindi Grain & Produce	Mr John Webster	02 6746 1911
R V Broadbent & Sons	Mr Geoff Barker	rvbroadbent.com
Redrock Corporation (NSW) Pty Ltd	Mr Jason Tetley	0418 866 843
Regal Seed & Grain P/L	Mr Damien White	regalseed.com.au
Reid Stockfeeds Pty Ltd	Mr Ian Reid	reidstockfeeds.com.au
Rivalea (Australia) Pty Ltd - Animal Nutrition	Mr Andrew Philpotts	rivalea.com.au
Riverina Oils & BioEnergy Pty Ltd	Mr Joe Fealy	riverinaoils.com
Robinson Grain Trading Co Pty Ltd	Mr Gary Robinson	robinsongrain.com.au
Roty Grain Store	Mr Brian Newman	02 6988 8221
Ruddenklau Grain Pty Ltd	Mr Tim Ruddenklau	08 8842 1314
Rural Logic (Aust) Pty Ltd	Mr Bill Baxter	rurallogic.com.au
SANWA Pty Ltd	Mr Charles Emerson	sanwa.com.au
Seedhouse Tasmania	Mr Matthew Crane	seedhouse.com.au
Shannon Bros Bulk Haulage	Mr Clayton Shannon	03 5390 2264
Silo Bag Grain (NSW QLD) Pty Ltd	Ms Lesley Kilby	02 6847 1788
Societa Cofica Pty Ltd	Mr Dia Ram Sharma	societacofica.com.au
Southern Cotton Trading Pty Ltd	Mr Chris Veness	02 69 552 779
Southern Grain Storage Pty Ltd	Mr Campbell Brumby	03 5267 2351
Southern Stockfeeds (Operations) Pty Ltd	Mr Brendan Maher	03 5437 8295
Starcom Grain Pte Ltd	Mr Ajay Aggarwal	+65 6336 7288
Sumitomo Australia Pty Ltd	Mr Tsuyoshi Osumi	sumitomocorp.com.au

## Membership List as at 17 April 2014

Organisation	Contact	Website /Phone
Summer Hill Grains	Mr Barney Hughes	0428 694 363
Tamma Grains	Mr Kim Packer	tammagrains.com.au
Tasmanian Agricultural Producers Pty Ltd	Mr David Skipper	tasagproducers.com.au
Tasmanian Stockfeed Services P/L	Mr Trevor Macleod	tasstockfeed.com.au
Twynam Pastoral Company	Ms Ella Shannon	02 9325 9000
Unigrain Pty Ltd	Mr Ervin Leong	unigrain.com.au
W B Hunter Pty Ltd	Mr Stewart Coombes	03 5821 5744
Ward McKenzie Pty Ltd	Mr Mal Parkhill	mckenziefoods.com.au
Whitty Produce	Ms Marsha McMonigle	03 5721 6588
Wilken Grain	Mr Richard Wilken	wilkens.com.au
Wimpak Export Company Pty Ltd	Ms Sarah Spicer	wimpak.com.au
XLD Grain Pty Ltd	Mr Lachie Stevens	xldgrain.com.au
		<b>150</b>
<b>Transport Operator</b>		
Gehrke Grains and Transport Pty Ltd	Mr Julian Gehrke	07 5465 6695
Wakefield Grain Export Services	Mr Steve Fallon	wakefields.com.au
		<b>2</b>
<b>Broker</b>		
<b>Large</b>		
		<b>0</b>
<b>Medium</b>		
Allied Grain Pty Ltd	Mr Angus Wettenhall	alliedgrain.com.au
Brightcom Australia Pty Ltd	Mr Simon Robertson	03 9591 6300
Cereal Milling Services Pty Ltd	Mr Michael Moss	02 4323 9339
FC Stone Australia Pty Ltd	Mr Brett Cooper	intlfestone.com
Grainsplus NSW	Mr David Sykes	grainsplusnsw.com
Horizon Grain Brokers Pty Ltd	Mr Ash Munro	horizongb.com.au
ICAP Australia Pty Ltd	Mr Garry Booth	icap.com
Igrain.com.au Pty Ltd	Mr Tom Roberts	igrain.com.au
McDonald Pelz Australia	Mr Peter Geary	mcdonaldpelz.com
Perkins Commodity Brokers	Mr Craig Perkins	03 9645 6846
Teague Australia Pty Ltd	Mr Tim Teague	teague.com.au
Wimmera Mallee Grain Services	Mr Rodney Edgerton	egrainservices.com.au
		<b>12</b>
<b>Broker (contd)</b>		
<b>Sole Operator</b>		
AgLink - CMS	Mr Justen Schofield	aglinkcms.com.au
Cogeser (Australia) Pty Ltd	Mr Robert Luetolf	cogeser.com.au
Farm Tender	Mr Matt Henke	farmtender.com.au
Knight Commodities	Mr Chris Groat	07 4671 5221
Link Brokering Pty Ltd	Mr Dion Costigan	03 5444 3295
Mallon Commodity Brokering	Mr Ian Mallon	mcbrokering.com
Shearwater International Pty Ltd	Mr Don Cattanach	07 3324 9088
Woodside Commodities Pty Ltd	Mr Hamish Steele-Park	woodcomm.com.au
		<b>8</b>
<b>Corporate</b>		
<b>Large</b>		
ASX Limited	Mr Dougal Hunter	asx.com.au/grainfutures
Australia And New Zealand Banking Group	Ms Casey Morecroft	anz.com.au
Commonwealth Bank of Australia	Mr Michael Golden	commbank.com.au
Meat & Livestock Australia Limited		mlla.com.au



## Membership List as at 17 April 2014

Organisation	Contact	Website /Phone
<b>Medium</b>		
Agfarm Pty Ltd	Mr Bob McKay	agfarm.com.au
Agrifood Technology Pty Ltd	Ms Doreen Fernandez	03 9742 0589
Agrisk Management Pty Ltd	Mr Brett Stevenson	02 9499 4199
Clear Grain Exchange		03 9514 9000
Commodity Inspection Services (Australia) Pty Ltd	Mr Mathew Conoulty	commodityinspection.com.au
Foss Pacific Pty Ltd	Mr Simon Kirkman	foss.com.au
Holman Fenwick Willan	Mr Stephen Thompson	hfw.com
Intertek	Mr Lee Shilvock	intertek.com
Macpherson + Kelley Lawyers	Mr Geoff Farnsworth	mk.com.au
SBA Law	Mr Jeremy Rosenthal	sbalaw.com
SGS Australia Pty Ltd	Mr James Saunders	au.sgs.com
<b>4</b>		
<b>Small</b>		
Ag Scientia Pty Ltd	Mr Lloyd George	03 9598 1980
Advance Trading Australasia	Mr Andrew Woodhouse	advance-trading.com.au
Agvise Management Consultants	Mr Shane Sander	08 9041 5992
Australian Superintendence Company	Mr Andrew Parry	07 3391 8640
AvantAgri Australia Pty Ltd	Mr Peter Woods	avantagri.com.au
CloudBreak Grain Marketing Pty Ltd	Mr Ed Scamps	08 8388 8084
Delta Agribusiness Pty Ltd	Mr Michael Parry	02 6772 0000
Direct Commodities Pty Ltd	Mr Hamish Robertson	directcommodities.com.au
Eyre Peninsula Integrated Commodities Pty Ltd	Ms Tracey Lehmann	08 8627 2304
Farmanco Marketing Pty Ltd	Mr Donald McTaggart	farmanco.com.au
FarMarCo Australia Pty Ltd	Mr Robert Imray	07 4637 6400
Finesse Solutions Pty Limited	Mr Malcolm Finlayson	02 9872 9270
Grain Storage Solutions	Mr Kerry Miles	grainstoragesolutions.com.au
HarvestCheck Pty Ltd	Mr Stephen Schumacher	0418 199535
IKON Commodities Pty Ltd	Mr Simon Clancy	ikoncommodities.com.au
Import-Export Services Pty Ltd	Mr Bob Ronai	02 9986 3000
MarketAg Pty Ltd	Mr Mark Martin	02 6747 1590
McMullen Consulting Pty Ltd	Mr Gerard McMullen	03 8300 0108
Mirfak P/L	Mr Mark Murphy	mirfak.com.au
Murray Goulburn Trading Pty Ltd	Mr David Earle	03 5862 2799
O'Halloran Deal Lawyers	Mr Anthony Deal	02 6971 0336
OMIC Melbourne	Mr Koji Nakashima	03 9326 4877
Perten Instruments Australia Pty Ltd	Mr Raul Ovelar	02 9979 6992
Peter McQueen Pty Limited	Mr Peter McQueen	petermcqueen.com
Pinnacle Commodities Pty Ltd	Mr Rod Buckle	pinnaclecommodities.com.au
Planfarm Marketing Pty Ltd	Mr Jerome Critch	planfarm.com.au
Primal Foods Group	Mr Peter Longhurst	02 8011 4182
Rural Directions Pty Ltd	Mr Chris Heinjus	ruraldirections.com
SGA Solutions Pty Ltd	Mr David Hudson	03 5428 4990
Ten Tigers	Mr Chris Tonkin	tentigers.com.au
<b>31</b>		
<b>International Affiliate</b>		
CIS - Commodity Inspection Services	Mr Paul Schweitzer	cis-inspections.com
<b>1</b>		