

Freight and Supply Chain Inquiry

Department of Infrastructure and Regional Development, GPO Box 594,

CANBERRA, ACT 2601.

Via Email: [freightstrategy@infrastructure.gov.au](mailto:freightstrategy@infrastructure.gov.au)

27th July 2017

**RE: Inquiry into National Freight and Supply Chain Priorities**

Dear Sir/Madam,

I am writing on behalf of Grain Trade Australia (GTA) in response to the call for submissions with respect to the Government ’s Inquiry into National Freight and Supply Chain Priorities.

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, human and stock feed milling. A list of GTA Members is attached

Please find attached GTA’s submission to the enquiry. We welcome consideration by the

Inquiry of the issues discussed in the GTA submission.

Please do not hesitate to contact me should you require further information.

Yours faithfully,

Pat O’Shannassy

CEO



Submission

Grain Trade Australia

to

**Inquiry into National Freight and Supply Chain Priorities**

27 July 2017

For more information contact Grain Trade Australia [www.graintrade.org.au](http://www.graintrade.org.au/)

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**1.0 Introduction**

Grain Trade Australia (GTA) welcomes the Australian Government commitment to a National Freight and

Supply Chain Strategy and the commencement of an Inquiry into freight and supply chain priorities.

The Australian agricultural industry, and its grain sector is critical to national and rural prosperity providing food security and much needed export revenue whilst generating income and employment opportunities within both urban and rural communities. To maintain and grow productivity in the sector, GTA is of the firm belief an effective and an efficient supply chain is critical to this outcome. GTA is committed to assist and provide input to the Australian Government and the Inquiry Panel to achieve its stated objectives.

**2.0 Grain Trade Australia’s Role**

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 is non-political, industry driven with a primary focus to ensure the efficient facilitation of commercial activities across the grain supply chain including a strong focus on the logistics of grain through transport storage and ports.

GTA’s has over 260 organisations as members ranging from regional family businesses to large national and international trading/storage and handling companies. The vast majority of grain contracts executed in Australia refer to GTA grain trading standards, standard form grain contracts and GTA trade rules. Most of Australia’s grain storage and freight movements are made by GTA members.

**3.0 Grain Industry Sector**

The Australian grains sector has been a consistent provider of productivity to the Australian economy with the Australian Bureau of Agricultural Research and Economics (ABARES) stating that in 2016–17, the gross value of crop production is set to increase to $28.6 billion. With 60% of production exported th e

industry is a major driver of export revenue and is a substantial employer of people from farm gate through to port.

The grain industry supply chain is geographically diverse and is spread across 18 ports in the 5 major producing states of the nation.

Producing on average 45mmt tonnes from approximately 21,000 farms production units1 the grain industry has an inordinately heavy reliance on the nation’s road and rail networks including rural branch lines and the many non-sealed farm access and rural roads.

The grains industry utilises all 5 road categories under the Heavy Vehicle Road Reform (HVRR)

categorisation model.

1 Grain Growers – State of the Nation 2016

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*Table 1. HVRR Road Categorisation Model*

***Road***

***Category***

***R1***

***R2***

***R3***

***R4***

***R5***

***Description***

R1 roads are freeways, motorways, and tollways that have divided carriageways with two or more lanes in each direction and sealed shoulders on both sides of each carriageway. These roads form major urban and interurban traffic movement routes. R2 roads are urban highways or major roads that are not a freeway but may have divided carriageways and two or more lanes in each direction. These roads always have sealed shoulders.

R3 roads are urban arterials and rural highways that have single carriageway with one lane in each direction. These roads may have sealed or unsealed shoulders.

R4 roads are collector or distributor roads. These are roads with no requirements for

shoulders.

R5 roads are local or access roads which provide property access.



Historically, the Australian grain supply chain operated under a simple aggregation system with farmers delivering their produce approximately 10-30kms at harvest time to local collection points from where the grain would, over time be delivered to domestic and export destinations. This model has now changed with the industry increasingly moving to a disaggregated market with:

 Increased use of farm storage, with the Australian Bureau of Statistics reporting approximately

15mmt of farm storage available to the industry in the 2008-2009 Agricultural Survey and currently is likely to be significantly higher.

 Rationalisation of bulk handler receival sites and service arrangements.

 Privatisation of the above rail operating companies and their rolling stock assets and some of the below rail track networks. Removal of government ownership and in some states Community Service Obligations (CSOs) for rail leading to a transport modal shift from rail to road.

 Increased use of containers for export tonnage due to favourable back freight opportunities combined with international markets preferences in delivery and order size.

 Increased commodity trading activity with multiple aggregators for most sales contracts and a dramatic increase in supply chain participants resulting in competing demand for common use infrastructure.

The increased complexity in the grain supply chain has created challenges and constraints in peak periods. This evolving model and its complexity need to be understood and factored into the governments supply chain planning frameworks.

**4.0 Grain Industry Capability and Competiveness**

Increasingly sophisticated global markets dictate the fortunes of the Australian grain industry. Australia does have some inherent advantages in the global market on account of our reputation for producing a clean quality product and the sea freight advantage accorded by our proximity to key south East Asian markets.

However, current depressed sea freight rates and increasing competition from the Black Sea region has dramatically reduced the inherent competitive advantage afforded to Australian grain.

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GTA in 2014 provided a Submission to the Agricultural Competiveness White Paper. This paper  [(GTA Submission to Ag White Paper](file:///C:/Users/ross.tma/Documents/tim%20documents%202015/GTA%20Transport/%20(GTA%20Submission%20to%20Ag%20White%20Paper) ) provides some detail on the competiveness of the Australian transport, infrastructure and the grains sector.

Supply chain related innovation is essential, and requires leadership, planning and capital investment to ensure an efficient globally competitive grain industry for Australia. Critical to the value proposition for Australian grain in the export market, is the ability for market participants to “front-end” (i.e. heavily concentrate the shipping program in the immediate six months following harvest) their sales and shipping programs prior to new season northern hemisphere grain being available to compete. This peak demand requirement has resulted in the grain supply chain demanding overcapacity with resultant cost implications.

**5.0 Government National Freight and Supply Chain Strategy**

GTA members are extremely interested in supporting and assisting government policy and strategy relating to the national supply chain as this area is the basis of a large proportion of the cost base in the production and delivery of grain to market. Recent research has shown that Australian grain transport costs represent on average over 30% of total production cost2. In some places they are far more. Such high transport costs damage the competitiveness of Australian grains in world markets, regardless of market access settings

The recent review of governance and institutional arrangements in the area of Coastal Shipping was welcomed by GTA, as it is felt this may reduce cost and improve efficiency for the grains industry. Similarly, GTA are committed to provide input and assistance to the Inquiry and its Panel to hopefully assist in facilitating positive outcomes for the Australian supply chain and industry.

***Particular issues and areas GTA would like the Inquiry to be aware of and considered are:***

**5.1 Effective Planning Processes**

**5.1.1 Inclusive and detailed approach**

Government and industry supply chain planning processes and supporting data are critical to the formulation of effective freight and supply chain related strategy. Whilst aware of the level of complexity and data that pertains to this study, GTA considers this type of process requires a strong focus on inclusive community consultation. This is especially the case, given the potential impact any changes in government

policy may have on rural industry and communities.

2 . Stretch, T, Carter, C and Kingwell, for Australian Export Grains Innovation Centre The Cost of Australia’s Bulk

Grain Export Supply Chains (2014)

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Obviously, there are numerous existing and prior federal, state and local council studies and strategies that are available as a resource for the Inquiry team. These should be accessed and utilised in the process. This is especially the case for reports or papers that have sourced input from remote and rural stakeholders.

5.1.2 Priority placed on Supply Chains that support national value

GTA would suggest the Inquiry Panel in their planning process ensure there is a priority placed on productivity growth and the value of local domestic product and export commodities to the overall national economic value. GTA preference is for the planning processes to place a higher priority on export value chains in preference over supply chains that are inherently focussed on importation of consumer products. Similarly, GTA are concerned the necessary strong government focus on the current and forecast urban congestion issues may be to the detriment of freight networks, and in particular rural and agricultural supply chains.

5.1.3 Introduction and utilisation of consistent analysis

When planning, governments across Australia utilise different methodologies for rating the capability of infrastructure and for valuing the cost and benefit of investment in infrastructure.

All cost benefit valuing initiatives should be based on a consistent methodology that is hopeful ly consistent with Infrastructure Australia. This will better allow for comparative analysis of the value of projects and will help to ensure a standardised method. The methodology should include social and environmental impacts as well as pure economic value.

5.1.4 Allow for Change

Evolution of markets through changes in demand and supply should be considered in all sectors. Unexpected changes, or degree of change (eg in population growth or distribution) can have impacts that are not forecast or predicted in longer term plans. This means, any planning and strategic process must have flexibility to adjust to unexpected changes. For example:

 The increase in farm storage and the holding of stored grain on farm compared to bulk handler facilities. This has a marked usage change for rural road networks and further exposes the industry to ‘first mile’ issues.

 Faster technology uptake by the road industry as compared to rail may support a future modal shift from rail to road.

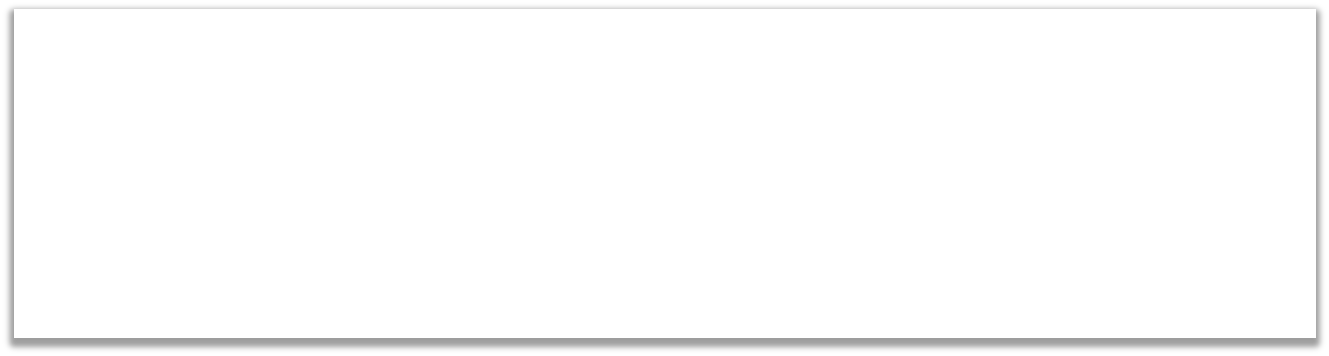
 Climate change may result in changes in long standing global and local supply and demand for grain and other agricultural commodities. This can lead to greater market volatility and the resultant impact on supply chains including:

o Price volatility creating spikes in export demand leading to local supply issues

o Potential for more frequent grain imports into eastern Australia requiring a simplified and standardised approach to imports. Current import regulation and arrangements can be arduous and consideration may be needed to address related issues going forward.

 Urban sprawl and congestion impacting on existing grain supply chain routes.

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5.1.5 Expansionary Planning

Government planning and funding of projects has a tendency to be limited by scope. When undertaking a planning process the ability to greatly multiply economic value through aligned additional infrastructure should always be considered.

A recent example in Victoria is the Murray Basin Rail Project where widening the scope of the project may have potentially multiplied economic value. This increase in value may have been available through spending additional funds to increase rail track axle load weight capabilities whilst performing the change of rail gauge from broad gauge to standard gauge.

Recommendations:

1. The Inquiry is resourced adequately to include extensive industry engagement, and the analysis and review of past industry reports.

2. Supply Chain Funding is prioritised on economic value principles.

3. Ensure a standard investment methodology.

4. Engage further with industry to forecast, plan and prepare for change.

5. Ensure the consideration of value uplift when scoping projects to consider expansionary value.

**5.2 Simplified Cross State Process**

A common issue amongst GTA members is the difficulty in managing supply chains that travel through more than one state. State based planning and government has value, however, a greater focus and capability to allow cross border movement of product is essential.

Some of the issues raised by members include state specific variances in safety regulation, mass limits for heavy vehicles, above rail operations and the movement of heavy agricultural vehicles.

**5.3 Leadership Structures**

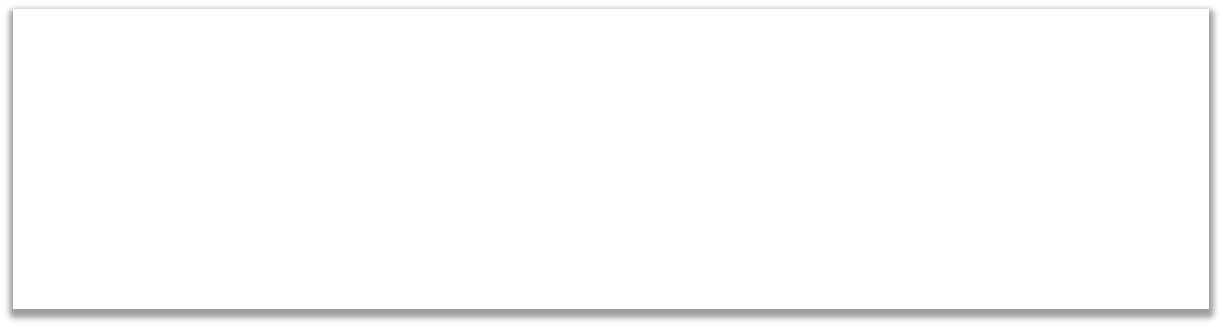
Given an outcome from this strategy may involve structural reform and change it is imperative that strong leadership from all levels of government is provided. Government should be supported in this process by strong industry representation and involvement of impacted community groups.

 The role of relevant federal, state and local councils in strategy formulation, policy and decision making must be respected and understood by all participants. Similarly, this process requires clarity as to the relevant structure and hierarchy of government departments, agencies and independent sector bodies.

 The Inquiry should consider how federal government planning can incentivise state and local governments to implement a national freight and supply chain strategy. State and local planning provides a critical role and function. However, without a common vision and methodology to value projects funding on occasions may be allocated due to political and corporate preference rather

than anticipated value.

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 Government have long utilised independent agencies and regulatory bodies within the transport infrastructure framework. This has not only provided additional skillsets and knowledge but has also sped up reform and the implementation of change. GTA support such structures to be continued and expanded where practical.

 Due to the scale and complexity of the transport network utilised by its members, GTA support extensive regional and rural input into policy and strategy frameworks.

Recommendations:

6. A standard national approach is applied to supply chain related regulation and policy.

7. Supply Chain Funding is prioritised on economic value principles

8. Continued use of independent agencies and structural reform of the different government sectors within the supply change is required.

**5.4 Infrastructure Funding Process**

5.4.1 Roads

Government have expressed a view that the current process of raising road related funding through a crude fuel excise tax should be changed to a more measured and economically sustainable revenue raising process, such as a user-pay system.

GTA are aware this methodology has been under review and discussion for some time within government and industry bodies. However, it is apparent that gaining agreement on a model to implement is proving exceedingly problematic.

Difficulty in agreeing on a model is understandable due to the complexity required to operate such a model. GTA believe the social and community aspects of the introduction of economic rent collection on rural

roads must be considered.

Given the majority of tonnes moving through the grain supply chain commences its journey on farm-access roads, prior to using all the other HMRR road categories to reach its destination, the impact of a road user tax may have severe consequences to grain growers and the grains industry supply chain.

GTA considers it imperative that government as part of the strategy consider and publish:

 Government policy in relation to the provision and funding model of all road types.

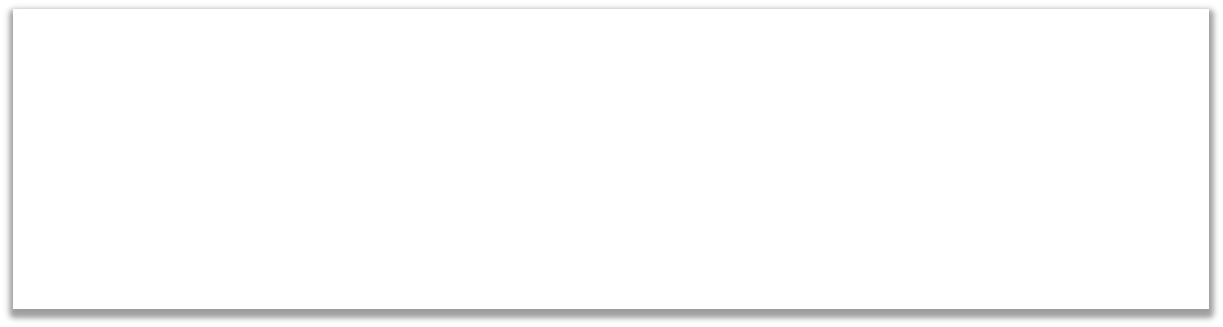
 The preferred model for the introduction of a new road funding model.

 Government position on Community Service Obligations (CSO) for rural transport infrastructure.

Austroads has recently published (June 2017) a Paper on Community Service Obligations for Road ([Community Service Obligations for Road](http://www.austroads.com.au/news-events/item/432-community-service-obligations-framework-for-roads) ). GTA supports the underlying principles suggested within the paper and suggest these are included as part of any policy and strategy considerations.

GTA understand the proposed new road based usage tax will be a hypothecated tax, therefore any revenue raised is solely for maintaining and improving relevant transport infrastructure. As part of the design of

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altered funding allocation arrangements, it is questioned whether the federal government will vary the existing allocation methodology, and importantly the oversight of funding to the 7 states, the Northern Territory and the 550 local councils. Whilst GTA has no formal view on these parameters this no doubt will require strong leadership and industry support if changes are contemplated.

5.4.2 Rail

Rail transport has historically supported the majority of the grain tonnage movement to export ports. This was due in part to federation government’s strategy of developing rural industry off the back of rail transport. Unfortunately, in most regions the remaining “pioneer” rail networks have been underfunded for some time.

Due to a number of factors, including the funding shortfall, a modal shift has occurred with road being the beneficiary. Whether this modal change will continue, or can be reversed, is uncertain. However, as part of this strategic process GTA would encourage the Inquiry Panel to consider the benefit of replicating a

similar network review and funding process (as articulated in the Austroads Paper) for the rural rail branch line network throughout Australia.

This process may provide a common methodology for measuring and considering the economic value of the two modes of freight. This could potentially provide a base for considering:

 The benefits of the coexistence of rural roads and rail,

 strategies to consider the future structure of rural supply chain networks based on solid economic principles and values, and

 Government policy on the value of CSO contributions being applied to the non-economic rural branch line rail track as well as rural roads.

GTA recommend that any consideration of funding within the below rail area is considered in conjunction with a review of existing below rail access regimes.

There are views that a national rail access regime may provide benefits. This regime could be consistent with the principles of the ACCC regulated framework that is applied to Australian Rail Track Corporation (ARTC) track. These views are based on this framework providing a consistent and transparent approach.

Mainline rail also has issues that require planning and investment to ensure the existing network operates to its full potential. This is especially in the areas of:

 pathway priority arrangements through congested metropolitan areas

 Restrictive chokepoints such as too few or inappropriate length ‘passing loops’.

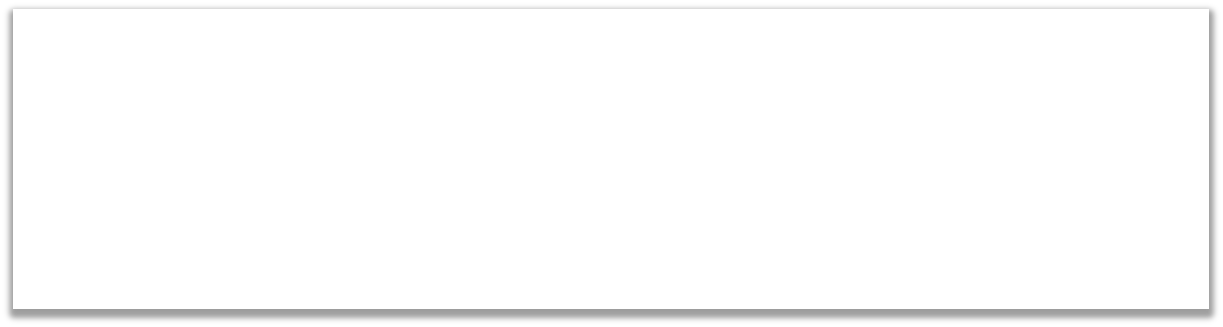
Recommendations:

9. Government clarify its role in the provision of transport infrastructure

10. Engage with stakeholders to finalise the new proposed road funding model.

11. Include the rural branch line network as part of the proposed road funding model and as part of this review consider an appropriate national rail access regime.

12. Review impediments to the efficient operation of the existing rail network.



**5.5 Management of Change**

The transport sector and especially the road network has been largely a service planned and provided by government. Government introduction of change, such as an economic market priced service for roads has the potential to place stress on rural focussed industry and communities.

Considerate management of the process of engaging with stakeholders is required. Similarly, any implementation of agreed strategy will require sustained effort and leadership.

**5.6 Implementation**

National regulatory and policy changes should be considered for implementation to remove or minimise specific state variances. This Inquiry should be encouraged to place a heavy focus on managing the implementation of any initiatives that flow from the strategy.

**5.7 Consideration of Market Complexity Price Cycles and Drought**

Global markets forces will at times depress value in the agricultural sector due to price variances in inputs and outputs. This volatility places pressure on private and government investment in rural industry. The agricultural sector and the grain industry in particular are of the view the cyclic nature of the industry may impact on government investment funding decisions.

It is important that Inquiry seek to understand adverse market cycles and downturn periods will occur in agriculture and as such a long term and balanced view of the demand and value of the grain industry is required when undertaking investment review and when considering changes to road based tax

arrangements.

Recommendations:

13. Inquiry Panel and supporting staff must engage and understand the complexities of the grain supply chain and the global market influences.

14. Government must invest in managing implementation of any outcomes to ensure a consistent application without cross border variances.

**6.0 Consolidated Questions**

In addition to the body of this report GTA has addressed relevant questions from the discussion paper in

Appendix 1.

**7.0 Conclusion**

GTA welcome this Inquiry and is committed to assisting with shaping the outcome to ensure the grains industry can continue to provide economic value to the nation as a whole.



**Appendix 1 - Consolidated Questions**

|  |  |
| --- | --- |
| **Consolidated Question Response**  **Questions** | |
| 2.1 What is Moving,  where, why & how | Grain with-in the Supply The grain industry is a heavy user of supply chain infrastructure for  Chain the task of moving product to the export and domestic markets.  Components utilised include:   All road classes   Rail assets within 5 states   18 Ports and relevant aggregation zones   Multiple storage locations across the grain producing areas including farm storage through to large BHC aggregation sites.   All major container terminals |
| What is Moving Australia produces on average 35mmt of grain. This moves through to  the export (24-25mmt) and domestic markets (10-11mmt) via a mix of road and rail transport. . |
| What changes are needed See recommendations in the body of this Submission |
| Data Gaps Industry supply chain data gaps include   Comparative economic supply chain cost analysis (potentially consider the CSIRO model)   Port and region based capacity and capability (within time buckets) forecasting   Comparative costing models to allow valuation of road and rail infrastructure |
| 2.2 Competiveness in  the Australian freight sector | Competiveness in the Addressed in section 4.0  Supply Chain |
| 3.1 Urban Growth  Pressures & 3.2 Port  Corridor Pressures | Urban growth and Port Like all industry in Australia the grain industry is concerned with  Corridor pressures encroachment issues and efficiency in the important and critical  transport corridors. Government must find a practical approach to issues such as the application of noise related night curfews. |
| 3.3 End to end Supply  Chain Integration and  Regulation | End to end supply chain The grain industry is effective at moving product between transport  integration modes. However, the existing funding of road and rail modes can  make the comparative costs of the two modes difficult to distinguish. GTA supports a supply chain strategy and execution plan to ensure effective and efficient use of infrastructure and investment to facilitate trade and efficient movement of grain  As discussed in the body of the report there are regulatory restrictions and differences in state and even local council regulation (and application of regulations) that hinders the effective interstate movements. Similarly, import regulations and cabotage arrangements hinder interstate shipping and the import of grain. |
| Empty Containers The issue the grain industry faces with containers is the global  reduction in food grade 20 ft containers. This is currently being managed through the use of 40 ft containers and a costly process of  regrading inferior 20 ft containers up to food grade standard. |
| 4.2 Key Drivers of  Change | Key Drivers of Change As discussed in Section 5.7 the enquiry needs to understand the  complexities the market and climatic conditions places on the infrastructure and planning processes within the Australian grain  supply chain. Similarly, the grain supply chain operates different models in different geographic areas. These points of difference must be understood in any review. Understanding the differences and the key drivers maybe best facilitated through joint discussion and Scenario  Planning. |
| 4.3 A National Freight  Performance Network | National Freight GTA consider performance indicators are essential within supply  Performance indicators chains and would welcome an opportunity to discuss this further. |



**Membership List as at 01 July 2017**

**Ordi**

|  |  |  |
| --- | --- | --- |
| Organisation | Contact | Website /Phone |
| **nary Member (Trading)**  **Level A1 (over 7 Million Tonnes)** |  |  |
| Co-operative Bulk Handling Limited | Mr Jason Craig | cbh.com.au |
| Glencore Agriculture Pty Ltd | Mr Philip Hughes | glencoreagriculture.com.au |
|  |  | **2** |
| **Level A2 (5 - 7 Million Tonnes)** |  | **0** |
| **Level A3 (3 - 5 Million Tonnes)** |  |  |
| ADM Trading Australia Pty Ltd | Mr Darryl Borlase | adm.com |
| Cargill Australia Limited | Ms Penne Kehl | cargill.com.au |
| Graincorp Operations Ltd | Mr Klaus Pamminger | graincorp.com.au |
|  |  | **3** |
| **Level A4 (1.5 - 3 Million Tonnes)**  Emerald Grain Pty Limited | Mr David Johnson | emeraldgrain.com |
| Nidera Australia Pty Ltd | Mr David Lengren | nidera.com.au |
|  |  | **2** |
| **Level B1 (1.0 - 1.5 Million Tonnes)** |  |  |
| Bunge Agribusiness Australia Pty Ltd | Mr Chris Aucote | bunge.com/Agribusiness |
| Louis Dreyfus Company Australia Pty Ltd | Mr Robert Green | louisdreyfus.com.au |
|  |  | **2** |
| **Level B2 (500,000 - 1 Million Tonnes)** |  |  |
| Agrex Australia Pty Ltd | Mr Hiro Oda | agrexaustralia.com.au |
| Broadbent CHS Pty Ltd | Mr Justin Fay | broadbentgrain.com.au |
| Cofco Agri Australia Pty Ltd | Mr Josh Taylor | au.cofcoagrigrain.com |
| George Weston Foods Limited | Mr Mark O'Brien | gwf.com.au |
| Plum Grove Pty Ltd | Mr Tony Smith | plumgrove.com.au |
| Ridley Agriproducts Pty Ltd | Mr Michael Reeves | agriproducts.com.au |
| Riverina (Australia) Pty Ltd | Mr Jon Mulally | riverina.com.au |
|  |  | **7** |
| **Level B3 (250,000 - 500,000 Tonnes)** |  |  |
| Agracom Pty Ltd | Mr Joe Hallman | agracom.com.au |
| AGRIGRAIN | Mr Jeremy Brown | agrigrain.com |
| Arrow Commodities Pty Ltd | Mr Dominic Vanzella | arrowcom.com.au |
| Australian Grain Export Pty Ltd | Mr John Thiele | 08 8832 2800 |
| Centre State Exports Pty Ltd | Mr Jeff Voigt | centrestateexports.com.au |
| Chinatex Australia Pty Ltd | Mr Jiling Lai | 02 9957 2688 |
| Lempriere Grain Pty Ltd | Mr Jonathan Holdsworth | lemprieregrain.com.au |
| Riordan Grain Services | Mr Bradley Hogan | riordangrains.com.au |
| Robinson Grain Trading Co Pty Ltd | Mr Gary Robinson | robinsongrain.com.au |
| Special One Grain Accumulator | Ms Jaimee Carrigan | specialonegrain.com.au |
| United World Enterprises Pty Ltd | Mr Jimmy Liu | uwetypical.com |
| Wilmar Gavilon Pty Ltd | Mr Matt Albion | 07 3713 8700 |
|  |  | **12** |

**Ordinary Member (Trading) (contd)**

|  |  |  |
| --- | --- | --- |
| **Level C (under 250,000 Tonnes)**  A & B Grains Pty Ltd | Mr Chris 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 Richard Alcorn | agmark.com.au |
| Agri Om Australia Pty Ltd | Mr Kishore Bulchandani | agriom.com.au |
| Agri-Oz Exports Pty Ltd | Mr Francois Darcas | 03 9830 7021 |
| Agriex Australia Pty Ltd | Mr Joseph Khnessier | 02 9232 0690 |
| Agrifoods Australia | Mr Rob Anderson | agrifoodsaustralia.com.au |
| Agromin Australia Pty Limited | Mr Rajni Patel | agromin.com.au |
| AGT Foods Australia | Mr Peter Wilson | agtfoods.com/australia |
| Allied Pinnacle Pty Ltd | Mr Josh Lawrence | alliedmills.com.au |
| AMPS Agribusiness Group  Associated Grain | Mr Simon McDougall  Mr Todd Jorgensen | ampsagribusiness.com.au  07 4662 1999 |
| Auscott Ltd | Mr Peter Webb | auscott.com.au |
| AusiCan Commodities | Mr Palwinder Singh | ausican.com |
| Australian Choice Exports Pty Ltd  Australian Grain Growers Co-operative Limited | Mr James Hunt  Mr Bruce McDonald | australianchoiceexports.com.au aggcoop.com.au |
| Australian Grain Storage | Mr Matt Bailey | sunrice.com.au |
| Australian Growers Direct Pty Ltd | Mr Tom Lucas | ausgrowersdirect.com.au |
| Australian Mungbean Company Pty Ltd | Mr Damien White | australianmungbean.com.au |
| Avigrain Produce | Mr Dennis Ward | avigrain.com.au |
| Baker Grain | Mr Richard Baker | bakergrain.com.au |
| Berriwillock Grain Storage Co-Operative Ltd | Mr Tony Bellinger | moulameingrain.com |
| BFB Pty Ltd | Mr Terry Brabin | bfb.com.au |
| Blairs Produce Company | Mr Sean Blair | 02 6025 4600 |
| Blue Ribbon Seed and Pulse Exporters | Mr Stephen Donnelly | 07 3363 8400 |
| Boort Grain Co-Operative | Mr Tony Bellinger | 03 5455 2600 |
| Broun and Co Grain Pty Ltd | Mr Wal Broun | brounandco.com.au |
| Bungulla Farming Pty Ltd | Mr Brad Jones | 08 9637 1164 |
| C & S Trading Pty Ltd | Mr Craig Scholz | scholzbh.com.au |
| C K Tremlett Pty Ltd | Mr Andrew Tremlett | 08 8524 9050 |
| Cameron Pastoral Company Pty Ltd | Mr Ross Stephens | 07 4671 4144 |
| Castlegate James Australasia Pty Ltd | Mr Dominic Hogan | castlegatejames.com.au |
| Cleveland Agriculture | Mr Chris Hurwood | 02 6756 5004 |
| Coorow Seeds | Mr Brian Pover | coorowseeds.com.au |
| COPRICE | Ms Kirsty Cutter | coprice.com.au |
| Cremer Australia Pty Ltd | Mr Scott Haughton | cremer.com.au |
| DA Hall and Co | Mr Bruce Holden | 07 4695 5777 |
| Dalby Bio-Refining Limited |  | dbrl.com.au |
| Dalgrains (Qld) Pty Ltd  Darwalla Milling Co Pty Ltd | Mr Tobin Cherry  Mr Gary Heidenreich | dalgrains.com  07 3822 0527 |
| Deacon Seeds Company | Mr Terry Deacon | 07 4662 3217 |
| Deckert Group Pty Ltd | Mr Chris Deckert | deckerts.com.au |
| Defiance Maize Products Pty Ltd | Mr Rodney Walker | corson.co.nz |
| Demeter Cormack Pty Ltd | Mr David Oates | 08 6389 0098 |
| Donnellons Bulk Haulage Pty Ltd  ED & F Man Grains Australia | Mr Bill Donnellon  Mr Jon Bucknall | 0428 136 483  edfman.com |
| East Coast Stockfeed Pty Ltd | Mr Stuart Dolden | ecsf.com.au |
| Elders Grain | Mr Lachlan Allen | elders.com.au |
| Export Trading Group Australia Pty Ltd  Feed Central Pty Ltd | Mr Shayne Clark  Mr Tim Ford | etgworld.com  feedcentral.com.au |
| Fellows Nominees | Mr Paul Fellows | [fellowsbulk.com.au](http://www.fellowsbulk.com.au/) |

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| FertInvest Pty Ltd  **Level C (under 250,000 Tonnes) cont.** | Mr Michael Jones | fertinvest.com |
| Findlays Barellan | Mr Neil Findlay | 02 6963 9246 |
| Fletcher International Exports Pty Ltd | Mr Kurt Wilkinson | fletchint.com.au |
| FREE Eyre Grain Pty Ltd | Mr Mark Rodda | free-eyre.com.au |
| Golden Harvest Grain Exports | Mr Chandru Hiremath | goldenharvest.net.au |
| Grain Direct Australia | Mr Lyndon Benecke | 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 Bonfante | grainpro.com.au |
| GrainTrend Pty Ltd | Mr Sanjiv Dubey | graintrend.com |
| Greentree Farming | Mr David Brown | 02 6751 1228 |
| GV Grain & Fodder | Ms Joanne Harry | 03 5828 3063 |
| Hanlon Enterprises Grain | Mr Peter Gerhardy | 02 6924 1781 |
| Harberger's Farm Supplies (Trading) Pty Ltd | Mr Reece Harberger | harberger.com.au |
| Hassad Australia Operations Company Pty Ltd | Ms Terrie Morgan | 02 9900 3700 |
| 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 |
| Itochu Australia Ltd | Mr Justin Swan | [www.itochu.com.au](http://www.itochu.com.au/) |
| J K International Pty Ltd | Mr Sandeep Mohan | jki.com.au |
| J W Koek & Company | Mr Brian Algate | 07 3341 4548 |
| James Stock Feed and Fertilizer Pty Ltd | Mr Adrian Moule | jamesstockfeed.com.au |
| Jerilderie Grain Storage & Handling | Mr David Barlow | 03 5886 0344 |
| KB Agri Services Pty Ltd | Mr Karl Bliss | 07 4634 4320 |
| K M & W M Kelly & Sons | Mr Matt Kelly | kellygrains.com.au |
| Kangaroo Island Pure Grain Pty Ltd | Ms Emma Tonkin | kipuregrain.com |
| Kennett Rural Services Pty Ltd | Mr Andrew Kennett | kennettrural.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 |
| Lane Grain Pty Ltd | Mr Garry Lane | 02 6887 3309 |
| Laragon Almond Processors Pty Ltd | Mr Mark Webber | laragon.com.au |
| Laucke Flour Mills P/L | Mr Roger Laubsch | laucke.com.au |
| Lawson Grains Pty Ltd | Mr Angus Blair | lawsongrains.com |
| LDC Enterprises Australia Pty Ltd | Mr Richard Porter | 07 3253 5999 |
| LPC Trading Pty Ltd | Mr Simon Langfield | 02 6383 7222 |
| Malteurop Australia Pty Ltd | Mr Jack King | 03 5277 1950 |
| 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 |
| McNaughts Grain & Fertilizer Pty Ltd | Mr Daniel McNaught | mcnaughts.com |
| Melaluka Trading Pty Ltd | Mr Simon Pritchard | melalukatrading.com.au |
| Mellco Pty Ltd | Mr Steve Mellington | 0419 867 971 |
| Moulamein Grain Co-Operative Ltd | Mr Tony Bellinger | moulameingrain.com |
| Mountain Industries Pty Ltd | Mr Bill Law | mountainindustries.com.au |
| Moxey Farms Pty Limited | Mr Peter Philipzen | 0407 103 158 |
| MSM Milling Pty Ltd | Mr Peter MacSmith | 02 6364 5999 |
| Murrumbidgee Grains Pty Ltd | Mr Peter Hassall | 02 6937 9100 |
| Namoi Cotton Co-Operative | Mr Shane McGregor | namoicotton.com.au |
| Nandaly Grain Co-Operative Ltd | Mr Tony Bellinger | 03 5078 1217 |
| Network Grains Pty Ltd | Mr Craig Dennis | 07 4637 8500 |
| Newcastle Agri Terminal Pty Ltd | Mr Jock Carter | 02 4962 4006 |
| Northern Riverina Grains Pty Ltd | Mr Tony Bellinger | 03 5032 2553 |
| OOMA Enterprises NSW Pty Limited | Mr Malcolm Berry | oomaenterprises.com.au |
| Origin Grain Pty Ltd | Mr Peter Brick | 03 5720 8500 |

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| PB Seeds Pty Ltd  **Level C (under 250,000 Tonnes) cont.** | Mr Peter Blair | pbseeds.com.au |
| PeaCo | Mr Shane Wall | 03 5497 1766 |
| Pearson's Grain Pty Ltd | Mr Darren Pearson | pearsonsgroup.com.au |
| Peters Commodities Pty Ltd | Mr Michael Oxley | petcom.com.au |
| Phoenix Global Australia Pty Ltd | Mr Jogesh Virk | phoenixcommodities.com.au |
| Premium Grain Handlers P/L | Mr John Orr | pgh.com.au |
| Preston Grain | Mr Andrew Kell | 02 6977 1733 |
| Pulse Association of the South East (PASE) Inc | Ms Leanne Burr | 08 9071 3655 |
| Quadra Commodities Pty Ltd | Mr Richard Black | quadra.com |
| Quattro Ports | Mr Dene Ladmore | quattroports.com.au |
| Quirindi Grain & Produce | Mr John Webster | 02 6746 1911 |
| Reid Stockfeeds Pty Ltd | Mr Ian Reid | reidstockfeeds.com.au |
| Rhodium Resources Australia Pty Ltd | Mr Mark Fitzgerald | rhodiumresources.com |
| Rivalea (Australia) Pty Ltd - Animal Nutrition | Mr Andrew Philpotts | rivalea.com.au |
| Riverina Oils & BioEnergy Pty Ltd | Mr Lachlan Herbert | riverinaoils.com |
| 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 Michael Wood | 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 Ark Storage Pty Ltd | Mr Simon Pritchard | arkstorage.com.au |
| Southern Cotton Trading Pty Ltd | Mr Chris Veness | 02 69 552 779 |
| Southern Cross Agricultural Exports P/L | Ms Alicia Dunbar | southerncrossag.com.au |
| Southern Grain Storage Pty Ltd | Mr Campbell Brumby | 03 5267 2351 |
| Southern Stockfeeds (Operations) Pty Ltd | Mr David Jemmet | 03 5437 8295 |
| Spagricon Australia Pty Limited | Mr Jiger Kotecha | spagricon.com.au |
| Standard Commodities Australia Pty Ltd | Mr Michael Betar | stancom.com.au |
| Sumitomo Australia Pty Ltd | Mr Akira Yabuuchi | sumitomocorp.com.au |
| Summer Hill Grains | Mr Barney Hughes | 0428 694 363 |
| SunPork Farms Feed Mills | Mr Bjorn Ludvigsen | 08 8532 4434 |
| Tasmanian Agricultural Producers Pty Ltd | Mr David Skipper | tasagproducers.com.au |
| TSS Grain | Mr Trevor Macleod | tasstockfeed.com.au |
| Thallon Grains Pty Ltd | Mr Andrew Earle | 02 6756 5004 |
| Twynam Pastoral Company | Ms Lesley Heidtman | twynam.com |
| Unigrain Pty Ltd | Mr Ervin Leong | unigrain.com.au |
| Unique Grain Management Pty Ltd | Mr Mark Thiele | uniquegrain.com.au |
| W B Hunter Pty Ltd | Mr Stewart Coombes | 03 5821 5744 |
| Ward McKenzie Pty Ltd | Mr Geoff Hammon | mckenziesfoods.com.au |
| WHG Oceania Pty Ltd | Gesheng Shen | 02 8040 3030 |
| Whyalla Beef Pty Ltd | Mr Gino De Stefani | whyallabeef.com.au |
| Wilken Grain | Mr Richard Wilken | wilkens.com.au |
| Wimpak Pty Ltd | Ms Jo Cameron | wimpak.com.au |
| WW Agri Pty Ltd | Mr Steve Sloss | wwagri.com.au |
| XLD Grain Pty Ltd | Mr Lachie Stevens | xldgrain.com.au |
| Yenda Prods Grain Pty Ltd | Mr Luke Mancini | 0437 512 322 |
|  |  | **155** |

**Transport Operator**

|  |  |  |
| --- | --- | --- |
| Gehrke Grains and Transport Pty Ltd | Mr Julian Gehrke | 07 5465 6695 |
| Hamilton Contracting (NSW) Pty Ltd  Wakefield Grain Export Services | Ms Jodie Hamilton  Mr John Gray | hamiltoncontracting.com.au wakefields.com.au |

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| **Broker** |  | **3** |
| **Large** |  | **0** |
| **Medium**  Fox Commodities | Mr Paul Cochrane | foxcommodities.com.au |
| Grain Brokers Australia | Mr Jeff Winspear | grainbrokers.com.au |
| Horizon Grain Brokers Pty Ltd | Mr Ash Munro | horizongb.com.au |
| Igrain.com.au Pty Ltd | Mr Tom Roberts | igrain.com.au |
| INTL FCStone Pty Ltd | Mr Brett Cooper | intlfcstone.com |
| 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 |
| Southern Aurora Markets | Mr Pat Cogswell | samarkets.com.au |
|  |  | **9** |
| **Sole Operator** |  |  |
| A C Grain | Mr Adam Clarke | 0400 065 763 |
| ACCB Australia | Mr Andy Cunliffe | 0455 105 300 |
| AgLink - CMS | Mr Justen Schofield | aglinkcms.com.au |
| Allied Grain Pty Ltd | Mr Angus Wettenhall | alliedgrain.com.au |
| Cereal Milling Services Pty Ltd | Mr Michael Moss | 02 4323 9339 |
| Cogeser (Australia) Pty Ltd | Mr Robert Luetolf | [cogeser.com.au](http://www.cogeser.com.au/) |
| Farm Tender | Mr Matt Henke | farmtender.com.au |
| Knight Commodities | Mr Chris Groat | 07 4671 5221 |
| Link Brokering | Mr Dion Costigan | linkbrokering.com.au |
| Lotema Pty Ltd | Mr Todd Lees | lotema.com.au |
| Mallon Commodity Brokering | Mr Ian Mallon | mcbrokering.com |
| Quest Commodities Pty Ltd | Ms Jayne Barker | questcommodities.com.au |
| Shearwater International Pty Ltd | Mr Don Cattanach | 07 3324 9088 |
| Wimmera Mallee Grain Services | Mr Rodney Edgerton | egrainservices.com.au |
| Woodside Commodities Pty Ltd | Mr Hamish Steele-Park | woodcomm.com.au |
|  |  | **15** |
| **Corporate**  **Large**  ASX Limited | Mr Kristen Hopkins | asx.com.au/grainfutures |
| Australia And New Zealand Banking Group | Mr Ian Hanrahan | anz.com.au |
| Australian Grain Technologies Pty Ltd | Mr Haydn Kuchel | agtbreeding.com.au |
| Commonwealth Bank of Australia | Mr Tom Barraket | commbank.com.au |
| Symbio Laboratories | Ms Elizabeth Owens | symbiolabs.com.au |
|  |  | **5** |
| **Medium**  Agfarm Pty Ltd | Mr Ron McCalman | agfarm.com.au |
| Agrifood Technology Pty Ltd | Ms Doreen Fernandez | 03 9742 0589 |
| Agrisk Management Pty Ltd | Mr Brett Stevenson | 02 9499 4199 |
| AMSPEC | Mr Lee Shilvock | amspecgroup.com |
| Australian Superintendence Company | Mr Andrew Parry | 07 3391 8640 |
| Commodity Inspection Services (Australia) Pty Ltd | Mr Mathew Conoulty | commodityinspection.com.au |
| Foss Pacific Pty Ltd | Mr Simon Kirkman | foss.com.au |
| Holding Redlich | Mr Geoff Farnsworth | holdingredlich.com |
| Holman Fenwick Willan | Mr Stephen Thompson | hfw.com |
| Intertek | Mr Ben Jones | intertek.com |
| Merricks Capital Pty Limited | Mr Adam Davis | merrickscapital.com |
| NZX Australia (ACF, PFA) | Mr Ron Storey | nzx.com |
| SBA Law | Mr Jeremy Rosenthal | sbalaw.com |
| SGS Australia Pty Ltd | Mr Scot Paterson | au.sgs.com |

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| **Corporate (cont.)** |  | **14** |
| **Small** |  |  |
| Advance Trading Australasia | Mr Andrew Woodhouse | advance-trading.com.au |
| Ag Scientia Pty Ltd | Mr Lloyd George | 03 9598 1980 |
| AvantAgri Australia Pty Ltd | Mr Peter Woods | avantagri.com.au |
| Clear Grain Exchange | Mr Nathan Cattle | cleargrain.com.au |
| CloudBreak Grain Marketing Pty Ltd | Mr Ed Scamps | 08 8388 8084 |
| Basis Commodities Pty Ltd | Mr Chris Whitwell | basiscommodities.com.ay |
| Delta Agribusiness Pty Ltd | Mr Michael Parry | 02 6772 0000 |
| Direct Commodities Pty Ltd | Mr Hamish Robertson | directcommodities.com.au |
| EP 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 |
| Flexi Grain | Mr Jarrod Tonkin | flexigrain.com.au |
| Goldstar Commodities | Mr Geoff Webb | goldstarcommodities.com.au |
| Grainx | Mr Chris Hood | grainx.com.au |
| HarvestCheck Pty Ltd | Mr Stephen Schumacher | 0418 199535 |
| Hay Plains Grain Storage Pty Ltd | Mr Ron Harris | 0404 444 600 |
| IKON Commodities Pty Ltd | Mr Simon Clancy | ikoncommodities.com.au |
| 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 Gerard Murphy | 03 5862 2799 |
| OMIC Australia Pty Ltd | Mr Yasuhide Okumura | omicaustralia.com.au |
| Perten Instruments Australia Pty Ltd | Mr Raul Ovelar | 02 9870 3400 |
| 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 |
| Rise Agribusiness Pty Ltd | Mr Ian Dalgliesh | riseagri.com.au |
| Rural Directions Pty Ltd | Mr Chris Heinjus | ruraldirections.com |
| SGA Solutions Pty Ltd | Mr David Hudson | 03 5428 4990 |
| TE Storage & Logistics Pty Ltd  Ten Tigers | Mr Tom Hage  Mr Chris Tonkin | 08 8762 2188  tentigers.com.au |
|  |  | **34** |

**International Affiliate**

|  |  |  |
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| CIS - Commodity Inspection Services | Mr Paul Schweitzer | cis-inspections.com |
| CCIC Australia Pty Ltd | Mr Isherwood Feng | 02 9580 3212 |
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**Industry Association**

|  |  |  |
| --- | --- | --- |
| Grain Growers Limited  Grain Industry Association of WA | D. McKeon/M. Southan  Ms Larissa Taylor | graingrowers.com.au giwa.org.au |
| Grain Producers Australia Ltd  NSW Farmers Association | Mr Andrew Weidemann  Mr Robert Hardie | grainproducers.com.au  02 8251 1827 |
| Victorian Farmers Federation | Mr Stephen Sheridan | 03 9207 5555 |
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**Merchant Association**

|  |  |  |
| --- | --- | --- |
| Grain Industry Association of SA | Ms Rebecca Freeman | 0414 844 425 |
| Grain Industry Association Of Victoria  Grain NSW Inc  Queensland Agricultural Merchants Inc. | Mr Colin Peace Ms Joanne Ware Mr John Francis | giav.com.au grainnsw.com.au qam.org.au |

**4**

**Life Members**

Mr Mervyn May

Mr Christopher Kelly

Mr Geoff Honey *(Posthumously awarded)*

Retired

KM &WM Kelly&Sons

Former GTA CEO

Awarded 1998

Awarded July 2015

Awarded July 2016

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