

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)

27<sup>th</sup> 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)

Phone: 02 9235 2155

Email: [admin@graintrade.org.au](mailto:admin@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 the 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 units<sup>1</sup> 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.

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<sup>1</sup> Grain Growers – State of the Nation 2016

Table 1. HVRR Road Categorisation Model

<b>Road Category</b>	<b>Description</b>
<b>R1</b>	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.
<b>R2</b>	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.
<b>R3</b>	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.
<b>R4</b>	R4 roads are collector or distributor roads. These are roads with no requirements for shoulders.
<b>R5</b>	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.

GTA in 2014 provided a Submission to the Agricultural Competitiveness White Paper. This paper ([GTA Submission to Ag White Paper](#)) provides some detail on the competitiveness 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 cost<sup>2</sup>. 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.

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<sup>2</sup> . Stretch, T, Carter, C and Kingwell, for Australian Export Grains Innovation Centre The Cost of Australia’s Bulk Grain Export Supply Chains (2014)

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 hopefully 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:
  - Price volatility creating spikes in export demand leading to local supply issues
  - 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.

### 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.



- 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.

Austrroads has recently published (June 2017) a Paper on Community Service Obligations for Road ([Community Service Obligations for Road](#)). 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

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 Questions	Question	Response
2.1 What is Moving, where, why & how	Grain with-in the Supply Chain	The grain industry is a heavy user of supply chain infrastructure for the task of moving product to the export and domestic markets. Components utilised include: <ul style="list-style-type: none"> <li>• All road classes</li> <li>• Rail assets within 5 states</li> <li>• 18 Ports and relevant aggregation zones</li> <li>• Multiple storage locations across the grain producing areas including farm storage through to large BHC aggregation sites.</li> <li>• All major container terminals</li> </ul>
	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 <ul style="list-style-type: none"> <li>• Comparative economic supply chain cost analysis (potentially consider the CSIRO model)</li> <li>• Port and region based capacity and capability (within time buckets) forecasting</li> <li>• Comparative costing models to allow valuation of road and rail infrastructure</li> </ul>
2.2 Competiveness in the Australian freight sector	Competiveness in the Supply Chain	Addressed in section 4.0
3.1 Urban Growth Pressures & 3.2 Port Corridor Pressures	Urban growth and Port Corridor pressures	Like all industry in Australia the grain industry is concerned with 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 integration	The grain industry is effective at moving product between transport 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 Performance indicators	GTA consider performance indicators are essential within supply chains and would welcome an opportunity to discuss this further.

## Membership List as at 01 July 2017

Organisation	Contact	Website /Phone
<b>Ordinary Member (Trading)</b>		
<b>Level A1 (over 7 Million Tonnes)</b>		
Co-operative Bulk Handling Limited	Mr Jason Craig	cbh.com.au
Glencore Agriculture Pty Ltd	Mr Philip Hughes	glencoreagriculture.com.au
		<b>2</b>
<b>Level A2 (5 - 7 Million Tonnes)</b>		
		<b>0</b>
<b>Level A3 (3 - 5 Million Tonnes)</b>		
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
		<b>3</b>
<b>Level A4 (1.5 - 3 Million Tonnes)</b>		
Emerald Grain Pty Limited	Mr David Johnson	emeraldgrain.com
Nidera Australia Pty Ltd	Mr David Lengren	nidera.com.au
		<b>2</b>
<b>Level B1 (1.0 - 1.5 Million Tonnes)</b>		
Bunge Agribusiness Australia Pty Ltd	Mr Chris Aucote	bunge.com/Agribusiness
Louis Dreyfus Company Australia Pty Ltd	Mr Robert Green	louisdreyfus.com.au
		<b>2</b>
<b>Level B2 (500,000 - 1 Million Tonnes)</b>		
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
		<b>7</b>
<b>Level B3 (250,000 - 500,000 Tonnes)</b>		
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 Gaviion Pty Ltd	Mr Matt Albion	07 3713 8700
		<b>12</b>

## 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	Mr Simon McDougall	ampsagribusiness.com.au
Associated Grain	Mr Todd Jorgensen	07 4662 1999
Auscott Ltd	Mr Peter Webb	auscott.com.au
AusiCan Commodities	Mr Palwinder Singh	ausican.com
Australian Choice Exports Pty Ltd	Mr James Hunt	australianchoiceexports.com.au
Australian Grain Growers Co-operative Limited	Mr Bruce McDonald	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	Mr Tobin Cherry	dalgrains.com
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	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	Mr Bill Donnellon	0428 136 483
ED & F Man Grains Australia	Mr Jon Bucknall	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	Mr Shayne Clark	etgworld.com
Feed Central Pty Ltd	Mr Tim Ford	feedcentral.com.au
Fellows Nominees	Mr Paul Fellows	fellowsbulk.com.au

FertInvest Pty Ltd	Mr Michael Jones	fertinvest.com
<b>Level C (under 250,000 Tonnes) cont.</b>		
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
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	mчнаughts.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

PB Seeds Pty Ltd	Mr Peter Blair	pbseeds.com.au
<b>Level C (under 250,000 Tonnes) cont.</b>		
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
Spagrimon Australia Pty Limited	Mr Jiger Kotecha	spagrimon.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	mckenziefoods.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

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### Transport Operator

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



**Broker****Large**

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**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

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**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
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

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**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

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**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

**Corporate (cont.)****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.au
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	Mr Tom Hage	08 8762 2188
Ten Tigers	Mr Chris Tonkin	tentigers.com.au

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**International Affiliate**

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	D. McKeon/M. Southan	graingrowers.com.au
Grain Industry Association of WA	Ms Larissa Taylor	giwa.org.au
Grain Producers Australia Ltd	Mr Andrew Weidemann	grainproducers.com.au
NSW Farmers Association	Mr Robert Hardie	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	Mr Colin Peace	giav.com.au
Grain NSW Inc	Ms Joanne Ware	grainnsw.com.au
Queensland Agricultural Merchants Inc.	Mr John Francis	qam.org.au

**Life Members**

Mr Mervyn May	Retired	Awarded 1998
Mr Christopher Kelly	K M & W M Kelly & Sons	Awarded July 2015
Mr Geoff Honey ( <i>Posthumously awarded</i> )	Former GTA CEO	Awarded July 2016