

## Submission

Grain Trade Australia

to

**Review of the National Freight & Supply Chain Strategy**

7<sup>th</sup> September 2023

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## 1.0 Introduction

Grain Trade Australia (GTA) welcomes the Australian Government 2023 Review of the National Freight and Supply Chain Strategy (Review).

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, an effective and efficient supply chain is critical. GTA is committed to assist and provide input to the Government and its Review to achieve its stated objectives.

## 2.0 Grain Trade Australia's Role

Grain Trade Australia (GTA) is a national member association and is the focal point for the commercial grain industry within Australia.

GTA has over 280 organisations as members. Their businesses range from regional family businesses to large national and international trading/storage and handling companies who are involved in grain trading activities, grain storage, grain marketing advisory services, processing grain for human consumption and stock feed milling. GTA Members are substantial employers, from the farm gate through to end point consumption, and notably in rural and regional Australia. A full list of GTA Members can be found [here](#).

GTA's mission is to 'facilitate trade' in the Australian grain industry. It's products and services, including the Australia Grain Industry [Code of Practice](#), provides a self-regulatory framework across the grain industry to facilitate and promote the trade of grain across the Australian grain value chain.

Within this context, on behalf of its members, GTA provides comment on the Review.

## 3.0 Grain Industry Sector

The Australian grain industry<sup>1</sup> is a major economic contributor in regional Australia and to export revenue, with annual value of production in 2022/23 forecast (excluding rice) to be a record \$30.7 billion at the farm gate and \$28.3 billion of exports<sup>2</sup>, meaning the grain industry is the highest value industry in the agriculture sector, contributing more than 33% of Australia's agricultural gross value of production annually.

The industry achieved record summer and winter production in 2022/23 of 71.7 million tonnes (mmt) following two prior large crops with 68.0 mmt in 2021/22 and 59.9 mmt in 2020/21.

Trade and an efficient supply chain is vital for the Australian grain industry and regional communities, with the Australian grain industry being highly export oriented e.g., 65 -75% of grain is exported.

The grain industry supply chain is geographically diverse and is spread across 31 operational bulk port terminals operated by 18 companies, and multiple container packers and exporters in the 5 major producing States. The Australian domestic market is the largest market for Australian grain and consumed 17.5m metric tonnes of grain in 2021-22<sup>3</sup>

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<sup>1</sup> Grains include wheat, coarse grains, oilseeds, oilseed meals and pulses

<sup>2</sup> Source: ABARES, 2023

<sup>3</sup> ACCC – Bulk grain ports monitoring report December 2022

Producing on average 45mmt tonnes from approximately 22,300 farms production units<sup>4</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.

Table 1. HVRR Road Categorisation Model

Road Category	Description
<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 Grains Research and Development Corporation (GRDC) reporting approximately 41 percent of the total grain production of 45mmt can now be stored on farm. This equates to 18.5mmt.
- Rationalisation of bulk handler receival sites and service arrangements.
- Investment in new seaport terminal facilities and the introduction of Mobile Bulk Loading capability.
- 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 grain exports given favourable back freight opportunities combined with some international consumer 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 and for deliveries direct to port to meet vessel schedules.

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

<sup>4</sup> Grain Growers – State of the Nation 2021

## 4.0 Grain Industry Capability and Competitiveness

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.

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 becoming available to compete with Australian grain in the international markets. This peak demand requirement has resulted in the grain supply chain demanding overcapacity with consequential cost implications.

Recent record production has provided some challenges and with the industry response demonstrating a capacity to innovate and thrive under pressure whilst maintaining the reputation of Australia’s grain quality, its food safety and our customer’s confidence in the capacity and capability of Australia’s grain and the grain supply chain.

Global food security is becoming increasingly important and challenging. As conflicts and the environment create concerns and complexity, the facilitation of trade in food between countries and counterparties grows in importance to global food security. The issues around global food security expose the importance of efficient trade and supply chains, as well as a political tendency towards protectionism in some economies, which ultimately will lead to inefficient outcomes.

Whilst the industry will continue to innovate and invest it is critical Government investment and structural reforms also advance to ensure supply chain remains robust and responsive to the market demands.

## 5.0 Government National Freight and Supply Chain Strategy

GTA members are engaged and will assist government policy towards improving the national supply chain, as this area is the basis of a large proportion (up to 35-40%) of the cost base in the production and delivery of grain to market. High supply chain costs damage the competitiveness of Australian grains in world markets, regardless of market access settings as well as impacting productivity within the Australian economy.

The cost of the moving grain through the supply chain, impacts the value of all grain that moves through it, irrespective of the grain quality and destination market.

### 5.1 Comments on the Review Discussion Paper issues:

#### 5.1.1 Are the Strategy’s current goals relevant and are other required?

The Strategy’s goals are still relevant and considering the impact of factors such as climate change, the pandemic and the Ukraine crisis and other global tensions it is imperative that increase focus and intensity as industry and Government to achieve these goals.

In GTA’s view the six goals are broad and capable of inclusion of all existing or new imperatives.

#### 5.1.2 Should the NAP focus on a smaller number of targeted actions?

GTA suggest the NAP should progress some prioritisation of the targeted actions to ensure resources are better utilised and priority initiatives are actioned.

#### 5.1.3 What KPIs would be useful and what are the data requirements?

Given the associated problems and costs that the different Government jurisdictions cause the flow of grain across state borders and as most of the heavy lifting needs to be done by Governments any KPIs need to focus on effective engagement by the local, State and Federal Government in the strategy. This includes the provision of information, engagement in cross jurisdictional planning, decision making and the collection and allocation of Government funding for supply chain infrastructure.

One example of a potential KPI is Governments across Australia utilising 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. Therefore, there needs to be a KPI that all jurisdictions – including local councils - apply an agreed consistent methodology for valuations.

#### 5.1.4 What outcomes / findings should the Review consider?

The Review should consider all and any relevant reports including the Productivity Commission – [Australia's Maritime Logistics Review](#) and its Recommendations. This Report examines the performance of Australia's maritime logistics system, long term trends in system performance, competition, industrial relations, infrastructure constraints and technology uptake.

There are several Recommendations in the review that need Government action and engagement to deliver system efficiency and structural gains. These must be considered as part of the National Supply Chain Strategy as failure to act on lead to further serious detrimental impacts on the trade of grain into the export market in shipping containers.

#### 5.1.5 Governance Arrangements – are they appropriate?

It is difficult to provide detailed comment on the efficiency of the Governance and structural arrangements from the limited diagram except to say that based on this diagram the model raises serious concerns as to its structure, clarity of responsibilities/accountabilities and therefore its overall appropriateness.

There appears to be no one group or resources fully allocated to the Strategy and no single point of control and the only 'Working Group' in the structure has a stated role to:

1. Manage the annual reporting and review the process.
2. Where appropriate develop a coordinated response to planning and other emerging freight issues.
3. Report to ITSOC, the group whose only responsibilities are:
  - a. to support the relevant ministers; and to
  - b. ensure the Working Group completes its annual reporting and review process

As stated, this appears inappropriate to achieve any outcomes. GTA suggests the existing Working Group should be replaced with a full-time working group compiled of cross jurisdictional Government and industry experts capable of progressing the Strategy. This Working Group should report to a council consisting of the Freight Industry Reference Panel and the ITMM. Anything less will weaken the opportunity to achieve the Goals and is a lost opportunity for Australia.

## 5.2 Prior Submission Recommendations

GTA provided a detailed Submission into the Strategy in 2017. We consider this previous submission to be valid and relevant to this forthcoming review and consideration as part of the Strategy.

The previous recommendations are provided below:

### Previous GTA Recommendations to Supply Chain Review

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.
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.
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.
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 Conclusion

The Australian grains industry is a extensive user of the national freight network and supply chain and is consequently significantly impacted by its efficiency in terms of costs, investment, regulation and overall productivity.

GTA welcomes this Review and is committed to assisting with shaping the outcome to ensure the grain industry can continue to provide economic value to the nation as a whole.

Organisation	Contact	Website /Phone
<b>Ordinary Member (Trading)</b>		
<b>Level A1 (over 7 Million Tonnes)</b>		
CBH Grain Pty Ltd	Mr Jason Craig	
Viterra Australia Pty Ltd	Mr Philip Hughes	
Graincorp Operations Ltd	Mr Robert Spurway	
<b>Level A2 (5 - 7 Million Tonnes)</b>		
<b>Level A3 (3 - 5 Million Tonnes)</b>		
Cargill Australia Limited	Mr Zsolt Kocza	
<b>Level A4 (1.5 - 3 Million Tonnes)</b>		
ADM Trading Australia Pty Ltd	Mr Darryl Borlase	
Louis Dreyfus Emerald Australia Pty Ltd	Mr David Johnson	
Arrow Commodities Pty Ltd	Mr Dominic Vanzella	
Bunge Agribusiness Australia Pty Ltd	Mr Stephen Bennett	
Australian Grain Export Pty Ltd	Mr Tim Martin	
<b>Level B1 (1.0 - 1.5 Million Tonnes)</b>		
Manildra Group	Mr Peter Sloan	
CHS Broadbent Pty Ltd	Mr Steve Broadbent	
Riordan Grain Services	Mr Mark Lewis	
George Weston Foods Limited	Mr Mark O'Brien	
<b>Level B2 (500,000 - 1 Million Tonnes)</b>		
Centre State Exports Pty Ltd	Mr Jeff Voigt	
Inghams Enterprises Pty Ltd	Mr Matt Clarke	
Ridley Agriproducts Pty Ltd	Mr Michael Reeves	
Riverina (Australia) Pty Ltd	Mr Gareth Stapleton	
Wilmar Gaviola Pty Ltd	Mr Matt Albion	
J K International Pty Ltd	Mr Sandeep Mohan	
ETG Commodities Pty Ltd	Mr Peter McMeekin	
<b>Level B3 (250,000 - 500,000 Tonnes)</b>		
Allied Pinnacle Pty Ltd	Mr Brett Duczmal	
Cofco International	Ms Sara Pan	
Robinson Grain Trading Co Pty Ltd	Mr Gary Robinson	
Quadra Commodities Pty Ltd	Mr Robin Cassar	
Brahman Commodities Pty Ltd	Mr Michael Aikman	
Boolah Farms Pty Ltd	Mr Stuart Tighe	
Fletcher International Exports Pty Ltd	Mr Joe Masters	
K M & W M Kelly & Sons	Mr Matt Kelly	
Demeter Grains	Mr David Oates/Barry Mansfield	
<b>Level C1 (over 10 employees, under 250,000 Tonnes)</b>		
Adams Australia Pty Ltd	Mr Ian Mack	
Agracom Pty Ltd	Mr Joe Hallman	
Agrisk Management Pty Ltd	Mr Brett Stevenson	
AGT Foods Australia	Mr Michael Brittain	
Associated Grain t/a Agrocorp Processing Australia	Mr Bhuvan Gandhi	
Australian Food and Fibre	Mr Peter Webb	
Australian Fresh Milk Holdings (AFMH)	Ms Jill Smith	
BFB Pty Ltd	Mr Shane Bird	
Blairs Produce Company	Mr Sean Blair	
Castlegate James Australasia Pty Ltd	Mr Ross Giovanetti	
Coprice	Ms Krissy Campbell	
Darwalla Milling Co Pty Ltd	Mr Gary Heidenreich	

Deckert Group Pty Ltd  
DDT Holdings Pty Ltd  
Esperance Quality Grains  
Fodder Link Pty Ltd  
Hanlon Enterprises Grain  
Hazeldenes Chicken Farm Pty Ltd  
Independent Grain Handlers Pty Ltd  
Irwin Stockfeeds  
Itochu Australia Ltd  
Inari Australia Pty Ltd  
Rex James Stockfeed Pty Ltd  
Jerilderie Grain Storage & Handling  
Laucke Flour Mills P/L  
Lawson Grains Pty Ltd  
LINX Cargo Care  
LPC Trading Pty Ltd  
Malteurop Australia Pty Ltd  
MC Croker Pty Limited  
MSM Milling Pty Ltd  
Namoi Cotton Ltd  
Newcastle Agri Terminal  
Premium Grain Handlers P/L  
Quattro Ports  
Queensland Cotton Corporation Pty Ltd  
Reid Stockfeeds Pty Ltd  
Rivalea (Australia) Pty Ltd - Animal Nutrition  
SunPork Farms Feed Mills  
ThriveAgri  
TSS Grain (Tasmanian Stockfeed Services)  
Unigrain Pty Ltd  
W B Hunter Pty Ltd  
Wilken Grain  
Woods Grain Pty Ltd  
XLD Commodities  
Viridis Ag

Mr Chris Deckert  
Mr Rajeev Saraff  
Mr Neil Wandel  
Mr Cameron Angel  
Mr Chris Coates  
Mr Marcus Dingle  
Mr Brad Bryant  
Mr Bryan Irwin  
Mr Ayush Rajvanshi  
Mr Karan Singh  
Ms Natasha Davies/Samuel James  
Mr David Barlow  
Mr Roger Laubsch  
Mr Angus Blair  
Mr David Simpson  
Mr Simon Langfield  
Mr Trevor Perryman  
Mr Greg Carroll  
Mr Peter MacSmith  
Mr Shane McGregor  
Mr Earl  
Mr John Orr  
Mr Dave Allen  
Mr Ashish Govil  
Mr Nick Reid  
Mr Andrew Philpotts  
Mr Mark Young  
Mr Charlie Brown  
Mr Trevor Macleod  
Mr Ervin Leong  
Mr Stewart Coombes  
Mr Richard Wilken  
Mr Bruce Woods  
Mr Lachie Stevens  
Mr Chris Reeves

**Level C2 (under 10 employees, under 250,000 Tonnes)**

A T Waterfield & Son Pty Ltd  
A W Vater and Co  
Advantage Grain Pty Ltd  
Access Grain Pty Ltd  
Aditya Birla Global Trading ( Australia) Pty Ltd  
Agmark Commodities  
Agri Om Australia Pty Ltd  
Agri-Oz Exports Pty Ltd  
Agromin Australia Pty Limited  
Australian - Asian Agricultural Exports Pty Ltd  
Australian Choice Exports Pty Ltd  
Australian Grain Storage  
Australian Growers Direct Pty Ltd  
Australian Mungbean Company Pty Ltd  
Avoca Grain Storage Pty Ltd  
Baker Grain  
Boort Grain Co-Operative  
Broun and Co Grain Pty Ltd  
C & S Trading Pty Ltd  
C K Tremlett Pty Ltd  
Carpendale Agri Pty Ltd  
Carson Stockfeeds Pty Ltd  
Chester Commodities Pty Ltd  
CL Commodities Pty Ltd  
Coorow Seeds  
Cory Johnston (Aust) Pty Ltd  
Craig Tyack Grain Trading  
Defiance Maize Products Pty Ltd  
Direct Commodities Pty Ltd

Mr Brad Waterfield  
Mr Kim Vater  
Mr Chris Nikolaou  
Mr Wade Humphreys  
Surya Jain  
Mr Richard Alcorn  
Mr Kishore Bulchandani  
Mr Francois Darcas  
Mr Rajni Patel  
Mr Mick Connolly  
Mr James Hunt  
Mr Matt Bailey  
Mr Tom Lucas  
Mr Damien White  
Ms Julie Bartlett  
Mr Richard Baker  
Mr Jon Bucknall  
Mr Charles Coventry  
Mr Craig Scholz  
Mr Andrew Tremlett  
Mr Andrew Kluck  
Mr John Carson  
Mr Richard Black  
Mr Robert Lean  
Mr Brian Pover  
Mr Justin Fay  
Mr Craig Tyack  
Mr Rodney Walker  
Mr Hamish Robertson



East Coast Stockfeed Pty Ltd	Mr Stuart Dolden
Ellerslie Free Range Farms Pty Ltd	Mr Bruce Holden
ETG Processing Pty Ltd T/A Wimpak	Mr James French
Export Import Australia Pty Ltd	Mr Dhanesh Kumar
Export Trading Group Australia Pty Ltd	Mr Shayne Clark
Fanmac Logisitics Pty Ltd	Mr Chris Fanning
Feed Central Pty Ltd	Mr Tim Ford
Findlays Barellan	Mr Neil Findlay
Forest Enterprises Development & Consulting Pty Ltd	Mr Charles Lowe
Grenfell Commodities Pty Ltd	Mr Glenn Beasley
GO Resources Pty Ltd	Mr Murray Gannon
Godde's Grain & Fertiliser Pty Ltd	Ms Bec Leitch
Gold Star International Pty Ltd	Abhishek Kotkar
Grain Link WA Pty Ltd	Mr Andrew Goyder
Grainforce Pty Ltd	Mr Derek Larnach
GrainTrend Pty Ltd	Mr Sanjiv Dubey
GV Grain & Fodder	Ms Joanne Harry
Hartree Partners (Australia) Pty Ltd	Mr Daniel Miller
Harwood Grains Pty Ltd	Mr Paul Harwood
Horizon Commodities Pty Ltd	Mr Aaron Jones
HX Food Group (Aus) Pty Ltd	Mr Dong Zhao
J W Koek & Company	Mr Brian Algate
KB Agri Services Pty Ltd	Mr Karl Bliss
Kangaroo Island Pure Grain Pty Ltd	Ms Emma Tonkin
Kennett Rural Services Pty Ltd	Mr Andrew Kennett
Lachlan Commodities Pty Ltd	Mr Tony Cogswell
Lake Grain Pty Ltd	Mr Derek Davis
Lane Grain Pty Ltd	Mr Garry Lane
Laragon Almond Processors Pty Ltd	Mr Mark Webber
Mandala Trading Pty Ltd	Mr Jayjeev Saraff
Marina Commodities	Mr Palwinder Singh
McKenzie Ag Services	Mr Lachlan McKenzie
McNaughts Grains & Fertilizer Pty Ltd	Mr Daniel McNaught
Matthews Transport and Grain Traders	Mr Neville Matthews
Max Grains Pty Ltd	Mr Jack Fahy
Melaluka Trading Pty Ltd	Mr Simon Pritchard
Mellco Pty Ltd	Mr Steve Mellington
Nandaly Grain Co-Operative Ltd	Mr John Bucknall
Network Grains Pty Ltd	Mr Craig Dennis
Origin Grain Pty Ltd	Mr Peter Brick
Outlook Commodities Pty Ltd	Mr Dominic Hogan
Pacific Global Sprouts Pty Ltd	Mr Prashant Kewlani
Parkinson Bros	Mr Rohan Parkinson
PB Seeds Pty Ltd	Mr Peter Blair
Pearson's Grain Pty Ltd	Mr Darren Pearson
Peters Commodities Pty Ltd	Mr Michael Oxley
Pinnacle Grains Pty Ltd	Mr Sonal Vij
Plum Grove Pty Ltd	Ms Rikki Foss
Pure Foods Eggs Pty Ltd	Ms Charmain Cain
QS Commodities Pty Ltd	Mr Nick Slipper
Quirindi Grain & Produce	Mr John Webster
RP Grain Pty Ltd	Mr Gordon Pulham
Rural Logic (Aust) Pty Ltd	Mr Michael Wood
Shannon Bros Bulk Storage Pty Ltd	Mr Clayton Shannon
Silo Bag Grain (NSW QLD) Pty Ltd	Ms Lesley Kilby
Societa Cofica Pty Ltd	Mr Dia Ram Sharma
Southern Cross Agricultural Exports P/L	Mr Syd Parsons
Spagrimon Australia Pty Limited	Mr Jiger Kotecha
Standard Commodities Australia Pty Ltd	Ms Elizabeth Bozinoska
Sudima Australia Pty Ltd	Mr Jim Garvey
Southern Grain Pty Ltd	Mr Tim Gross
Southern Grain Storage Pty Ltd	Mr Campbell Brumby
Tamma Grains Australia Pty Ltd	Mr Kim Packer
Targray Australia Pty Ltd	Mr Srinivas Boyapalli
Tiller Commodities Pty Ltd	Mr Brett Cooper
TRC International Pty Ltd	Mr Yohan Goonetilleke

Ulusoy Asia Pacific  
Universal Commodity Management  
Ward McKenzie Pty Ltd  
Watson's Bulk Logistics  
WHG Oceania Pty Ltd  
Wirrincourt Transport & Trading  
WW Agri Pty Ltd  
ZTC Australia

#### **Transport Operator**

Crawfords Freightlines Pty Ltd  
Gehrke Ag Pty Ltd  
Hamilton Contracting (NSW) Pty Ltd  
Horne Ag Logistics Pty Ltd  
Pacific National (NSW) Pty Ltd  
SEAWAY Intermodal Pty Ltd

#### **Broker**

##### **Large**

##### **Medium**

Fox Commodities Pty Ltd  
Grain Brokers Australia  
Horizon Grain Brokers Pty Ltd  
iGrain.com.au Pty Ltd  
Rain Argibusiness  
StoneX Financial Pty Ltd  
McDonald Pelz Australia  
Pure Grain Network Pty Ltd  
Quest Commodities Pty Ltd  
Teague Australia Pty Ltd

##### **Sole Operator**

A C Grain  
Allied Grain Pty Ltd  
Cogeser (Australia) Pty Ltd  
Farm Tender  
Lotema Pty Ltd  
Mallon Commodity Brokering  
Perkins Commodity Brokers  
Woodside Commodities Pty Ltd

#### **Corporate**

##### **Large**

ASX Limited  
Australian Grain Technologies Pty Ltd  
Barrett Burston Malting Co Pty Ltd  
Boortmalt Asia Pacific Pty Ltd  
Commonwealth Bank of Australia  
NSW Ports  
Symbio Laboratories

##### **Medium**

AgriDigital  
Agrifood Technology Pty Ltd  
Amspec Australia Pty Ltd  
Australian Superintendence Company  
Commodity Inspection Services (Australia) Pty Ltd  
Foss Pacific Pty Ltd  
Holding Redlich  
HFW Australia  
Intertek  
Mars Petcare t/a Mars Birdcare  
Oldendorff Carriers  
SBA Law  
SGS Australia Pty Ltd  
T-Ports Pty Ltd

Mr Mark Madjarevic  
Mr Tim Dean  
Mr Geoff Hammon  
Mr Joel Watson  
Mr Gesheng Shen  
Mr Karl Hendy  
Mr Steve Sloss  
Mr Tim Byass

Mr Phillip Davis  
Mr Julian Gehrke, Nicholas Gehrke  
Ms Jodie Hamilton  
Mr Jeremy Horne  
Mr Nick Ryder  
Mr Bikash Ram

Mr Paul Cochrane  
Mr Jeff Winspear  
Mr Ash Munro  
Ms Emily Fleming  
Mr Ian Grellman  
Mr Stefan Meyer  
Mr Peter Geary  
Mr Stuart Tighe  
Ms Jayne Barker  
Mr Tim Teague

Mr Adam Clarke  
Mr Angus Wettenhall  
Mr Robert Luetolf  
Mr Matt Henke  
Mr Todd Lees  
Mr Ian Mallon  
Mr Craig Perkins  
Mr Hamish Steele-Park

Mr Ian Waddell  
Mr Tristan Coram  
Mr Dean Ganino  
Mr Simon Robertson  
Mr Samuel Chambers  
Mr Campbell Mason  
Mr Ian Nenke/Kristian Just

Mr Henry McKay  
Mr Rob Anderson  
Mr Lee Shilvock  
Mr Andrew Parry  
Mr James Saunderson  
Mr Phil Soderberg  
Mr Geoff Farnsworth  
Mr Stephen Thompson  
Ms Debbrah Millard  
Mr Kurt Sosinski  
Mr Ben Harper  
Mr Jeremy Rosenthal  
Mr Scot Paterson  
Mr Nathan Kent

Qube Logistics (SB) Pty Ltd (T/A Qube Agri)

Mr Jeremy Brown

#### Small

Advance Trading Australasia  
Ag Scientia Pty Ltd  
Agvise (WA) Pty Ltd  
Aperture Ag Pty Ltd  
Basis Commodities Pty Ltd  
BSM Global Pty Ltd  
Clear Grain Exchange  
CloudBreak Grain Marketing Pty Ltd  
Delta Agribusiness Pty Ltd  
EP Integrated Commodities Pty Ltd  
Farmanco Marketing Pty Ltd  
FarMarCo Australia Pty Ltd  
Finesse Solutions Pty Limited  
Flexi Grain  
Futari Holding Pty Ltd  
Goldstar Commodities  
Graintec Scientific Pty Ltd  
Grainx  
Guud Asset Cerium Pty Ltd  
HarvestCheck Pty Ltd  
Hay Plains Grain Storage Pty Ltd  
IKON Commodities Pty Ltd  
Indyn Pty Ltd  
Lachstock Consulting Pty Ltd  
Longbridge Commodities Pty Ltd  
MarketAg Pty Ltd  
McMullen Consulting Pty Ltd  
Mercari Pty Ltd  
Mirfak P/L  
National Grower Register Pty Ltd  
OMIC Australia Pty Ltd  
Perten Instruments Australia Pty Ltd  
Planfarm Marketing Pty Ltd  
Priag Marketing Pty Limited  
Primal Foods Group  
Profarmer Australia Pty Ltd  
Rise Agribusiness Pty Ltd  
Pinion Advisory  
Saputo Dairy Australia Pty Ltd  
SGA Solutions Pty Ltd  
TE Storage & Logistics Pty Ltd  
Ten Tigers  
TT Club Mutual Insurance  
Ultimate Global Trading Pth Ltd  
Wattleree Consulting Pty Ltd

Mr Andrew Woodhouse  
Mr Lloyd George  
Mr Shane Sander  
Mr Alex Campbell  
Mr Chris Whitwell  
Mr Jason Fleming  
Mr Nathan Cattle  
Mr Ed Scamps  
Mr Michael Parry  
Ms Tracey Lehmann  
Mr Donald McTaggart  
Mr Robert Imray  
Mr Malcolm Finlayson  
Mr Jarrod Tonkin  
Ms Leah Petrie  
Mr Geoff Webb  
Mr Lucas Anstiss  
Mr Chris Hood  
Mr Eric Chen  
Mr Stephen Schumacher  
Mr Ron Harris  
Mr Ole Houe  
Mr Rob Martin  
Mr Nick Carracher  
Ms Kareen Durr  
Mr Mark Martin  
Mr Gerard McMullen  
Mr Daniel Marsh  
Mr Mark Murphy  
Ms Debbie Newmarch  
Mr Yasuhide Okumura  
Mr Raul Ovelar  
Mr Jerome Critch  
Mr Kevin Schwager  
Mr Peter Longhurst  
Mr James Maxwell  
Mr Ian Dalgliesh  
Mr Chris Heinjus  
Mr Ashley Denishensky  
Mr David Hudson  
Mr Tom Hage  
Mr Chris Tonkin  
Mr Rhys Richards  
Mr Andrew Alexopoulos  
Mr Jon Bucknall

#### International Affiliate

CIS - Commodity Inspection Services

Mr Paul Schweitzer

#### Industry Association

Australia Export Grain Innovation Centre  
Grain Growers Limited  
Grain Industry Association of WA  
Grain Producers Australia Ltd  
NSW Farmers Association  
Stock Feed Manufacturers' Council of Australia

Ms Courtney Draper  
Ms Shawna Gawel  
Mr Peter Nash  
Mr Colin Bettles  
Mr Peter Arkle  
Mr Duncan Rowland

#### Merchant Association

Grain Industry Association of SA  
Grain Industry Association Of Victoria  
Grain NSW Inc  
Queensland Agricultural Merchants Inc.

Ms Marie Cunningham  
Mr Colin Peace  
Ms Joanne Ware  
Mr John Francis

#### Life Members

Mr Mervyn May

Mr Christopher Kelly  
Mr Geoff Honey  
Mr Terry Deacon

