

30th May 2024

The Committee Secretary
House of Representatives Standing Committee on Agriculture
PO Box 6021
Parliament House
Canberra ACT 2600

Via: *Uploaded to the Government Portal*

Dear Secretary,

Thank for the opportunity to make a submission to the House of Representatives Standing Committee on Agriculture (Standing Committee) inquiry into the role of Australian agriculture in Southeast Asia (SEA) markets and specifically the Terms of Reference for your inquiry.

1. About Grain Trade Australia

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

GTA has over 285 organisations as members (see attachment 1.). 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.

GTA's core focus 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 within the Australian grain value chain.

GTA plays an important stewardship role, with industry specific training and development programs as well as convening several important grain industry networking events. This stewardship activity focuses on **building skills, confidence and understanding of the quality assurance systems and process** in the Australian grain supply chain, notably:

- *Australian Grains Industry Conference (AGIC)* – Australia,
- *AGIC – Asia* events,
- *AGIC – Asia* regional government/industry *Roundtables* sessions,
- The *Australian Grain Storage and Protection Conference* in association with the National Working Party on Grain Protection.

Australia's grain¹ is exported by GTA members. A full list of GTA Members is annexed to this submission.

2. Summary/Recommendations:

The key position and recommendations of this Submission for the Standing Committee to consider are summarised below:

¹ "Grain" includes cereals, pulses, oilseeds and grain/oilseed-based products (e.g. meal & oils)

Table 1 – Summary of GTA Positions

Position	Recommendation
“Practical” Government Programs	<ul style="list-style-type: none"> Government strategies must target industry/Government co-designed and implemented “front line” programs. Government to focus on practical outcomes for importing economies and their consumers as well as Australian producers.
Funding Programs for improved outcomes	<ul style="list-style-type: none"> GTA and its members support additional Government funding to assist in multi-level engagement with SEA countries (i.e. at both regional and bi-lateral government, industry and customer levels) to develop and improve capability and regulatory coherence through joint programs.
Growth focus, Compliment vs Compete	<ul style="list-style-type: none"> Australian grains are critical to SEA regional food security and subsequent political stability necessary for investment and growth. Government and industry to position Australia as a mutually beneficial trade partner, to compliment – vs compete - with local production to meet increased food demand. Australian grains, particularly wheat, barley and sorghum, offer a consistent source of feed grain for stockfeed manufacturing (value-adding) sectors in several SEA countries. Promotion of Australian grain supports SEA regional and sovereign goals of food security and an increase in the value-added sectors.
Focus on a Strategic Partnership Approach	<ul style="list-style-type: none"> GTA supports an industry/Government strategic partnership approach to build capability and strengthen trade relationships.
ESG & Sustainable value chain	<ul style="list-style-type: none"> Promote Australian sustainability and the grain value chain’s strong credentials in Environment, Social and Governance (ESG) in food safety, traceability, sustainability, environment, people & safety, nutritional quality and system integrity.
Risk based / Market-Orientated Approach	<ul style="list-style-type: none"> Focus on addressing distorting trade barriers, both in terms of tariffs, political interference, and Non-Tariff Measures (NTMs). Begin a process of addressing SEA domestic politically focused barriers to trade that are increasing costs and risks to trade, impacting consumers and producers, value adding opportunities, and simultaneously increasing sovereign food security risks. More timely release of Australian Bureau of Statistics (ABS) market information to improve market efficiency and trade facilitation.

3. Australia’s Southeast Asia Economic Strategy to 2040

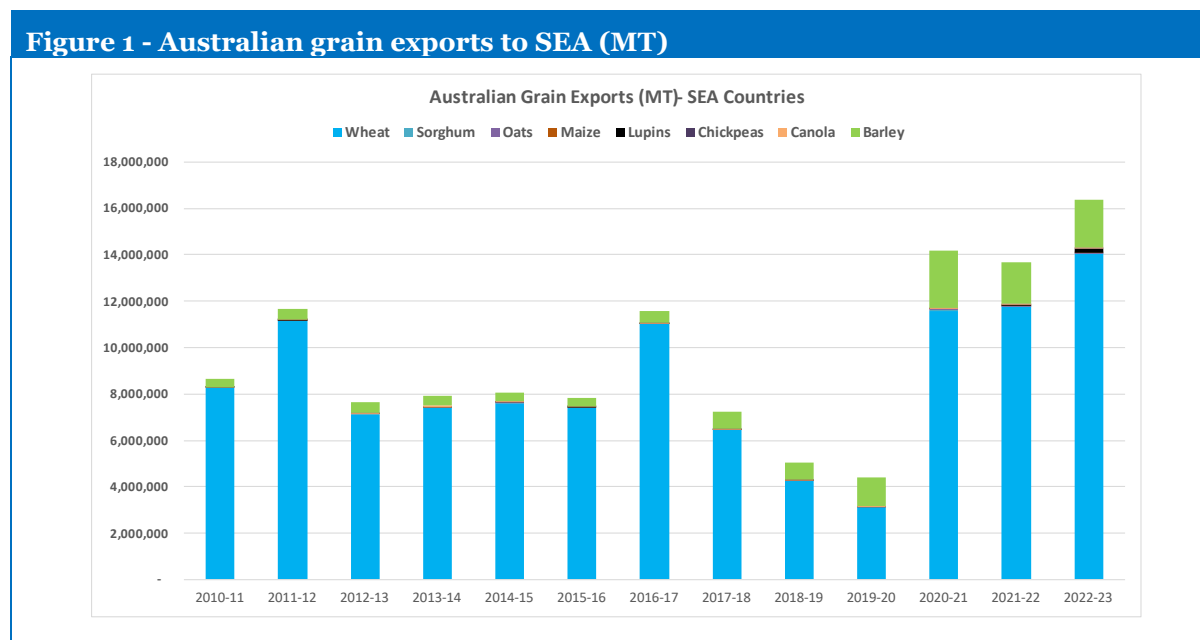
GTA is broadly **supportive of the principles and recommendations** contained in the report by Mr Nicholas Moore AO on *Australia’s Southeast Asia Economic Strategy to 2040*. The approach to raise awareness, remove blockages, build capability, and deepen investments and partnerships is an approach that allows for pragmatic applications and has been successfully utilised by the grain sector and other industries over time.

We support the Report’s recognition of the importance of agriculture and food to the SEA strategy. Australia’s agricultural sector and exports are critical to the food and nutritional security of the SEA region, and in turn critically important and directly linked to political stability within the region. **Political stability is a fundamental necessity for economic growth and investment.**

The Report notes that in 2022 agriculture and food contributed A\$17.5 billion or 23.6% of Australian exports to the SEA region. The **grain sector contributed A\$ 6.6 billion or 38% of Australia’s**

agricultural exports to the SEA region, and 9% of total Australian exports to SEA². The next largest agricultural commodity to SEA is cotton which was 22% lower than the grain sector with 16% of agricultural exports to SEA.

Figure 1 shows Australian grain exports to the SEA region by commodity. Since 2010/11 Australia has exported an average of approximately 9.5 million metric tonnes (MT) of grain per annum to SEA, with a minimum of 4 MT and a maximum of over 16 MT. Wheat is the dominant commodity accounting for 90% of exports, followed by barley (9%).



Source: ABS

We present these statistics to highlight that the grain sector has long standing trade relationships and significant market access into the SEA region. However, there remains **opportunity for leverage and growth** and improved market access for exporters, with appropriate and proportionate funding from government working with industry expertise. For example, the dominant export market for Australian barley is China, which means there is significant diversification opportunity for barley and feed grains in general in SEA.

In our view, Government strategies should be targeting “front line” programs with industry involvement in the design and program application focussed on practical outcomes for importing economies and their consumers as well as Australian producers. We highlight this in contrast to a **common tendency for many Government programs to increase spending, resources** (including internally orientated bureaucracy and consultancy) **for Government departments and agencies** rather than delivery of “front line” programs.

Programs which feature increases in Government agency resources and administration can be problematic in terms of sustaining longer term durable outcomes for industry. Changes and rotation over time to Government staff, agency strategies and mandates can impact the continuity of engagement and building durable business and trade relationships. Whereas programs jointly designed and implemented by industry and Government are more likely to adapt and live through staff and program changes and lead to stronger, more durable business relationships and outcomes

4. Specific concerns House Standing Committee Terms of Reference:

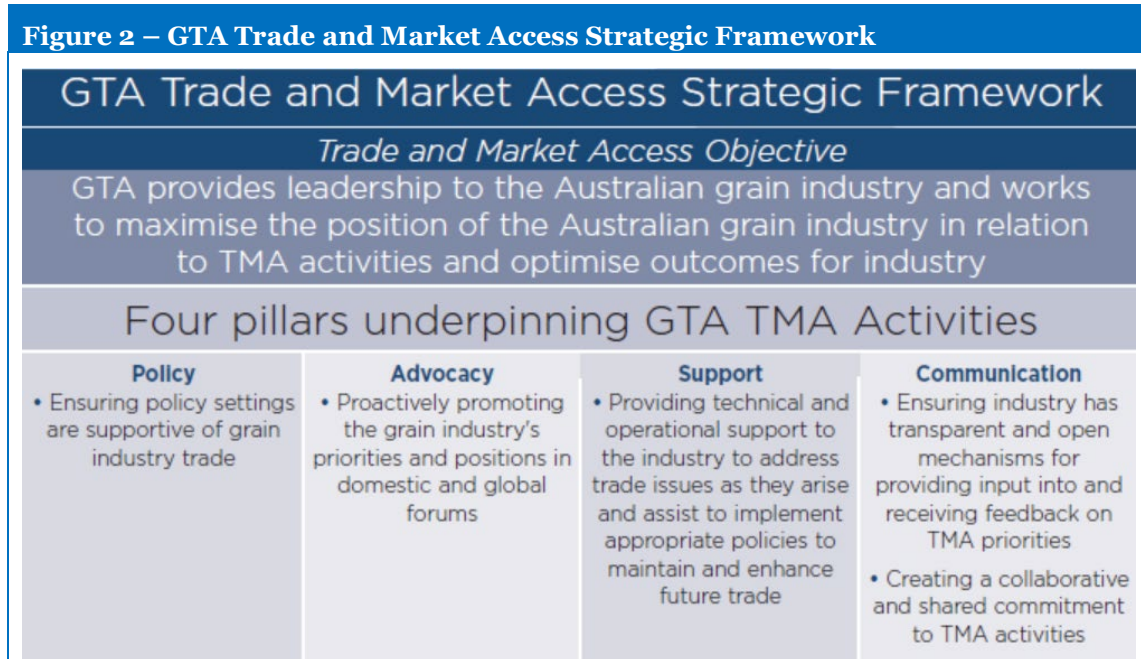
In response to the specific proposed inquiry Terms of Reference we offer the following comments:

² [Trade statistical pivot tables | Australian Government Department of Foreign Affairs and Trade \(dfat.gov.au\)](https://www.dfat.gov.au/trade-statistical-pivot-tables)

a) *How the Australian Government can support agriculture and food industries in leveraging partnership opportunities within the region. This includes new and improved market access, streamlining trade systems, and supporting industry to identify and build market opportunities in the region*

- The grain industry has a long-established history of trade and economic relationship with its customers throughout the South East Asia (SEA) region. To support this trading relationship GTA has developed a Trade and Market Access Strategy, which includes the following Strategic framework focusing on policy, advocacy, support and communications.

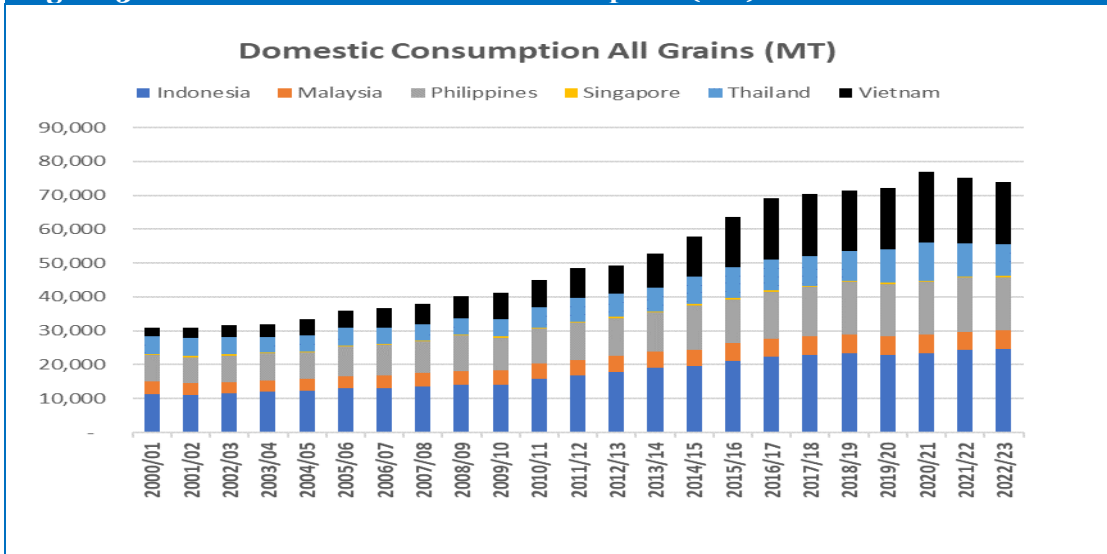
Figure 2 – GTA Trade and Market Access Strategic Framework



- Further details on the GTA Trade and Market Access Strategy can be found [here](#) and in the [GTA Annual Report](#).
- We note in the Moore Report into *Australia's Southeast Asia Economics Strategy to 2040* there is **enormous scope to strengthen economic engagement** and to leverage existing partnerships between SEA and Australia. The economic and demographic growth, including rising incomes, increase in demand for protein and flour-based products in SEA countries has seen a dramatic increase in domestic demand for all grain (food and feed) reaching 77 MT in 2020/21 ³.

³ USDA PSD

Figure 3 – SEA All Grain Domestic Consumption (MT)

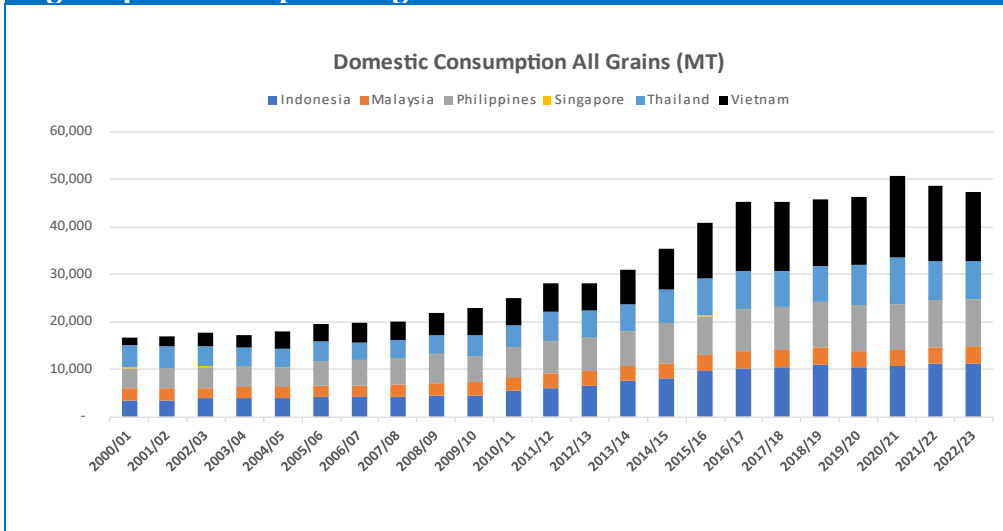


Source: USDA PSD

- GTA and its members **support additional Government funding** to assist in multi-level engagement with SEA countries (i.e. at both regional and bi-lateral government, industry, and customer levels) to develop and **improve capability and regulatory coherence** through joint programs focussing on:
 - understanding of respective regulatory systems,
 - quality assurance processes,
 - sampling and analysis harmonisation.
- Such funding should focus on:
 - technical exchanges,
 - networking, and
 - engagement.
- Any work to be undertaken on policy and capacity building should focus on a **rigorous scientific, evidence risk-based approach** as opposed to a “hazard based” approach that can sometimes influence policy, regulatory decision making and application in some countries.
- Market opportunities are also best progressed through **joint programs**. We are strong supporters of the development of **programs focussed on the SEA feed grain market** (largely focused on the feed milling sector), noting:
 - These markets are substantial, around **48-50 million metric tonnes**, with significant growth potential as population, incomes and demand for protein increase across SEA.
 - Since 2001/01 domestic consumption of **feed grains in SEA has grown over 180%**⁴

⁴ Calculated from USDA PSD data.

Figure 4 – Consumption of grain for Animal Feed in SEA



Source: USDA PSD

- However, due to political sensitivity in relation to the large number of small domestic corn producers, these markets, in most SEA countries tend to be protected with **restrictions on imports of feed grains** (including wheat, barley, corn and canola meal) to **support domestic corn producers**. For example, while Australian feed grains have a tariff advantage against international competitors under FTA arrangements, Thailand has at times implemented a regulation that requires a grain importer to purchase 2 tonnes of domestic corn production for every 1 tonne of imported feed grain. This inhibits economic feasibility and logistical efficiencies of both local and importing supply chains.
- These types of restrictions inhibit policy objectives in several SEA countries of growth and development of value-added economic activity, through the growth and promotion of domestic manufacturing industries, including developing export markets for the value-added products (such as poultry products and packaged foods).
- Australian grains, particularly wheat, barley, and sorghum, offer a consistent source of feed grain for stockfeed manufacturing sectors in several SEA countries, thereby supporting regional and sovereign goals **of food security and increase in value-adding sectors**. Such **imports would be complementary – not competitive to local corn production**.
- Another example is provided by the International Market Analysis Research and Consulting (IMARC) Group in its Indonesian Animal Feed Market Report stated:

‘The Indonesia animal feed market size reached US\$ 8.3 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 12.2 Billion by 2032, exhibiting a growth rate (CAGR) of 4.32% during 2024-2032. The rising demand for meat and dairy products, the growing affluence and changing dietary preferences, the increasing meat consumption, the research and development in the field of animal nutrition, the escalating awareness of the importance of animal welfare and health, and the expansion of livestock farming are some of the factors propelling the market’.
- While noting the **political sensitivities in relation to domestic market support** provided to corn producers in several SEA countries, we believe given the growth potential and increased demand **this issue needs to be addressed** in the medium to longer term by the Australian Government **in the context of mutually beneficial policy objectives**. Our competitors are known to be active in this sector providing significant resources (often with significant own government funding) for market penetration including quality and technical advice to SEA domestic processors.
- These restrictive policy actions on the import of feed grain result in market access restrictions and trade barriers that not only constrain growth opportunities and future value for

Australian growers, but also work to the detriment of the SEA countries. This negative impact is felt in terms of:

- Higher costs for consumers,
 - Constrained growth; and
 - Restricting job growth in value-add industries such as poultry.
- This raises challenges for our SEA trade partners, including generating investment to meet future **increases in food security risks and increased demand driven by population and consumer income growth**. GTA believes it is in the longer-term interests of Australia and its trade partners in SEA to focus on and strive to address this issue.
 - The grain sector has a long history of working collegiately with the Australian Government. Working together we can develop long term strategies to address these issues with our trade partners by highlighting the **beneficial impacts for both parties** through expanded growth in value adding industries such as feed milling (animal and aqua).
 - Messaging to our trade partners is critical and it is important to explain **Australian feed grain exports are not seeking to displace domestic corn production** in the importing country, but rather participate and assist in the forecast growth in demand and value adding production. As the demand for meat and dairy products rises in SEA, there is a parallel increase in the need for cereal-based animal and aqua feed to sustain the growing industries.
 - An essential focus for trade strategies and engagement is to recognise and clearly communicate that **successful and sustainable trade with SEA needs to be mutually beneficial**.

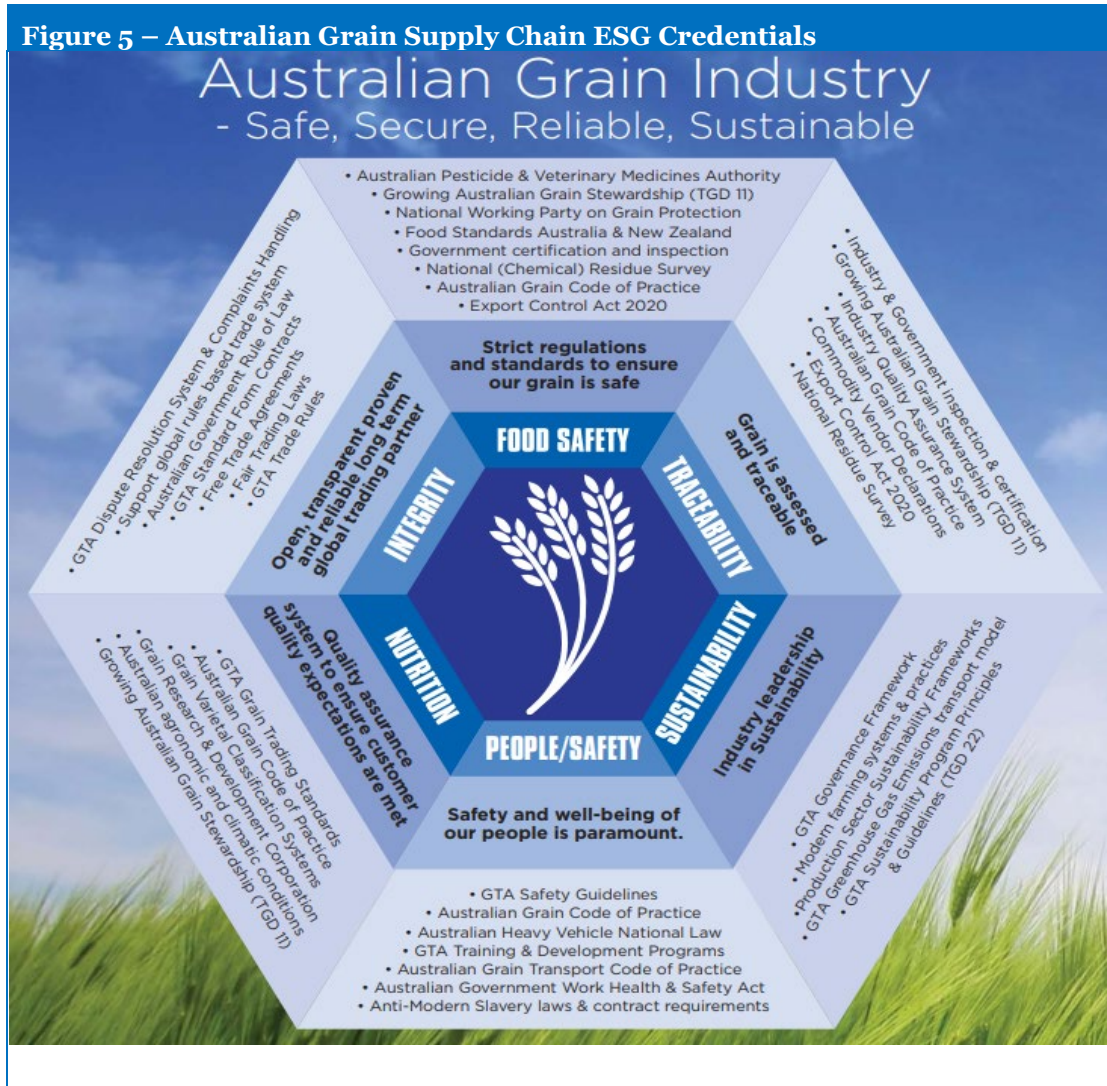
b) *Opportunities to build and strengthen partnerships in Southeast Asia to build capability in the region, including in the area of animal and plant biosecurity, adapting to a changing climate, improving agriculture sustainability and agriculture technology and innovation.*

- GTA supports a focus on these areas as they are all supportive of enhancing existing trade (including through reduced risk to exporters i.e. GTA members) and the opportunity outlined above to support SEA food security and increases in demand through improved market access for feed grain exports to SEA.

GTA supports a **strategic partnership approach to build capability and strengthen trade relationships**. GTA has successfully engaged this approach in other markets and regions. Australia's grain industry has significant knowledge and experience that can be shared and exchanged with partners in SEA. An important area to focus will be:

- to **improve the knowledge and understanding of respective regulatory systems, and**
 - to improve regulatory harmonisation between economies, particularly in the areas of biosecurity and plant biotechnology.
- The Australian grain sector is recognised as an industry that is focussed and has a very positive story on sustainability and strong credentials on Environment, Social and Governance (ESG) aspects of the value chain.
 - GTA has developed a communication tool titled [Australia's grain supply chain and its Environmental, Social and Governance \(ESG\) credentials](#). This seeks to illustrate the Australian grain supply chain credentials with respect to:
 - Food Safety,
 - Traceability,
 - Sustainability,

- People & Safety,
- Food and nutrition quality, and
- Integrity.
- This is represented diagrammatically in Figure 5 below:



Source: GTA

- The anticipated increase in demand for feed grains in SEA is driven by increasing population and the rising middle class shift to higher consumption of animal and aqua protein. **Formulation of feed rations, improving efficiency, and animal wellbeing** are all tenants of a modernising and growing feed grain sector.
- In SEA there is a growing awareness of the environment and a shift towards sustainable and eco-friendly food supply chain. This creates a tangible opportunity for the Australian agricultural sector to work with our trade partners and governments to enhance existing trade and develop a sustainable feed grain trade.

c) *Identifying new and emerging opportunities and challenges in the region for the Australian agriculture industry, including enhanced market intelligence for exporters to support them to navigate markets and realise opportunities.*

- The Australian grain sector and the Government has a long history of trade and trade relationships in SEA as demonstrated by the annual export income of A\$6.6b in 2022. GTA has highlighted the opportunity for the **export of Australian grains** into the extremely large SEA feed sector to help the region meet increases in demand and stabilise regional food security.
- We would be supportive of efforts to **enhance market intelligence for exporters**, provided such intelligence is as a “primary” source, rather than information sourced from commercial information providers. In terms of priorities for the overall SEA strategy, in our view governments financial resources should be prioritised towards more **industry orientated and “front line” resources and programs**.
- One area where Government does provide “primary” information for the grain industry is the **Australian Bureau of Statistics (ABS) export data**. This data is important for the grain industry in monitoring grain exports from Australia. Currently this data is released 3 months after the fact. In GTA’s view, more **timely release of this data, would assist grain exporters**, consumers and growers in navigating markets, improved understanding of demand, and management of market and logistical risks. In short, **more timely release of this ABS data** will lead to a more efficient domestic and export grain market. This timing of this information is even more critical given the marked increase in the monthly Australian export supply chain capacity since deregulation of wheat marketing (as indicated in Table 2).

Table 2 – Monthly Capacity Growth 2008 to 2024 (million metric tonnes)			
	2008	2024	% Growth
Peak Monthly Exports	3mmt	5.8mmt	93%
Average Monthly Exports	1.8mmt	4.3mmt	139%
Domestic Demand	14mmt	17.7mmt	26%

d) *Mechanisms for government and industry to leverage identified opportunities for Australian agriculture, and to address key priorities in the Southeast Asia region.*

- As discussed, market opportunities are best progressed through joint industry and Government programs. GTA and its members support additional Government funding to assist in multi-level engagement with SEA countries supporting technical exchanges, networking, and engagement.
- As noted above, GTA is convenor of several stewardship events in both Australia and SEA that aim to develop and strengthen trade relationships. Further engagement by government to support these events would be beneficial for both SEA and Australian industry.
- In addition, support for technical programs including training, capability building and technical exchange, and importantly regular and **formal joint government and industry dialogues on both a bilateral and multilateral basis would be effective in improving mutual understanding between economies and thereby strengthen trade.**

e) *How Australian agriculture can support Southeast Asia's food security [towards 2040].*

- Given the close proximity to SEA and complimentary grain products there is inherent potential to increase trade into SEA to meet increasing growth and demand. Notable in Figure 3, in recent years of record Australian grain production, Australian **exports of grain to SEA increased significantly, notability into Vietnam and Philippines.** Exports to Indonesian feed market remains relatively low (versus its consumptive demand) and remains a potentially important market.
- **Feed grain imports into Indonesia are being restricted due to previously discussed political sensitivities around local corn producers.**
- It is important to position Australian agriculture as complimentary, not competitive, to the SEA food system as well as constructive to its food security. **Trade is and must remain a critical component of food security.** However, it is important this is **positioned as mutually beneficial** with an emphasis on developing and **demonstrating long term value** to the importing economy value chain and its consumers.
- A more reflective **market-based trade** of grain between Australia and SEA is a key element in supporting SEA's food security goals. This means addressing trade barriers, both in terms of tariffs, **political interference and Non-Tariff Measures (NTMs).**
- There are risks and barriers to food security goals and trade through political disruptions and policy that distort trade and increase risks and costs for industry and the consumer. These trade barriers include tariff policies and NTMs.
- While it is recognised some NTMs serve legitimate purposes (such as protecting human, animal and plant health and the environment), many NTMs can act as trade barriers. **Illegitimate NTMs, result in higher costs for consumers, higher risk to trade, and lower returns to producers.**
- NTMs have long been used by governments as policy and trade regulatory tools and have the scope to significantly increase the costs and risks of trade and impact on trade opportunities. These restrictive trade measures, including some NTMs and other policies can be detrimental to trade facilitation and can generate barriers that will increase the likelihood of **food insecurity.**
- Previous work undertaken by the Australian grain industry has identified the importance of NTMs in relation to market access and in particular chemical maximum residue limits (MRLs) and documentation. As a principle, Australia should encourage economies to adopt a scientific risk-based approach to chemical regulations and MRLs, and as a guideline **encourage adoption of exporting country MRLs or CODEX MRLs,** where an importing country does not have its own scientific risk-based MRLs in place.
- GTA has been a strong advocate, including working with DAFF in ASEAN and APEC forums, in seeking to **minimise the impact and disruption NTMs have** on both the Australian industry, and importantly on the importing economy. Working with industry, regional multi-lateral alliances and DAFF, GTA facilitated the production of a report on the impact NTMs have on the Australian grain industry.

Figure 6 – Australian Grain Industry NTM Report



Source: GTA

- The NTM report is available [here](#).
- An ongoing focus on trade facilitation through the reduction of NTMs would be welcomed by all trade participants and would support food security in SEA.

5. Conclusion

SEA is on a fast track to growth providing the Australian grain industry opportunities and expanded markets especially in feed grains.

This growth story of SEA, coupled with changes in dietary preferences (increase in protein demand and cereal-based products) are aligned to an increase in focus on:

- consumer preferences,
- food safety and
- incorporation of technology in the production systems, supply chains, processing, and the consumer “experience”.

These will drive efficiencies and increase in demand for Australia’s agricultural products and necessitate investment (both government and private) to support and ensure opportunities are realised and trade efficiency and with-it regional food security is improved.

We look forward to continued engagement and input to assist the inquiry understand the role of Australian agriculture in Southeast Asian markets and progressing the *SEA Economic Strategy to 2040*.

Please do not hesitate to contact GTA at any stage on this and other grain industry matters.

Yours faithfully,

Pat O'Shannassy
Chief Executive Officer



GRAIN TRADE AUSTRALIA

Membership List as of 03 April 2024

Member Type ↑	Member Level ↑	Account Name	Primary Contact	Website
Ordinary Member	A1	CBH Group	Ben Macnamara	www.cbh.com.au
		GrainCorp Australia	Robert Spurway	www.graincorp.com.au
		Viterra Australia	Philip Hughes	www.viterra.com.au
			3	
	A3	Cargill Australia	Zsolt Kocza	www.cargill.com.au
			1	
	A4	ADM Trading Australia	Darryl Borlase	www.adm.com
		Arrow Commodities	Dominic Vanzella	www.arrowcom.com.au
		Australian Grain Export	Tim Martin	www.australiangrainexport.com.au
		Bunge Agribusiness Australia Pty Ltd	Stephen Bennett	www.bunge.com
		Louis Dreyfus Company Emerald Australia	Oliver Reid	www ldc.com
			5	
	B1	CHS Broadbent	Steve Broadbent	www.broadbentgrain.com.au
		ETG Commodities	Peter McMeekin	www.etgworld.com
		George Weston Foods	Michael Schmidt	www.gwf.com.au
		Manildra Group	Peter Sloan	www.manildra.com.au
		Riordan Grain Services	Jim Riordan	www.riordangrains.com.au
			5	
	B2	Centre State Exports	Jeff Voigt	www.centrestateexports.com.au
		Inghams Enterprise Pty Ltd	Matt Clarke	www.ingham.com.au
		J K International Pty Ltd	Sandeep Mohan	www.jki.com.au
		Ridley Agriproducts	Michael Reeves	www.agriproducts.com.au
		Riverina (Australia) Pty Ltd	Gareth Stapleton	www.riverina.com.au
		Wilmar Gavilon Pty Ltd	Matt Albion	www.wilmargavilon.com
			6	
	B3	Allied Pinnacle	Brett Duczmal	www.alliedmills.com.au
		Boolah Farms Pty Ltd	Stuart Tighe	www.boolah.com.au
		Brahman Commodities	Michael Aikman	www.brahmancommodities.com.au
		Cofco International Australia	Sarah Pan	www.cofcointernational.com
		Demeter Grains	David Oates	www.demetergrains.com.au
		K M & W M Kelly & Sons	Matt Kelly	www.kellygrains.com.au
		Quadra Commodities Pty Ltd	Robin Cassar	www.quadra.com
		Robinson Grain Trading	Adam Robinson	www.robinsongrain.com.au
			8	
	C1	Adams Australia Pty Ltd	Ian Mack	www.adamsaustralia.com.au
		Agracom	Joe Hallman	www.agracom.com.au
		Agrisk (Market Check)	Brett Stevenson	www.marketcheck.com.au
		AGT Foods Australia	Michael Brittain	www.agtfoods.com/australia
		Associated Grain t/a Agrocorp Processing Australia	Russell Darbey	www.agrocorp.com.au
		Australian Food & Fibre Processing	Peter Webb	www.australianfoodandfibre.com.au
		Australian Fresh Milk Holdings (AFMH)	Jill Smith	www.afmh.com.au
		BFB Pty Ltd	Shane Bird	www.bfb.com.au
		Blairs Produce Company	Sean Blair	crt.com.au/store/blairs-produce-company/
		Castlegate James Australasia Pty Ltd	Ross Giovanetti	www.castlegatejames.com.au
		COPRICE	Krissy Campbell	www.coprice.com.au
		Darwalla Milling Co Pty Ltd	Gary Heidenreich	www.darwalla.com.au
		DDT Holdings	Rajeev Saraff	www.ddtholdings.com.au
		Deckert Group Pty Ltd	Chris Deckert	www.deckerts.com.au
		Esperance Quality Grains Pty Ltd	Neil Wandel	www.esperancequalitygrains.com
		Fletcher International Exports	Joe Masters	www.fletchint.com.au
		Fodder Link Pty Ltd	Cameron Angel	www.fodderlink.com.au
		Hanlon Enterprises	Chris Coates	www.hanlonenterprises.com.au
		Hazeldenes Chicken Farm	Marcus Dingle	www.hazeldenes.com.au
IGH Commodities		Brad Bryant	www.igh.net.au	
Inari Australia		Karan Singh	www.inariaustralia.com.au	
Irwin Stockfeeds		Bryan Irwin	www.irwinstockfeeds.com.au	
Itochu Australia Ltd		Ayush Rajvanshi	www.itochu.com.au	
Jerilderie Grain Storage & Handling		David Barlow	www.jgsh.com.au	
Laucke Flour Mills Pty Ltd		Roger Laubsch	www.laucke.com.au	
Lawson Grains Pty Ltd		John Marshall	www.lawsongrains.com	
LPC Trading Pty Ltd		Simon Langfield	www.lpctrading.com.au	
Malteurop Australia Pty Ltd		Eric Fisher	www.malteurop.com/en/australia	
MC Croker		Jason McPherson	www.crockergrain.com.au	
MSM Milling Pty Ltd		Peter MacSmith	www.msmmilling.com.au	
Namoi Cotton Ltd		Nathan Hunter	www.namoicotton.com.au	
Newcastle Agri Terminal		Jock Carter	www.naterminal.com.au	
Pentarch Agricultural Pty Ltd	James Whiteside	www.pentarch.com.au		
Premium Grain Handlers P/L	John Orr	www.pgh.com.au		
Quattro Ports	Dave Allen	www.quattroports.com.au		
Queensland Cotton Corporation	Ashish Govil	www.qcotton.com.au		

	Reid Stockfeeds Pty Ltd	Ian Reid	www.reidstockfeeds.com.au
	Rex James Stockfeed	Natasha Davies	www.jamesstockfeed.com.au
	Rivalea (Australia) Pty Ltd - Animal Nutrition	Andrew Philpotts	www.rivalea.com.au
	SunPork Farms Feed Mills	Mark Young	www.sunporkgroup.com.au
	ThriveAgri Pty Ltd	Charlie Brown	www.thriveagri.com
	TSS Grain (Tasmanian Stockfeed Services)	Trevor Macleod	www.tasstockfeed.com.au
	Unigrain	Ervin Leong	www.unigrain.com.au
	Viridis Ag	Chris Reeves	www.viridisag.com
	W B Hunter Pty Ltd	Stewart Coombes	www.wbhunter.com.au
	Wilken Grain	Richard Wilken	www.wilkens.com.au
	Woods Grain Pty Ltd	Bruce Woods	www.woodsgrain.com.au
	XLD Commodities	Paul Willows	www.xldgrain.com.au
		48	
C2	Access Grain Pty Ltd	Wade Humphries	www.accessgrain.com.au
	Aditi UVG	Harshad Kale	www.aditiuvg.com
	Aditya Birla Global Trading (Australia)	Surya Jain	www.abgtrading.com
	Advantage Grain Pty Ltd	Chris Nikolaou	www.advantagegrain.com.au
	Agmark Commodities	Richard Alcorn	www.agmark.com.au
	Agri Om Australia Pty Ltd	Kishore Bulchandani	www.agriom.com.au
	Agri-Oz Exports (Aust) Pty Ltd	Francois Darcas	linkedin.com/in/francois-darcas-4a440577
	Agromin Australia Pty Ltd	Rajni Patel	www.agromin.com.au
	Arya Pulses Australia Pty Ltd	Aravindhan Ravindraraaj	www.aryapulses.com.au
	A T Waterfield & Son Pty Ltd	Brad Waterfield	linkedin.com/in/brad-waterfield-8767869b
	Australian - Asian Agricultural Exports (AAAX)	Mick Connolly	www.aaax.ws
	Australian Choice Exports Pty Ltd	James Hunt	www.australianchoiceexports.com.au
	Australian Grain Storage	Matt Bailey	www.sunrice.com.au
	Australian Growers Direct Pty Ltd	Tyrone Stowers	www.ausgrowersdirect.com.au
	Australian Mungbean Company Pty Ltd	Damien White	www.australianmungbean.com.au
	A W Vater & Co	Kim Vater	www.vater.com.au
	Baker Grain	Richard Baker	www.bakergrain.com.au
	Boort Grain Co-Operative	Jon Bucknall	www.boortco-op.com.au
	Broun and Co Grain Pty Ltd	Charles Coventry	www.brounandco.com.au
	C & S Trading Pty Ltd	Craig Scholz	www.scholzbh.com.au
	Carpendale Agri Pty Ltd	Andrew Kluck	www.carpendale.com.au
	Carson Stockfeed Pty Ltd	John Carson	03 6634 7376
	Chester Commodities	Richard Black	www.chestercommodities.com.au
	C K Tremlett Pty Ltd	Andrew Tremlett	linkedin.com/in/andrew-tremlett-36a06385
	CL Commodities	Robert Lean	www.clcommodities.com.au
	Coorow Seeds	Brian Pover	www.coorowseeds.com.au
	Cory Johnston (Aust) Pty Ltd	Justin Fay	www.coryjohnston.com.au
	Craig Tyack Grain Trading	Craig Tyack	craig.tyack@bigpond.com
	Defiance Maize Products Pty Ltd	Rodney Walker	www.corson.co.nz
	Direct Commodities Pty Ltd	Hamish Robertson	www.directcommodities.com.au
	East Coast Stockfeeds	Stuart Dolden	www.ecsf.com.au
	Ellerslie Free Range Farms Pty Ltd	Bruce Holden	www.dahall.com.au
	ETG Processing Pty Ltd T/A Wimpak	James French	www.wimpak.com.au
	Export Import Australia	Dhanesh Kumar	www.exportimportaustralia.com.au
	Export Trading Group Australia Pty Ltd	Shayne Clark	www.etgworld.com
	Fanmac Logistics Pty Ltd	Chris Fanning	www.fanmacag.com.au
	Feed Central Pty Ltd	Tim Ford	www.feedcentral.com.au
	Findlays Barellan	Neil Findlay	www.findlay.world/about-us
	Forest Enterprises Development & Consulting Pty Ltd	Charles Lowe	02 6662 8261
	Gold Star International Pty Ltd	Abhishek Kotkar	www.goldstarinternational.com.au
	GO Resources Pty Ltd	Murray Gannon	www.go-resources.com.au
	Grainforce Pty Ltd	Derek Larnach	www.grainforce.com
	Grain Link WA Pty Ltd	Andrew Goyder	www.grainlink.com.au
	GrainTrend Pty Ltd	Sanjiv Dubey	www.graintrend.com
	Grenfell Commodities Pty Ltd	Glenn Beasley	www.grenfellcomm.com.au
	GV Grain & Fodder	Joanne Harry	linkedin.com/in/joanne-harry-707119116
	Hartree Partners (Australia) Pty Ltd	Daniel Miller	www.hartreepartners.com
	Harwood Grains & Stockfeeds	Paul Harwood	www.harwoodgrains.com.au
	Horizon Commodities Pty Ltd	Aaron Jones	www.horizoncommodities.com.au
	HX Food Group (Aus) Pty Ltd	Dong Zhao	www.hxfoodgroup.com.au
	J W Koek & Company	Brian Algate	07 3341 4548
	Kangaroo Island Pure Grain	Emma Tonkin	www.kipuregrain.com
	KB Agri Services Pty Ltd	Karl Bliss	linkedin.com/in/karl-bliss-916bb679
	Kennett Rural Services Pty Ltd	Andrew Kennett	www.kennetrural.com.au
	Lachlan Commodities Pty Ltd	Tony Cogswell	www.lachlancommodities.com
	Lane Grain Pty Ltd	Garry Lane	linkedin.com/in/garry-lane-82635b88
	Laragon Almond Processors Pty Ltd	Mark Webber	www.laragon.com.au
	Mandala Trading	Jayjeev Saraff	www.mandalatrading.com.au
	Marina Commodities (Australia)	Palwinder Singh	www.marinacommodities.com
	Matthews Transport and Grain Traders	Neville Matthews	linkedin.com/in/neville-matthews-aa592191
	Max Grains Pty Ltd	Jack Fahy	www.maxgrains.com.au
	Mckenzie Ag Services	Lachlan Mckenzie	www.mckenzieag.com.au
	McNaughts Grain & Fertilizer Pty Ltd	Daniel Mcnaught	www.mcnaughts.com
	Melaluka Trading Pty Ltd	Simon Pritchard	www.melalukatradng.com.au
	Mellco Pty Ltd	Steve Mellington	www.mellco.com.au
	Nandaly Grain Co-Operative	Jon Bucknall	www.nandalvco-op.com.au

		Network Grains Pty Ltd	Craig Dennis	www.networkgrains.com.au
		Northbound Trading Pty Ltd t/a WA Lupins	Daniel Marshall	www.walupins.com.au
		Origin Grain Pty Ltd	Marcus Currie	www.origingrain.com
		Outlook Commodities	Dominic Hogan	https://facebook.com/Outlookcommodities
		Pacific Global Sprouts Pty Ltd	Prashant Kewlani	www.pacificglobalsprouts.com
		Parkinson Bros	Rohan Parkinson	linkedin.com/in/rohan-parkinson-a76a761b4
		PB Seeds	Peter Blair	www.pbseeds.com.au
		Pearson's Grain	Darren Pearson	www.pearsonsgroup.com.au
		Peters Commodities	Michael Oxley	www.petcom.com.au
		Pinnacle Grains Pty Ltd	Sonal Vij	www.pinnaclegrains.com.au
		Plum Grove	Rikki Foss	www.plumgrove.com.au
		Pure Foods Eggs Pty Ltd	Tim Castle	www.purefoods.com.au
		QS Commodities Pty Ltd	Nick Slipper	www.qscommodities.com
		Quirindi Grain & Produce	John Webster	john.webster@quirindigrain.com.au
		RP Grain Pty Ltd	Gordon Pulham	randpcarriers.com.au/r-p-grains
		Rural Logic (Aust) Pty Ltd	Michael Wood	www.rurallogic.com.au
		Shannon Bros Bulk Storage Pty Ltd	Clayton Shannon	www.shannonbros.com.au
		Silo Bag Grain (NSW QLD) Pty Ltd	Lesley Kilby	www.silobaggrain.com.au
		Societa Cofica Pty Ltd	Dia Ram Sharma	www.societacofica.com.au
		Southern Grain Pty Ltd	Tim Gross	www.southernstockfeeds.com.au
		Southern Grain Storage Pty Ltd	Campbell Brumby	www.southerngrains.com.au
		Spagrimon Australia	Jiger Kotecha	www.spagrimon.com.au
		Standard Commodities Australia Pty Ltd	Elizabeth Bozinoska	www.stancom.com.au
		Sudima Australia	James Garvey	www.sudima.com
		Sun Euro Australia	Tarun Saxena	www.suneuro.com.au
		Tamma Grains Australia Pty Ltd	Kim Packer	www.tammagrains.com.au
		Tiller Commodities Pty Ltd	Brett Cooper	www.tillercommodities.com
		TRC International	Yohan Goonetilleke	www.trcglobal.com.my
		Trentham Grazing Pty Ltd (t/a Godde's Grain & Fertiliser Pty Ltd)	Kim McGaw	www.goddesgrainandfertiliser.com.au
		Ulusoy Asia Pacific Pty Ltd	Mark Madjarevic	www.ulusoyflour.com
		Universal Commodity Management	Tim Dean	www.commoditymanagement.com.au
		Ward McKenzie Pty Ltd	Greg Howe	www.mckenziefoods.com.au
		Waterfall Australia	Ian Mallon	ian@waterfallaustralia.com.au
		Watsons Bulk	Joel Watson	www.wbl.net.au
		WHG Oceania Pty Ltd	Gesheng Shen	shen@tqaj.cn
		Wirrinour Transport & Trading	Karl Hendy	www.wirrinourtransport.com.au
		WW Agri Pty Ltd	Steve Sloss	wwagri.com.au
		ZTC Australia	Timothy Byass	www.ztcaus.com
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Transport Operator		Crawfords Freightlines Pty Ltd	Phillip Davis	www.crawfordsfreightlines.com.au
		Gehrke Grains & Transport Pty Ltd	Julian Gehrke	www.gehrke.com.au
		Hamilton Contracting (NSW) Pty Ltd	Jodie Hamilton	www.hamiltoncontracting.com.au
		Horne Ag Logistics Pty Ltd	Jeremy Horne	www.horneaglogistics.com.au
		Pacific National (NSW) Pty Ltd	Nick Ryder	www.pacificnational.com.au
		SEAWAY Intermodal Pty Ltd	Bikash Ram	www.seawayintermodal.com.au
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Broker	Medium	Fox Commodities Pty Ltd	Paul Cochrane	www.foxcommodities.com.au
		Grain Brokers Australia	Jeff Winspear	www.grainbrokers.com.au
		Horizon Grain Brokers Pty Ltd	Ash Munro	www.horizongb.com.au
		Pure Grain Network Pty Ltd	Stuart Tighe	www.puregrain.com.au
		Quest Commodities Pty Ltd	Jayne Barker	www.questcommodities.com.au
		Rain Agribusiness	Ian Grellman	www.rainag.com.au
		StoneX Financial Pty Ltd	Stefan Meyer	www.intlfcstone.com
		Teague Australia Pty Ltd	Tim Teague	www.teague.com.au
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	Sole Operator	A C Grain	Adam Clarke	www.acgrain.com
		Allied Grain Pty Ltd	Angus Wettenhall	www.alliedgrain.com.au
		Cogeser (Australia) Pty Ltd	Robert Luetolf	www.cogeser.com.au
		Farm Tender	Matt Henke	www.farmtender.com.au
		Lotema Pty Ltd	Todd Lees	www.lotema.com.au
		Mallon Commodity Brokering	Ian Mallon	www.mcbrokering.com
		McDonald Pelz Australia	Stuart Richardson	www.mcdonaldpelz.com
		Perkins Commodity Brokers	Craig Perkins	linkedin.com/in/craig-perkins-9a27211a
		Woodside Commodities Pty Ltd	Hamish Steele-Park	www.woodcomm.com.au
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Corporate	Large	ASX	Ian Waddell	www.asx.com.au/grainfutures
		Australian Grain Technologies	Tristan Coram	www.agtbreeding.com.au
		Barrett Burston Malting Co.	Dean Ganino	www.bbmalt.com.au
		BoortMalt Asia Pacific Pty Ltd	Simon Robertson	www.boortmalt.com
		Commodity Inspection Services (Australia) Pty Ltd	Katrina Saunderson	www.commodityinspection.com.au
		Commonwealth Bank of Australia	Samuel Chambers	www.commbank.com.au
		NSW Ports	Campbell Mason	www.nswports.com.au
		Sanitarium Health Food Company	Nathan Bullock	www.sanitarium.com.au
		Symbio Laboratories	Kristian Just	www.symbiolabs.com.au
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	Medium	AgriDigital	Emma Williams	www.agridigital.io
		AgriFood Technology	Doreen Fernandez	www.agrifood.com.au
		Amspec Australia	Lee Shillock	www.amspecgroup.com.au
		Australian Superintendence Company (ASC)	Andrew Parry	www.austsupco.com.au

	Clear Grain Exchange	Nathan Cattle	www.cleargrain.com.au
	Foss Pacific	Steven Ilgoutz	www.foss.com.au
	HFW Australia	Stephen Thompson	www.hfw.com
	Holding Redlich	Geoff Farnsworth	www.holdingredlich.com
	Intertek	Debbrah Millard	www.intertek.com
	Mars Petcare Australia (t/a Mars Birdcare)	Kurt Sosinski	www.mars.com.au
	Oldendorff Carriers Melbourne	Allen Dewhirst	www.oldendorff.com
	PSC Griffith Goodall Insurance Brokers	Mandy Gladman	www.pscgib.com.au
	Qube Logistics (SB) Pty Ltd (T/A Qube Agri)	Jeremy Brown	www.qube.com.au
	SBA Law	Jeremy Rosenthal	www.sbalaw.com
	SGS Australia	Trent Charlton-Maughan	www.au.sgs.com
	T-Ports	Nathan Kent	www.tports.com
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Small	Advance Trading Australasia	Andrew Woodhouse	www.advance-trading.com.au
	Ag Scientia	Lloyd George	www.agscientia.com.au
	AgVise (WA) Pty Ltd	Shane Sander	www.agvise.com.au
	Aperture Ag Pty Ltd	Alex Campbell	www.apertureag.com.au
	Basis Commodities	Chris Whitwell	www.basiscommodities.com
	BSM Global	Jason Flemming	www.buysellmove.com
	Cloudbreak Grain Marketing	Ed Scamps	www.cloudbreak.com.au
	Delta Agribusiness	Michael Parry	www.deltaag.com.au
	E P Integrated Commodities Pty Ltd	Tracey Lehmann	epicbrokers.biz
	Farmanco Marketing Pty Ltd	Donald McTaggart	www.farmanco.com.au
	FARMARCO Australia Pty Ltd	Rob Imray	www.farmarco.com.au
	Finesse Solutions	Malcolm Finlayson	malcolm@finessesolutions.com.au
	Flexi Grain Pty Ltd	Jarrod Tonkin	www.flexigrain.com.au
	Futari Grain Technology Services	Leah Petrie	www.futari.com.au
	Goldstar Commodities	Geoff Webb	www.goldstarcommodities.com.au
	Graintec Scientific	Lucas Anstiss	www.graintec.com.au
	Grainx	Judi Morgan	www.grainx.com.au
	Greenoaks Agriculture Pty Ltd	Richard Perkins	https://linkedin.com/in/richard-perkins-39090a3b/
	Harvestcheck Pty Ltd	Stephen Schumacher	www.harvestcheck.com.au
	Hay Plains Grain Storage Pty Ltd	Ron Harris	www.fellowsbulk.com.au/grainstorage
	IKON Commodities	Ole Houe	www.ikoncommodities.com.au
	Indyn	Rob Martin	www.indyn.net
	Lachstock Consulting	Nick Carracher	www.lachstockconsulting.com.au
	Longbridge Commodities	Karen Durr	www.longbridge.com
	MarketAg Pty Ltd	Mark Martin	www.marketag.com.au
	McMullen Consulting	Gerard McMullen	www.mcmullengrainagricultural.com
	Mercari Pty Ltd	Daniel Marsh	www.mercari.com.au
	Mirfak P/L	Mark Murphy	www.mirfak.com.au
	National Grower Register	Debbie Newmarch	www.ngr.com.au
	OMIC Australia Pty Ltd	Koji Nakashima	www.omicaustralia.com.au
	Perten Instruments	Raul Ovelar	www.perten.com
	Pinion Advisory	Chris Heinjus	www.pinionadvisory.com
	Planfarm Marketing Pty Ltd	Jerome Critch	www.planfarm.com.au
	Praig Marketing Pty Limited	Kevin Schwager	www.praig.com.au
	Primal Foods Group	Peter Longhurst	www.primalfoodsgroup.com
	Profarmer and Australian Crop Forecasters	James Maxwell	www.nzx.com
	Rise Agribusiness	Ian Dalgliesh	www.riseagri.com.au
	Saputo Dairy Australia	Ashley Denishensky	www.saputo.com
	SGA Solutions Pty Ltd	David Hudson	linkedin.com/in/david-hudson-8240b913
	Sizer & Cogill (t/a NQ Bulk)	Chris Sizer	www.sizercogill.com.au
	Ten Tigers	Chris Tonkin	www.tentigers.com.au
	TE Storage & Logistics Pty Ltd	Tom Hage	www.testorage.com.au
	TT Club Mutual Insurance	Rhys Richards	www.ttclub.com
	Ultimate Global Trading Pty Ltd	Andrew Alexopoulos	www.ultimategt.com.au
	Wattletree Consulting	Joe Righetti	www.wattletree.net.au
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International Affiliate	CIS Commodity Inspection Services	Paul Schweitzer	www.cis-inspections.com
	Grains Middle East Trading DWC-LLC	Mark Stapleton	www.grains-middleeast.com
		2	
Industry Association	AEGIC	Courtney Draper	www.aegic.org.au
	Grain Growers Limited (GGL)	Shona Gawel	www.graingrowers.com.au
	Grain Industry Association of WA (GIWA)	Peter Nash	www.giwa.org.au
	Grain Producers Australia Ltd (GPA)	Colin Bettles	www.grainproducers.com.au
	NSW Farmers Association	Elen Welch	www.nswfarmers.org.au
	Stock Feed Manufacturers' Council of Australia (SFMCA)	Duncan Rowland	www.sfmca.com.au
		6	
Merchant Association	Grain Industry Association of SA	Marie Cunningham	www.giasa.org.au
	Grain Industry Association of VIC (GIAV)	Colin Peace	www.giav.com.au
	Grain NSW	Joanne Ware	www.grainnsw.com.au
	Queensland Agricultural Merchants (QAM)	Rob Imray	www.qam.org.au
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