

11 March 2016

Committee Secretary  
Joint Standing Committee on Treaties inquiry to the Trans Pacific Partnership  
PO Box 6021  
Parliament House  
Canberra ACT 2600

Dear Sir/Madam,

**RE: Submission by GrainGrowers Limited to the Joint Standing Committee on Treaties inquiry to the Trans Pacific Partnership**

This letter is in support of the submission (attached) placed before the Committee by GrainGrowers Limited, a member of Grain Trade Australia.

**1 Grain Trade Australia**

The members of Grain Trade Australia 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.

GTA also attracts membership from organisations to the side of the value chain in related commercial activities such as financial (banking, stock exchanges etc.), communications, grain advisory services, and professional services (e.g. solicitors and accountants).

Further information can be found on the GTA website – [www.graintrade.org.au](http://www.graintrade.org.au) . A full list of the GTA membership is attached.

**2 Grain exports from Australia**

The GGL submission notes the importance of export activities to the Australian grain industry, in particular:

1. that over 60% of all Australian grain production is destined for overseas markets; and
2. over 70% of our exports go into Asian markets, many of which are TPP signatories.

As an export dependent sector with our key markets in Asia, Australia must be an active participant in the policy setting for Trans Pacific Partnership as a member.

Please do not hesitate to contact me, should you require clarification in respect to any aspect of this submission.

Yours sincerely,



Mr. Geoff Honey  
Chief Executive Officer



# **Submission to the *Joint Standing Committee on Treaties inquiry to the Trans Pacific Partnership***

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**March 2016**



GrainGrowers is an independent and technically resourced, grain farmer representative organisation with 17,500 members across Australia. GrainGrowers' goal is a more efficient, sustainable and profitable grain production sector that benefits all Australia grain farmers and the wider grains industry. GrainGrowers has three divisions which work cooperatively to achieve improved grain industry outcomes: 1) On-farm Information Services, 2) Industry capacity building, and 3) Policy and Advocacy

Trade & Market Access is a key focus within Policy and Advocacy and GrainGrowers has the specific aim to:

*Drive the development and implementation of positive international trade and market access outcomes for the Australian grains industry and its customers.*

GrainGrowers makes this submission to the Joint Standing Committee on Treaties (JSCOT) inquiry into the Trans Pacific Partnership Agreement (TPP), in support of the Agreement. The TPP is an agreement that:

- Has the potential to facilitate efficiencies in grain supply chains therefore delivering additional value to both importing and exporting nations in the region;
- Encompasses two of Australia's top 5 export grain markets in Japan and Vietnam, as well as New Zealand, Singapore and Malaysia which in total account for approaching 20% of Australia's grain exports;
- Includes Australia's top two grain competitors in the United States and Canada, and excludes a range of low cost suppliers (Argentina, India, Black sea countries); and
- Our industry cannot afford for Australia to not be a signatory. If the TPP goes ahead without Australia, our grains industry will lose competitiveness for almost 20% of our exports. This proportion increases to more than 35% if Indonesia were to join the TPP, an interest that Indonesia has expressed.

As such, we congratulate the Minister for Trade and Investment, together with Australia's trade negotiators and officials, in negotiating Australia's position in this agreement. There are important provisions in TPP for our industry, as detailed on the following pages, along with evidence supporting the value of the TPP markets to our industry. I also attach a copy of a detailed industry brief on the TPP and its implications for our industry (Appendix A).

Thank you for the opportunity to contribute to your inquiry. GrainGrowers support the TPP agreement and encourages the Committee to recommend to Parliament its adoption. I am happy to expand on this submission if that would be useful to the inquiry.

Yours faithfully,



**Dr Cheryl Kalisch Gordon**

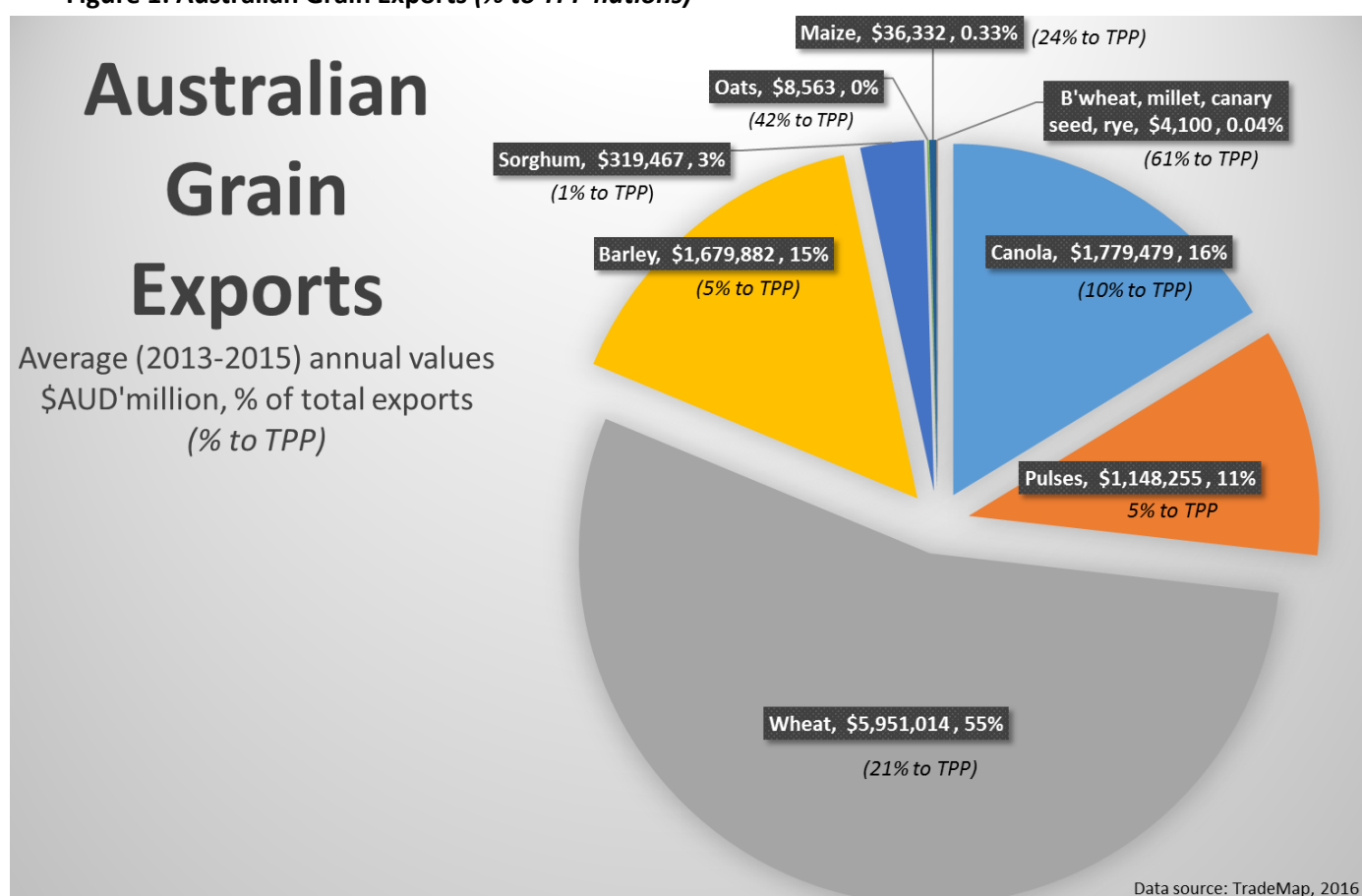
Manager, Trade & Market Access

[cheryl.kalischgordon@graingrowers.com.au](mailto:cheryl.kalischgordon@graingrowers.com.au)

## ***TPP member nations account for a significant share of Australia's Grain exports***

The TPP includes five of Australia's important grain export markets in Japan, Vietnam, Malaysia, New Zealand and Singapore. Total Australian grain trade to TPP nations was valued at \$AUD 1.9 billion during 2014-15, accounting for 17 percent of Australian grain export value during that period. Wheat is Australia's leading grain export and over 20% of Australia's wheat is sold into TPP nation markets (see Figure 1).

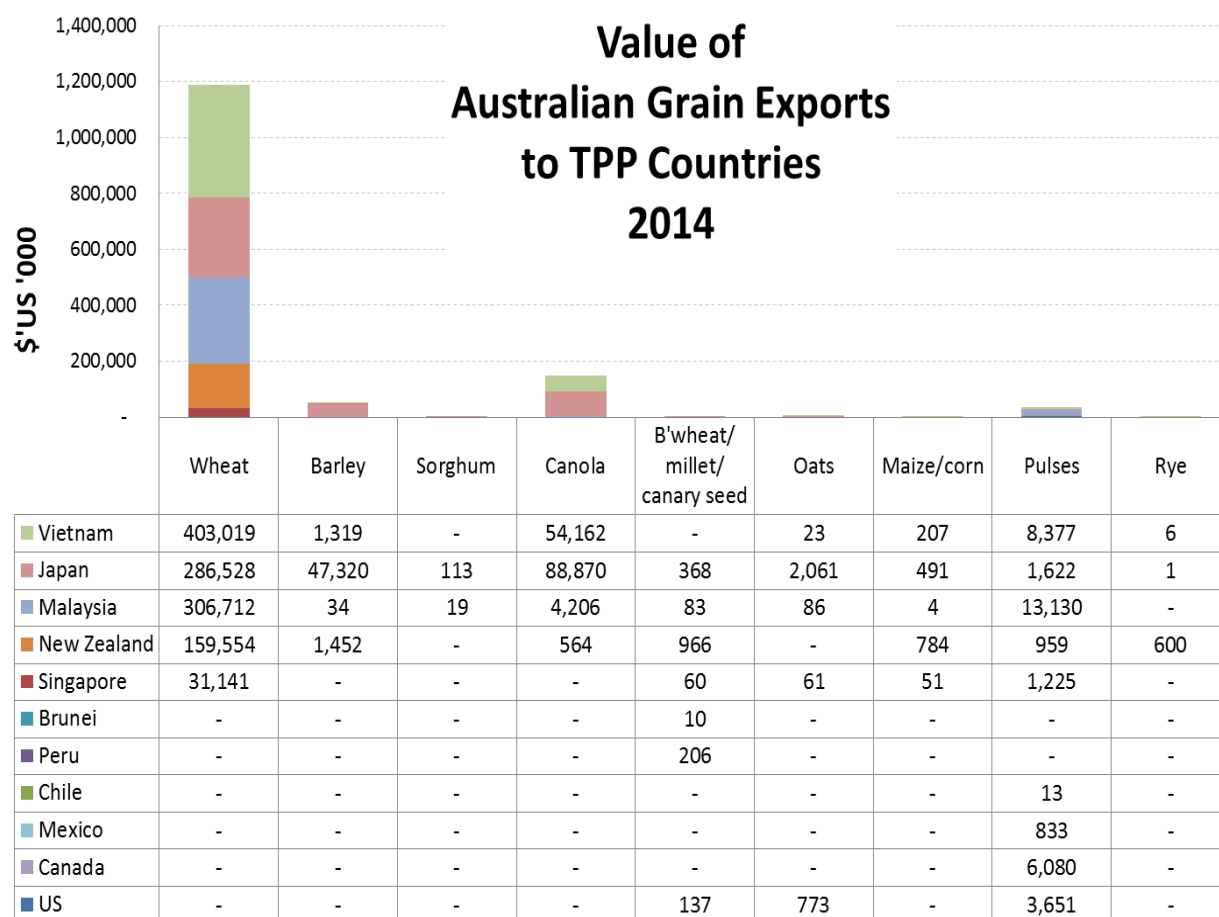
**Figure 1: Australian Grain Exports (% to TPP nations)**



**Japan**, a TPP negotiating nation, has long been an important market for Australian grains, and is so for the range of Australian grains (see Figure 2). In particular, Japan has been an important customer of Australian wheat and a customer prepared over time to pay premiums for particular Australian noodle wheats. Competition for wheat sales to Japan is strong given the mature and discerning nature of the market. Japan has also traditionally been an important customer for Australian canola, barley sorghum and pulses. Australia has preferential access for canola oil, feed

grain and feed barley, some pulses and sorghum, but not for milling wheats or malt barley, under JAEPA (Japan-Australia Economic Partnership Agreement).

**Figure 2. Value of Australian exports to TPP Countries by grain**



*Data Source: Trade Map, 2015*

**Vietnam** is a growing market for Australian grains. The value of wheat exports in particular has grown at an average annual compound rate of 22% over the past 10 years, and growth in the market can only be expected to grow as the Vietnamese population continues to grow and the trend of increasing westernisation of diets continues. ASEAN-ANZ-FTA (ASEAN-Australia-New Zealand Free Trade Agreement) preferential access (0% for most grains by 2016, and 0% for the balance by 2018) for Australian grains further provides the basis for growth in the Vietnamese market going forward.

**Malaysia** and **Singapore** have been consistent buyers of Australian grains, wheat in particular, over many years. Both nations afford 0% MFN (Most Favoured Nation rate under World Trade Organisation) on relevant grains. The countries are important to Australia given the comparatively low freight rates from Australia and are important buyers of container consignments and niche grains. In recent years, an increasing amount of Indian and Black Sea region origin wheat has been imported to these markets, providing significant price competition for Australian wheat.

**New Zealand** remains an important market for Australian grains. With complementary agricultural systems and a significant freight advantage, Australia is New Zealand's primary supplier of wheat and canola (more than 85% of imports). In recent years however Australia has accounted for a declining proportion of some grains imports, including barley and sorghum.

**Indonesia** is not an original negotiating member of the TPP, however has expressed interest in joining the TPP. Indonesia is Australia's number one wheat market and is set to become the world's largest wheat importing nation by the end of the decade on the back of population growth, an increasing middle class and increasing westernization of diets. Should Indonesia join the TPP, Australia's share of grain finding accounted for under the TPP would increase to 35%.

## ***A number of existing trade agreements contribute to our grains competitiveness in the TPP region***

Australia already has 'free' or 'enhanced' trade agreements with a number of the TPP negotiating countries which provide Australian grains with an enhanced competitive position.

The TPP builds on and expands the existing trade agreements that Australia has in place in terms of market access (tariffs and quotas) and introduces a range of harmonisation, transparency and operational elements designed to streamline the movement of goods and services across the region.

However, if Australia does not join the TPP, those who do join the TPP will be afforded the benefit of more efficient supply chains, and the benefits that our industry has gained under existing trade agreements will be equalled, without exception<sup>1</sup>, by our competitors and in many cases surpassed.

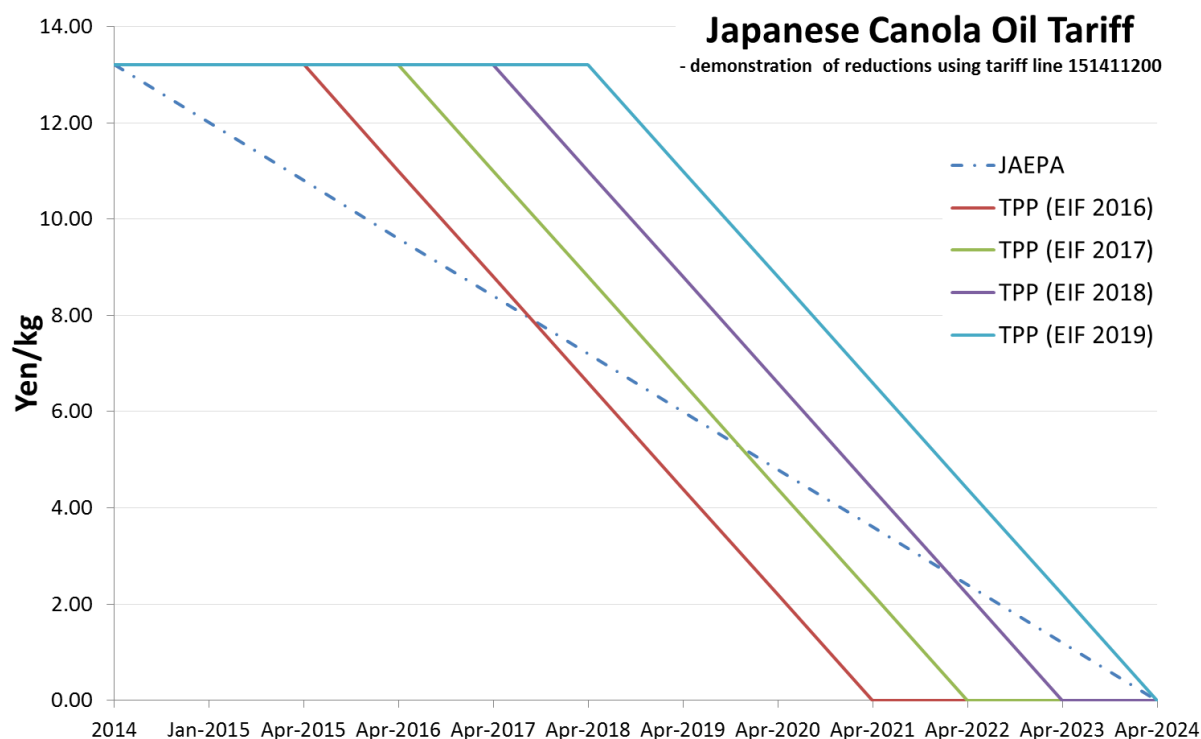
It is important to note that Australian exporters will be able to choose the agreement under which they supply goods during the implementation period of the TPP. This is relevant where a tariff reduction under an earlier Australian agreement is more advanced in its tariff reduction schedule, than agreed to under the TPP.

An example of this would be in the export of canola oil to Japan. Under JAEPA Australian canola oil to Japan was granted tariff elimination over 11 instalments, meaning that by April 2016, Australian canola oil will enter Japan with a 27 percent lower tariff than canola oil from other nations without preferential access. Under the TPP, all TPP members will be granted tariff elimination over six instalments. On the basis that TPP enters in force (EIF) in 2016, Australian canola oil will have preferential access under JAEPA until and including 2017, however beyond that should export under the TPP Agreement would be preferential. The year at which TPP becomes preferable depends on the year that TPP enters into force (see Figure 3).

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<sup>1</sup> At full implementation

**Figure 3 Japanese Canola Oil Tariff Reduction under JAEPA v TPP**



## ***A range of provisions have the potential to unlock value in grain supply chains in the region***

Change in access to the Japanese market is the most significant market access gain for Australian grains under the TPP. The improvements come as a combination of reduced mark-ups and additional quota access on milling grade wheats and malt barley. Currently, mark-ups on Japanese imports of wheat and barley equate to almost \$AUD200/tonne and \$AUD100/tonne respectively. Under the agreement, these mark ups will be almost halved over the first 9 years of the agreement for grain sold via the Simultaneous-Buy-Sell System used by the Japanese Ministry of Agriculture Fisheries and Forestry.

Australia achieved 20 percent of the growing additional wheat quota offered by Japan in the Agreement, which is above the medium-term average proportion of their wheat imports that Australia has supplied. These improvements are accompanied by equivalence to all TPP nations on feed barley and wheat, and the unrestricted access Australia achieved for these under JAEPA.

Technical access is of course not assured by the negotiation of free trade agreements. Trade agreements have to date been unable to meaningfully accommodate the introduction of non-tariff barriers to trade. With respect to technical access issues, the TPP includes the WTO Technical

Barriers to Trade Agreement which commits members to apply technical regulations in ways that are non-discriminatory, do not create unnecessary barriers to trade, and are based on international standards. The TPP seeks commitment from all parties to increase cooperation and transparency on technical barriers and establishes a Technical Barriers to Trade Committee, which has representatives from all TPP countries. Conditions relating to technical requirements for a range of products (including organic products, wine and spirits, medical devices and cosmetics) have been incorporated with the agreement, but grains have not been captured in these.

The Technical Barriers to Trade provisions in TPP do not in and of themselves present a solution to technical barriers to trade, but do highlight the importance technical barriers are playing in world trade, and the agreement does include a specific committee which facilitates resolution of technical trade issues (including a third party witness provision). Ensuring Australian government representation to these committees are well resourced will be key to their being meaningful technical access harmonisation in the TPP, and the value of these provisions overall will be demonstrated only when the Agreement comes into force.

The agreement does improve access for Australian grains and grain products across the region and also removes some of the protections that competitor grain producing nations have had (such as Canada and US will remove import tariffs on grain from some TPP countries that still have barriers to access to those countries), however it also means that other countries will achieve market access equivalence either immediately or over time. For example, under the Australia-NZ-ASEAN FTA, tariffs on Australian wheat imported to Vietnam are abolished as of 2016, compared to Vietnam's MFN wheat tariff of five percent. TPP nations will all have a zero percent tariff on wheat from the time TPP enters into force. A summary of the market access provisions by grain and by country is provided in the industry briefing paper developed by GrainGrowers (Section 4 of the attached Appendix).

The following is a list of some of the general provisions within TPP that will influence trade flows, and benefit the grain supply chains in the region. The extent to which they will is unlikely to be gauged until after the Agreement comes into force because the language around some of these provisions is not specific.

The general provisions include:

- Member countries agree to improved transparency on import licensing. Great transparency on licensing, trade volumes and trade processes allows for greater efficiency in supply chains. Any provisions that increase the information available to buyers and sellers will increase the efficiency, and therefore value, in the supply chain. It is not possible to speculate on the extent of the additional value.
- Import administration levies and fees may not be charged on an *ad valorem* basis, but must be related to the cost of service provision. This provision removes the relationship between price and import charge and encourages transparency in the charge applied.
- Export subsidies are expressly prohibited (with the exception of US export credits which have been classified as export competition measures). Given Australian grain is grown and export without any production, supply or export subsidies, any measure that approaches a more level playing field encourages greater efficiency in production across the TPP and will contribute to greater competitiveness for Australian grains.



- Measures to encourage more transparency on food security import and export arrangements. Again, it is difficult to determine the extent of the value of this provision, however greater transparency will encourage food aid, to truly be food aid and, not distortionary trade.
- The rules outlining what qualifies as a TPP originating good are done on a product by product basis. Grains and legumes will be considered to be of TPP origin if they are wholly obtained or produced in one or more TPP country. Malt and vegetable oils will be considered to be of TPP origin provided the malting of the grain or processing of the oil occurs in one or more TPP country. In addition, a general *de minimis* (minimal amount commitments) provision allows for up to 10 percent of the value of these products to come from a non-TPP country. This provision ensures that the benefits of TPP membership accrue within the TPP.
- The formation of a specific Agriculture Committee to address agricultural trade issues. This is a promotion from a sub-committee which is routinely the case for agriculture in trade agreements. We anticipate this elevation to allow for greater and faster resolution of trade disputes and agreement violations in relation to our industry.

Additional general provisions, likely to present an immediate cost saving to exporters are in relation to certification include:

- Claims for tariff preferences will be made through self-certification.
- A single set of rules of origin for all 12 countries so that only one Origin Certification is required to satisfy the import requirements of all TPP nations.

Currently, the issue of a certificate of origin costs in the order of \$36 per document, and a certificate is generally required for each importer. As such the self-certification provision on a bulk grain shipment to Vietnam may save as little as \$36, but equally may save around \$700 as it is not unusual for a bulk shipment to deliver to 20 importers.

## ***The competitive position of Australian grain in the region will be undermined if Australia is not an original signatory to the TPP Agreement***

The United States and Canada, competitors of Australia in international grain supply, are key members of the TPP. The TPP builds on the liberalised trade they enjoy as part of the North American Free Trade Agreement and provides, over time for equivalence with Australia in many grain markets (e.g. Vietnam) and preferential access to the very important Japanese market.

If Australia is not a signatory to the TPP, Canada and the United States will:

- gain access to a TPP wide barley quota (additional to WTO quota commitments);
- gain access to country specific wheat quotas for milling grades of wheat (over and above World Trade Organisation quota commitments); and

- will become increasingly more price competitive in the Japanese market than Australian origin wheat and barley as the mark up on Canadian and US wheat and barley imports via the Japanese Simultaneous-Buy-Sell falls by 45% over 9 years, but not on Australia wheat and barley.

Important in the context of North America, especially the United States is the reduction in corn/maize tariffs offered across the TPP. Australia is not a leading corn/maize producer but does have an important industry (worth an average of \$36 million p.a. 2013-15) including premium sales into Japan and other TPP nations. Preferential access to product from the United States under the TPP would serve to add to the already challenging market environment for Australian origin maize.

APPENDIX A:  
The Trans Pacific Partnership  
and Australian Grain  
*(Industry Brief, December  
2015)*

## Membership List as at 24 February 2016

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 Grain Pty Ltd	Mr Phillip Hughes	glencoregrain.com.au
		<b>2</b>
<b>Level A2 (5 - 7 Million Tonnes)</b>		
Cargill Australia Limited	Ms Penne Kehl	cargill.com.au
		<b>1</b>
<b>Level A3 (3 - 5 Million Tonnes)</b>		
ADM Trading Australia Pty Ltd	Mr Tim Henry	adm.com
Graincorp Operations Ltd	Mr Neil Johns	graincorp.com.au
		<b>2</b>
<b>Level A4 (1.5 - 3 Million Tonnes)</b>		
Emerald Grain Pty Limited	Mr John Warda	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
CHS Trading Company Australia	Mr Bryce Banfield	chsinc.com.au
Louis Dreyfus Australia	Mr Robert Green	louisdreyfus.com.au
		<b>3</b>
<b>Level B2 (500,000 - 1 Million Tonnes)</b>		
Agrex Australia Pty Ltd	Ms Katrina Liston	agrexaustralia.com.au
George Weston Foods Limited	Mr Mark O'Brien	gwf.com.au
Inghams Enterprises Pty Limited	Mr Graeme Dillon	ingham.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>6</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
Australian Grain Growers Co-operative Limited	Mr Ian Schofield	aggcoop.com.au
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
Mitsui and Co (Australia) Ltd	Mr Kane Fukuoka	mitsui.com
Riordan Grain Services	Mr Bradley Hogan	riordangrains.com.au
Special One Grain Accumulator	Ms Jaimee Carrigan	specialonegrain.com.au
United World Enterprises Pty Ltd	Mr Jimmy Liu	uwetypical.com
Wilmar Gaviola Pty Ltd	Mr Matt Albion	07 3713 8700
		<b>13</b>

## Ordinary Member (Trading) (contd)

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

A & B Grains Pty Ltd	Mr Rod Wolski	abgrains.com.au
A T Waterfield & Son Pty Ltd	Mr Brad Waterfield	03 5382 3725
A W Vater and Co	Mr Kim Vater	vater.com.au
Adams Australia Pty Ltd	Mr Ian Mack	adamsaustralia.com.au
Agmark Commodities	Mr 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
All Commodities Pty Ltd	Mr Nathan Holmes	allcommodities.com.au
Allied Mills	Mr Simon Gelling	alliedmills.com.au
AMPS Agribusiness Group	Mr David Caldwell	ampsagribusiness.com.au
Associated Grain	Mr Todd Jorgensen	07 4662 1999
Auscott Ltd	Mr Peter Webb	auscott.com.au
Ausrealt International Pty Ltd	Mr Robin Luo	ausrealt.com.au
Australia Milling Group Pty Ltd	Mr Peter Wilson	aumg.com.au
Australian Grain Storage	Mr Matt Bailey	sunrice.com.au
Australian Growers Direct Pty Ltd	Mr Jamie Smith	ausgrowersdirect.com.au
Avigrain Produce	Mr Dennis Ward	avigrain.com.au
Baker Grain	Mr Richard Baker	bakergrain.com.au
Barooga Agriproducts	Mr Andrew Leighton-Daly	03 5875 2202
Berriwillock Grain Storage Co-Operative Ltd	Mr Tony Bellinger	moulameingrain.com
BFB Pty Ltd	Mr Terry Brabin	bfb.com.au
Big River Feeds Pty Ltd	Mr Bjorn Ludvigsen	08 8532 4434
Blairs Produce Company	Mr Sean Blair	02 6025 4600
Blue Ribbon Seed and Pulse Exporters	Mr Stephen Donnelly	07 3363 8400
Boort Grain Co-Operative	Mr Tony Bellinger	03 5455 2600
Broadbent Grain Pty Ltd	Mr Justin Fay	broadbentgrain.com.au
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	Ms Ross Stephens	07 4671 4144
Castlegate James Australasia Pty Ltd	Mr Dominic Hogan	castlegatejames.com.au
Cleveland Agriculture	Mr Chris Hurwood	02 6756 5004
Commex International Pty Ltd	Ms Mariam Boulos	02 9531 7341
Coorow Seeds	Mr Brian Pover	coorowseeds.com.au
COPRICE	Ms Kirsty Cutter	coprice.com.au
Cremer Australia Pty Ltd	Mr Brendan Macauley	cremer.de
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
East Coast Stockfeed Pty Ltd	Mr Stuart Dolden	ecsf.com.au
Elders Grain	Mr Matthew Tolmachoff	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 Preyesh Barar	fertinvest.com
Findlays Barellan	Mr Neil Findlay	02 6963 9246

**Level C (under 250,000 Tonnes) cont.**

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
Goodman Fielder Limited	Mr Alex Krzanic	goodmanfielder.com.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 Greenhalgh	grainpro.net.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
Hassad Australia Operations Company Pty Ltd	Mr James Carson	02 8019 7150
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 Chris 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
Langdon Grain Logistics	Mr Adrian Murphy	langdongrainlogistics.com.au
Laragon Almond Processors Pty Ltd	Mr Mark Webber	laragon.com.au
Laucke Flour Mills P/L	Mr Roger Laubsch	laucke.com.au
LDC Enterprises Australia Pty Ltd	Mr 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
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 Paul Smith	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
Noble Resources Australia Pty Ltd	Mr Josh Taylor	thisisnoble.com
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
Pallinup Logistics Pty Ltd	Kevin Imberti	0429 508 302
PB Seeds Pty Ltd	Mr Peter Blair	pbseeds.com.au

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

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 Commodities (Australia) Pty Ltd	Mr Jogesh Virk	07 35 537 111
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 Andrew Jackson	quadra.com
Quirindi Grain & Produce	Mr John Webster	02 6746 1911
Regal Seed & Grain P/L	Mr Damien White	regalseed.com.au
Reid Stockfeeds Pty Ltd	Mr Ian Reid	reidstockfeeds.com.au
Rivalea (Australia) Pty Ltd - Animal Nutrition	Mr Andrew Philpotts	rivalea.com.au
Riverina Oils & BioEnergy Pty Ltd	Mr Lachlan Herbert	riverinaoils.com
Robinson Grain Trading Co Pty Ltd	Mr Gary Robinson	robinsongrain.com.au
Roty Grain Store	Mr Brian Newman	02 6988 8221
Ruddenklau Grain Pty Ltd	Mr Tim Ruddenklau	08 8842 1314
Rural Logic (Aust) Pty Ltd	Mr 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	Mr Matthew Barnes	0427 876 643
Southern Grain Storage Pty Ltd	Mr Campbell Brumby	03 5267 2351
Southern Stockfeeds (Operations) Pty Ltd	Mr Brendan Maher	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 Tsuyoshi Osumi	sumitomocorp.com.au
Summer Hill Grains	Mr Barney Hughes	0428 694 363
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 Mal Parkhill	mckenziefoods.com.au
Whitty Produce	Ms Marsha McMonigle	03 5721 6588
Whyalla Beef Pty Ltd	Mr Gino De Stefani	whyallabeef.com.au
Wilken Grain	Mr Richard Wilken	wilkens.com.au
Wimpak Export Company Pty Ltd	Ms Jo Cameron	wimpak.com.au
XLD Grain Pty Ltd	Mr Lachie Stevens	xldgrain.com.au
Yenda Prods Grain Pty Ltd	Mr Luke Mancini	0437 512 322

157

#### Transport Operator

Gehrke Grains and Transport Pty Ltd	Mr Julian Gehrke	07 5465 6695
Wakefield Grain Export Services	Mr John Gray	wakefields.com.au

2

## Broker

### Large

0

### Medium

Allied Grain Pty Ltd	Mr Angus Wettenhall	alliedgrain.com.au
Brightcom Australia Pty Ltd	Mr Simon Robertson	03 9591 6300
Cereal Milling Services Pty Ltd	Mr Michael Moss	02 4323 9339
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 FC Stone 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

11

### Sole Operator

A C Grain	Mr Adam Clarke	0400 065 763
AgLink - CMS	Mr Justen Schofield	aglinkcms.com.au
Cogeser (Australia) Pty Ltd	Mr Robert Luetolf	cogeser.com.au
Farm Tender	Mr Matt Henke	farmtender.com.au
Knight Commodities	Mr Chris Groat	07 4671 5221
Mallon Commodity Brokering	Mr Ian Mallon	mcbrokering.com
Quest Commodities Pty Ltd	Ms Jayne Barker	questcommodities.com.au
Shearwater International Pty Ltd	Mr Don Cattanaach	07 3324 9088
Wimmera Mallee Grain Services	Mr Rodney Edgerton	egrainservices.com.au
Woodside Commodities Pty Ltd	Mr Hamish Steele-Park	woodcomm.com.au

10

## 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 Steve Jeffries	agtbreeding.com.au
Commonwealth Bank of Australia	Mr Tom Barraket	commbank.com.au
Symbio Laboratories	Ms Elizabeth Owens	symbiolabs.com.au

5

### Medium

Agfarm Pty Ltd	Mr Ron McCalman	agfarm.com.au
Agrifood Technology Pty Ltd	Ms Doreen Fernandez	03 9742 0589
Agrisk Management Pty Ltd	Mr Brett Stevenson	02 9499 4199
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 Lee Shilvock	intertek.com
Merricks Capital Pty Limited	Mr Adam Davis	merrickscapital.com
NZX Australia (CGX, ACF, PFA)	Mr Nathan Cattle	nzx.com
SBA Law	Mr Jeremy Rosenthal	sbalaw.com
SGS Australia Pty Ltd	Mr Scot Paterson	au.sgs.com

13

### 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
CloudBreak Grain Marketing Pty Ltd	Mr Ed Scamps	08 8388 8084
Basis Commodities Pty Ltd	Mr Chris Whitwell	basiscommodities.com.au



#### Corporate - Small (cont)

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
Grain Storage Solutions	Mr Kerry Miles	grainstoragesolutions.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
JBS Australia	Mr Richard Nicholls	jbssa.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
Peter McQueen Pty Limited	Mr Peter McQueen	petermcqueen.com
Pinnacle Commodities Pty Ltd	Mr Rod Buckle	pinnaclecommodities.com.au
Planfarm Marketing Pty Ltd	Mr Jerome Critch	planfarm.com.au
Primal Foods Group	Mr Peter Longhurst	02 8011 4182
Rural Directions Pty Ltd	Mr Chris Heinjus	ruraldirections.com
SGA Solutions Pty Ltd	Mr David Hudson	03 5428 4990
TE Storage & Logistics Pty Ltd	Mr Tom Hage	08 8762 2188
Ten Tigers	Mr Chris Tonkin	tentigers.com.au

33

#### International Affiliate

CIS - Commodity Inspection Services	Mr Paul Schweitzer	cis-inspections.com
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1

#### Industry Association

Grain Growers Limited	Ms Alicia Garden	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 Justin Crosby	02 8251 1827
Victorian Farmers Federation	Mr Stephen Sheridan	03 9207 5555

5

#### Merchant Association

Grain Industry Association of SA	Mr Tim Mee	08 8395 3572
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

4