

## Expression of Interest Inland Rail Interface Program

Grain Trade Australia

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### Version Control

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16 September 2020	1.5	

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**Inland Rail Interface Improvement Program**

*GTA EOI – Inland Rail Interface Program*

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## 1 Proposal Title

### Inland Rail – Grain Supply Chain Integration

## 2 Summary

- *Grain industry structure, disaggregated demand for transport assets and the cyclic nature of grain production is resulting in a modal shift from rail to road.*
- *Funding shortfalls on below rail infrastructure across regional lines does not support rail usage due to the load capacity difference across Networks significantly impacting transport efficiencies.*
- *Rural supply chain network strategies are necessary to leverage any benefits from Inland Rail and to integrate the project with existing infrastructure and market and operational arrangements.*
- *Industry collaboration and coordination is likely to foster more efficient intermodal operations and the integration of farm-based storages into the supply chain.*

## 3 Proponents

Grain Trade Australia is the focal point for the commercial grain industry within Australia. It facilitates trade and works to provide an efficient, equitable and open trading environment by providing leadership, advocacy and commercial services to the Australian grain value chain. GTA is non-political, industry driven with a primary focus to ensure the efficient facilitation of commercial activities across the grain supply chain. This includes a strong focus on the logistics of grain through transport storage and ports.

GTA's has over 260 organisations as members ranging from regional family businesses to large national and international trading, storage and handling companies, grain marketers, consumers and processors. The vast majority of grain contracts executed in Australia refer to GTA grain trading standards, standard-form grain contracts and GTA Trade Rules. Most of Australia's grain storage and freight movements are made by GTA members. Key national and state producer representative groups are also GTA Members. A full list of GTA Members is attached to this Submission.

Whilst GTA is the proponent of this application it is proposed any review undertaken is inclusive all of industry and includes all participants of the grain supply chain. This includes representation from primary producers, bulk and container storage and handling companies, transport providers, grain marketers, port service providers and domestic processors and end-users of processed grain products.

### 3.1 Description of Proposal

Over the last decade, the Australian grain industry has significantly changed. In particular, the grain supply chain has grown in complexity, creating challenges and constraints for industry participants. These challenges have been most strongly felt across eastern Australia, limiting supply chain effectiveness and capacity, and ultimately impacting the capability of eastern Australia's global competitiveness within the grain supply chain.

GTA is proposing a **joint grain industry, ARTC and multi-level government strategic review** of the grain supply chain in eastern Australia. The **objective** of the review is to drive value for grain producers, rural communities, the grain supply chain and for the Inland Rail project. This will be achieved through:

*GTA EOI – Inland Rail Interface Program*

1. A study of the existing eastern Australian grain supply chain and **quantify the benefits and opportunities** of the grain supply chain from the **Inland Rail project**.
2. This proposed review will include the creation of **inclusive state** and **regional strategic forums** for focus and dialogue amongst the numerous supply chain stakeholders with the aim of isolating and defining strategic investment and for **ongoing operational efficiency** opportunities.

The review should consider a process that includes:

**Table 1. Indicative Program Process**

Phase	Process Steps
<b>1.Planning</b>	Development of Strategic Review design and structure; <ul style="list-style-type: none"> <li>• Development of Scope and supporting Scope Outline</li> <li>• Identification of key stakeholders, key resources and analytical data requirements</li> <li>• Development of the strategic framework and regional engagement including:               <ul style="list-style-type: none"> <li>◦ Levels and layers (eg. State, port zone &amp; regional)</li> </ul> </li> </ul>
<b>2.Capture</b>	Stakeholder engagement, and test and refine the Scope and design, which includes: <ul style="list-style-type: none"> <li>• Seeking governments and industry stakeholder buy-in and alignment</li> <li>• Capture and refine analytical data and processes</li> <li>• Capture ideas/concepts - test and find synergies</li> <li>• Establish and recruit talent to network strategy and planning teams</li> <li>• Determine industry level data, metrics and information sharing that will benefit supply chain efficiency.</li> </ul>
<b>3.Analyse</b>	Implement detailed analysis and further refine and discuss opportunities/concepts <ul style="list-style-type: none"> <li>• Assess all valid opportunities/concepts against set criteria and rank/prioritise according to value</li> <li>• Refine analytical data to support the planning process.</li> <li>• Design the proposed logistical planning processes/information sharing</li> <li>• Prepare an outline document that capture and presents all the outcomes of the review</li> </ul>
<b>4.Test</b>	Second round stakeholder engagement <ul style="list-style-type: none"> <li>• Extensive discussion/workshops to refine direction and confirm opportunities – Investment and operational</li> </ul>
<b>5. Conclusion</b>	Finalise outcomes of the review and progress opportunities and collaborative planning.

### 3.2 Background to Proposal

The Australian grain sector has been a consistent provider of productivity increases to the Australian economy. Depending on the season the Australian grain industry is **Australia's largest or second largest agricultural export industry**. In 2020/21 ABARES estimates the **Australian grain industry value to be around \$A14.57 billion (at the farm gate)**. This is 12% above the 5-year average of \$A13.0 billion with 60% of production exported in a normal season the industry is a major driver of export revenue. Exports in 2020-21 are forecast by ABARES at \$A9.6 billion (FOB) and approximately 26.7 million metric tonnes (mmt). This has been severely impacted by the drought being 4.8% below the 5-year average. The grain industry, and its ancillary suppliers and service providers, are a **substantial employer of people from farm gate through to domestic consumer and port**.

Domestic demand for all crops is estimated at 14.6mmt in 2019/20. The domestic market continues to be the largest consumptive home for Australian grain.

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

Forecast production in 2020-21 is 47.3mmt (5 year average **41mmt**) **from approximately 21,000 farms** production units<sup>1</sup> the grain industry has an inordinately heavy reliance on the nation's road and rail networks including rural branch lines and the many non-sealed farm access and rural roads.

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 on-farm storage.
- Rationalisation of bulk handler receival sites and service arrangements.
- Privatisation of the above rail operating companies and their rolling stock assets and some of the below rail track networks. Removal of government ownership and in some states Community Service Obligations (CSOs) for rail leading to a transport modal shift from rail to road.
- Vertical separation of rail infrastructure from rail operators.
- Increased use of containers for export tonnage due to favourable sea transport back freight opportunities combined with international markets preferences in delivery and order size.
- Increased commodity trading activity with multiple aggregators for most sales contracts and a dramatic increase in supply chain participants resulting in competing demand for common use infrastructure.

The increased complexity in the grain supply chain has created challenges and constraints. This evolving model and its complexity need to be understood and factored into any planning and reform agenda by governments and industry.

## **4 Problem or Opportunity Description**

### **4.1 Description of Problem**

The grain supply chain in eastern Australia is fragmented and has minimal strategic planning and coordination. It is exhibiting a **significant modal shift to road** across the three eastern seaboard states of Queensland, NSW and Victoria. Whether this modal change will continue, or can be reversed, is uncertain even with the major investment in the Inland Rail project.

These changes at the local level **are impacting the competitiveness of grain growers and industry** as it competes on a competitive and in some cases heavily subsidised global market.

An inclusive joint industry and government review is considered necessary to focus on **creating efficiency** and to better **understand the causal issues of the modal shift to road** and to consider the potential **benefits through integration** and alignment of the grain supply chain to the Inland Rail project.

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<sup>1</sup> Grain Growers Limited – State of the Australian Grain Industry 2016  
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## 4.2 Cause of the Problem

Historically, rail transport has supported the majority of the grain tonnage moved to export ports and to a portion of the domestic market.

Due to several factors, including a funding shortfall for below rail assets, a highly agile and innovative road trucking sector combined with a disparity in infrastructure access pricing has **resulted in a significant modal shift to road across the three eastern states of Queensland, NSW and Victoria.**

Whether this modal change will continue, or can be reversed, is uncertain even with the major investment in the Inland Rail project. This should be of concern to government due to road transport's increased emissions, road congestion and safety considerations.

A further factor that has contributed to the reduction in rail usage by the grain industry is the difficulty associated with the high fixed cost of rail in providing a service to an industry that has many peaks and troughs of demand. Historically, this has been managed by a commitment to rail operators of 'take or pay' multi-year rail contracts by the larger bulk handlers and exporters. Since the removal of legislation that supported regulated grain marketing **the rail and grain industries have been struggling to find a commercial model that supports rail** in the eastern states.

It is acknowledged with its relatively high fixed cost; rail requires a consistent volume preferably spread evenly throughout a calendar year. Matching demand for transport assets from the multiple marketing and trading companies to the supply of rail is challenging. Given the economic return on rail assets is sensitive to volume any decrease in rail's share of the market is likely to create a compounding withdrawal of demand for rail.

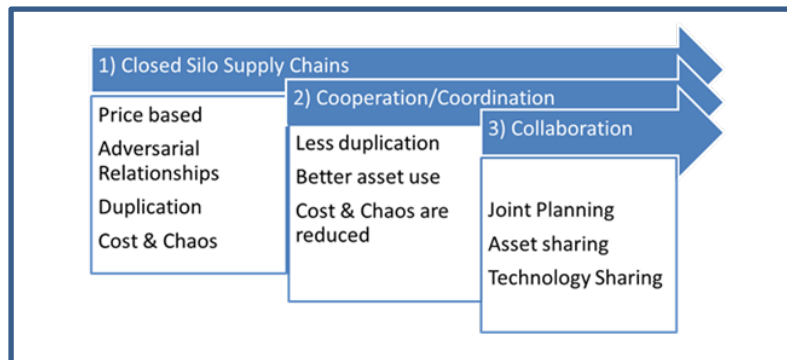
The aggregation of demand for rail assets and rail services across a number of domestic consumers and export marketers has proven difficult. The efficiencies of rail can be quickly eroded without a system overview or orchestration model being in place. In WA and SA system optimisation for transport occurs through a bundled transport service arrangement provided by the Bulk Handling Companies (BHCs) in those states.

In the eastern states BHCs continue to provide rail services as part of their service offering without the same network impact and efficiencies as in WA and SA due to a more competitive environment, a large domestic market and the recent adverse production cycles. Transport economists would argue that some form of vertical cooperation amongst the key participants may result in more efficient planning, capital decisions and operational efficiency.

Some form of grain **supply chain system collaboration and coordination** amongst the participants may assist to at least analyse and understand the pressures on rail and road to determine if there is a model that **may support and enhance rail and road coexisting** in the grain supply chain.

The current grain industry model in eastern Australia has been described as a 'Closed Silo Supply Chain' with minimal strategic collaboration. The review may promote a focus on inclusive planning forums that discuss and seek methods to move towards a more efficient collaborative industry model.

**Figure 1- Degrees of Collaboration-**



As a minimum governments and industry should at least work towards forming a view on the **viable model of rail transport for grain**.

It is important that any study includes **the integration of farm-based storage into the supply chain**. Farm storage has evolved to be a major component of the supply chain. Whilst this evolution is based on sound transport economic principles the proliferation of farm storage and small commercial storages is creating supply chain complexity and challenges from a biosecurity and quality management perspective.

Without a clear government and industry strategy that considers a full network review and considers road and below rail funding, the modal shift from rail to road may continue within the grain industry.

GTA poses the questions of whether the advent of the Inland Rail project will benefit the use of rail over road and whether any review or study that has been undertaken or published that indicates substantive benefit to the grain industry from the Inland Rail project. This may be a reflection of planning that is yet to be integrated and formed as how the new and upgraded rail infrastructure will coexist with existing grain routes and infrastructure and if it is likely to slow or halt the demise of the grain rail network. It is possible this can be corrected. **However, it will not be possible without leadership, strategic consideration and discussion between industry, and federal and state governments.**

### 4.3 Effects of the Problem

The effect of the problem is inefficiency within the grain supply chain that is **eroding value for growers, regional communities, and supply chain participants**. It is exhibited in a modal shift away from rail. Whether this is a systemic market correction or a combination of market failure, inefficiency in government planning and industry coordination is not known without a rigorous review of the grain supply chain. What is clear is that rail has inherent efficiencies and is supported by governments stated strategies. The grain market operates globally, is extremely competitive and is based on commodity trading principles including a focus on least cost pathways. The market is relatively mature, transparent, and competitive with importing countries experienced with processing grain from multiple origins. As a result, the Australian supply chain must be efficient and at least comparable in cost to its overseas competitors. However as discussed by AEGIC in its report, ([Australia's grain supply chains- Costs, risks and opportunities](#)) Australia's grain export sector should be concerned given the **high costs of its supply chains relative to those of emerging competitors**.

The grain supply chain requires efficiency in volume, price and operational arrangements. Rail can assist with these key metrics and the Inland Rail may generate benefit. However, the opportunity requires a collaborative approach to governments and industry planning at the strategic level that currently does not exist.



## 5 Strategic Fit

### 5.1 Alignment with Productivity Enhancement Program (PEP) principles

Table 1. Alignment with PEP principles

Principles Reference	Desired Outcome	Potential to achieve the Outcome objectives
PEP1	Increase Inland Rail throughput, helping to maximise the benefits realised through the project, drive modal shift from road to rail and safeguard the Commonwealth's substantial equity investment.	This outcome is a major component of this Project and will be delivered through establishing system level collaboration and coordination that will support more effective strategic planning and decision making and will foster a more collegiate participation of the supply chain by its users. This will drive efficiency through greater industry coordination and focus on efficiency and key asset utilisation including rail.
PEP2	Support regional economic growth by funding the development, re-positioning or re-organising of local infrastructure to increase the competitiveness of regional economies and supply chains.	The grain supply chain is an integral component and driver of regional economic growth. This growth can be maximised through the more efficient coordination and re-organisation of local infrastructure aligned with potential savings in supply chain costs that will flow through to regional communities.
PEP3	Deliver cost-effective improvements to the national rail freight network through strategic investment, based on independent technical advice and in consultation with the Australian Rail Track Corporation (ARTC) and state track managers.	The project plans to support collaborative and strategic discussion performed with the aid of contemporary analytical data that will produce opportunities and isolate cost-effective improvements to the national freight network (including rail). These should support cost effective improvements to the national rail freight network that is aligned with the existing supply chain and market and customer demands.
PEP4	Support partnerships between Commonwealth and state governments with local government and industry, including shared funding responsibilities, appropriate risk allocation and improved data sharing	The grain supply chain requires a partnership approach with all participants involved and responsible for an appropriate risk level. The project has an objective to dramatically improve information sharing, alignment and shared contribution between industry and government.
PEP5	Minimise downtime on regional rail lines.	The project aims to understand the value of road and rail and to integrate these modes within the supply chain to enable efficiency. The outcome of this objective should reduce the downtime on regional rail lines
PEP6	Improve safety for road users through increased mode shift from road and rail and through strategic investment in the road interfaces with rail.	The grain supply chain may, as a result of this project see an increase in the modal shift of grain from road to rail. Similarly, the increased dialogue, discussion and collaborative planning will support any government and industry road safety initiatives.
PEP7	Support National Freight and Supply Chain Priorities, enabling productivity improvements to Inland Rail by developing efficient and industry-relevant interfaces with priority regional rail networks	The project is directly aligned to the National Freight and Supply Chain priorities as one of its key outcomes is to develop efficient interfaces between road and rail where appropriate.

Ends





## Membership List as at 15 September 2020

Organisation	Contact	Website /Phone
<b>Ordinary Member (Trading)</b>		
<b>Level A1 (over 7 Million Tonnes)</b>		
CBH Grain Pty Ltd	Mr Jason Craig	cbh.com.au
Glencore Agriculture Pty Ltd	Mr Philip Hughes	glencoreagriculture.com.au
		2
<b>Level A2 (5 - 7 Million Tonnes)</b>		
Graincorp Operations Ltd	Mr Robert Spurway	graincorp.com.au
		1
<b>Level A3 (3 - 5 Million Tonnes)</b>		
ADM Trading Australia Pty Ltd	Mr Darryl Borlase	adm.com
Cargill Australia Limited	Mr Erik Wibholm	cargill.com.au
		2
<b>Level A4 (1.5 - 3 Million Tonnes)</b>		
		0
<b>Level B1 (1.0 - 1.5 Million Tonnes)</b>		
Emerald Grain Pty Limited	Mr David Johnson	emeraldgrain.com
Cofco International	Ms Sara Pan	cofcoagri.com.au
		2
<b>Level B2 (500,000 - 1 Million Tonnes)</b>		
Arrow Commodities Pty Ltd	Mr Dominic Vanzella	arrowcom.com.au
Australian Grain Export Pty Ltd	Mr Brett Dodson	australiangrainexport.com.au
CHS Broadbent Pty Ltd	Mr Steve Broadbent	broadbentgrain.com.au
Centre State Exports Pty Ltd	Mr Jeff Voigt	centrestateexports.com.au
George Weston Foods Limited	Mr Mark O'Brien	gwf.com.au
Ridley Agriproducts Pty Ltd	Mr Michael Reeves	agriproducts.com.au
Riordan Grain Services	Mr Mark Lewis	riordangrains.com.au
Riverina (Australia) Pty Ltd	Mr Gareth Stapleton	riverina.com.au
Bunge Agribusiness Australia Pty Ltd	Mr Stephen Bennett	bunge.com/agribusiness
		9
<b>Level B3 (250,000 - 500,000 Tonnes)</b>		
Allied Pinnacle Pty Ltd	Mr Josh Lawrence	alliedpinnacle.com
Robinson Grain Trading Co Pty Ltd	Mr Gary Robinson	robinsongrain.com.au
Wilmar Gavilon Pty Ltd	Mr Matt Albion	07 3713 8700
Louis Dreyfus Company Australia Pty Ltd	Mr Sam Roache	louisdreyfus.com.au
Quadra Commodities Pty Ltd	Mr Robin Cassar	quadra.com
		5
<b>Level C1 (over 10 employees, under 250,000 Tonnes)</b>		
Adams Australia Pty Ltd	Mr Ian Mack	adamsaustralia.com.au
Agriex Australia Pty Ltd	Mr Joseph Khnessier	02 9232 0690
Agriex Management Pty Ltd	Mr Brett Stevenson	02 9499 4199
AGT Foods Australia	Mr Michael Brittain	agtfoods.com/australia
Associated Grain t/a Agrocorp Processing Australia	Mr Bhuvan Gandhi	07 4662 1999
Auscott Ltd	Mr Peter Webb	auscott.com.au
Australian Fresh Milk Holdings (AFMH)	Ms Jill Smith	02 6344 8462
BFB Pty Ltd	Mr Shane Bird	bfb.com.au
Blairs Produce Company	Mr Sean Blair	02 6025 4600
Boolah Farms Pty Ltd	Mr Stuart Tighe	02 6754 0343
Castlegate James Australasia Pty Ltd	Mr Ross Giovanetti	castlegatejames.com.au
Coprice	Mr Lyndon Benecke	coprice.com.au
Darwalla Milling Co Pty Ltd	Mr Gary Heidenreich	07 3822 0527
Deacon Seeds Company	Mr Mark Schmidt	07 4662 3217
Deckert Group Pty Ltd	Mr Chris Deckert	deckerts.com.au
Esperance Quality Grains	Mr Neil Wandel	members.westnet.com.au/eqg
Five Star Stock Feeds	Mr Tim Huggins	fssf.com.au
Fletcher International Exports Pty Ltd	Mr Kurt Wilkinson	fletchint.com.au
Hanlon Enterprises Grain	Mr Peter Gerhardt	02 6924 1781
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
James Stock Feed and Fertilizer Pty Ltd	Mr Adrian Moule	jamesstockfeed.com.au

Jerilderie Grain Storage & Handling	Mr David Barlow	03 5886 0344
K M & W M Kelly & Sons	Mr Matt Kelly	kellygrains.com.au
Laucke Flour Mills P/L	Mr Roger Laubsch	laucke.com.au
Lawson Grains Pty Ltd	Mr Angus Blair	lawsongrains.com
LDC Enterprises Australia Pty Ltd	Mr Richard Porter	07 3253 5999
LINX Cargo Care	Mr David Simpson	linxcc.com.au
LPC Trading Pty Ltd	Mr Simon Langfield	02 6383 7222
Malteurop Australia Pty Ltd	Mr Jack King	03 5277 1950
MC Croker Pty Limited	Mr Greg Carroll	crokergrain.com.au
MSM Milling Pty Ltd	Mr Peter MacSmith	02 6364 5999
Namoi Cotton Ltd	Mr Shane McGregor	namoicotton.com.au
Newcastle Agri Terminal Pty Ltd	Mr Jock Carter	02 4962 4006
Premium Grain Handlers P/L	Mr John Orr	pgh.com.au
Quattro Ports	Mr Dene Ladmore	quattroports.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
Southern Cotton Trading Pty Ltd	Mr Chris Veness	02 69 552 779
SunPork Farms Feed Mills	Mr Mark Young	08 8532 4434
Tasmanian Agricultural Producers Pty Ltd	Mr David Skipper	tasagproducers.com.au
ThriveAgri	Mr Charlie Brown	thriveagri.com
TSS Grain (Tasmanian Stockfeed Services)	Mr Trevor Macleod	tasstockfeed.com.au
Unigrain Pty Ltd	Mr Ervin Leong	unigrain.com.au
W B Hunter Pty Ltd	Mr Stewart Coombes	03 5821 5744
Wilken Grain	Mr Richard Wilken	wilkens.com.au
Woods Grain Pty Ltd	Mr Bruce Woods	woodsgrain.com.au
XLD Commodities	Mr Lachie Stevens	xldgrain.com.au
Yenda Prods Grain Pty Ltd	Mr Luke Mancini	0437 512 322

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

A T Waterfield & Son Pty Ltd	Mr Brad Waterfield	03 5382 3725
A W Vater and Co	Mr Kim Vater	vater.com.au
AACL Pty Ltd	Mr Simon Gellert	trade@australianagriculturalcontracts.com.au
Access Grain Pty Ltd	Mr Wade Humphreys	accessgrain.com.au
Agmark Commodities	Mr Richard Alcorn	agmark.com.au
Agracom Pty Ltd	Mr Joe Hallman	agracom.com.au
Agri Om Australia Pty Ltd	Mr Kishore Bulchandani	agriom.com.au
Agri-Oz Exports Pty Ltd	Mr Francois Darcas	03 9830 7021
AgriGrain	Mr Jeremy Brown	agrigrain.com
Agromin Australia Pty Limited	Mr Rajni Patel	agromin.com.au
Marina Commodities	Mr Palwinder Singh	marinacommodities.com
Australian - Asian Agricultural Exports Pty Ltd	Mr Mick Connolly	aaax.ws
Australian Choice Exports Pty Ltd	Mr James Hunt	australianchoiceexports.com.au
Australian Grain Storage	Mr Matt Bailey	sunrice.com.au
Australian Growers Direct Pty Ltd	Mr Tom Lucas	ausgrowersdirect.com.au
Australian Mungbean Company Pty Ltd	Mr Damien White	australianmungbean.com.au
Baker Grain	Mr Richard Baker	bakergrain.com.au
Boort Grain Co-Operative	Mr Jon Bucknall	02 9875 3919
Broun and Co Grain Pty Ltd	Mr Wal Broun	brounandco.com.au
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C & S Trading Pty Ltd	Mr Craig Scholz	scholzbh.com.au
C K Tremlett Pty Ltd	Mr Andrew Tremlett	08 8524 9050
Carpendale Commodities	Mr Andrew Kluck	0448 761 246
Chester Commodities Pty Ltd	Mr Richard Black	chestercommodities.com.au
CL Commodities Pty Ltd	Mr Robert Lean	clcommodities.com.au
Continental Grain Handling Pty Ltd (CGH)	Mr Rick Guo	08 6333 1068
Coorow Seeds	Mr Brian Pover	coorowseeds.com.au
Cory Johnston (Aust) Pty Ltd	Mr Justin Fay	coryjohnston.com.au
Craig Tyack Grain Trading	Mr Craig Tyack	0428 729 167
Dalby Bio-Refining Limited	Mr Chris Coore	dbri.com.au
Demeter Cormack Pty Ltd	Mr David Oates	08 6389 0098
Defiance Maize Products Pty Ltd	Mr Rodney Walker	corson.co.nz
Direct Commodities Pty Ltd	Mr Hamish Robertson	directcommodities.com.au
Donnellons Bulk Haulage Pty Ltd	Mr Bill Donnellon	0428 136 483
East Coast Stockfeed Pty Ltd		ecsf.com.au
Ellerslie Free Range Farms Pty Ltd		07 4695 5777
Export Trading Group Australia Pty Ltd	Mr Shayne Clark	etgworld.com
Feed Central Pty Ltd	Mr Tim Ford	feedcentral.com.au
Findlays Barellan	Mr Neil Findlay	02 6963 9246
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GO Resources Pty Ltd	Ms Rosemary Richards	go-resources.com.au
Gold Star International Pty Ltd	Abhishek Kotkar	goldstarinternational.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
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
Harwood Grains Pty Ltd	Mr Paul Harwood	harwoodgrains.com.au
Hutt & Co Pty Ltd T/A GrainSource	Mr Simon Hutt	grainsource.com.au
J W Koek & Company	Mr Brian Algate	07 3341 4548
KB Agri Services Pty Ltd	Mr Karl Bliss	07 4634 4320
Kangaroo Island Pure Grain Pty Ltd	Ms Emma Tonkin	kipuregrain.com
Kennett Rural Services Pty Ltd	Mr Andrew Kennett	kennetttrural.com.au
Lachlan Commodities Pty Ltd	Mr Tony Cogswell	02 6851 2077
Laharum Bulk Handling Co	Mr Donald Carter	03 5381 2666
Lake Grain Pty Ltd	Mr Derek Davis	lakegrain.com.au
Lane Grain Pty Ltd	Mr Garry Lane	02 6887 3309
Laragon Almond Processors Pty Ltd	Mr Mark Webber	laragon.com.au
Lemarc Agromond Pty Ltd	Mr Michael Aikman	lemarcagromond.com
Mandala Trading Pty Ltd	Mr Jayjeev Saraff	mandalatrading.com.au
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Matthews Transport and Grain Traders	Mr Neville Matthews	08 9831 1021
Max Grains Pty Ltd	Mr Jack Fahy	maxgrains.com.au
Melaluka Trading Pty Ltd	Mr Simon Pritchard	melalukatrading.com.au
Melloco Pty Ltd	Mr Steve Mellington	0419 867 971
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Nandaly Grain Co-Operative Ltd	Mr Tony Bellinger	03 5078 1217
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ETG Processing Pty Ltd T/A Wimpak	Mr James French	wimpak.com.au
Origin Grain Pty Ltd	Mr Peter Brick	03 5720 8500
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Parkinson Bros	Mr Rohan Parkinson	parkinsonbros.com.au
PB Seeds Pty Ltd	Mr Peter Blair	pbseeds.com.au
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Plum Grove Pty Ltd	Ms Rikki Foss	plumgrove.com.au
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RT Wallace Pty Ltd	Mr Reilly Wallace	wallacebulkhaulage.com.au
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Spagrimon Australia Pty Limited	Mr Jiger Kotecha	spagrimon.com.au
Standard Commodities Australia Pty Ltd	Ms Elizabeth Bozinoska	stancom.com.au
Sudima Australia Pty Ltd	Mr Jim Garvey	sudima.com
Summer Hill Grains	Mr Barney Hughes	0428 694 363
Surat Bulk Grains	Ms Fay Donoghue	0428 265 425
Southern Grain Storage Pty Ltd	Mr Campbell Brumby	03 5267 2351
Swiss Singapore (Australia) Pty Ltd	Surya Jain	swiss-singapore.com
Tamma Grains Australia Pty Ltd	Ms Kim Packer	0428 887 026
Thallon Grains Pty Ltd	Mr Andrew Earle	02 6756 5004
Ulusoy Asia Pacific	Mr Mark Madjarevic	ulusoyflour.com
Unique Grain Management Pty Ltd	Mr Mark Thiele	uniquegrain.com.au
Universal Commodity Management	Mr Tim Dean	commoditymanagement.com.au
Ward McKenzie Pty Ltd	Mr Geoff Hammon	mckenziefoods.com.au
Watershed Commodities	Mr Jack Vivers	0427 715 543
Watson's Bulk Logistics	Mr Joel Watson	wbl.net.au
WHG Oceania Pty Ltd	Mr Gesheng Shen	02 8040 3030
WW Agri Pty Ltd	Mr Steve Sloss	wwagri.com.au

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#### Transport Operator

Aurizon Operations Limited	Ms Ruth Stjernqvist	aurizon.com.au
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Gehrke Grains and Transport Pty Ltd	Mr Julian Gehrke	07 5465 6695
Hamilton Contracting (NSW) Pty Ltd	Ms Jodie Hamilton	hamiltoncontracting.com.au
Pacific National (NSW) Pty Ltd	Mr Hugh Cox	pacificnational.com.au
SEAWAY Intermodal Pty Ltd	Mr Bikash Ram	seawayintermodal.com.au
<b>Broker</b>		<b>5</b>
<b>Large</b>		<b>0</b>
<b>Medium</b>		
Fox Commodities Pty Ltd	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	Ms Emily Fleming	igrain.com.au
INTL FCStone Pty Ltd	Mr Brett Cooper	intlfcstone.com
McDonald Pelz Australia	Mr Peter Geary	mcdonaldpelz.com
Perkins Commodity Brokers	Mr Craig Perkins	03 9645 6846
Teague Australia Pty Ltd	Mr Tim Teague	teague.com.au
		<b>8</b>
<b>Sole Operator</b>		
A C Grain	Mr Adam Clarke	0400 065 763
Allied Grain Pty Ltd	Mr Angus Wettenhall	alliedgrain.com.au
Cogeser (Australia) Pty Ltd	Mr Robert Luetolf	cogeser.com.au
Esquire Commodities Pty Limited	Mr Rowan Relton	07 4635 7215
Farm Tender	Mr Matt Henke	farmtender.com.au
Lotema Pty Ltd	Mr Todd Lees	lotema.com.au
Mallon Commodity Brokering	Mr Ian Mallon	
Quest Commodities Pty Ltd	Ms Jayne Barker	questcommodities.com.au
Wimmera Mallee Grain Services	Mr Rodney Edgerton	egrainservices.com.au
Woodside Commodities Pty Ltd	Mr Hamish Steele-Park	woodcomm.com.au
	#REF!	<b>10</b>
<b>Corporate</b>		
<b>Large</b>		
ASX Limited	Mr Ian Waddell	asx.com.au/grainfutures
Australia And New Zealand Banking Group	Mr Ian Hanrahan	anz.com.au
Australian Grain Technologies Pty Ltd	Mr Tristan Coram	agtbreeding.com.au
Commonwealth Bank of Australia	Mr Tom Barraket	commbank.com.au
		<b>4</b>
<b>Medium</b>		
AgriDigital	Mr Henry McKay	agridigital.io
AgriFood Technology Pty Ltd	#REF!	03 9742 0589
Amspec Australia Pty Ltd	Mr Lee Shilvock	amspecgroup.com
Australian Superintendence Company	Mr Andrew Parry	07 3391 8640
Commodity Inspection Services (Australia) Pty Ltd	Ms Katrina Saunderson	commodityinspection.com.au
Foss Pacific Pty Ltd	Mr Phil Soderberg	foss.com.au
Holding Redlich	Mr Geoff Farnsworth	holdingredlich.com
Holman Fenwick Willan	Mr Stephen Thompson	hfw.com
Intertek	Mr Ben Jones	intertek.com
SBA Law	Mr Jeremy Rosenthal	sbalaw.com
SGS Australia Pty Ltd	Mr Scot Paterson	au.sgs.com
T-Ports Pty Ltd	Mr Kieran Carvill	tports.com
Viridis Ag	Mr Anthony Howard	viridisag.com
		<b>13</b>
<b>Small</b>		
Advance Trading Australasia	Mr Andrew Woodhouse	advance-trading.com.au
Ag Scientia Pty Ltd	Mr Lloyd George	03 9598 1980
Basis Commodities Pty Ltd	Mr Chris Whitwell	basiscommodities.com.au
BSM Global Pty Ltd	Mr Robert Fleming	buysellmove.com
Clear Grain Exchange	Mr Nathan Cattle	cleargrain.com.au
CloudBreak Grain Marketing Pty Ltd	Mr Ed Scamps	08 8388 8084
Delta Agribusiness Pty Ltd	Mr Michael Parry	02 6772 0000
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
Graintec Scientific Pty Ltd	Mr Lucas Anstiss	graintec.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 Ole Houe	ikoncommodities.com.au
Lachstock Consulting Pty Ltd	Mr Nick Carracher	lachstockconsulting.com.au
MarketAg Pty Ltd	Mr Mark Martin	02 6747 1590

McMullen Consulting Pty Ltd  
 Mercari Pty Ltd  
 Merricks Capital Services Pty Ltd  
 Mirfak P/L  
 National Grower Register Pty Ltd  
 OMIC Australia Pty Ltd  
 Perten Instruments Australia Pty Ltd  
 Planfarm Marketing Pty Ltd  
 Primal Foods Group  
 Profarmer Australia Pty Ltd  
 Rise Agribusiness Pty Ltd  
 Rural Directions Pty Ltd  
 Saputo Dairy Australia Pty Ltd  
 SGA Solutions Pty Ltd  
 TE Storage & Logistics Pty Ltd  
 Ten Tigers  
 Wattletree Consulting Pty Ltd

#### International Affiliate

CCIC Australia Pty Ltd  
 CIS - Commodity Inspection Services

#### Industry Association

Australia Export Grain Innovation Centre  
 Grain Growers Limited  
 Grain Industry Association of WA  
 Grain Producers Australia Ltd  
 NSW Farmers Association

#### Merchant Association

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

#### Life Members

Mr Mervyn May  
 Mr Christopher Kelly  
 Mr Geoff Honey  
 Mr Terry Deacon

Mr Gerard McMullen  
 Mr Scott Still  
 Mr Adam Davies  
 Mr Mark Murphy  
 Ms Debbie Newmarch  
 Mr Yasuhide Okumura  
 Mr Raul Ovelar  
 Mr Jerome Critch  
 Mr Peter Longhurst  
 Ms Hannah Janson  
 Mr Ian Dalgliesh  
 Mr Chris Heinjus  
 Mr Robert Ford  
 Mr David Hudson  
 Mr Tom Hage  
 Mr Chris Tonkin  
 Mr Jon Bucknall

Mr Isherwood Feng  
 Mr Paul Schweitzer

Mr Richard Simonaitis  
 D. McKeon  
 Ms Larissa Taylor  
 Mr Andrew Weidemann  
 Ms Alexandra Bunton

Mr Ben Noll  
 Mr Colin Peace  
 Ms Joanne Ware  
 Mr John Francis

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 02 9870 3400  
 planfarm.com.au  
 primalfoodsgroup.com  
 australiancropforecasters.com.au  
 riseagri.com.au  
 ruraldirections.com  
 1300 643 333  
 03 5428 4990  
 08 8762 2188  
 tentigers.com.au

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 cis-inspections.com

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 giwa.org.au  
 grainproducers.com.au  
 02 9478 1000

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 grainnsw.com.au  
 qam.org.au

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Awarded 1998  
 Awarded July 2015  
 Awarded July 2016  
 Awarded August 2019

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