

## Submission

## Grain Trade Australia

## National Heavy Vehicle Regulator Grain Harvest Management Schemes Review

October 2019

## **Version Control**

Date	Version	Amendments
1 October 2019	1.0	

For more information contact Grain Trade Australia <u>www.graintrade.org.au</u> Phone: 02 9235 2155 Email: <u>admin@graintrade.org.au</u>

GTA Submission – 2019 NHVR Grain Harvest Management Schemes Review



## **Grain Harvest Management Schemes Review**

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## GRAIN TRADE AUSTRALIA GRAIN TRADE AUSTRALIA

Grain Trade Australia Limited PO Box R1829 Royal Exchange NSW 1225

## **1.0 Introduction**

Grain Trade Australia (GTA) welcomes the opportunity to provide a Submission to the National Heavy Vehicle Regulator's (NHVR) Grain Harvest Management Schemes Review.

GTA is firmly of the belief an effective and efficient supply chain is critical to maintaining and growing productivity and profitability in the agricultural industry and within the grain sector. GTA is committed to assisting and providing input to NHVR to achieve the stated objectives of this review.

## 2.0 Grain Trade Australia's Role

GTA 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 including a strong focus on the logistics of grain through transport storage and ports.

GTA's has over 280 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, standardform 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.

## **3.0 Grain Industry Sector**

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 number one or two agricultural export industry. In 2018/19 ABARES estimates the Australian grain industry value to be around \$A12.9 1 billion (at the farm gate). This is 6% below the 5-year average of \$A13.8 billion with 60% of production exported in a normal season the industry is a major driver of export revenue. Exports in 2018/19 are estimated by ABARES at \$A7.9 2 billion (FOB) and approximately 18.7 million metric tonnes (mmt). This has been severely impacted by the drought being 29 % 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 port.

Domestic demand for all crops is estimated at 15.5mmt in 2018/19. The domestic market continues to be the largest consumptive home for Australian grain, and its growth is expected to continue with consumption forecast to reach 16mmt in 2019/20.

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

<sup>1</sup> ABARES (farm gate value, July 2019

<sup>2</sup> ABARES (FOB value), July 2019

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Grain Trade Australia Limited

Producing on average 45mmt tonnes from approximately 21,000 farms production units<sup>3</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.
- 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 in peak periods. This evolving model and its complexity need to be understood and factored into any reform agenda such as this Review.

## 4.0 Grain Industry Framework and Transport

The Australian grain industry operates under a self-regulatory industry framework enabled by GTA's products and services. Industry self-regulation is unique to Australia and is well-regarded amongst other grain trading nations. This self-regulatory framework is recognised by the Australian Government and by governments in our destination markets as an important part of the Australian grain industry.

The glue that binds the self-regulatory framework together is the Australian Grains Industry Code of Practice (Code), managed by GTA. The Code plays an important role in the facilitation of trade and creates value by ensuring confidence in the Australian value chain. Australia remains the only major exporting country with an industry managed and driven Code of Practice.

Supplementary to the Code is the <u>GTA Grain Transport Code of Practice</u> (Transport Code). The Transport Code has been developed as an important tool to assist participants transport grain to their designated markets quickly, safely and within the relevant laws. It is referenced as a Technical Guideline Document in the Code and has been developed to provide more detailed information to industry on transport safety.

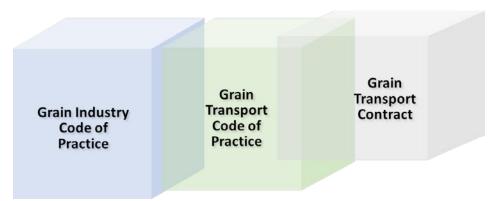
The Transport Code was developed using the NHVR Registered Master Industry (Transport) Code of Practice as a guide and reference document and is to assist industry participants in the management of statutory responsibilities and compliance with Applicable Laws, in particular road transport chain of responsibilities in relation to fatigue and mass management and other parameters.

<sup>&</sup>lt;sup>3</sup> Grain Growers Limited – State of the Australian Grain Industry 2016

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Figure 1. Grain Industry Framework and Transport



Supporting the GTA Transport Code is the **GTA Grain Transport Contract**. This contract is provided to industry to enshrine commercial arrangements between the consignor and consignee. Use of the Transport Code can be made binding between agreeable parties using this GTA Grain Transport Contract.

## **5.0 NHVR HMMS Review - Objectives**

The NHVR Issues Paper list the Review purpose and objectives as:

#### **Purpose:**

• Develop a concessional mass management scheme to assist participants that may unintentionally over-load grain into trucks when weighing technology is not available.

#### **Objectives:**

- Ensure compliance with statutory vehicle mass limits as prescribed in the HVNL
- Provide a level of support to assist with difficulties associated with grain transportation
- Ensure the safe transportation of grain
- Manage risks to road infrastructure and public safety

Whilst, GTA consider the stated purpose and the objectives are sufficient for this Review, GTA would also recommend NHVR consider the scope of this Review. Given the grain industry model now relies on access to grain stored in farm storage (as part of its normal post-harvest supply chain) this Review should be broader than a harvest centric mass management system. This is the approach taken in South Australia with its mass loading management concession.

Similarly, the NHVR should potentially consider as part of this review process other agricultural products that also leave farms in unweighed road transport.

## **6.0 NHVR Review – Structure**

The NHVR Issues Paper raises several questions and provides some potential structures, and the process to support these structures.

GTA is not in a position to be able to comment on which structure is preferable as this requires a high level of analysis, discussion and engagement with industry.



This Review is complex, and it is important to understand the existing HMMS evolved within each state to address the objectives and concerns of industry over several years and numerous iterations. NHVR should seek to understand each different HMMS system and to isolate the better components for consideration as part of a potential national HMMS and set of national standards.

The concept of harmonising these schemes appears sound and GTA supports the removal of inconsistent approaches to legislation and consider this supportive of the current National Transport Regulatory Reform inquiry. However, given these schemes were developed at the grass roots level GTA recommends NHVR should:

- Take into consideration the complexities associated with the grain supply chain.
- Consider the historical reasons for the introduction of each HMMS and the changes that have been introduced to the different schemes over time.
- Recognize the many varied participant groups involved in HMMS and seek to engage with these groups and industry through workshops and forums.

Engaging with industry through forums and workshops is highly recommended given the history and parochial support for each scheme. Change to any of one of the three proposed HMMS structures must be well understood and opportunities to understanding and debate change is critical.

## 6.0 Conclusion

GTA welcome the opportunity to provide input into the NHVR HMMS Review and see this aligned to the current National Transport Regulatory Reform inquiry. Being involved and staying abreast of any outcome is an important step in keeping GTA's Transport Code updated so it remains a valid industry resource. GTA is committed to support the Review process and asked to be kept informed of further opportunities to assist and be involved.

# GRAIN TRADE AUSTRALIA

#### Membership List as at 25 September 2019

Website /Phor	Contact	Organisation
		nary Member (Trading)
		Level A1 (over 7 Million Tonnes)
cbh.com.a	Mr Jason Craig	CBH Grain Pty Ltd
glencoreagriculture.com.a	Mr Philip Hughes	Glencore Agriculture Pty Ltd
		Level A2 (5 - 7 Million Tonnes)
graincorp.com.a	Mr Klaus Pamminger	Graincorp Operations Ltd
		Level A3 (3 - 5 Million Tonnes)
adm.co	Mr Darryl Borlase	ADM Trading Australia Pty Ltd
cargill.com.a	Mr Erik Wibholm	Cargill Australia Limited
-		
		Level A4 (1.5 - 3 Million Tonnes)
		Level B1 (1.0 - 1.5 Million Tonnes)
arrowcom.com.a	Mr Dominic Vanzella	Arrow Commodities Pty Ltd
plumgrove.com.a	Mr Andrew Young	Plum Grove Pty Ltd
emeraldgrain.co	Mr David Johnson	Emerald Grain Pty Limited
cofcoagri.com.a	Ms Sara Pan	Cofco International
		Level B2 (500,000 - 1 Million Tonnes)
australiangrainexport.com.a	Mr Brett Dodson	Australian Grain Export Pty Ltd
broadbentgrain.com.a	Mr Steve Broadbent	CHS Broadbent Pty Ltd
centrestateexports.com.	Mr Jeff Voigt	Centre State Exports Pty Ltd
gwf.com.a	Mr Mark O'Brien	George Weston Foods Limited
agriproducts.com.	Mr Michael Reeves	Ridley Agriproducts Pty Ltd
riordangrains.com.	Mr Mark Lewis	Riordan Grain Services
riverina.com.	Mr Kenji Kumoi	Riverina (Australia) Pty Ltd
bunge.com/agribusine	Mr Stephen Bennett	Bunge Agribusiness Australia Pty Ltd
		Level B3 (250,000 - 500,000 Tonnes)
agfarm.com.a	Mr Ron McCalman	Agfarm Pty Ltd
agracom.com.a	Mr Joe Hallman	Agracom Pty Ltd
02 9499 419	Mr Brett Stevenson	Agrisk Management Pty Ltd
alliedpinnacle.co	Mr Josh Lawrence	Allied Pinnacle Pty Ltd
robinsongrain.com.a	Mr Gary Robinson	Robinson Grain Trading Co Pty Ltd
07 3713 870	Mr Matt Albion	Wilmar Gavilon Pty Ltd
louisdreyfus.com.a	Mr Sam Roache	Louis Dreyfus Company Australia Pty Ltd
quadra.co	Mr Robin Cassar	Quadra Commodities Pty Ltd
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#### Ordinary Member (Trading)

Level C (under 250,000 Tonnes) A T Waterfield & Son Pty Ltd A W Vater and Co Access Grain Pty Ltd Adams Australia Pty Ltd Agmark Commodities Agri Om Australia Pty Ltd Agri-Oz Exports Pty Ltd Agriex Australia Pty Ltd Agrifoods Australia Agrigrain Agromin Australia Pty Limited AGT Foods Australia Associated Grain Auscott Ltd AusiCan Commodities Australian - Asian Agricultural Exports Pty Ltd Australian Choice Exports Pty Ltd Australian Grain Storage Australian Growers Direct Pty Ltd Australian Mungbean Company Pty Ltd Australian Storage Alliance Pty Ltd Baker Grain BFB Pty Ltd Blairs Produce Company Boolah Grains Pty Ltd Boort Grain Co-Operative Broun and Co Grain Pty Ltd C & S Trading Pty Ltd C K Tremlett Pty Ltd Carpendale Commodities Cameron Pastoral Company Pty Ltd Castlegate James Australasia Pty Ltd CL Commodities Ptv Ltd Coorow Seeds Coprice Cremer Australia Pty Ltd DA Hall and Co Dalby Bio-Refining Limited Darwalla Milling Co Pty Ltd Deacon Seeds Company Deckert Group Pty Ltd Defiance Maize Products Pty Ltd Demeter Cormack Pty Ltd Direct Commodities Pty Ltd Donnellons Bulk Haulage Pty Ltd East Coast Stockfeed Pty Ltd **Elders** Grain Esperance Quality Grains Export Trading Group Australia Pty Ltd Feed Central Pty Ltd

Mr Brad Waterfield Mr Kim Vater Mr Wade Humphreys Mr Ian Mack Mr Richard Alcorn Mr Kishore Bulchandani Mr Francois Darcas Mr Joseph Khnessier Mr Rob Anderson Mr Jeremy Brown Mr Rajni Patel Michael Brittain Mr Bhuvan Gandhi Mr Peter Webb Mr Douglas Saunders Mr Mick Connolly Mr James Hunt Mr Matt Bailey Mr Tom Lucas Mr Damien White Mr Jon Bucknall Mr Richard Baker Mr Terry Brabin Mr Sean Blair Mr Stuart Tighe Mr Jon Bucknall Mr Wal Broun Mr Craig Scholz Mr Andrew Tremlett Mr Andrew Kluck Mr Ken Cameron Mr Ross Giovanetti Mr Robert Lean Mr Brian Pover Mr Lyndon Benecke Mr Scott Haughton Mr Bruce Holden Mr Gary Heidenreich Mr Mark Schmidt Mr Chris Deckert Mr Rodney Walker Mr David Oates Mr Hamish Robertson Mr Bill Donnellon Mr Lachlan Allen Mr Neil Wandel Mr Shayne Clark Mr Tim Ford

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

Findlays Barellan Five Star Stock Feeds Fletcher International Exports Pty Ltd GO Resources Pty Ltd Golden Harvest Grain Exports Gold Star International Ptv Ltd Grain Direct Australia Grain Link (NSW) Pty Ltd Grain Link WA Pty Ltd Grainforce Pty Ltd GrainTrend Pty Ltd Greentree Farming GV Grain & Fodder Hanlon Enterprises Grain Harwood Grains Pty Ltd Harberger's Farm Supplies (Trading) Pty Ltd Hassad Australia Operations Company Pty Ltd Independent Grain Handlers Pty Ltd Irwin Stockfeeds Itochu Australia Ltd J K International Ptv Ltd J W Koek & Company James Stock Feed and Fertilizer Pty Ltd Jerilderie Grain Storage & Handling KB Agri Services Pty Ltd K M & W M Kelly & Sons Kangaroo Island Pure Grain Pty Ltd Kennett Rural Services Pty Ltd Lachlan Commodities Pty Ltd Laharum Bulk Handling Co Lake Grain Pty Ltd Lane Grain Pty Ltd Laragon Almond Processors Pty Ltd Laucke Flour Mills P/L Lawson Grains Pty Ltd LDC Enterprises Australia Pty Ltd LINX Cargo Care LPC Trading Pty Ltd Mandala Trading Pty Ltd Malteurop Australia Pty Ltd Matthews Transport and Grain Traders Max Grains Pty Ltd MC Croker Pty Limited Melaluka Trading Pty Ltd Mellco Pty Ltd Moulamein Grain Co-Operative Ltd Moxey Farms Pty Limited MSM Milling Pty Ltd Namoi Cotton Ltd Nandaly Grain Co-Operative Ltd Network Grains Pty Ltd Newcastle Agri Terminal Pty Ltd

Mr Neil Findlay Mr Tim Huggins Mr Kurt Wilkinson Ms Rosemary Richards Mr Chandru Hiremath Abhishek Kotkar Mr Chris Kochanski Mr Paul Pearsall Mr Andrew Goyder Mr Derek Larnach Mr Saniiv Dubev Mr David Brown Ms Joanne Harry Mr Peter Gerhardy Ms Rebecca Molloy Mr Reece Harberger Ms Terrie Morgan Mr Brad Bryant Mr Bryan Irwin Mr Justin Swan Mr Sandeep Mohan Mr Brian Algate Mr Adrian Moule Mr David Barlow Mr Karl Bliss Mr Matt Kelly Ms Emma Tonkin Mr Andrew Kennett Mr Tony Cogswell Mr Donald Carter Mr Derek Davis Mr Garry Lane Mr Mark Webber Mr Roger Laubsch Mr Angus Blair Mr Richard Porter Mr David Simpson Mr Simon Langfield Mr Jayjeev Saraff Mr Jack King Mr Neville Matthews Mr Jack Fahy Mr Greg Carroll Mr Simon Pritchard Mr Steve Mellington Mr Tony Bellinger Ms Jill Smith Mr Peter MacSmith Mr Shane McGregor Mr Tony Bellinger Mr Craig Dennis Mr Jock Carter

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

Origin Grain Pty Ltd Pacific Global Sprouts Pty Ltd Parkinson Bros PB Seeds Ptv Ltd PeaCo Pearson's Grain Pty Ltd Peters Commodities Pty Ltd Phoenix Global Australia Pty Ltd Premium Grain Handlers P/L Preston Grain Pulse Association of the South East (PASE) Inc Quattro Ports Quirindi Grain & Produce Reid Stockfeeds Ptv Ltd Rhodium Trading Australia Pty Ltd Rivalea (Australia) Pty Ltd - Animal Nutrition Riverina Oils & BioEnergy Pty Ltd RT Wallace Pty Ltd Ruddenklau Grain Pty Ltd Rural Logic (Aust) Pty Ltd Shannon Bros Bulk Haulage Silo Bag Grain (NSW QLD) Pty Ltd Societa Cofica Pty Ltd Southern Cotton Trading Pty Ltd Southern Cross Agricultural Exports P/L Southern Grain Storage Pty Ltd Southern Stockfeeds (Operations) Pty Ltd Spagricon Australia Pty Limited Standard Commodities Australia Ptv Ltd Sudima Australia Pty Ltd Summer Hill Grains SunPork Farms Feed Mills Swiss Singapore (Australia) Pty Ltd Tasmanian Agricultural Producers Pty Ltd Thallon Grains Pty Ltd ThriveAgri TSS Grain Twynam Pastoral Company Ulusoy Asia Pacific Unigrain Pty Ltd Unique Grain Management Pty Ltd Universal Commodity Management W B Hunter Pty Ltd Ward McKenzie Pty Ltd Watershed Commodities Watson's Bulk Logistics WHG Oceania Pty Ltd Wilken Grain Wimpak Pty Ltd

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Woods Grain Pty Ltd WW Agri Pty Ltd XLD Grain Pty Ltd Yenda Prods Grain Pty Ltd

#### **Transport Operator**

Aurizon Operations Limited Gehrke Grains and Transport Pty Ltd Hamilton Contracting (NSW) Pty Ltd Pacific National (NSW) Pty Ltd SEAWAY Intermodal Pty Ltd

#### **Broker**

#### Large

#### Medium

Grain Brokers Australia Horizon Grain Brokers Pty Ltd INTL FCStone Pty Ltd McDonald Pelz Australia Perkins Commodity Brokers Teague Australia Pty Ltd

#### Sole Operator

A C Grain ACCB Australia Allied Grain Pty Ltd Cogeser (Australia) Pty Ltd Esquire Commodities Pty Limited Farm Tender Lotema Pty Ltd Mallon Commodity Brokering Quest Commodities Pty Ltd Wimmera Mallee Grain Services Woodside Commodities Pty Ltd

#### Corporate

#### Large ASX Limited Australia And New Zealand Banking Group Australian Grain Technologies Pty Ltd Commonwealth Bank of Australia

#### Medium

AgriDigital Agrifood Technology Pty Ltd Amspec Australia Pty Ltd Australian Superintendence Company Commodity Inspection Services (Australia) Pty Ltd Foss Pacific Pty Ltd Holding Redlich Holman Fenwick Willan Intertek SBA Law SGS Australia Pty Ltd T-Ports Pty Ltd Mr Bruce Woods Mr Steve Sloss Mr Lachie Stevens Mr Luke Mancini

Ms Ruth Stjernqvist Mr Julian Gehrke Ms Jodie Hamilton Mr Antony Borgese Mr Bikash Ram

Mr Jeff Winspear Mr Ash Munro Mr Brett Cooper Mr Peter Geary Mr Craig Perkins Mr Tim Teague

Mr Adam Clarke Mr Andy Cunliffe Mr Angus Wettenhall Mr Robert Luetolf Mr Rowan Relton Mr Matt Henke Mr Todd Lees Mr Ian Mallon Ms Jayne Barker Mr Rodney Edgerton Mr Hamish Steele-Park

Mr Ian Waddell Mr Ian Hanrahan Mr Tristan Coram Mr Tom Barraket

Mr Henry McKay Ms Doreen Fernandez Mr Lee Shilvock Mr Andrew Parry Mr Mathew Conoulty Mr Simon Kirkman Mr Geoff Farnsworth Mr Stephen Thompson Mr Ben Jones Mr Jeremy Rosenthal Mr Scot Paterson Mr Kieran Carvill woodsgroup.com.au wwagri.com.au xldgrain.com.au 0437 512 322

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aurizon.com.au 07 5465 6695 hamiltoncontracting.com.au pacificnational.com.au seawayintermodal.com.au 5

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#### Corporate (cont.)

Small

Advance Trading Australasia Ag Scientia Pty Ltd Basis Commodities Pty Ltd Clear Grain Exchange CloudBreak Grain Marketing Pty Ltd Delta Agribusiness Pty Ltd EP Integrated Commodities Pty Ltd Farmanco Marketing Pty Ltd FarMarCo Australia Pty Ltd Finesse Solutions Pty Limited Flexi Grain **Goldstar Commodities** Graintec Scientific Pty Ltd Grainx HarvestCheck Pty Ltd Hay Plains Grain Storage Pty Ltd Indigo Agriculture Australia Pty Ltd IKON Commodities Pty Ltd Lachstock Consulting MarketAg Pty Ltd McMullen Consulting Pty Ltd Mercari Pty Ltd Merricks Capital Pty Limited Mirfak P/L National Grower Register Pty Ltd OMIC Australia Ptv Ltd Perten Instruments Australia Pty Ltd Pinnacle Commodities Pty Ltd Planfarm Marketing Pty Ltd Plansafe Logistics 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 Mr Andrew Woodhouse Mr Lloyd George Mr Chris Whitwell Mr Nathan Cattle Mr Ed Scamps Mr Michael Parry Ms Tracey Lehmann Mr Donald McTaggart Mr Robert Imray Mr Malcolm Finlayson Mr Jarrod Tonkin Mr Geoff Webb Mr Lucas Anstiss Mr Chris Hood Mr Stephen Schumacher Mr Ron Harris Mr Peter McMeekin Mr Ole Houe Mr Lachie Stevens Mr Mark Martin Mr Gerard McMullen Mr Scott Still Mr Adam Davis Mr Mark Murphy Ms Debbie Newmarch Mr Yasuhide Okumura Mr Raul Ovelar Mr Rod Buckle Mr Jerome Critch Mr Mark Sloan Mr Peter Longhurst Ms Hannah Janson Mr Ian Dalgliesh Mr Chris Heinjus Mr Robert Ford Mr David Hudson Mr Tom Hage Mr Chris Tonkin Jon Bucknall

Mr Isherwood Feng Mr Paul Schweitzer

Mr Richard Simonaitis D. McKeon

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02 9580 3212 cis-inspections.com 2

aegic.org.au graingrowers.com.au Grain Industry Association of WA Grain Producers Australia Ltd NSW Farmers Association Victorian Farmers Federation Ms Larissa Taylor Mr Andrew Weidemann Ms Alexandra Bunton Ms Annabel Mactier giwa.org.au grainproducers.com.au 02 9478 1000 03 9207 5555 6

#### **Merchant Association**

Grain Industry Association of SA Grain Industry Association Of Victoria Grain NSW Inc Queensland Agricultural Merchants Inc. Mr Ben Noll Mr Colin Peace Ms Joanne Ware Mr John Francis

+61 8 8361 5601 giav.com.au grainnsw.com.au qam.org.au

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#### **Life Members**

Mr Mervyn May Mr Christopher Kelly Mr Geoff Honey Mr Terry Deacon Awarded 1998 Awarded July 2015 Awarded July 2016 Awarded August 2019

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