

# Final report

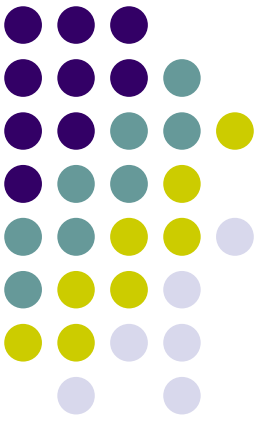
Project Code: A.PIA.0112  
Prepared by: Indigo Marketing and Communications Pty  
Ltd  
Date published: 03 July 2009

PUBLISHED BY  
Meat and Livestock Australia Limited  
Locked Bag 991  
NORTH SYDNEY NSW 2059

## Top 25 processors 2008

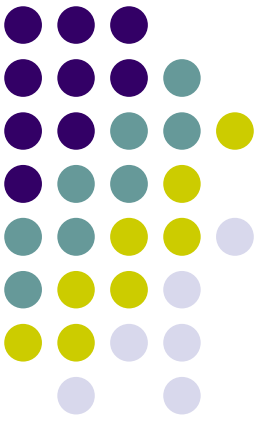
Meat & Livestock Australia acknowledges the matching funds provided by the Australian Government to support the research and development detailed in this publication.

This publication is published by Meat & Livestock Australia Limited ABN 39 081 678 364 (MLA). Care is taken to ensure the accuracy of the information contained in this publication. However MLA cannot accept responsibility for the accuracy or completeness of the information or opinions contained in the publication. You should make your own enquiries before making decisions concerning your interests. Reproduction in whole or in part of this publication is prohibited without prior written consent of MLA.



## contents

Executive Summary	3
Article for feedback magazine	5
<i>2008 Ranking</i>	7
Respondent Information Summary	8
Raw Ranking Table	9
2008 Top 25 Processors company survey results	10



## executive summary

It is with a great deal of pleasure that Indigo Marketing & Communications submits to Meat and Livestock Australia the results of the 2007 Top 25 Processors research project.

### Methodology:

In undertaking this project we “short listed” 32 processors, that represented 59 plant sites. Each processor was contacted by telephone by way of introduction prior to emailing a survey regarding both their company details for updating and questionnaire regarding industry operating conditions, company and industry developments and request for their opinion on potential issues that were foreseeable in the short term (12 months).

### Companies Surveyed

The following companies were surveyed as part of the compilation of the 2008 report. Companies highlighted in purple declined participation in the 2007 report also.

Organisation	No. plants operated in 2008	Participation
Australian Country Choice Production Pty Ltd	1	Participating
Bindaree Beef Pty Ltd	1	Participating
Cargill Beef Australia	2	Participating
Churchill Abattoir Management Pty Ltd	1	Declined
CRF (Colac Otway) Pty Ltd	1	Participating
E C Throsby Pty Ltd	1	Participating
Fletcher International Exports	2	Participating
G & B Gathercole (VIC) Pty Ltd	3	Participating
G & K O'Connor Pty Ltd	1	Participating
H W Greenham & Sons Pty Ltd	2	Participating
Harvey Industries Group	1	Participating
JBS Swift Australia Pty Ltd	10	Declined
John Dee Warwick Pty Ltd	1	Declined
JSA Jackson & Son Pty Ltd	2	Participating
Kilcoy Pastoral Company Ltd	1	Participating
M C Herd Pty Ltd	1	Participating
Midfield Meat International Pty Ltd	2	Participating
Nippon Meat Packers Aust Pty Ltd	3	Participating
Nolan Meats Pty Ltd	1	Declined

Northern Co-Operative Meat Co Ltd	2	Participating
Norvic Food Processing Pty Ltd	1	Participating
Primo Australia Scone Abattoir	1	Participating
Rockdale Beef Pty Ltd	1	Declined
Southern Meats Pty Ltd	1	Participating
Stanbroke Beef Pty Ltd	1	Participating
T&R Pastoral Pty Ltd	4	Participating
Tabro Meat Pty Ltd	1	Declined
Tatiara Meat Company Pty Ltd	1	Participating
Teys Bros Pty Ltd	6	Participating
V&V Walsh	1	Declined
Wagstaff Cranbourne	1	Declined
WAMMCO International	1	Declined
<b>Total</b>	<b>59</b>	<b>23 Participating 9 Declined</b>

In conjunction with our survey to the processors we undertook a thorough investigation of macro factors affecting the industry in order to provide context to the operational results for the top echelon of the industry.

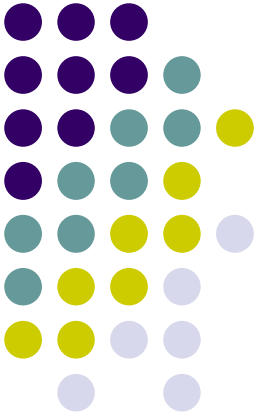
### Results:

We were able to secure the responses of 23 processors.

There was some reluctance to provide figures from approximately one third of those that were surveyed. Further, approximately two thirds of those surveyed did not provide any financial information to us as part of the information gathering process.

Prior to the finalization of the report, we were advised that this project had been cancelled. The information included as part of this report is the total sum of information collected prior to the cancellation.

*We would like to sincerely thank Meat & Livestock Australia for the opportunity to undertake this project on their behalf, and we look forward to working again with you in the future.*



## Article for *feedback* magazine

### Processor Snapshot 2008:

- National production figure of 2,827,570MT is 44,557MT less than 2007 results;
- Number 1 producer JBS Swift refused participating in this year's survey citing stakeholder interest;
- Nippon Meat Packers production has risen approximately 12% on 2007;
- Midfield Meats tonnage is back up to 2007 figures sitting at just under 75,000MT;
- The top 23 processors published represent 41 plant sites and 58.90% share of total kill.

### Ranking Methodology:

The Top 25 Processors has been published by *feedback* since 1999, with the omission of calendar year 2005.

This year, 32 companies were surveyed regarding their metric tonnage figures for the calendar year and company details regarding administration, operations, finance and marketing. The 23 respondents have been ranked determined on metric tonne figures. It should be noted that the data provided has not been independently audited, and the ranking has been based on information received by participating organisations.

The national kill share percentage is calculated as a percentage of national kill for all beef, veal, mutton and lamb, and is a figure provided by the Australian Bureau of Statistics.

### 2008 in Review:

#### Rationalisation:

- JBS Swift purchases Tasman Group reportedly for \$150m in May 2008. The merger increases the JBS holding in Australia to 10 sites, employing 5,000 people with a capacity to slaughter 25,000 animals daily.

#### Emerging Markets:

- The Brunei Government sets up a new company to supply Halal product globally, selecting Australian meat to supply this market.
- Austrade points to growing demand in the Philippines market predicated by forecasted population growth that will see the population nearly double in

two decades combined with a growth in the food and fast food chain sectors.

- UAE continues to grow with the UAE beef market increasing 138% year-on-year and mutton increasing just over 25%.
- Russia's consumption of beef has increased from 5,000t to 67,000t in one year.

#### **Increased competition in traditional markets:**

- US beef has begun to erode the safe markets of Korea and Japan with Abare citing a 23% decline imports of Australian beef to Korea during the four months June to September 2008 compared to the same period in 2007. Similarly Japanese beef imports are forecast to fall 6% during 2008-09.

#### **Production Levels:**

- National herd numbers for cattle and sheep continue to decline throughout the 07/08 fiscal year.
- Cattle herd has declined 0.8% to 27.8m. A 4% increase in Queensland has offset the decline across the other states. Victorian numbers have dropped 8% year-on-year and are now at their lowest level in 15 years.
- Australia's sheep flock has dropped 7.6% to 79.2m – its lowest number since 1920.
- There has been a significant shift from sheep to cropping in WA that has seen numbers drop 13% year on year.

#### **Drought:**

- Drought conditions continued across New South Wales, Victoria and South Australia.

#### **Government:**

- *DoHa Outcomes* - Proposed cuts to farm subsidy entitlements in the EU and US by 70-80%. Agriculture tariffs in the EU, US and Japan would be cut by up to 70%;
- Tariff quotas boosted to allow in some cases hundreds of thousands of tonnes of new market access in developed countries.
- *ASEAN – Australia-NZ FTA* – low tariffs on entry-into-force of the Agreement;
- Further FTA's under discussion with Japan, China and Korea;
- *Tariff free exports to Chile negotiated from January 1 2009* – Chile will recognize the AusMeat Industry Classification System;

#### **Economy:**

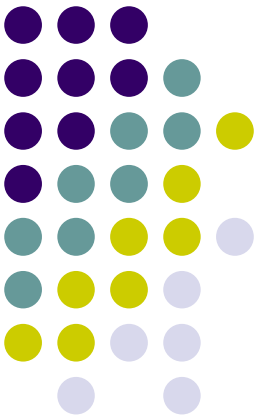
- The depreciation of the Australian dollar amid the chaos of world financial markets from September onwards saw a reduction in the landed price of beef seeing a summary increase in US imports at the back end of 2008.
- The financial climate has seen an impact on consumers' demand for beef and lamb with consumption of less expensive beef cuts and ground meat products increasing particularly in the US and Japanese markets coupled with a 41% reduction in lamb exports to the US for the period July to September 2008 when compared to the same 2007 period.



## 2008 Ranking

Rank 2008	Rank 2007	Rank 2006	Organisation	Throughput ETCW 2008	Throughput ETCW 2007	Throughput ETCW 2006	Kill Share % 2008	No. plants operated in 2008	Turnover \$million	Turnover \$ million previous year	Employee Numbers
1	2	2	Teys Bros Pty Ltd	331,165	344,933	273,300	11.71%	6	\$1.169*	n/a	2,700
2	3	3	Nippon Meat Packers Aust Pty Ltd	184,720	164,200	168,700	6.53%	3	\$864	\$930	1,650
3	5	5	Cargill Beef Australia	152,000	152,000	145,000	5.38%	2	\$500	\$530	1,100
4	6	6	T&R Pastoral Pty Ltd	145,000	133,000	99,800	5.13%	4	n/a	\$500	1,500
5	7	7	Fletcher International Exports	80,000	82,400	80,000	2.83%	2	n/a	n/a	1,365
6	13	8	Company details withheld	73,250	47,766	72,000	2.59%	2	n/a	n/a	550
7	11	13	Kilcoy Pastoral Company Ltd	63,025	54,200	52,800	2.23%	1	\$312	\$265	610
8	n/a	9	Bindaree Beef	58,500	n/a	63,000	2.07%	1	\$255	n/a	500
9	8	Equal 10	Australian Country Choice Production Pty Ltd	57,600	60,250	54,750	2.04%	1	n/a	n/a	1050
10	9	12	H W Greenham & Sons Pty Ltd	57,500	58,000	53,500	2.03%	2	n/a	n/a	475
11	14	17	Company details withheld	47,430	47,000	45,500	1.68%	1	n/a	n/a	n/a
12	15	18	Harvey Industries Group	47,191	44,486	44,200	1.67%	1	n/a	n/a	350
13	16	24	G & B Gathercole (VIC) Pty Ltd	45,000	40,140	35,000	1.59%	3	n/a	n/a	360
14	12	15	JSA Jackson & Son Pty Ltd	41,407	49,515	47,600	1.46%	2	\$240	\$320	580
15	19	22	Stanbroke Beef Pty Ltd	38,000	38,000	36,500	1.34%	1	n/a	n/a	n/a
16	20	21	G & K O'Connor Pty Ltd	34,200	37,000	37,000	1.21%	1	n/a	n/a	300
17	18	n/a	Tatiara Meat Company Pty Ltd	34,104	39,200	n/a	1.21%	1	\$179	\$194	470
18	24	16	Northern Co-Operative Meat Co Ltd	33,358	30,226	45,932	1.18%	2	n/a	n/a	694
19	22	n/a	CRF (Colac Otway) Pty Ltd	30,527	34,320	n/a	1.08%	1	n/a	n/a	367
20	21	Equal 25	Primo Australia Scone Abattoir	30,000	35,000	32,000	1.06%	1	n/a	n/a	360
21	25	14	Southern Meats Pty Ltd	29,624	28,000	51,000	1.05%	1	n/a	n/a	480
22	n/a	Equal 25	Norvic Food Processing Pty Ltd	26,000	n/a	32,000	0.92%	1	n/a	n/a	n/a
23	n/a	n/a	E C Throsby Pty Ltd	25,766	n/a	n/a	0.91%	1	\$78	n/a	200
<b>Totals</b>				<b>1,665,367</b>			<b>58.90%</b>	<b>41</b>			

2008 Australian national kill figure for all beef, veal, mutton and lamb equating to 2,827,570 tonnes carcass weight (Australian Bureau of Statistics)  
 Turnover figures are based on calendar year figures unless \* demarking financial year end 07/08



## Respondent Information Summary

<b>RANKING</b>	<b>ORGANISATION</b>	<b>INFORMATION PROVIDED</b>
1	Teys Bros Pty Ltd	Company profile & MT
2	Nippon Meat Packers Aust. Pty Ltd	Company background, profile & MT
3	Cargill Beef Australia	Company background, profile & MT
4	T&R Pastoral Pty Ltd	Company profile & MT
5	Fletcher International Exports	Company profile & MT
6	Midfield Meat International Pty Ltd	MT – details remain undisclosed
7	Kilcoy Pastoral Company Ltd	Company profile & MT
8	Bindaree Beef	Company background, profile & MT
9	Australian Country Choice Production Pty Ltd	Company background, profile & MT
10	H W Greenham & Sons Pty Ltd	Company profile & MT
11	M C Herd Pty Ltd	MT – details remain undisclosed
12	Harvey Industries Group	Company profile & MT
13	G & B Gathercole (VIC) Pty Ltd	Company background, profile & MT
14	JSA Jackson & Son Pty Ltd	Company background, profile & MT
15	Stanbroke Beef Pty Ltd	Company profile & MT
16	G & K O'Connor Pty Ltd	Company profile & MT
17	Tatiara Meat Company Pty Ltd	Company profile & MT
18	Northern Co-Operative Meat Co Ltd	Company profile & MT
19	CRF (Colac Otway) Pty Ltd	Company profile & MT
20	Primo Australia Scone Abattoir	Company background, profile & MT
21	Southern Meats Pty Ltd	Company profile & MT
22	Norvic Food Processing Pty Ltd	Company profile & MT
23	E C Throsby Pty Ltd	Company profile & MT





# Raw Ranking Table

*Not for publishing*

Rank 2008	Rank 2007	Rank 2006	Organisation	Throughput ETCW 2008	Throughput ETCW 2007	Throughput ETCW 2006	Kill Share % 2008	No. plants operated in 2008	Turnover \$million	Turnover \$ million previous year	Employee Numbers
1	2	2	Teys Bros Pty Ltd	331,165	344,933	273,300	11.71%	6	\$1.169*	n/a	2,700
2	3	3	Nippon Meat Packers Aust Pty Ltd	184,720	164,200	168,700	6.53%	3	\$864	\$930	1,650
3	5	5	Cargill Beef Australia	152,000	152,000	145,000	5.38%	2	\$500	\$530	1,100
4	6	6	T&R Pastoral Pty Ltd	145,000	133,000	99,800	5.13%	4	n/a	\$500	1,500
5	7	7	Fletcher International Exports	80,000	82,400	80,000	2.83%	2	n/a	n/a	1,365
6	13	8	Midfield Meat International Pty Ltd	73,250	47,766	72,000	2.59%	2	n/a	n/a	550
7	11	13	Kilcoy Pastoral Company Ltd	63,025	54,200	52,800	2.23%	1	\$312	\$265	610
8	n/a	9	Bindaree Beef	58,500	n/a	63,000	2.07%	1	\$255	n/a	500
9	8	Equal 10	Australian Country Choice Production Pty Ltd	57,600	60,250	54,750	2.04%	1	n/a	n/a	1050
10	9	12	H W Greenham & Sons Pty Ltd	57,500	58,000	53,500	2.03%	2	n/a	n/a	475
11	14	17	M C Herd Pty Ltd	47,430	47,000	45,500	1.68%	1	n/a	n/a	n/a
12	15	18	Harvey Industries Group	47,191	44,486	44,200	1.67%	1	n/a	n/a	350
13	16	24	G & B Gathercole (VIC) Pty Ltd	45,000	40,140	35,000	1.59%	3	n/a	n/a	360
14	12	15	JSA Jackson & Son Pty Ltd	41,407	49,515	47,600	1.46%	2	\$240	\$320	580
15	19	22	Stanbroke Beef Pty Ltd	38,000	38,000	36,500	1.34%	1	n/a	n/a	n/a
16	20	21	G & K O'Connor Pty Ltd	34,200	37,000	37,000	1.21%	1	n/a	n/a	300
17	18	n/a	Tatiara Meat Company Pty Ltd	34,104	39,200	n/a	1.21%	1	\$179	\$194	470
18	24	16	Northern Co-Operative Meat Co Ltd	33,358	30,226	45,932	1.18%	2	n/a	n/a	694
19	22	n/a	CRF (Colac Otway) Pty Ltd	30,527	34,320	n/a	1.08%	1	n/a	n/a	367
20	21	Equal 25	Primo Australia Scone Abattoir	30,000	35,000	32,000	1.06%	1	n/a	n/a	360
21	25	14	Southern Meats Pty Ltd	29,624	28,000	51,000	1.05%	1	n/a	n/a	480
22	n/a	Equal 25	Norvic Food Processing Pty Ltd	26,000	n/a	32,000	0.92%	1	n/a	n/a	n/a
23	n/a	n/a	E C Throsby Pty Ltd	25,766	n/a	n/a	0.91%	1	\$78	n/a	200
<b>Totals</b>				<b>1,665,367</b>			<b>58.90%</b>	<b>41</b>			

2008 Australian national kill figure for all beef, veal, mutton and lamb equating to 2,827,570 tonnes carcass weight (Australian Bureau of Statistics)  
 Turnover figures are based on calendar year figures unless \* demarking financial year end 07/08



## 2008 top 25 processors

**Ranking:** 1  
**Company Name** Teys. Bros (Holdings) Pty Ltd

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	Teys Bros (Holdings) Pty Ltd
Country of Ownership	Australia
Address	PO Box 15, Beenleigh, QLD 4207
Phone	07 3287 2188
Fax	07 3808 0003
Email	<a href="mailto:tbros@teysbros.com.au">tbros@teysbros.com.au</a>
Web address	<a href="http://www.teysbros.com.au">www.teysbros.com.au</a>
Parent company	N/A
Directors	N/A
Company Officers	Allan Teys, Gary Teys, Graham Cubbin, James Packer, Ashok Jacob, Michael Johnson, Geoffrey Teys, Robin Teys, Kirsty Jackson (Secretary), Glenn Wein (Alt Director)
Senior management	Allan Teys, Chairman Bradley Teys, Chief Executive Officer Michael Brown, Chief Financial Officer Geoffrey Teys, Executive Director of Livestock Tom Maguire, General Manager, Corporate Affairs & Innovation John Salter, General Manager, Human Resources Greg Kimpton, General Manager, Marketing & Sales Paul Day, General Manager, Executive Services Gabriel Perez, General Manager, Information Technology Kym McBride, General Manager, Logistics & Purchasing John Coughlan, General Manager, Engineering & Environment

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	6
Plant info	Location – Beenleigh, QLD Species – Beef Rating – A+ Location – Biloela, QLD Species – Beef Rating – A+ Location – Innisfail, QLD (closed) Species – Beef Rating – A+ Throughput (MT) – N/A Head Capacity – N/A Location – Rockhampton, QLD Species – Beef Rating – A+ Location – Katherine, NT (closed) Species – Beef Rating – A+ Throughput (MT) – N/A Head Capacity – N/A Location – Naracoorte, SA Species – Beef Rating – A+
Total combined throughput	331,165 MT
Number of feedlots	1
Feedlot locations	Condamine, QLD (JV with Itochu & Prima)
Further processing facilities & locations	Teys Food Services, Brisbane, QLD Murgon Leather Pty Ltd, Murgon, QLD
Production split	80% export / 20% domestic
Species	Beef
Species split	100%
Number of employees	2,700
<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	\$1, 169, 345,000
<b>MARKETING</b>	<b>DETAIL</b>
Brands	Royal Gold, Teys Gold, President's Choice, Aussie Premium, Teys Certified Angus
Major export markets	US, Japan, Korea, Canada, European Union,



## 2008 top 25 processors

**Ranking:** 2  
**Company Name** Nippon Meat Packers Australia Pty Ltd

Nippon Meat Packers Australia (NMPA) was established in 1978 and is a wholly owned subsidiary of Nippon Meat Packers, Inc., Japan. A consistent top 25 performer, Nippon Meat Packers has grown its operation to a significant level in the Australian industry.

Nippon Meat Packers Australia produces a large range of beef products and by-products and exports to more than 34 countries. With its head office, sales and distribution centre (Beef Producers Australia) located in Sydney, NMPA employs over 1,650 people across 3 processing plants, 3 tanneries and feedlot.

The Oakey Abattoir located in Queensland was purchased in 1987 and is one of the largest chilled (mainly grain) beef processors to service the Japanese market, processing up to 1,200 head per day. The Wingham abattoir (NSW) specialises in British breed grain fed cattle and free range beef, processing up to 800 head per day. The Borthwicks processing site at Mackay was one of the first Australian production facilities to be certified for organic beef production and can process up to 700 head per day. Each site has an on-site rendering plant producing meat and bone meal, blood meal, bone chips, concentrated gall, beef bone extract and tallow.

New Wave Leather, a NMPA tannery operation, operates wet blue tanneries in Toowoomba (south east Queensland), Gunnedah (northern NSW) and Melbourne (Victoria), producing high quality wet blue leather and related products. New Wave Leathers processes approximately 50,000 hides per week for the export market.

Oakey Holdings operates the Whyalla cattle feedlot near Texas (southern Queensland), one of Australia's largest feedlots and a cattle breeding property Sheelite (King Island, Tasmania).

Beef Producers Australia is the domestic distribution company for NMPA with depots in Sydney (NSW), Mackay and Cannonvale (central Queensland). Beef Producers Australia supplies a full range of both chilled and frozen beef, stocking most of our grass and grain fed brands including budget grass fed cuts to the higher export quality grain fed beef together with a select range of beef offals.

ADMINISTRATION	DETAIL
Organisation Name	Nippon Meat Packers Australia Pty Limited
Country of Ownership	Japan
Address	Level 10, 76 Berry Street, North Sydney, NSW 2060
Phone	02 8918 0000
Fax	02 9954 1592
Email	<a href="mailto:info@nmpa.com.au">info@nmpa.com.au</a>
Web address	<a href="http://www.nmpa.com.au">www.nmpa.com.au</a>
Parent company	Nippon Meat Packers Inc., Japan
Directors	Katsumi Inoue, Takaharu Chujo, Stephen Kelly, Seiji Inatomi, Jock Hudson, Hideyuki Koide, Tetsudai Kito, Michael Harris, Takayuki Miwa
Senior management	Katsumi Inoue, Managing Director Stephen Kelly, Director , Sales & Marketing Howard Halter, Managing Director, Oakey Abattoir Michael Hughes, Managing Director, Wingham Abattoir Simon Stahl, Managing Director, Mackay Abattoir Chris Fenwicke, Managing Director, Oakey Holdings Jack Hudson, Director, By-Products Division Michael Harris, Managing Director, Beef Producers Australia Andrew Ralph, President, Australian Premium Brands, Inc. USA

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	3
Plant info	<p>Location – Mackay, QLD  Species – Beef  Rating – A+  Throughput (MT) – 43,120MT  Head Capacity – 158,400</p> <p>Location – Oakey, QLD  Species – Beef  Rating – A+  Throughput (MT) – 85,800  Head Capacity – 288,000</p> <p>Location – Wingham, NSW  Species – Beef  Rating – A+  Throughput (MT) – 55,800  Head Capacity – 192,000</p>
Total combined throughput	184,720 MT
Number of feedlots	1
Feedlot locations	“Whyalla”, QLD
Further processing facilities & locations	N/A
Number of tanneries	3
Tanneries locations	Toowoomba, QLD Gunnedah, NSW Melbourne, VIC
Production split	80% export / 20% domestic
Species	Beef
Species split	100%
Number of employees	1,650

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	\$864 million
Sales Turnover for fiscal year end 07-08	\$946 million

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Omugi-gyu, Olive, Oakey, Oakey Black, Borthwick, Borthwick Organic, BPA, CBP, Wingham, Wingham Gold, Wingham Reserve
Major export markets	Japan, USA, Korea, Russia, Taiwan, European Union



## 2008 top 25 processors

**Ranking:** 3  
**Company Name** Cargill Beef Australia

Cargill Australia is a subsidiary of the US Cargill Inc – an enterprise with interests across food, agriculture and risk management products and services, employing approximately 160,000 people in 66 countries.

Commencing Australian operations in beef processing in 1991, Cargill Australia operates 2 processing plants in Wagga Wagga and Tamworth. The Wagga plant, also the headquarters for Cargill in Australia has the capacity to process over 300,000 head per annum, and the Tamworth plant 200,000 per annum and between the two plants, Cargill employees approximately 1,100 staff.

The Cargill feedlot ("Jindalee") is situated at Stockinbingal, NSW with a capacity of 17,000 head.

Grain fed product is heavily marketed towards Asia, and the Australian domestic high-end food service channel.

ADMINISTRATION	DETAIL
Organisation Name	Cargill Beef Australia
Country of Ownership	USA
Address	PO Box 166, Wagga Wagga, NSW 2650
Phone	02 6938 3000
Fax	02 6921 1174
Email	<a href="mailto:Aust.beef@cargill.com">Aust.beef@cargill.com</a>
Web address	<a href="http://www.cargillbeefaustralia.com.au">www.cargillbeefaustralia.com.au</a>
Parent company	Cargill Inc.
Directors (Cargill Aust Ltd)	Ralph Selwood, Andrew MacPherson, Gavin Joyce, Jeral Dsouza
Company Officers	N/A
Senior management	Andrew MacPherson, Managing Director Alan Calvert, Financial Controller Shaun Crapp, Human Resource Manager Matt Wentzel, Operations Manager Grant Garey, General Manager, Livestock Kevin Himmelberg, Sales Manager

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	2
Plant info	Location – Tamworth, NSW Species - Beef Rating - A+ Head Capacity – 800hd/day  Location – Wagga Wagga, NSW Species - Beef Rating - A+ Head Capacity – 1250hd/day
Total combined throughput	152,000MT
Number of feedlots	1
Feedlot locations	“Jindalee” – NSW
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	50% export / 50% domestic
Species	Beef
Species split	100%
Number of employees	1,100

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	A\$500mill
Sales Turnover for fiscal year end 07-08	A\$500mill

<b>MARKETING</b>	<b>DETAIL</b>
Brands	CAAB, Riverine Premium Beef, Excel Genuinely Better
Major export markets	Japan, Korea, USA, Russia



## 2008 top 25 processors

**Ranking:** 4  
**Company Name** T&R Pastoral Pty Ltd

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	T&R Pastoral Pty Ltd
Country of Ownership	Australia
Address	Lagoon Road, Murray Bridge, SA 5253
Phone	08 8532 1955
Fax	08 8532 6216
Email	<a href="mailto:exportsales@tandrpastoral.com.au">exportsales@tandrpastoral.com.au</a>
Web address	<a href="http://www.tandrpastoral.com.au">www.tandrpastoral.com.au</a>
Parent company	N/A
Directors	Chris Thomas (Chairman), Darren Thomas (Managing Director), Brian James (Executive Director), Frank Porcaro (General Manager), Allan Potter (Company Secretary)
Senior management	Chris Thomas, Chairman Darren Thomas, Managing Director Brian James, Executive Director Frank Porcaro, General Manager David McKay Group Operations Manager Allan Potter, Chief Financial Officer Will Escabache, Group Engineer Brian Devey, Group Human Resources Manager



<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	4
Plant info	Location – Lobethal, SA Species – Sheep / Lambs Rating – A+ Throughput (MT) – 25,000 MT Head Capacity – 23,000 p/w  Location – Murray Bridge, SA Species – Beef / Sheep / Lambs Rating – A+ Throughput (MT) – 120,000 MT Head Capacity – 50,000 Smallstock & 4,000 Cattle p/wk
Total combined throughput	145,000 MT
Number of feedlots	1
Feedlot locations	N/A
Further processing facilities & locations	North Dandalup, WA Pt Pirie SA
Number of tanneries	N/A
Tanneries locations	N/A
Production split	90% export / 10% domestic
Species	Beef & Sheep
Species split	40% Beef / 60% Sheepmeat
Number of employees	1,500

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Clare Valley, Murray Lands Premium, Murray Bridge Meat, T&R
Major export markets	USA, European Union, Japan, Middle East, Korea



## 2008 top 25 processors

**Ranking:** 5  
**Company Name** Fletcher International Exports

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	Fletcher International Exports Pty Ltd
Country of Ownership	Australia
Address	Lot 11, Yarrandale Road, Dubbo, NSW, 2830
Phone	02 6884 5833
Fax	02 6884 2965
Email	<a href="mailto:mailbox@fletcher-international.com.au">mailbox@fletcher-international.com.au</a>
Web address	<a href="http://www.fletchint.com.au">www.fletchint.com.au</a>
Parent company	N/A
Directors	Roger & Gail Fletcher
Senior management	Roger Fletcher, Chief Executive Officer Gail Fletcher, Joint Financial Controller Kent Dickens, Joint Financial Controller David McKay, General Manager, Dubbo Gerald Webster, Fletcher Sheepskins Greg Cross, General Manger, Albany

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	2
Plant info	Location – Dubbo, NSW Species – Sheep / Lambs Rating – A+ Throughput - 40'000mt Head capacity - 2 million head capacity  Location – Albany, WA Species – Sheep / Lambs Rating – A+ Throughput - 40'000mt Head capacity - 2 million head capacity
Total combined throughput	80,000MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	98% export / 2% domestic
Species	Sheep/Lamb
Species split	100%
Number of employees	1,365

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Fletcher, Premium Fletcher Lamb
Major export markets	USA, Middle East, Japan, Taiwan, China, EU & South Africa.



## 2008 top 25 processors

**Ranking:** 6  
**Company Name** Midfield Meat International Pty Ltd

*Company Information withheld*



## 2008 top 25 processors

**Ranking:** 7  
**Company Name** Kilcoy Pastoral Company Ltd

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	Kilcoy Pastoral Company Limited
Country of Ownership	Singapore
Address	PO Box 84, Kilcoy, QLD 4515
Phone	07 5497 1277
Fax	07 5497 2128
Email	<a href="mailto:kpc@kpc.com.au">kpc@kpc.com.au</a>
Web address	<a href="http://www.kpc.com.au">www.kpc.com.au</a>
Parent company	Harmony Investment Fund Limited
Directors	John Nicholls, Tony Munns, Suresh Withana, Will McEwin
Senior management	Tony Munns, Chief Executive Officer Dean Goode, General Manager Operations Brett Buktenica, General Manager Marketing & Livestock Peter Johnstone, General Manager Finance & Corporate Services Nerida Robertson, Human Resources Manager Shane Clancy, Operations Manager

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Kilcoy, QLD Species – Beef Rating – A + Head Capacity – 750 cattle per day
Total throughput	63,025 MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	85% export / 15% domestic
Species	Beef
Species split	100%
Number of employees	610

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	\$311.9 M
Sales Turnover for fiscal year end 07-08	\$269.4 M

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Kilcoy Diamond, Golden Jubilee
Major export markets	Japan, USA, South Korea, South East Asia, Middle East, Russia



## 2008 top 25 processors

**Ranking:** 8  
**Company Name** Bindaree Beef Pty Ltd

Bindaree Beef is Australian owned and has been an active player in export and domestic markets for over 28 years.

Bindaree operates an export registered beef processing plant and value adding operation at Inverell in northern NSW. The Inverell plant operates on a single shift basis five days per week while the retail ready division operates six days. It has the capacity to build to a 7 day operation as orders dictate.

Bindaree Beef source their livestock requirements, either direct from farm or through the vast sale yard network, throughout Eastern Australia.

Inverell's location is geographically suited to cover the whole of Eastern Australia, where prime high quality livestock are available all year round.

Bindaree Beef operates all year round with no seasonal shutdown period and has the ability to work through most public holidays and meet all its customer's requirements.

Further processing of beef is coming more important and Bindaree Beef is well advanced down this path.

Bindaree Beef is one of a very few, fully integrated plants in Australia, which processes live cattle through to retail ready products, all on the one site.

ADMINISTRATION	DETAIL
Organisation Name	Bindaree Beef Pty Ltd
Country of Ownership	Australia
Address	7307 Gwydir Highway, Inverell, NSW 2360
Phone	02 6721 1411
Fax	02 6721 1351
Email	marketing@bindareebeef.com.au
Web address	<a href="http://www.bindareebeef.com.au">www.bindareebeef.com.au</a>
Parent company	Yolarno P/L
Directors	John McDonald, John Newton & John Belbeck
Company Officers	N/A
Senior management	John McDonald, Chairman and Managing Director John Belbeck, Director John Newton, Director Kerri Newton & Leigh Belbeck- admin. Don Green, Accounts Manager Michael Bayes, Human Resources Manager David Richards, Plant Manager Paul Murray, Co-Manager Danna Stephens, QA Manager

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Inverell, NSW Species - Beef Rating - A+ Head Capacity – 900 head/day
Total throughput	Approx 58,500 MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	50% export / 50% domestic
Species	Beef
Species split	100%
Number of employees	500+

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	\$255 million approx
Sales Turnover for fiscal year end 07-08	\$217 million approx

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Bindaree Beef, Uki, GH Elliott, Sapphire City, Weddel, Bindaree Gold & MSA.
Major export markets	USA, Japan, Korea, Canada





## 2008 top 25 processors

**Ranking:** 9

**Company Name** Australian Country Choice Production Pty Ltd.

Australian Country Choice is part of the Lee Group Pty Ltd, a Queensland family company, privately owned and operated by the Lee family, which commenced as H.J. Lee & Sons in 1958.

Today, third and fourth generation family members remain active in the business which employs more than more than 930 people, across its rural and meat processing operations. Vertical integration remains a key priority which sees ACC managing a 85,000 head cattle herd on 16 owned and 9 leased rural properties, covering around 570,000 hectares to provide cattle breeding, backgrounding and feedlot capacity for the modern meat processing facility requirements in Cannon Hill, Brisbane.

ACC is exclusively dedicated to the supply of high quality house brand beef products to Coles Group - Supermarkets and their export customers maintaining a demand chain philosophy.

The Cannon Hill central meat processing facility employs approximately 820 people in management, slaughtering, boning, further processing, value-adding and retail packaging operations which have the built capacity to produce over 2 million kilograms of processed, value-added or retail ready fresh meat products for the Coles Group each week.

These processing facilities are USDA licensed, HALAL certified , Certified for Organic processing by Safefood Queensland and Aus-Meat A+ accreditation all under the inspection and monitoring processes of AQIS.

Substantively, ACC remains one of the only food processor in the world with multiple international accreditations for Food Safety (22000), Environmental management (14001), HACCP (9000), Quality (9002), BRC Global Food Standard, OH&S (AS4801) & NATA accredited laboratory.

ADMINISTRATION	DETAIL
Organisation Name	Australian Country Choice Pty Ltd
Country of Ownership	Australia
Address	117 Colmslie Road, Cannon Hill, QLD 4170
Phone	07 3902 4141
Fax	07 3902 4142
Email	<a href="mailto:reception@accbeef.net.au">reception@accbeef.net.au</a>
Web address	<a href="http://www.accbeef.net.au">www.accbeef.net.au</a>
Parent company	Lee Group
Directors	Trevor Lee, Chairman
Company Officers	N/A
Senior management	David Foote, Chief Executive Officer David Healey, Chief Financial Officer Ross Scholes, Executive Manager, Primary Processing Richard West, Executive Manager, Group Services Peter Kennedy Executive Manager Further Processing Jim Titmarsh, General Manager Rural Production Damian Barsby, Manager Livestock – Properties & Feedlots David Daunton, Manger Livestock Cannon Hill Alan Kropp, Manager External sales Anthony Lee, Manager -Retail Ready Michael Lee, Manager-Further Processing



<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info (Primary Processing)	Location - Cannon Hill, QLD Species - Beef Rating - A+ Head Capacity – 295,000 per annum
Total throughput FY09	57,600MT
Number of feedlots	2
Feedlot locations	Brisbane Valley, Esk, QLD Brindley Park, Roma, QLD
Further processing facilities & locations	Integrated Manufacturing, Value-adding & Retail Ready packing facilities at Cannon Hill
Number of tanneries	N/A
Tanneries locations	N/A
Production split	75% domestic / 25% External
Species	Beef & Veal
Species split	Beef 90% / Veal 10%
Number of employees	1,050

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Coles,
Major export markets	Japan, Korea, Taiwan, South Asia, USA



## 2008 top 25 processors

**Ranking:** 10  
**Company Name** H W Greenham & Sons Pty Ltd

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	H.W. Greenham and Sons Pty Ltd
Country of Ownership	Australia
Address	222 Lorimer Street, Port Melbourne, VIC 3207
Phone	03 9644 6500
Fax	03 9681 8034
Email	<a href="mailto:email@greenham.com.au">email@greenham.com.au</a>
Web address	<a href="http://www.greenham.com.au">www.greenham.com.au</a>
Parent company	N/A
Directors	Peter Greenham, Frank Herd, Grant Ryan, Peter Greenham Jnr
Senior management	Peter Greenham, Executive Chairman Grant Ryan, Joint Managing Director Peter Greenham Jnr, Joint Managing Director Darren Maloney, Operations Manager, Tongala Richard Leslie, Operations Manager, Smithton

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	2
Plant info	Location – Smithton, TAS Species – Beef Rating – A+ Head Capacity – 75,000  Location – Tongala, VIC Species – Beef Rating – A+ Head Capacity – 170,000
Total combined throughput	57,500 MT
Number of feedlots	Nil
Feedlot locations	Nil
Further processing facilities & locations	Cold Store – Port Melbourne
Number of tanneries	Nil
Tanneries locations	Nil
Production split	85% export / 15% domestic
Species	Beef
Species split	100%
Number of employees	475

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Greenham, Natural Tasmanian Beef, Cape Grim Natural Beef
Major export markets	USA, Japan, Korea



## 2008 top 25 processors

**Ranking:** 11  
**Company Name** M C Herd Pty Ltd.

*Company Details Withheld*



## 2008 top 25 processors

**Ranking:** 12  
**Company Name** Harvey Industries Group

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	Harvey Industries Group Pty Ltd
Country of Ownership	Australia
Address	PO Box 492, Harvey, WA 6220
Phone	08 9729 0000
Fax	08 9729 1810
Email	<a href="mailto:info@harveybeef.com.au">info@harveybeef.com.au</a>
Web address	<a href="http://www.harveybeef.com.au">www.harveybeef.com.au</a>
Parent company	N/A
Directors	John Nicholls, Suresh Withana, Eric Thompson and Derrick Saldanha
Executive Team	Shane Wilkinson, Chief Financial Officer Danika Mullins, Executive Marketing/Communications Manager Justin Croser, Executive Sales Manager Kim McDougall, Executive Livestock Manager

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Harvey, WA Species – Beef Rating – A+ Head Capacity – 5,000 per week
Total throughput	47,191 MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	62% Export / 38% Domestic
Species	Beef
Species split	100%
Number of employees	350

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Harvey Beef, Harvey Meat Exports, Harvey By-Products
Major export markets	Japan, Korea, Indonesia, USA, Singapore, Taiwan, Middle East, Russia, Mauritius, Hong Kong, China, Vietnam, Thailand, Philippines





## 2008 top 25 processors

**Ranking:** 13  
**Company Name** G & B Gathercole (VIC) Pty Ltd.

G & B Gathercole commenced operations in Melbourne in 1974. Family owned, Gathercoles is one of the few multi species processors ranked in the Top 25.

Supplying Victorian domestic wholesale and retail butchers, Gathercoles operates 3 plants in Victoria – Carrum (beef/sheep), Tatura (sheep/pigs) and Wangarrata (beef/sheep/pigs) with further processing on site at Carrum and Tatura. Gathercoles also tenders out its salted skins weekly.

ADMINISTRATION	DETAIL
Organisation Name	G & B Gathercole (VIC) Pty Ltd
Country of Ownership	Australia
Address	Learmonth Road, Carrum, VIC 3197
Phone	03 9772 2533
Fax	03 9776 0137
Email	<a href="mailto:Justin@gathercole.com.au">Justin@gathercole.com.au</a>
Web address	<a href="http://www.gathercole.com.au">www.gathercole.com.au</a>
Parent company	N/A
Directors	Graeme & Barbara Gathercole
Senior management	Graeme Gathercole, Managing Director Daryl Little, Company Secretary John Collins, Livestock Manager Justin Gathercole, Commercial Manager Andrew Gathercole, Wholesale Sales manager Doug Cole, Chief Engineer David Cunningham, General Manager Carrum Bill Smith, Tatura Manager Shane Dalton Wangaratta Supervisor Peter Kittelty, Wangaratta Manager Daryl Sewell, QA Supervisor

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	3
Plant info	Location – Carrum, VIC Species – Beef / Sheep  Location – Tatura, VIC Species – Sheep / Pig  Location – Wangaratta, VIC Species – Beef / Sheep / Pig
Total combined throughput	45,000
Number of feedlots	Nil
Feedlot locations	N/A
Further processing facilities & locations	2 - Tatura & Carrum
Number of tanneries	Nil
Tanneries locations	N/A
Production split	100% domestic
Species	Sheep / Beef / Pig
Species split	60% sheep / 30% beef / 10% pig
Number of employees	360

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Gathercole
Major export markets	N/A



## 2008 top 25 processors

**Ranking:** 14  
**Company Name** JSA Jackson & Son Pty Ltd

JSA Jackson & Son Pty Limited is a privately owned, third generation family company that has been in the industry for 70 years.

The company produces premium quality sheep and lamb product for global markets including the US and Mexico, Canada, Japan, the Middle East and the EU. It also services leading domestic industry operators including Woolworths, Country Fresh Nationwide, Tenderplus Pty Ltd, and Westend Wholesale.

The company operates two processing plants – one in Tamworth, NSW under Peel Valley Exporters, and the second located in Wallangarra, operates under Southern Queensland Exporters.

Commencing operations in 2002, the Tamworth plant is the lamb processing centre for the organization.

The Tamworth plant has recently commissioned a new By Products Plant- processing Meat Meal, Tallow and Blood.

Wallangarra processes predominantly sheep has its own By Products Plant and also a Fellmongering Plant.

ADMINISTRATION	DETAIL
Organisation Name	JSA Jackson & Son Pty Ltd
Country of Ownership	Australia
Address	PO Box 101, Armidale, NSW 2350
Phone	02 6772 6616
Fax	02 6772 6630
Email	N/A
Web address	<a href="http://www.countryfresh.com.au">www.countryfresh.com.au</a>
Parent company	N/A
Directors	John Jackson, Graham Jackson, Helen McNeill, Neville Halloran, John McCluskey, Stephen Marshall
Senior management	John Jackson, Chairman Helen McNeill, Chief Financial Officer Graham Jackson, Chief Executive Officer Stephen Marshall, Export Marketing Manager John McCluskey, Operations Manager Vivien He, Co Accountant Toni Young, Human Resources Manager

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	2
Plant info	Location – Tamworth, NSW Species – Lamb / Sheep  Location – Wallangarra, QLD Species – Lamb / Sheep
Total combined throughput	41,407MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	60% export / 40% domestic
Species	Lamb / Sheep
Species split	100% sheepmeat
Number of employees	580

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	\$240million
Sales Turnover for fiscal year end 07-08	\$320million

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Country Fresh Australia, Country Fresh America, Country Fresh Nationwide, Peel Valley Exporters, Southern Queensland Exporters, Country Wool Exports
Major export markets	Mexico, USA, Canada, Japan. Middle East, European Union



## 2008 top 25 processors

**Ranking:** 15  
**Company Name** Stanbroke Beef Pty Ltd.

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	Stanbroke Beef Pty Ltd
Country of Ownership	Australia
Address	Grantham Scrub Road, Grantham, QLD 4347
Phone	07 4697 6188
Fax	07 4697 6581
Email	<a href="mailto:corporate@stanbrokebeef.com.au">corporate@stanbrokebeef.com.au</a>
Web address	<a href="http://www.stanbroke.com.au">www.stanbroke.com.au</a>
Parent company	N/A
Directors	N/A
Senior management	Brendan Menegazzo, Managing Director Mike Jackson, General Manager

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Gatton, QLD Species – Beef Rating – A+ Head Capacity – N/A
Total throughput	38 000 MT
Number of feedlots	1
Feedlot locations	Stanbroke Feedlot, Chinchilla, QLD
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	75% export / 25% domestic
Species	Beef
Species split	100% Beef
Number of employees	N/A

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Diamantina, Circle 8
Major export markets	Japan, Korea, SE Asia, USA, Russia



## 2008 top 25 processors

**Ranking:** 16  
**Company Name** G & K O'Connor Pty Ltd.

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	G & K O'Connor Pty Ltd
Country of Ownership	Australia
Address	Healsville-Koo Wee Rup Road, Pakenham, VIC 3810
Phone	03 5941 2033
Fax	03 5941 3870
Email	info@oconnoraustralia.com.au
Web address	www.oconnorbeef.com.au
Parent company	N/A
Directors	N/A
Senior management	Kevin O'Connor, Matthew O'Connor, Owen Robinson, Greg Wareham

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Species – Beef Rating – N/A Head Capacity – N/A
Total throughput	34,200MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	85% export / 15% domestic
Species	Beef
Species split	100% Beef
Number of employees	300

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	O'Connor
Major export markets	Japan, USA, Korea, EU, all other global beef markets





## 2008 top 25 processors

**Ranking:** 17  
**Company Name** Tatiara Meat Company Pty Ltd

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	Tatiara Meat Company Pty Ltd
Country of Ownership	Australia
Address	Meatworks Road Bordertown SA 5268
Phone	
Fax	
Email	<a href="mailto:sales@tatiara.com.au">sales@tatiara.com.au</a>
Web address	<a href="http://www.tatiara.com.au">www.tatiara.com.au</a>
Parent company	Vion Food Group
Directors	Eckard Huebl & Gerard Janssen
Senior management	William de Klein, Joint Managing Director Willem van Doorn, Joint Managing Director

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Bordertown, SA Species – Lamb Rating – N/A Head Capacity – 8000 per day
Total throughput	34,104 MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	90% export / 10% domestic
Species	Lamb
Species split	100%
Number of employees	470

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	\$178m
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Tatiara, Good Country
Major export markets	France, Germany, USA, Japan, Korea, Canada, Taiwan



## 2008 top 25 processors

**Ranking:** 18  
**Company Name** Northern Co-Operative Meat Company Ltd.

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	Northern Co-Operative Meat Company Ltd
Country of Ownership	Australia
Address	10615 Summerland Way, Casino, NSW 2470
Phone	02 6662 2444
Fax	02 6662 2391
Email	<a href="mailto:cassino@cassino.com.au">cassino@cassino.com.au</a>
Web address	<a href="http://www.cassino.com.au">www.cassino.com.au</a>
Parent company	N/A
Directors	George Bennett (Chairman), Tom Amey (Deputy Chairman), Ken Somerville, Frank Bray, Lennard Blok, Chris Dockrill. Ron Chittick
Senior management	Gary Burridge, Chief Executive Officer

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	2
Plant info	Location – Casino, NSW Species – Beef Rating – A+ Throughput (MT) –33,358 MT Head Capacity – 293,147  Location – Booyong, NSW Species – Pigs
Total combined throughput	33,358MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	1
Tanneries locations	Casino
Production split	65% export / 35% domestic
Species	Beef / Veal & Pigs
Species split	80% Beef / Veal & 20% Pigs
Number of employees	694 permanent, 267 casual

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Cassino, CHT, CRSM
Major export markets	USA, Canada, Japan, Korea



## 2008 top 25 processors

**Ranking:** 19  
**Company Name** CRF (Colac Otway) Pty Ltd.

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	CRF (Colac Otway) Pty Ltd
Country of Ownership	Australia
Address	1 Tristania Drive, Colac, VIC 3250
Phone	03 5231 9700
Fax	03 5231 1477
Email	contact@crfco.com.au
Web address	www.crfco.com.au
Parent company	N/A
Directors	Jack Barclay- Chief Executive Officer Allan McCallum Chairman Wayne O'Brien- Director Gary Flanigan- Director Simon Ramsay- Director Don Bacon-Hall- Director Allan McCallum- Director
Senior management	Miffy Shelton- General Manager, Corporate Culture and Employee Development Trevor Schiller- General Manager, Operations, Standardisation and Customer Service Kevin Martin- General Manager, Information Analysis and Decision Reporting Angela Flett- General Manager, Growth and Project Implementation

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Colac Species - Lamb Rating – Export Head Capacity –1,425,679
Total throughput	30,527 MT
Number of feedlots	N/A None
Feedlot locations	N/A
Further processing facilities & locations	CRF (Colac Otway) locations Colac
Number of tanneries	N/A
Tanneries locations	N/A
Production split	35% export / 65% domestic
Species	Lamb
Species split	100%
Number of employees	367 EFT

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	N/A
Major export markets	Japan, USA, China, Middle East, Taiwan, South America



## 2008 top 25 processors

**Ranking:** 20  
**Company Name** Primo Australia (Scone Abattoir)

Primo Smallgoods is the largest producer of ham, bacon and smallgoods in Australia.

Primo's extensive infrastructure includes the operation of its own abattoirs - a beef plant in Scone NSW, and a pork processing plant in Port Wakefield, South Australia - as well as smallgoods manufacturing plants, a retail ready / portion control packing facility, and distribution warehouses.

The Primo Scone beef abattoir employs around 360 people, and is one of the largest employers in the Hunter region. The plant is situated in the Upper Hunter Valley which is recognized as one of the premier beef livestock regions in Australia.

The abattoir process in excess 3,200 head of beef per week on a single shift basis, and exports to most major markets around the world including Japan, Korea, USA, Canada, South East Asia and the Pacific Islands. It also holds exports licences for China and Russia which are other major export markets for the operation, and has plans to be Halal registered by 2010.

The plant processes mostly British breed livestock with a mixture of export steers, shortfed grainfed steers, and selected A\* beef for export markets. They also have a solid domestic business with retailers, wholesalers, and further processors, through their processing of grassfed and grainfed yearling cattle, as well as running a yearling MSA program.

In addition to the above operation Primo also have a pork abattoir in Port Wakefield, South Australia. The plant has just been re-commissioned after an extensive rebuild.

The rebuilt plant now makes Primo Port Wakefield the most modern pork processing plant in Australia, incorporating state of the art technology such as robotics and carcass scanning. With a capacity to process up to 18,000 head per week it makes this facility the largest facility in South Australia.

The plant is also export registered and exports to various countries worldwide. Primo Port Wakefield has a reputation of supplying high quality pork due to its extensive work and long term commitment with local pork producers with regards to supply, specification and genetics.

ADMINISTRATION	DETAIL
Organisation Name	Primo Australia Scone Abattoir
Country of Ownership	Australia
Address	18 Hume Highway, Chullora, NSW 2190
Phone	02 6540 2200
Fax	02 6540 2202
Email	N/A
Web address	<a href="http://www.primosmallgoods.com.au">www.primosmallgoods.com.au</a>
Parent company	N/A
Directors	Paul Lederer & John Hunt
Senior management	Paul Lederer, Managing Director Michael Gilpin, General Manager Meat Division Todd Brooks, General Manager Primo Scone Len Rae, Sales / Trade Manager

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	2
Plant info	Location – Scone, NSW Species – Beef Rating – A+ Head Capacity – 3,000  Location – Port Wakefield, SA Species – Pig Rating – A+
Total combined throughput	30,000MT (beef only)
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	70% export / 30% domestic (MT)
Species	Beef
Species split	100%
Number of employees	360

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Hunter Gold, Primo, Milton Farm
Major export markets	Korea, USA, Japan, Canada, Taiwan, China, S.E Asia





## 2008 top 25 processors

**Ranking:** 21  
**Company Name** Southern Meats Pty Ltd.

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	Southern Meats Pty Ltd
Country of Ownership	Australia
Address	PO Box 244, Goulburn, NSW 2580
Phone	02 4824 0000
Fax	02 4822 1085
Email	<a href="mailto:craig@southernmeats.com.au">craig@southernmeats.com.au</a>
Web address	<a href="http://www.southernmeats.com.au">www.southernmeats.com.au</a>
Parent company	N/A
Directors	Nick Peters (Chairman) & Neville Newton
Senior management	Neville Newton, Managing Director Craig Newton, Marketing & General Manager

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Goulburn, NSW Species – Sheep / Lamb
Total throughput	29,624MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	95% export / 5% domestic
Species	Sheep / Lamb
Species split	75% sheep / 25% lamb
Number of employees	480

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	N/A
Sales Turnover for fiscal year end 07-08	N/A

<b>MARKETING</b>	<b>DETAIL</b>
Brands	Fine Brand, Country Meadow, Southern Cross
Major export markets	USA, Middle East, South East Asia, Japan, European Union



## 2008 top 25 processors

**Ranking:** 22  
**Company Name** Norvic Food Processing Pty Ltd.

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	Norvic Food Processing Pty Ltd
Country of Ownership	Australia
Address	54 Kelly Street, Wodonga, VIC 3690
Phone	02 6055 0226
Fax	02 6024 5925
Email	<a href="mailto:Norvic.food@norvic.com.au">Norvic.food@norvic.com.au</a>
Web address	<a href="http://www.norvic.com.au">www.norvic.com.au</a>
Parent company	N/A
Directors	Jon Hayes & Desmond Richardson
Senior management	Jon Hayes, Managing Director Rob Lowe, Operations Manager Neville Hensell, QA Manager Des Richardson, Director

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Wodonga, NSW Species – Beef / Sheep / Deer / Bobby Calves / Goats Rating – A+
Total throughput	30,000
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	100% export
Species	Beef / Sheep / Small stock
Species split	30% Beef / 70% small stock
Number of employees	350

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	
Sales Turnover for fiscal year end 07-08	

<b>MARKETING</b>	<b>DETAIL</b>
Brands	N/A
Major export markets	USA, Canada, Mexico, Japan, Korea, Malaysia, Indonesia, Russia, China, Middle East, South East Asia, South Africa



## 2008 top 25 processors

**Ranking:** 23  
**Company Name** E C Throsby Pty Ltd.

*Company background information was not authorised.*

ADMINISTRATION	DETAIL
Organisation Name	E C Throsby Pty Ltd
Country of Ownership	Australia
Address	Old North Road, Cnr Golden Highway & New England Highway, Whittingham, NSW 2330
Phone	02 6574 7777
Fax	02 6574 7208
Email	edwardthrosby@bigpond.com
Web address	www.ecthrosby.com.au
Parent company	N/A
Directors	Edward Throsby – Owner/Director
Senior management	Mick Ayton, General Manager Brett Bottfield – QA Manager Jamie Moffatt – Cold Store Distribution Manager & Sales Donna Fuller – Production Manager Bryan Hornery – Environmental Manager

<b>OPERATIONS</b>	<b>DETAIL</b>
Number of plants	1
Plant info	Location – Whittingham, NSW Species - Beef Throughput – 2,500 head per week
Total throughput	25,766MT
Number of feedlots	N/A
Feedlot locations	N/A
Further processing facilities & locations	N/A
Number of tanneries	N/A
Tanneries locations	N/A
Production split	98% export / 2% domestic
Species	Beef
Species split	100%
Number of employees	200

<b>FINANCIAL</b>	<b>DETAIL</b>
Sales Turnover for calendar year 2008	\$78m
Sales Turnover for fiscal year end 07-08	\$67m

<b>MARKETING</b>	<b>DETAIL</b>
Brands	E C Throsby / Charles David
Major export markets	USA, South East Asia, Middle East, Japan, Korea



## 2008 top 25 processors

<b>Ranking:</b>	<b>24</b>
<b>Company Name</b>	<b>Position not ranked</b>



## 2008 top 25 processors

**Ranking:** 25  
**Company Name** Position not ranked