In this period the industry has struggled with prices, supply of suitable stock, an appreciating dollar and a further consolidation in processing capacity in several states. Judging from the results of the latest Top 25 ranking, major processors have increased their tonnages in line with the wider industry’s production figures but have also expanded their share of the total processing pie, sharply increased kill capacity at several key plants and closed other facilities.

There was, moreover, among many processors a sense of uncertainty about market conditions into 2007-08 with continued drought conditions throughout most of eastern Australia, strong demand from the domestic consumer market competing for product and the perceived absence of a sustained recovery in demand for beef in the North Asian markets since the BSE crisis several years ago.

This year’s ranking comprises 26 companies instead of the traditional 25 owing to a ‘photo finish’ between Norvic Food Processing Pty Ltd (Norvic) and Primo Australia Scone Abattoir, both of which had an estimated throughput of 32,000 metric tonnes in 2006.

Data from 2006 suggests that the Top 25, responsible for 49 plants last year, processed around 77% of total red meat production, a slight increase from the last ranking.

HOW IS THIS CALCULATED?
feedback has published a ranking of the industry’s major processors on an annual basis since 1991, with the exception of 2005. The purpose of the ranking is to identify the industry’s major entities based on throughput levels and to note the significant developments in processing capacity during the previous calendar year.

The ranking is based on the estimated tonnes carcase weight (ETCW) of beef and sheepmeat produced on the kill floors of each group in 2006. Throughput for plants which have undergone a change in ownership is credited to the new owners. Similarly, works operating a service kill on behalf of other processors or packers are credited with the processing throughput.

TOP 25 RED MEAT PROCESSORS
Calendar year 2006

Production data provided by Australia’s major processors for 2006 initially suggests that last year was very similar to 2004 when the last Top 25 review was conducted. This however belies several changes that have taken place in terms of livestock availability, market share and plant control over the past 18 months.

2006 AT A GLANCE:

- Australia’s largest processor AMH (now JBS Swift Australia) placed first again with production levels similar to the previous year.
- The Top 25’s red meat production levels increased by 6% in line with the wider industry’s total production for the year.
- Teys Bros retained second place with a massive 25% increase in tonnage from its five plants.
- Multi-species processor Tasman Group Services entered the top five.
- Higher tonnages kept sheepmeat processor Fletcher’s in the top 10.
- The top five companies processed around 55% of Australia’s total beef and veal production, up from 49% in 2004.
- The Australian-owned component of the Top 25 throughput decreased slightly to an estimated 58%.
Figure 1 – feedback’s Top 25 red meat processors 2006

<table>
<thead>
<tr>
<th>Rank 2006</th>
<th>Rank 2004</th>
<th>Organisation</th>
<th>Throughput ETCW 2006 (a)</th>
<th>Throughput ETCW 2004</th>
<th>Kill share % 2006 (b)</th>
<th>No. plants operated in 2006</th>
<th>Turnover $ million (c)</th>
<th>Turnover $ million prev. yr (d)</th>
<th>Employee numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>JBS Swift Australia/Australia Meat Holdings Pty Ltd</td>
<td>436,000</td>
<td>435,000</td>
<td>15.3%</td>
<td>4</td>
<td>$2,600</td>
<td>$3,100</td>
<td>4,775</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>Teys Bros (Holdings) Pty Ltd</td>
<td>273,300</td>
<td>205,000</td>
<td>9.6%</td>
<td>5</td>
<td>$1,229</td>
<td>$929</td>
<td>2,700</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Nippon Meat Packers Aust Pty Ltd</td>
<td>168,700</td>
<td>166,500</td>
<td>5.9%</td>
<td>3</td>
<td>$1,100</td>
<td>$750</td>
<td>1,780</td>
</tr>
<tr>
<td>4</td>
<td>-</td>
<td>Tasman Group Services Pty Ltd</td>
<td>162,000</td>
<td>-</td>
<td>5.7%</td>
<td>6</td>
<td>na</td>
<td>na</td>
<td>1,900</td>
</tr>
<tr>
<td>5</td>
<td>4</td>
<td>Cargill Beef Australia</td>
<td>145,000</td>
<td>130,000</td>
<td>5.1%</td>
<td>2</td>
<td>2</td>
<td>400</td>
<td>1,100</td>
</tr>
<tr>
<td>6</td>
<td>6</td>
<td>T &amp; R (Murray Bridge) Pty Ltd</td>
<td>99,800</td>
<td>96,237</td>
<td>3.5%</td>
<td>3</td>
<td>$385</td>
<td>$350</td>
<td>1,200</td>
</tr>
<tr>
<td>7</td>
<td>8</td>
<td>Fletcher International Exports Pty Ltd</td>
<td>80,000</td>
<td>74,000</td>
<td>2.8%</td>
<td>2</td>
<td>na</td>
<td>na</td>
<td>1,250</td>
</tr>
<tr>
<td>8</td>
<td>9</td>
<td>Midfield Meat International Pty Ltd</td>
<td>72,000</td>
<td>70,000</td>
<td>2.5%</td>
<td>2</td>
<td>$225</td>
<td>$220</td>
<td>550</td>
</tr>
<tr>
<td>9</td>
<td>5</td>
<td>Bindaree Beef Pty Ltd</td>
<td>63,000</td>
<td>106,000</td>
<td>2.2%</td>
<td>1</td>
<td>$225</td>
<td>$295</td>
<td>500</td>
</tr>
<tr>
<td>=10</td>
<td>11</td>
<td>Australian Country Choice Pty Ltd</td>
<td>54,750</td>
<td>53,400</td>
<td>1.9%</td>
<td>1</td>
<td>na</td>
<td>na</td>
<td>790</td>
</tr>
<tr>
<td>=10</td>
<td>12</td>
<td>Rockdale Beef Pty Ltd</td>
<td>54,750</td>
<td>52,800</td>
<td>1.9%</td>
<td>1</td>
<td>na</td>
<td>na</td>
<td>450</td>
</tr>
<tr>
<td>12</td>
<td>13</td>
<td>HW Greenham &amp; Sons Pty Ltd</td>
<td>53,500</td>
<td>52,500</td>
<td>1.9%</td>
<td>2</td>
<td>na</td>
<td>$230</td>
<td>470</td>
</tr>
<tr>
<td>13</td>
<td>16</td>
<td>Kilooy Pastoral Company Pty Ltd</td>
<td>52,800</td>
<td>45,600</td>
<td>1.8%</td>
<td>1</td>
<td>$245</td>
<td>$197</td>
<td>490</td>
</tr>
<tr>
<td>14</td>
<td>10</td>
<td>Southern Meats Pty Ltd</td>
<td>51,000</td>
<td>55,000</td>
<td>1.8%</td>
<td>1</td>
<td>na</td>
<td>$185</td>
<td>480</td>
</tr>
<tr>
<td>15</td>
<td>14</td>
<td>JSA Jackson &amp; Son Pty Ltd</td>
<td>47,600</td>
<td>50,600</td>
<td>1.7%</td>
<td>2</td>
<td>$185</td>
<td>$580</td>
<td>580</td>
</tr>
<tr>
<td>16</td>
<td>23</td>
<td>Northern Co-Operative Meat Company Ltd</td>
<td>45,932</td>
<td>33,647</td>
<td>1.6%</td>
<td>1</td>
<td>$121</td>
<td>$80</td>
<td>961</td>
</tr>
<tr>
<td>17</td>
<td>=19</td>
<td>MC Herd Pty Ltd</td>
<td>45,500</td>
<td>38,000</td>
<td>1.6%</td>
<td>1</td>
<td>na</td>
<td>na</td>
<td>350</td>
</tr>
<tr>
<td>18</td>
<td>15</td>
<td>Harvey Industries Group Pty Ltd</td>
<td>44,200</td>
<td>49,800</td>
<td>1.5%</td>
<td>1</td>
<td>na</td>
<td>na</td>
<td>420</td>
</tr>
<tr>
<td>19</td>
<td>-</td>
<td>South Burnett Beef Trading Pty Ltd</td>
<td>42,900</td>
<td>-</td>
<td>1.5%</td>
<td>1</td>
<td>na</td>
<td>na</td>
<td>350</td>
</tr>
<tr>
<td>20</td>
<td>18</td>
<td>- (e)</td>
<td>39,500</td>
<td>38,200</td>
<td>1.4%</td>
<td>1</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>21</td>
<td>-</td>
<td>- (e)</td>
<td>37,000</td>
<td>-</td>
<td>1.3%</td>
<td>1</td>
<td>na</td>
<td>na</td>
<td>300</td>
</tr>
<tr>
<td>22</td>
<td>=19</td>
<td>Stanbrooke Beef Company Pty Ltd</td>
<td>36,500</td>
<td>38,000</td>
<td>1.3%</td>
<td>1</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>23</td>
<td>22</td>
<td>V &amp; V Walsh Pty Ltd</td>
<td>35,600</td>
<td>34,300</td>
<td>1.2%</td>
<td>1</td>
<td>na</td>
<td>260</td>
<td>na</td>
</tr>
<tr>
<td>24</td>
<td>21</td>
<td>G &amp; B Gathercole (Vic) Pty Ltd</td>
<td>35,000</td>
<td>35,250</td>
<td>1.2%</td>
<td>3</td>
<td>na</td>
<td>na</td>
<td>320</td>
</tr>
<tr>
<td>=25</td>
<td>24</td>
<td>Norvic Food Processing Pty Ltd</td>
<td>32,000</td>
<td>32,000</td>
<td>1.1%</td>
<td>1</td>
<td>na</td>
<td>na</td>
<td>360</td>
</tr>
<tr>
<td>=25</td>
<td>-</td>
<td>Primo Australia Scane Abattoir</td>
<td>32,000</td>
<td>-</td>
<td>1.1%</td>
<td>1</td>
<td>na</td>
<td>-</td>
<td>360</td>
</tr>
</tbody>
</table>

**Combined Total of Top 25:** 2,240,332

Notes:

a. Throughput based on estimated tonnes carcase weight (ETCW) processed at plants under common ownership or control at 31 December 2006.
c. See company profiles for end-of-financial year details. Most figures are preliminary results for 12 months ended June 2007.
d. Turnover figures are for the year ended 30 June 2006 unless otherwise noted.
e. Data not approved by company.

** comprises entire AMH operation

In: Tasman Group Services Pty Ltd; South Burnett Beef Trading Pty Ltd, Primo Australia Scane Abattoir.
Out: Tatiara Meat Company Pty Ltd

Data compiled by ProAnd Associates
WHAT HAPPENED IN 2006?

Once again first place in the ranking was taken by Australia Meat Holdings Pty Ltd with approximately 436,000 metric tonnes, virtually even with tonnages for the previous year. The company has continually invested in greater processing and refrigeration capacity as well as restructured shift arrangements at its four Queensland plants that have served to bolster overall throughput capability. Formerly owned by Swift and Company of the USA, the AMH assets were acquired in June 2007 by Brazilian-based JBS Friboi. It now trades as JBS Swift Australia. The development has made the Australian plants part of a global entity with significant investments in North and South America in addition to wider marketing entrée to the European Union. The company has expressed its intention to maximize its investments in the Australian industry through further development of its feedlotting, processing and activities.

While JBS Swift Australia is the country’s largest beef processor, it is worthwhile noting the significant increase for the second year running in the tonnage for Teys Bros (Holdings) Pty Ltd (Teys). Also a family-owned and operated company, Teys Bros in 2006 were able to report the consequences of its recommissioned Rockhampton and Beenleigh plants operating at increased levels throughout 2006. Teys’s turnover figure of $1.23 billion in their company profile for the year ended June 2007 underscores the extent of their expanded trading activity in 2006, with record sales levels in Japan, South Korea and further inroads in the local Australian market. Its total throughput level in 2006 is equal to around 10% of Australia’s total red meat processing.

Close on the heels of Teys Bros is Nippon Meat Packers Australia Pty Ltd which has plants in Queensland and NSW covering all product types including manufacturing cuts, grainfed beef for Asian markets and high quality beef destined for the European Union. In 2006 Nippon’s abattoir at Oakey Qld was fully commissioned after an extended rebuild: it represents a new phase in meat processing trends, offering product traceability and other quality assurance provisions.

Cargill Beef Australia also increased its tonnage in 2006 by around 15,000 tonnes, due largely to major refurbishment of its facility at Wagga Wagga NSW. Last year its associated feedlot near Cootamundra NSW was an important part of its supply chain for heavy grainfed beef into the north Asian markets it has been developing since Cargill Australia’s establishment in 1991.

A new name in the ranking is Primo Australia Scone Abattoir located at Scone NSW which is part of the sizable Primo Smallgoods family. It processes chilled and frozen beef for the domestic and export markets. The Scone enterprise has been upgraded over the past five years and ranked equal with Norvic Food Processing. Tatiara Meat Company left the ranking in 2006 due to lower throughput estimates.

For the first time in several years a multi-species processor joined the ranks of the top five companies. Tasman Group Services (TGS) appears this year in fourth place. In 2006 it controlled six plants in southern Australia processing a variety of product including veal, pork and grainfed lambs. While turnover figures are not available for the company, the diversity of its export and domestic marketing activities attest to its increasing importance in the industry.

![Figure 2: Top 25 share of production 1999 – 2006](image-url)
The other major multi-species entity in the top 10 is T & R Murray Bridge Pty Ltd (T & R) which placed sixth in 2006 with an estimated throughput just under 100,000 tonnes. Smallstock is also a vital part of the processing activities of T & R, with export markets for chilled and frozen lamb having increased substantially in 2006. Data provided by the companies in the ranking suggests that sheepmeat represents around 12–15% of the Top 25’s overall production. Figure 2 provides some interesting data on this point.

Several other companies showed significantly increased tonnages including Fletcher International Exports Pty Ltd and Kilcoy Pastoral Company Pty Ltd. Northern Cooperative Meat Company in particular reported a substantially better year in terms of throughput and turnover.

There were some falls in production levels over the previous year. Bindaree Beef moved from fifth to ninth place owing to the sale of its Murgon, Queensland plant (throughput for that plant in 2006 was attributed to South Burnett Beef Trading further down the ranking).

PLANTS ARE GETTING BIGGER

Industry restructuring has been evident over the past eighteen months as processors have adjusted to tighter supply conditions, continued shortages in skilled labour and uncertainty over future livestock numbers. There has been a definite movement in the past several years towards two-shift operations where possible in order to combat plant overheads and improve efficiencies. This has served to further concentrate throughput capacity and influenced some of the closures of recent months. During the period under review three mid-sized Queensland beef abattoirs closed with little likelihood of reopening in the near future. And smallstock processors of any scale saw strong competition for livestock both in Queensland and NSW all through last year.

The processing industry now seems to be coming to the end of a long period of re-investment which has encompassed new slaughter floors, boning rooms, upgraded chiller and freezer provisions in addition to improved effluent and odour management measures. There are now an estimated eight plants in Australia that can process in excess of 1000 head of cattle per day, compared to four in 1996. With the outlook for seasonal conditions still uncertain in southeastern Australia, processors are now faced with the ongoing challenge to make their investments in increased capacity pay off. Figure 1 indicates that several processors were reluctant to reveal turnover figures for publication this year. On the basis of the results at hand it can be estimated that the combined turnover of the Top 25 companies in the 12 months to June 2007 would have exceeded $10 billion.

WHO ARE THEY?

The ownership breakup of the Top 25 changed markedly in mid-2007 with the sale of AMH to the JBS Friboi group. There is now only one US-owned company in the ranking (Cargill); and the Australian-owned component decreased slightly with the purchase of Harvey Beef (WA) and Kilcoy Pastoral Company (Queensland) by a Singapore-based funds investment group. Figure 3 provides a breakdown of ownership at key points over the past decade.
Parent company:  
S & C Australia Holdco Pty Ltd

Background:
The company ranks as Australia’s largest meat processor by a long measure, with extensive investments throughout the feedlotting, trading and further processing industries. AMH was formerly a division of the giant US-based Swift and Company. On 29 May 2007 Swift announced the sale of AMH along with Swift’s US-based assets to the JBS Friboi Group, headquartered in Sao Paulo, Brazil. The sale was concluded in July 2007, making Friboi the largest beef and third largest pork processor in the world with integrated facilities in four countries. The new owners state that the acquisition gives the entity unrivalled access to markets which account for almost 47% of total world beef consumption.

AMH Dinmore, as most readers would be aware, is the country’s largest processing plant with a weekly capacity of around 18,500 head. The AMH Dinmore facility is an international benchmark in terms of production and environmental performance standards. Dinmore has implemented a range of innovative technologies and practices and won numerous environmental awards for water and energy efficiency.

The Beef City plant at Toowoomba, Queensland processes livestock from the company’s four feedlots. The expansion of the plant over the past two years now enables it to kill and process 865 heavy grainfed cattle daily. A new boning room was completed in April 2006.

The Rockhampton and Townsville plants are located in the cattle dense areas of Queensland. Both are fully-integrated export registered plants with high capacity. Products from these plants are mainly grassfed in origin, and destined for markets in USA and Asia.

Senior management:
- Iain Mars, Chief Executive Officer
- John Berry, General Manager, Corporate and Industrial Affairs
- Michael Doyle, General Manager, Feedlots
- Brent Eastwood, General Manager, AMH Trading Divisions
- Ken Flanders, General Manager, Finance and Administration
- Ken Jeude, General Manager, Foodpartners
- Ross Keane, General Manager, Livestock
- Joe Shepherd, General Manager, Information Technology

Plants: 4
- Beef City Qld: Beef (A+)
- Dinmore Qld: Beef (A+)
- Rockhampton Qld: Beef (A+)
- Townsville Qld: Beef (A+)

Feedlots: 4
- Caroona NSW
- Prime City NSW
- Mungindi Qld
- Beef City Qld

Throughput 2006: 436,000 ETCW
Estimated share of national kill: 15.3%

Major export markets:
USA, Japan, Korea, European Union, Canada, Mexico and Taiwan

Employees: 4,775

Turnover:
$A2.6 billion (fiscal year ending 30 May 2007)

Production split:
85% export/15% domestic

Species split: 100% beef

Brands:
AMH, Beef City, Your Choice, Royal, Prime 220, Pure Prime, River Valley, Tender Valley, Premium Gold, Aberdeen Beef, Premium Black.

2. Teys Bros (Holdings) Pty Ltd

PO Box 15 Beenleigh Qld 4207
Phone: 07 3287 2188
Fax: 07 3808 0003
Web: www.teysbros.com.au
Email: tbro@teysbros.com.au

Background:
Teys Bros is the country’s largest Australian-owned meat processor, with extensive investments in all sectors of the supply chain including production, feedlotting, wholesaling, overseas marketing and further processing. It has its origins in the family company established in 1946 by the four original Teys family members. Today there are third-generation family members involved in the company’s operations.

Beenleigh, Queensland was the site of the Teys family’s first involvement with the processing industry. This plant undertook a major expansion program in 2003 and is now one of the state’s largest cattle slaughter facilities. The company’s grainfed cattle from the Condamine feedlot are processed at this site. The Biloela plant was acquired in 1984 and is situated in the highly productive central Queensland region. Product from Biloela is destined for US, Japan, China and Taiwan.

During the 1990’s the company concentrated increasingly on building export markets in Japan and South Korea, in addition to marketing grinding beef and manufacturing items into the US market. In 1998 it purchased the export plant at Naracoorte, SA as part of the breakup of Metro Meat.

A significant development was the merger in October 2002 of the three beef plants owned by the Consolidated Meat Group into the Teys business. Under the terms of the merger Teys Bros operates the Rockhampton and Innisfail plants as well as the currently-closed abattoir at Katherine NT. The hot beef boning plant at Innisfail in northern Queensland is currently closed.

Company officers:
Allan Teys, Gary Teys, Graham Cubbin, James Packer, Ashok Jacob, Michael Johnson, Geoffrey Teys, Robin Teys, Kirsty Jackson (Secretary)

Senior management:
- Allan Teys (Chairman)
- Bradley Teys, Chief Executive Officer
- Gary Teys, Executive Director of Finance and Administration
- Michael Brown, Chief Financial Officer
- Geoffrey Teys, Executive Director of Livestock
- John Salter, General Manager, Human Resources
- Eric Van Ras, General Manager, Marketing and Sales
- Paul Day, General Manager, Executive Services
- Gabriel Perez, General Manager, Information Technology
- Kym McBride, General Manager, Logistics and Purchasing
- John Coughlan, General Manager, Engineering and Environment
Plants: 6
- Beenleigh Qld Beef (A+)
- Bilambil Qld Beef (A+)
- Innisfail, Qld Beef (A+) [closed]
- Rockhampton, Qld Beef (A+)
- Katherine, NT Beef (closed)
- Naracoorte SA Beef (A+)

Feedlots and further processing:
- Condamine Qld (joint venture with Itochu and Primo)
- Teys Food Services, Brisbane Qld
- Murgon Leather Pty Ltd, Murgon Qld

Throughput 2006: 273,300 ETCW
Estimated share of national kill: 9.6%

Major export markets:
US, Japan, Korea, Canada, EU

Employees: 2,700
Turnover: $1,229 million
Production split:
85% export, 15% domestic
Species split: 100% beef

Brands:
Royal Gold, Teys Gold, President's Choice, Aussie Premium.

3. Nippon Meat Packers Australia Pty Limited

Level 10, 76 Berry Street
North Sydney NSW 2060
Phone: 02 8918 0000
Fax: 02 9954 1592
Web: www.nmpa.com.au
Email: info@nmpa.com.au

Background:
The company was established in 1978 as a fully-owned subsidiary of Nippon Meat Packers, Inc, Japan. In the intervening period it has expanded to become a significant entity in the feedlotting, processing and marketing sectors and has consistently ranked as one of the top 3 processors since 1994. Its parent company is regarded as one of the largest in the Japanese domestic market for fresh and processed meats.

NMPA is headquartered in Sydney which is also the base of its domestic trading arm, Beef Producers Australia P/L. In addition to being a major exporter of record to Australia’s key international markets, including Japan and USA, Nippon has developed a strong sales reputation in the domestic retail and wholesale supply chain through sales of chilled vacuum-packed primals and sub-primals. It markets a range of well-known brands listed in this profile.

The abattoir at Oakley Queensland was purchased in 1987 and processes a high percentage of grain-fed cattle. Livestock from the company’s 55,000 head feedlot at Texas, Queensland are also processed here. The Oakley plant was completely revamped in the period 2003-2006 to focus on anticipated greater demand for grain-fed and quality grassfed beef from North Asian markets. This upgrade included a new state-of-the-art boning room with arguably the best product traceability system in any Australian abattoir and a new slaughter floor. Oakley is also an EU-registered plant and can process 1100 head per shift. The plant won a Queensland Govt Smart Award in April 2007 for its traceability and other quality control innovations.

NMPA first commenced beef processing operations in central Queensland with the acquisition of the former Borthwicks plants at Mackay and Bowen, Queensland in the early 1990’s. Bowen was closed permanently in 1997 and production was consolidated to the Mackay site. This plant has been the subject of further upgrades, is EU-registered and is one of the country’s major suppliers of organic beef to export and domestic markets. The plant can process up to 850 per day.

Nippon also owns a high-capacity beef plant located at Wingham in NSW’s verdant North Coast region. The plant is EU-registered and processes a mix of heavy grass fed and grain fed cattle. The plant can process 800 head per day and its brands have an excellent reputation for quality in export and domestic markets.

New Wave Leather complements the Nippon processing plants with three wet blue tanneries in Toowoomba Queensland, Gunnedah NSW and Melbourne Victoria.

Directors:
Sumio Somura, Takaharu Chuo, Tatsuhito Kito, Katsumi Inoue, Kenichi [John] Tamagaki, Michael Harris, Jock Hudson, Seiji Inatomi

Senior Management:
- Katsumi Inoue, Managing Director
- Kenichi [John] Tamagaki, Deputy Managing Director
- Stephen Kelly, General Manager, Group Operations & Planning
- Howard Halter, Managing Director, Oakley Abattoir
- Michael Hughes, Managing Director, Wingham Abattoir

4. Tasman Group Services Pty Ltd

PO Box 36 Altana North Vic 3025
Phone: 03 9316 4413
Fax: 03 9314 1011
Web: www.tasmangroup.com.au
Email: info@tsgs.net.au

Background:
Tasman Group Services (TGS) is one of the few multi-species processors listed in the Top 25. It was established in 1974 in Melbourne, Victoria. The company has grown over the years with the acquisition of similar businesses to become arguably Australia’s largest multi-species meat processor. It has a total capacity of 600,000 cattle, 3 million smallstock and 80,000 pigs annually.

The group employs in excess of 1800 people and has operations throughout southern Australia. These
comprise three in Victoria (Brooklyn, Cobram and Yarrawonga) and three in Tasmania (Devonport, King Island and Longford). This enables flexibility and consistency of supply through the utilization of stock from the company’s beef and smallstock feedlot, Yambinya, located near Wakool, NSW.

TGS’s plants are strategically located to source premium livestock and for access to shipping ports and airports. The company’s shipping department is able to maximize use of the company’s extensive airfreight and shipping network to deliver product to any location worldwide.

The company is driven by its commitment to investing in people and technology as well as developing an adaptable approach to supply in order to offer domestic and export customers a wide range of products and services. The company has invested in the integrity of its supply chain and traceability and has stringent USDA and EU approval production capability. The company has also built up a strong reputation as an exporter of high quality beef and sheepmeat items to over 50 international markets. These customers receive the same services as customers in the domestic market including fresh product delivery, custom trimming and packaging services.

Senior Management:
- Gilbert Cabral, Managing Director
- Ross Goodman, Sales Manager
- Steve Chapman, Livestock Manager, Smallstock
- Barry Hunter, Livestock Manager, Beef
- Lydia Horsburgh, Marketing Manager

Abattoirs: 6
- Brooklyn, Vic Beef, lamb (A+)
- Cobram, Vic lamb (A+)
- Yarrawonga, Vic Beef (A+)
- Longford, Tas Lamb, beef (A+)
- King Island, Tas Beef (A+)
- Devonport, Tas Beef, smallstock

Feedlots: 1
- “Yambinya”, Vic

Throughput 2006: 162,000 ETCW

Estimated share of national kill: 5.7%

Major export markets:
US, Japan, Korea, Canada, EU, Malaysia, Indonesia, China, Russia

Employees: 1,900

Turnover: n/a

Production split:
70% export, 30% domestic

Species split:
65% beef, 35% sheepmeat

Brands:
Tasman Meats, King Island Beef, Longford Meats, Seattle Meats.

5. Cargill Beef Australia

PO Box 166 Wagga Wagga
NSW 2650
Phone: 02 6938 3000
Fax: 02 6921 1174
Web: www.cargill.com
Email: aust.beef@cargill.com

Background:
Cargill Beef Australia is a business unit of Cargill, Inc, an international provider of food, agricultural and risk management products and services. It is a privately-owned company with its headquarters in Minneapolis, USA and employs around 160,000 people worldwide.

Cargill’s initial entry in the Australian marketplace commenced in 1967 with involvement in grain exports. It later acquired a grainfeeding operation in 1991 near Cootamundra NSW which currently has a carrying capacity of approximately 17,000 head.

Cargill Beef Australia is the business entity responsible for the company’s investments in the meat processing sector in Australia. This comprises the operations of the feedlot and the two integrated processing facilities in NSW. The Cargill plant at Wagga Wagga NSW was acquired in 1991 and is strategically situated in a region that is heavy with feedlot activity. It processes a high percentage of grainfed cattle from the company’s ‘Jindalee’ feedlot in addition to other grainfed cattle produced under contract at other feedlots for varying markets’ requirements. This product forms the basis of Cargill’s marketing efforts in the North Asian markets which has grown substantially over the past decade.

The Wagga plant was upgraded in 2005 and came fully on-stream in 2006. Improvement include a new boning room; enlarged freezer capacity; updated environmental measures to handle the greater effluent volumes from the plant’s expanded capacity; and refinements in the site’s rendering department.

The Cargill plant at Tamworth NSW was acquired in 1998 and has been substantially upgraded to provide a total slaughter capacity of around 200,000 head per year. Currently the majority of the plant’s kill is destined for the Australian domestic market retail channel. Livestock processed here are predominantly young grass-fed and 70 day grain-fed.

Directors:
Ralph Selwood, Dick Kelley

Senior Management:
- Dick Kelley, Managing Director
- Alan Calvert, Financial Controller
- Andrew MacPherson, General Manager Commercial
- Greg O’Hare, Engineering Manager
- Des Copeland, QA & Technical Services Manager
- Shaun Crapp, Director of Operations
- Bernard Smith, Plant Manager, Tamworth
- Matt Wentzel, Plant Manager, Wagga Wagga
- Grant Garey, General Manager Livestock

Abattoirs: 2
- Tamworth NSW Beef (A+)
- Wagga Wagga NSW Beef (A+)

Feedlots: 1
- “Jindalee” NSW

Throughput 2006: 145,000 ETCW

Estimated share of national kill: 5.1%

Major export markets:
Japan, Korea, USA

Employees: 1,100

Turnover: n/a

Production split:
50% domestic, 50% export

Species split:
100% beef

Brands:
CAAB, Riverine Premium Beef, Excel Genuinely Better.

6. T & R (Murray Bridge) Pty Ltd

GPO Box 496
Murray Bridge SA 5253
Lagoon Road Murray Bridge SA 5253
Phone: 08 8532 1955
Fax: 08 8532 6216
Web: www.tandrpastoral.com.au
Email: exportsales@tandrpastoral.com.au

Background:
This company has established itself as a formidable player in the southern
Australian processing sector and has retained its strong links to the production sector where its roots lie. T & R (Murray Bridge) Pty Ltd is one of the few major multi-species processing groups in Australia and has substantial investments in livestock growing and feedlotting operations as well.

Since purchasing the abattoir and boning facility at Murray Bridge, SA in 1998 T & R has consistently invested in new chillers, freezers and boning room equipment. Murray Bridge operates separate beef, mutton and lamb processing and boning operations. Stock for its plant is mainly drawn from Victoria, SA and NSW. Product processed at Murray Bridge is primarily destined for export markets under T & R's own brands.

The plant at Lobethal, SA is now fully operational with US and EU registrations. A large proportion of its throughput is on account of a national supermarket chain for distribution throughout southern states. It performs a service kill for local wholesalers and for the company's meat businesses. Lobethal also incorporates beef and lamb processing and boning operations. Since the last Top 25 review, the company has acquired further processing and boning capacity, first with the purchase of an export-registered processing centre at North Dandalup, WA in February 2006. The facility is not currently in use. In July 2006 T & R purchased the assets of the export sheep abattoir at Port Pirie, SA. The estimated tonnage processed by the former operators in 2006 prior to the plant's closure has been credited to T & R's overall tonnage. The abattoir owned in conjunction with Midfield Meat International Pty Ltd at Mt Gambier SA was broken up and sold last year.
9. Bindaree Beef Pty Ltd
Warialda Road Inverell NSW 2360
Phone: 02 6721 1411
Fax: 02 6721 1351
Web: www.bindareebeef.com.au

Background:
Bindaree Beef has been an active player in export and domestic markets for over 25 years. It operates an export-registered beef processing plant at Inverell in northern NSW. In June 2006 the company sold the plant and assets located at Murgon, Queensland which had been acquired in 2000 from the former South Burnett Meatworks Cooperative. Throughput at Murgon has been attributed to the new owners. This ranking therefore primarily reflects throughput at the Inverell facility in 2006. Last year saw the sale of some plant and equipment from the company’s site at Orange, NSW. The company’s value adding operations which were also located at this site were transferred to Inverell, further strengthening the site’s capabilities. The value added production mainly comprises retail ready packs.

The Inverell plant operates on a single shift basis five days per week while the retail ready division works six days. Bindaree Beef draw cattle from the fertile New England, north-west central NSW and Macquarie Plains regions. Throughput is mainly grassfed cattle, along with a growing percentage of grainfed livestock for north Asian and our local markets.

During the past 18 months the company has been particularly active in developing the domestic market for organic, MSA and modified atmosphere products (MAP) along with grain fed meat products. The organic beef line is processed in conjunction with Bindaree’s export marketing ally, Sanger Australia.

Senior Management:

- John McDonald, Chairman and Managing Director
- Leigh Belbeck
- John Belbeck, Director
- John Newton, Director
- Don Green, Accounts Manager
- Michael Bayes, Human Resources Manager
- David Richards, Plant Manager, and Paul Murray Co-manager
- Danna Stephens, QA Manager

Abattoirs: 1
- Inverell NSW Beef (A+)

Throughput 2006: 63,000 ETCW
Estimated share of national kill: 2.2%

Major export markets:
USA, Japan, Korea, Canada

Employees: 500

Turnover: $295 million

Production split:
60% export, 40% domestic

Brands:
- Bindaree Beef, Uki, GH Elliott, Sapphire City, Weddell, Bindaree Gold

=10. Australian Country Choice Pty Ltd
117 Colmslie Road
Cannon Hill Qld 4170
PO Box 478 Morningside Qld 4170
Phone: 07 3902 4141
Fax: 07 3902 4142
Email: reception@accbeef.net.au

Background:
Australian Country Choice Pty Ltd (ACC) is located at Cannon Hill, Queensland and comprises modern, slaughter, boning, value-adding and retail ready facilities. ACC is a family owned private company which provides a dedicated beef and veal northern supply chain for Coles supermarkets. The facility processes and packs yearling, Certified Organic beef and trade veal for Coles’ national distribution.

Livestock are sourced through the Colestock program established by ACC and Coles in 1999 under which producer alliances in Queensland and northern NSW supply finished stock to Coles’ specifications. Around 50% of yearlings processed come from ACC’s own Queensland properties and feedlots through the integrated supply chain.

Over the past six years, the Cannon Hill site has seen major redevelopment with the commissioning of an integrated slaughter, value-add, further processing, boning and distribution facilities. Additional to the packing of primals and a wide range of manufactured fresh products for Coles, in August 2006 ACC commissioned Australia’s largest modified atmosphere packaging (MAP)-retail ready packing plant for Coles to service their Coles & Bi-Lo supermarkets’ growth in the eastern states. This facility has the capacity to process and pack up to 1,000 tonnes per week of shelf ready products and will create 300 new jobs.

ACC maintains a strong quality and standards culture with third party accreditations for carcass quality (MSA), Environment (ISO14001), Food Safety (ISO 22000), Quality (ISO 9002) Occupational Health & safety (AS4801) and Laboratory services (NATA).

ACC continues to export a wide range of beef and veal products and specialty items on behalf of Coles to retail, food service and further processing customers in north and south Asia.

Directors:
Trevor Lee, Chairman

Senior Management:

- David Foote, Chief executive officer
- Ross Scholes, Executive manager – production
- Richard West, Executive manager – RRM & manufacturing
- David Healey, Chief financial officer
- John O’Kane, Executive manager – agribusiness
- Damian Barsby, Livestock – Properties & Feedlots
- Neil Carstens, Production
- David Daunton, Livestock – Cannon Hill
- Paul Gibson, Research & Innovation
- Peter Kennedy, Manufacturing
- Alan Kropp, Export
- Andrew LeBreton, Environment, Laboratories & Accreditations
- Anthony Lee, Retail Ready
- Peter Phelan, Quality Services
- Jim Timmarsh, Rural production

Abattoirs: 1
- Cannon Hill, Qld Beef (A+)

Feedlots: 1
- “Brisbane Valley” – Esk Qld
- “Brindley Park” – Roma Qld

Throughput 2006: 54,750 ETCW
Estimated share of national kill: 1.9%

Major export markets:
Japan, Korea, Taiwan, South Asia, USA

Employees: 790

Turnover: n/a

Production split:
75 % domestic, 25% export

Species split:
- Beef 80%; veal 20%

Brands:
- Coles, Australian Country Choice
Rockdale Beef Pty Ltd

Regulator Road Yanco NSW 2703
Phone: 02 6951 1199
Fax: 02 6953 5397
Email: rdbeef@rockdale.com.au
Web: www.rockdalebeef.com.au

Background:
The company was established in 1989 to develop a grain-feeding, processing and value-adding enterprise in the Australian industry and represents a partnership between Itoham Foods Inc (Japan) and the Mitsubishi Corporation of Japan. Both of these companies are significant processors and distributors of meat products in the Japanese market. Rockdale’s chief focus is the supply of grainfed product to Japan with other important markets being the US and Korea. Rockdale consists of an integrated farm, major feedlot and feedmill, abattoir, testing laboratory and further processing complex situated in the NSW Riverina. On average about 60% of abattoir production is drawn from the company’s feedlot, supplemented by grainfed and some grassfed stock drawn from Victoria and southern NSW. The feedlot is estimated to be Australia’s third largest with a one-time capacity of 53,000 head. Both the feedlot and meat processing sites have achieved ISO certification and the company places a heavy emphasis on wise environmental management of the total site. To this end it incorporates water and energy saving processes into its farming, feedlot and processing operations. The abattoir operates six days per week on a two-shift basis of three days per shift, processing around 600 head of cattle per day. During 2004 the company made substantial improvements to its boning department, adding food safety and traceability measures to further enhance customer confidence.

Senior Management:
- Paul Troja, General Manager
- Gary Thomas, Plant Engineer
- Jeff Ticehurst, Financial Controller
- Graham Flynn, Feedlot Manager
- Gary Shanley, Production Manager

Abattoirs: 1
- Yanco, NSW Beef (A+)

Feedlots: 1
- Yanco, NSW

Throughput 2006: 54,750 ETCW

Estimated share of national kill: 1.9%

Major export markets:
- Japan, United States, Korea, New Zealand, South Africa

Employees: 450 (over two shifts)

Turnover: n/a

Production split:
- 80% export, 20% domestic

Species split: 100% beef

Brands:
- Rockdale Beef, Leeton Royal, Leeton Beef

H.W. Greenham and Sons Pty Ltd

222 Lorimer Street Port Melbourne
Vic 3207
Phone: 03 9644 6500
Fax: 03 9681 8034
Email: email@greenham.com.au
Web: www.greenham.com.au

Background:
The company has featured in previous Top 25 rankings and is regarded as one of the industry’s most experienced players. A family-owned company with its beginnings going back to the mid-1800’s in Melbourne, Victoria, HW Greenham and Sons (Greenhams) operates two export-registered processing plants in southern Australia. The company pioneered the hot beef boning concept in Australia when its Tongala, Victoria plant opened in 1993. This plant processes culled cows and bulls and is focused predominantly on providing lean manufacturing-grade product to the US and other grinding beef markets. The company also operates a beef processing plant at Smithton, Tasmania which draws livestock locally and from King Island as well as Victoria and South Australia when availability permits. Throughput at this plant covers a wider range of specifications and feeding backgrounds and underpins the company’s developing market supplying table meat to domestic and selected export markets. A significant feature of the overall Greenham operation has been the development of positive relationships with farmers throughout the catchment which has helped to bolster access to livestock supplies. The firm buys the majority of its livestock over-the-hooks either at sales centres or through its on-farm pick-up and weighing service. This particularly suits livestock growers who are culling their herds or want to restock.

The company also instituted in 2000 two scholarship programs to facilitate further improvement of the beef and dairy industries through education.

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

Abattoirs: 2
- Smithton, Tasmania Beef (A+)
- Tongala, Victoria Beef (A+)

Throughput 2006: 53,500 ETCW

Estimated share of national kill: 1.9%

Major export markets:
- USA, Japan, Korea, Canada, Taiwan

Employees: 470

Turnover: n/a

Production split:
- 95% export / 5% domestic

Species split: 100% beef

Brands:
- Greenham, Natural Tasmanian Beef, Lovely Beef

Kilcoy Pastoral Company Limited

PO Box 84 Kilcoy Qld 4515
Phone: 07 5497 1277
Fax: 07 5497 1572
Web: www.kpc.com.au
Email: kpc@kpc.com.au

Background:
During 2006 Kilcoy Pastoral Co Ltd (KPC) processed higher numbers and heavier grainfed cattle, which has increased its total throughput on previous year figures. The company is exclusively involved in production of grainfed beef for export markets and has consolidated its penetration of Korean, Japanese and US markets. Restructuring of the plant’s shift arrangements has also enabled higher production levels to be achieved.
On 30 June 2007 Harmony Investment Fund Limited finalised the purchase of KPC from its former owners. Harmony is an investment fund manager based in Singapore with extensive international
and Australian business interests, including a controlling share in Harvey Industries Group Pty Ltd in WA. Harmony intends to further develop the Kilcoy site, which was established in 1953 by the Kennedy family. Implicit in this development will be the company's ongoing focus on providing information back to producers about the markets' requirements in terms of fat coverage, marbling and muscle conformation and other criteria.

**Directors:**
John Nicholls, Tony Munns, Suresh Withana

**Senior Management:**
* Tony Munns, CEO
* Dean Goode, General Manager Operations
* Shane Clancy, Operations Manager
* Peter Johnstone, General Manager Finance & Corporate Services
* Brett Buktenica, General Manager Marketing

**Abattoirs:** 1
* Kilcoy QLD Beef

**Throughput 2006:** 52,800 mt

**Estimated share of national kill:** 1.8%

**Major export markets:**
Japan, USA, South Korea and South-East Asia

**Employees:** 490

**Turnover:** $245 million

**Production split:**
85% export, 15% domestic

**Species split:** 100% beef

**Brands:**
Kilcoy Diamond, Golden Jubilee

**14. Southern Meats Pty Ltd**

PO Box 244 Goulburn NSW 2580
Phone: 02 4824 0000
Fax: 02 4822 1085
Web: www.southernmeats.com.au
Email: craig@southernmeats.com.au

**Background:**
The company has appeared in previous Top 25 reviews and is regarded as one of the major sheepmeat processors in eastern Australia. The plant at Goulburn NSW draws on livestock from NSW and Victoria and reports an increasingly high percentage of lambs in its throughput over the past two years. The company's production is predominantly export-driven including the Middle East and US markets.

Production ranges from simple six-way packs to more detailed specifications for foodservice and institutional buyers. Like other sheepmeat processors, byproducts values, particularly offal, are important to Southern Meats. The plant incorporates early stage treatment of sheepskins and a rendering department producing the standard rendering products like bloodmeal, meatmeal and tallow. The company's plant at Harden NSW operated for the early part of 2006 before being shut permanently in September 2006 and broken up.

**Directors:**
Nick Peters (Chairman), Neville Newton

**Senior Management:**
* Neville Newton, Managing Director
* Craig Newton, Marketing and General Manager

**Abattoirs:** 1
* Goulburn NSW Sheep, lambs

**Throughput 2006:** 51,000 ETCW

**Estimated share of national kill:** 1.8%

**Major export markets:**
USA, Middle East, SE Asia, Japan, EU

**Employees:** 480

**Turnover:** n/a

**Production split:**
95% export, 5% domestic

**Species split:**
75% sheep, 25% lamb

**Brands:**
Fine Brand, Country Meadow, Southern Cross

**15. JSA Jackson & Son Pty Ltd**

PO Box 101 Armidale NSW 2350
Phone: 02 6772 6616
Fax: 02 6772 6630
Web: www.countryfresh.com.au

**Background:**
Like other sheepmeat processors, further value adding is increasingly important to the Co-operative’s overall business model. Casino is arguably the largest veal processor in NSW, with a separate veal chain handling up to 1200 bodies per day. The Cooperative also operates a pig slaughter plant at nearby Booyong, NSW (throughput at this plant is not included in the tonnage estimates for NCMC).

**Directors:**
Peter Carill (Chairman); George Bennett (Deputy Chairman); Tom Amey, Ken Somerville; Frank Bray; Lennard Blok; Chris Dockrill

**Senior Management:**
* Gary Burridge, Chief Executive Officer

**Abattoirs:** 2
* Casino NSW Beef & Veal (A+)
* Booyong NSW Pigs

**Throughput 2006:** 45,932 mt

**Estimated share of national kill:** 1.6%

**Major export markets:**
USA, Canada, Japan, Korea

**Employees:**
694 permanent, 267 casual

**Turnover:** $121 million (group)

**Production split:**
65% export, 35% domestic

**Species split:**
80% beef/veal 20% pigs (tonnage estimate represents beef/veal only)

**Brands:**
Casino, CHT, CRSM

Commitment to reinvesting profits from the enterprise into the provision of state of the art services and facilities for its members. It is situated in a cattle-dense region of northern NSW with excellent transport links to domestic markets and to export shipment facilities.

Membership in the cooperative is open to livestock producers and to commercial customers who operate at the cooperative’s premises. The Board of the Co-operative consists of producer-members who are elected on a rotational basis by their peers.

The Cooperative charges a slaughter and processing fee for all stock slaughtered at the premises in Casino NSW. The site is integrated with an export-registered boning room, freezing plant, rendering facilities, wet blue tannery (Casino Hide Tanners) and further value adding. In particular the processing of retail-ready and portion control items is increasingly important to the Co-operative’s overall business model.

Casino is arguably the largest veal processor in NSW, with a separate veal chain handling up to 1200 bodies per day. The Cooperative also operates a pig slaughter plant at nearby Booyong, NSW (throughput at this plant is not included in the tonnage estimates for NCMC).

**Directors:**
Peter Carill (Chairman); George Bennett (Deputy Chairman); Tom Amey, Ken Somerville; Frank Bray; Lennard Blok; Chris Dockrill

**Senior Management:**
* Gary Burridge, Chief Executive Officer

**Abattoirs:** 2
* Casino NSW Beef & Veal (A+)
* Booyong NSW Pigs

**Throughput 2006:** 45,932 mt

**Estimated share of national kill:** 1.6%

**Major export markets:**
USA, Canada, Japan, Korea

**Employees:**
694 permanent, 267 casual

**Turnover:** $121 million (group)

**Production split:**
65% export, 35% domestic

**Species split:**
80% beef/veal 20% pigs (tonnage estimate represents beef/veal only)

**Brands:**
Casino, CHT, CRSM
### 17. M C Herd Pty Ltd

**245 Bacchus Marsh Road**  
Corio Vic 3214  
**Phone:** 03 5275 0555  
**Fax:** 03 5275 4769  
**Email:** frank.herd@herd.com.au

**Background:**  
Herds is arguably Victoria’s largest domestic processor. It consistently appears in the Top 25 ranking by virtue of its substantial mixed species kill at its abattoir outside Corio, Vic. Livestock is drawn from southern states including Tasmania. The Corio plant is ISO 9000 approved. It was established in 1951 and is a family-owned and operated entity with strong ties to the development of the state’s local and wholesale meat industry.

The company is a significant supplier of beef and lamb products to the wholesale and retail sectors within the eastern states. It performs a small service kill for wholesale and retail butchers but most product is processed on its own behalf. Herds is also a significant supplier to national supermarket chains. A percentage of its sheepmeat and beef production goes for further value-adding and manufacturing at the associated Challenge Meats Pty Ltd situated in Geelong, Victoria.

Herd’s has also developed a range of export markets for its beef and sheepmeat products, particularly in the Middle East and South-East Asia. Exports current account for around 15–20% of total production.

**Directors:**  
Frank Herd

**Senior Management:**  
- Frank Herd, Managing Director  
- Nigel Vince, Livestock Manager  
- David Osborne, Financial Controller  
- Barry Smith, Plant Manager  
- Charles Giarrusso, QA Manager

**Abattoirs:** 1  
- Corio, Vic  

**Throughput 2006:** 45,500 MT  
**Estimated share of national kill:** 1.6%  
**Employees:** 350  
**Turnover:** n/a  
**Production split:** 85% domestic / 15% export  
**Species split:** Beef 70%, sheepmeat 30%

### 18. Harvey Industries Group Pty Ltd trading as Harvey Beef

**PO Box 492 Harvey WA 6220**  
**Phone:** 08 9729 0000  
**Fax:** 08 9729 1810  
**Web:** www.harveybeef.com.au  
**Email:** info@harveybeef.com.au

**Background:**  
This is the first appearance by Harvey Industries Group Pty Ltd (Harvey Beef) in the Top 25 ranking. The company reached agreement with administrators to acquire the beef processing assets of E.G. Green & Sons Pty Ltd in March 2006. Since that time substantive changes have been made at the Harvey, WA plant which has long been the state’s largest beef processor. Estimated tonnage for the first two months of 2006 by the former operators has been credited to Harvey Beef’s total tonnage for the year.

The new owners have introduced an overall approach at Harvey which is designed to improve the value for each participant in the beef production chain from the plate to the paddock. Part of this strategy has resulted in major capital improvements being undertaken at the plant over the past fourteen months, including a new packing area; side chiller; expanded rendering capacity; and renewal of the refrigeration systems throughout the plant. The main objective has been to raise weekly capacity in the slaughter and boning departments towards 4000 head. Moreover, attempts are being made to minimize the plant’s reliance on favourable seasons to bring forward suitable livestock by encouraging a greater focus on lofited cattle and scheduling of grass fed cattle for appropriate processing to accommodate the plant’s capacity.

Harvey Beef intends to make the abattoir operation more efficient and to assist producers to improve their overall profitability at the property level. To this end the company emphasizes the benefits for producers to forward manage their supply arrangements under a range of programs and contracts for mutual benefit.

**Directors:**  
John Nicholls, Suresh Withana

**Senior Management:**  
- Mark Spurr, Chief Executive Officer  
- Michael Rapattoni, Chief Financial Officer  
- Don Oliver, General Manager, Sales and Marketing  
- Barry Davis, Production Manager

### 19. South Burnett Beef Trading Pty Ltd

**37 Mickan Street Murgon Qld 4605**  
**Phone:** 07 4169 5110  
**Fax:** 07 4169 5238  
**Web:** www.southburnettbeef.com.au  
**Email:** info@southburnettbeef.com.au

**Background:**  
The company commenced operations at the export registered slaughtering and boning establishment at Murgon, Queensland in July 2006. During that year the plant processed a higher proportion of grainfed cattle than previously in order to meet the carcase conformity requirements of its major customers in Korea and Japan. The company was also very active in developing and supplying the domestic market for organic beef products. The plant closed in April 2007.

**Abattoirs:** 1  
- Murgon Qld  

**Throughput 2006:** 42,900 ETCW  
**Estimated share of national kill:** 1.5%  
**Major export markets:**  
Korea, USA, Japan  
**Employees:** 350  
**Production split:** 75% export, 25% domestic  
**Brands:**  
South Burnett Gold, South Burnett Platinum, Signature Brand
20. Company details not confirmed

21. Company details not confirmed

22. Stanbroke Beef Company Pty Ltd
Grantham Scrub Road
Grantham, Qld 4347
Phone: 07 4697 6188
Fax: 07 4697 6581
Web: www.stanbroke.com.au
Email: info@stanbrokebeef.com.au

Background:
The company has appeared in previous Top 25 reviews and is a major component in the wider Stanbroke integrated supply chain, which comprises extensive pastoral holdings throughout northern Australia, the ‘Bottle Tree’ feedlot, an export abattoir and boning room and marketing networks. Stanbroke Beef Company is owned by the Menegazzo family.

Beef processing is centered at an integrated plant located approximately one hour’s drive west of Brisbane, Queensland in prime agricultural country. The plant specializes in production of high quality grainfed and grassfed beef which require adherence to detailed trim and packaging specifications. The facility is accredited for organic beef production. The primal and sub-primals produced here are destined for top-end foodservice customers in north Asian markets as well as other key export markets. In addition to processing livestock off the Bottletree feedlot, Stanbroke also processes cattle on behalf of a select group of well-established service customers including AACo, Stockyard Meat Packers and OBE.

Senior Management:
- Brendan Menegazzo, Group Managing Director
- Mike Jackson, Chief Executive Officer

Abattoirs: 1
Feedlots: 1

“Bottle Tree”, Qld

Throughput 2006: 36,500 ETCW
Estimated share of national kill: 1.3%

Major export markets:
Japan, Korea, USA

Employees: n/a
Turnover: n/a

Production split:
75% export, 25% domestic

Species split: 100% beef
Brands:
Diamantina, Lockyer Valley

23. V & V Walsh Pty Ltd
PO Box 1713
South Western Highway
Bunbury WA 6231
Phone: 08 9725 4488
Fax: 08 9791 4077
Web: www.vvwalsh.com.au
Email: sales@vvwalsh.com.au

Background:
The export-registered plant at Bunbury WA handles cattle, sheep and lambs primarily for the domestic market and is the state’s second largest processing facility. The operator, V & V Walsh Pty Ltd, has been prominent in the WA meat industry for several decades. This experience, combined with the processing capacity of the company, has contributed to Walsh’s becoming the preferred supplier for a major supermarket chain in the state, undertaking lamb processing and boning services in a dedicated portion of the facility. Walsh’s also process and bone lambs for its own Amelia Park brand of lamb products.

On the beef side, Walsh’s boning room processes beef carcasses into boxed beef cuts for further distribution. It also undertakes a kill and bone service for a range of exporters and domestic wholesalers. The operator notes that activity in its main export markets has been hindered by the weaker US dollar in recent months. Also at this site are located the company’s skin handling centre (skins are shipped salted) and rendering plant, producing high quality tallow and meatmeat.

Directors:
Peter Walsh, Gregory Walsh

Senior Management:
- Peter Walsh, Director
- Greg Walsh, Director
- Paul Crane, Export Sales Manager
- Peter Cody, Plant Manager

Abattoirs: 1
- Bunbury, WA

Throughput 2006: 35,600 ETCW
Estimated share of national kill: 1.2%

Major export markets:
Middle East, SE Asia, South Africa

24. G & B Gathercole (Vic) Pty Ltd
Learmonth Road Carrum Vic 3197
Phone: 03 9772 2533
Fax: 03 9776 0137
Web: www.gathercole.com.au
Email: justin@gathercole.com.au

Background:
The company has operated mixed species plants in the Victorian domestic sector for the past four decades, providing kill services for retail and wholesale butchers; a supermarket chain; and the owners’ expansive wholesale activities in beef and sheepmeat products. G & B Gathercole (Vic) Pty Ltd’s plants have been successfully upgraded and improved in order to meet or exceed inspection requirements and the specifications of their customers’ quality assurance programs. Lamb boning facilities are also operated at the Tatura and Carrum sites and value adding processes are now in operation at both sites.

In addition to their downstream wholesaling business Gathercole’s is active in feedlotting in order to ensure sufficient throughput of quality carcasses for its own customers in foodservice and high-end retail butchers.

Directors:
Graeme Gathercole; Barbara Gathercole

Senior Management:
- Graeme Gathercole, Managing Director
- Darryl 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
- Jack Winters, Tatura Supervisor
- Shane Dalton, Wangaratta Supervisor
- Peter Kittelty, Wangaratta Manager
- Daryl Sewell, Boning Room Manager
**Abattoirs:** 3
- Carrum, Vic  Beef, sheep
- Tatura, Vic  Sheep
- Wangaratta, Vic  Beef, sheep, pigs

**Throughput 2006:** 35,000 ETCW

**Estimated share of national kill:** 1.2%

**Major export markets:**
- USA and SE Asia
- The Norvic plant overseas markets including Middle East, foodservice markets in Australia and for beef and lamb items destined for

**Addition to more detailed specifications**
- six way cuts for the sheepmeat lines in

**Further processing of carcases includes**
- its freezing department with the installation of new plate freezers in addition to a rebuilding of the loadout and dispatch area.

**Norvic is currently upgrading**
- its freezing department with the installation of new plate freezers in addition to a rebuilding of the loadout and dispatch area.

**Directors:**
- Jon Hayes; Desmond Richardson

**Senior Management:**
- Jon Hayes, Rob Lowe, Neville Hensell, Des Richardson

**Abattoirs:** 1
- Wodonga, Vic  Beef, sheep, deer, bobby calves, goats (A+)

**Throughput 2006:** 32,000 ETCW

**Estimated share of national kill:** 1.1%

**Employees:** 350

**Turnover:** n/a

**Production split:** 100% export

**Species split:**
- 65% sheep, 25% beef and 10% pigs

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**=25. Norvic Food Processing Pty Ltd**

54 Kelly Street Wodonga Vic 3690
Phone: 02 6055 0226
Fax: 02 6024 5925
Web: www.norvic.com.au
Email: norvic.food@norvic.com.au

**Background:**
The company operates an integrated export registered slaughter and boning facility in Wodonga Victoria and acts as a service works for a range of customers, including other processors and exporters. The company was established in 1997 and is ideally situated on the NSW-Victoria border, with excellent access to livestock supply and transport routes.

The abattoir is one of the few mixed species represented in the Top 25: it processes all categories of cattle in addition to sheep and goats.

Goat processing is one of the plant’s mainstays and it has developed a sound reputation for the processing of skin-on and skin-off goats for sensitive export markets.

Bobby calf processing is also a feature of this plant and its kill figures have reflected the significant increase in calf slaughtering over the past eighteen months due to drought.

Further processing of carcases includes six way cuts for the sheepmeat lines in addition to more detailed specifications for beef and lamb items destined for foodservice markets in Australia and overseas markets including Middle East, USA and SE Asia. The Norvic plant is approved for production of organic product and is also Halal approved.

Significant time and resources investment has been made in the development of superior meat safety and quality assurance systems for the plants’ customers. One means of accomplishing this has been the development of core groups within the workforce who look for opportunities for continuous improvement in meat safety, environmental and OHS issues.

Norvic is currently upgrading its freezing department with the installation of new plate freezers in addition to a rebuilding of the loadout and dispatch area.

Primo itself is one of the foremost suppliers of fresh and processed meat products to the retail and foodservice sectors throughout all Australian states and many overseas markets. Its headquarters at Chullora NSW incorporate world’s best practice in acquisition, handling and delivery of an enormous range of retail ready meats, pork and smallgoods. This is supported by an extensive marketing and distribution network across all states. In addition to these investments the company is currently finalizing plans for the construction of a state of the art pig processing plant at Port Wakefield SA following a fire at the previous plant in February 2007.

The Scone operation processes grassfed and grainfed yearling prime cattle as well as export steer and cow, drawn from eastern NSW particularly the Hunter Valley region. This tonnage excludes production from the Port Wakefield plant.

**Directors:**
- Paul Lederer, John Hunt

**Senior Management:**
- Paul Lederer, Managing Director
- Michael Gilpin, General Manager
- Meat Division
- James Cutler, General Manager
- Primo Scone
- Len Rae, Trade Manager
- Newport Plant Manager
- Primo Scone

**Abattoirs:** 2
- Scone NSW  Beef (A+)
- Port Wakefield SA  Pork

**Throughput 2006:** 32,000 ETCW

**Estimated share of national kill:** 1.1%

**Major export markets:**
- Korea, US, Japan, Canada, Taiwan

**Employees:** 360

**Turnover:** n/a

**Production split:** 40% export, 60% domestic

**Species split:** 100% beef

**Brands:**
- Hunter Gold, Primo, Milton Farm