

feedback

Meat & Livestock Industry Journal Supplement

September 2008

TOP 25 RED MEAT PROCESSORS

Calendar year 2007

2007 INDUSTRY OVERVIEW

DROUGHT

Drought conditions continued across Australia at varying degrees over 2007 and into 2008 impacting the value of livestock turn-off in the 2006-07 year by increasing total value by approximately 2% from the previous year to \$15.9 billion.

In Tasmania, parts of Western Australia and New South Wales conditions worsened resulting in producers in these areas increasing turn-off rates and reducing sheep and beef cattle numbers due to a reduction in pasture availability and an increase in feed grain and fodder costs.

Grainfed cattle numbers continued to decline in 2007 contributing to a strong decrease in feedlot numbers; due in part to higher grain prices.

With an improvement in seasonal conditions from spring 2007 many

producers expected to reduce livestock turn-off and to focus on rebuilding herds in 2008.

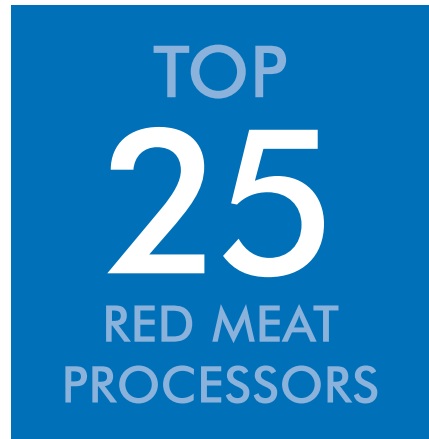
2007 saw some of the lowest water storage levels on record combined with reduced irrigation water allocations. The increased costs and competition for water heralds a significant challenge for the industry given its position as one of the highest users of the nation's water supply.

INCREASED FUEL PRICES

The increased price of fuel was viewed as a major challenge to those surveyed, placing pressure on processors through increased operational costs with no reprieve in the foreseeable future.

IMPACT OF CURRENCY FLUCTUATIONS

2007 saw a strong Australian dollar up against currencies of Australia's



significant major export markets of the US (increase from USD\$0.7457 to USD\$0.7840 average) and Japan (increase of ¥85.45 to ¥92.72 average).

PRODUCTION LEVELS

In 2007 cattle numbers were 25.4 million which is down from 28.85 million in 2006. Decreases in numbers in NSW, Victoria, Tasmania, South Australia and Western Australia were offset by increases in the northern regions of Queensland and Northern Territory.

Sheep and lamb numbers dropped to their lowest level in over 80 years to 85.7 million in the 2006-07 period – a decrease of 6% on the previous year.

EXPORT MARKET SNAPSHOT

The US continued to be Australia's largest lamb export market with nearly 30% of all lamb exported. Increased beef turn-off due to dry conditions in the US resulted in a decrease in demand for Australian imports, whilst increasing income in developing countries, particularly China and much of South East Asia, is creating increased demand for product.

2007 AT A GLANCE:

- JBS Swift Australia maintains number one position in the 2007 ranking with a national kill share of 15.77%.
- Second placed Teys Bros. production levels increased by 26% on 2006 figures.
- Top five red meat processors account for approximately 45% of production with the combined top 25 accounting for approximately 79% of national production.
- The top 25 processors represent 51 plant sites.

Figure 1 – feedback's Top 25 red meat processors 2007

Rank 2007	Rank 2006	Organisation	Throughput ETCW 2007 (a)	Throughput ETCW 2006	Kill share % 2007 (b)	No. plants operated in 2007	Species	Employee numbers
1	1	JBS Swift Australia Pty Limited	453,000	436,000	15.77%	4	Beef	4,800
2	2	Tey's Bros Pty Limited	344,933	273,300	12.01%	6	Beef	2,700
3	3	Nippon Meat Packers Aust Pty Limited	164,200	168,700	5.72%	3	Beef	1,650
4	4	Tasman Group Services	163,072	162,000	5.68%	6	Multi	1,900
5	5	Cargill Beef Australia	152,000	145,000	5.29%	2	Beef	1,100
6	6	T&R Pastoral Pty Limited	133,000	99,800	4.63%	4	Multi	1,400
7	7	Fletcher International Exports Pty Limited	82,400	80,000	2.87%	2	Sheep	1,365
8	Equal 10	Australian Country Choice Production Pty Limited	60,250	54,750	2.10%	1	Beef	950
9	12	H. W. Greenham & Sons Pty Limited	58,000	53,500	2.02%	2	Beef	475
10	Equal 10	Rockdale Beef Pty Limited	54,870	54,750	1.91%	1	Beef	450
11	13	Kilcoy Pastoral Company Limited	54,200	52,800	1.89%	1	Beef	550
12	15	JSA Jackson & Son Pty Limited	49,515	47,600	1.72%	2	Sheep	580
13	8	(c)	47,766	72,000	1.66%	2	Beef	550
14	17	MC Herd Pty Limited	47,000	45,500	1.64%	1	Multi	n/a
15	18	Harvey Industries Group Pty Limited	44,486	44,200	1.55%	1	Beef	654
16	24	G & B Gathercole (Vic) Pty Limited	40,140	35,000	1.40%	3	Multi	390
17	20	(c)	39,500	39,500	1.38%	1	Beef	n/a
18	n/a	Tatiara Meat Company Pty Limited	39,200	n/a	1.36%	1	Sheep	470
19	22	Stanbroke Beef Company Pty Limited	38,000	36,500	1.32%	1	Beef	n/a
20	21	(c)	37,000	37,000	1.29%	1	Beef	n/a
21	Equal 25	Primo Australia Scone Abattoir	35,000	32,000	1.22%	1	Beef	360
22	n/a	CRF (Colac Otway) Pty Limited	34,320	n/a	1.19%	1	Sheep	377
23	23	V & V Walsh Pty Limited	34,320	35,600	1.19%	1	Multi	300
24	16	Northern Co-Operative Meat Co Limited	30,226	45,932	1.05%	2	Multi	961
25	14	Southern Meats Pty Limited	28,000	51,000	0.97%	1	Sheep	480
Combined total of Top 25:			2,264,398		78.84%	51		

Notes:

- a. Throughput based on estimated tonnes carcass weight (ETCW) processed at plants under common ownership or control at 30 June 2008.
b. 2007 Australian national kill figure for all beef, veal, mutton and lamb equating to 2,872,127t carcass weight (Australian Bureau of Statistics)
c. Data not approved by company.

In: Tatiara Meat Company Pty Ltd, CRF (Colac Otway) Pty Ltd
Out: Bindaree Beef Pty Ltd, South Burnett Beef Trading Pty Ltd, Norvic Food Processing Pty Ltd

Data compiled by Indigo Marketing & Communications

BSsE IMPACT ON ASIAN MARKETS

Japanese restrictions on US imported beef continue however throughout 2007 the US continued to lobby Japan to raise this to OIE standards.

Similarly Korean restrictions on US imported beef continue with cattle less than 31 months of age imported as part of a staged lifting of beef import restrictions in order to gain a fully ratified trade agreement between the two countries. This is expected to come into force at some stage in 2008 resulting in greater competition for Australian beef exports and decline in demand.

LABOUR

The critical shortage of labour across the industry continues to be of concern to those surveyed. Those surveyed maintain that the attraction of labour resources is the biggest challenge that the industry faces.

HOW IS IT CALCULATED?

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. Of the 26 respondents, the top 25 processors were then determined based on metric tonne figures. It should be noted that the data provided has not been independently audited, and the top 25 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.

HIGHLIGHTS OF THE 2007 RANKING

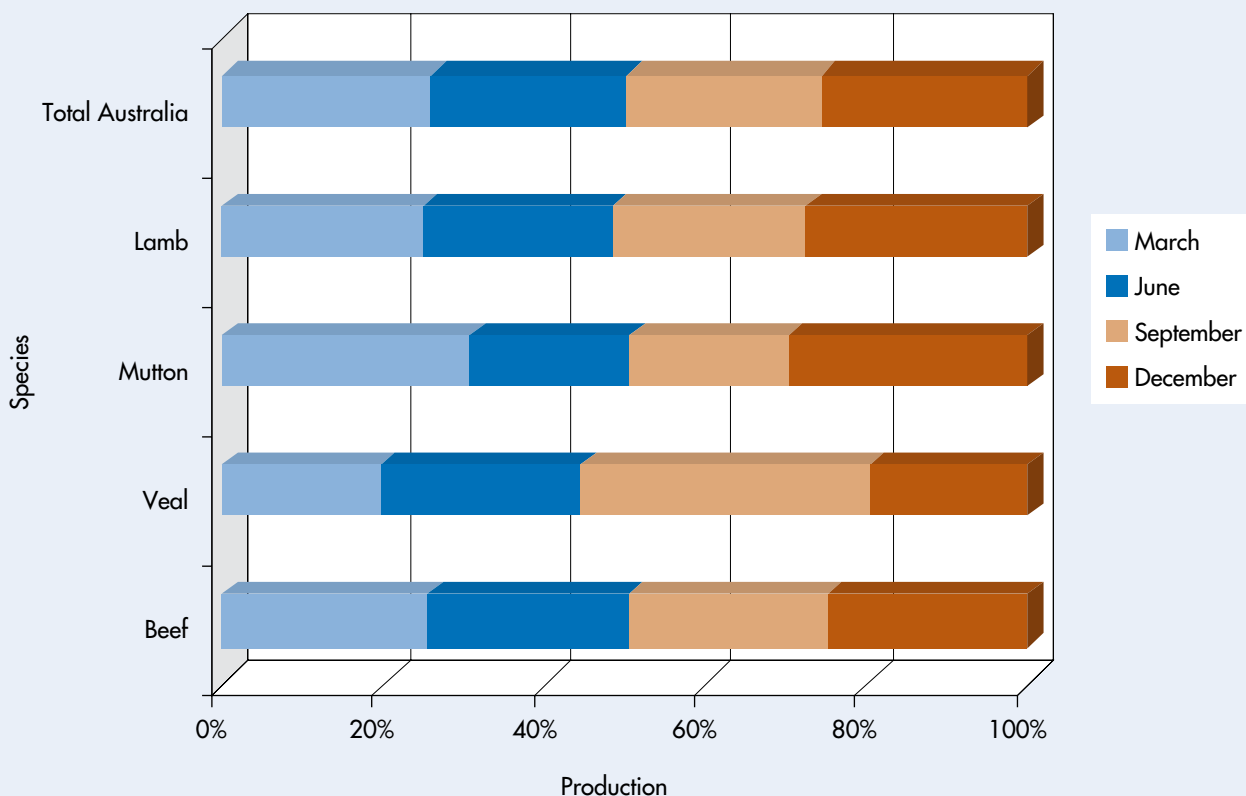
Following on from the 2006 ranking it was status quo for the top seven processors in 2007. Although dominated again by the beef processing sector, Tasman and T&R Pastoral solidified their 2006 ranking as the two top ranking multi-species industry processors and Fletcher the top ranked sheepmeat processor.

JBS Swift consolidated its first place position in 2007, following the merger with Brazilian based JBS Friboi and Swift Australia in the same year, with an increase of 4% on 2006 production levels.

It is also worthwhile to note that in early 2008 JBS Swift acquired Tasman.

Teys production levels rose an impressive 26% – on the back of a 33% increase between 2004 and 2006. This increase is despite the Katherine and Innisfail plants remaining closed.

Figure 2: 2007 red meat produced



Source: Australian Bureau of Statistics

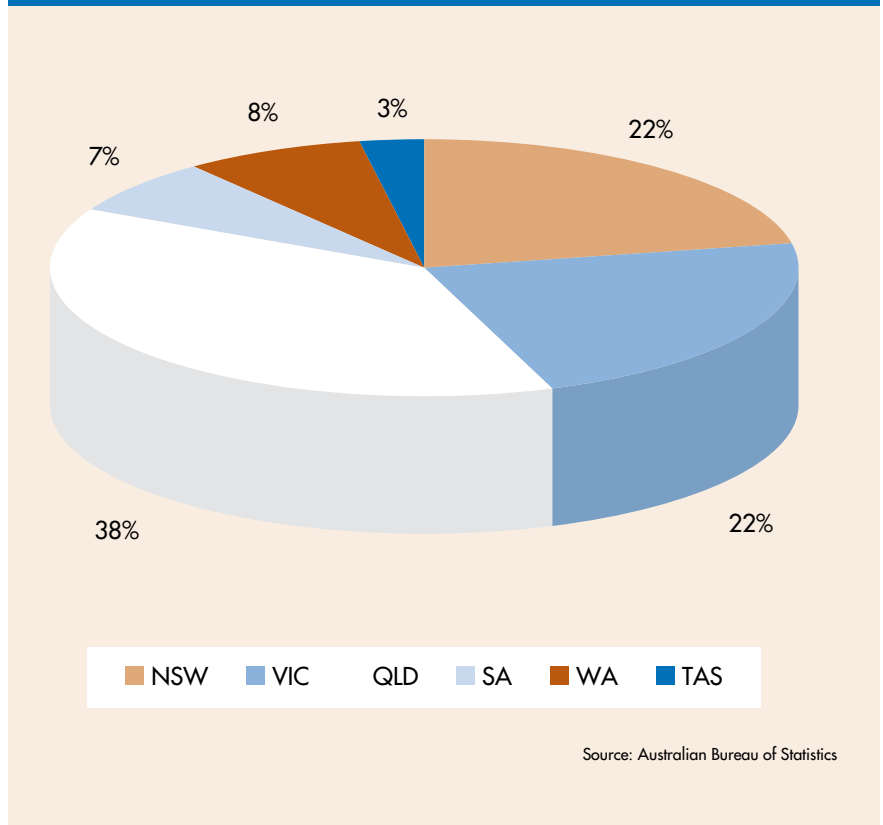
Of a similar nature, T&R Pastoral increased production levels by the same percentage between 2006 and 2007. This has been mainly attributed to the introduction of a second shift at Murray Bridge and the substantial upgrade to the Lobethal plant.

The majority of movement has occurred in the middle of the ranking where all companies processing between 35,000t and 60,000t in 2007 (with the exception of one) have moved up the ranking order from the previous year. In most instances these companies have moved three ranking points from where they were in 2006 but with increases of only between 2,000t and 4,000t. The biggest mover was Gathercoles who has gone from 24 in 2006 to 16 in 2007 with an increase in production of just under 5,000t.

New appearances in 2007 are attributed to CRF (Colac Otway) and Tatiara, both omitted from the 2006 ranking.

Bindaree Beef Pty Ltd which was ranked fifth in 2006 did not participate in the 2007 ranking.

Figure 3: 2007 red meat processing by state



Located near Ipswich in south east Queensland, Dinmore is the largest and most technologically advanced meat processing plant in Australia. It is owned by JBS Swift & Company, who have been named as the top processing company for 2007.



1. JBS Swift Australia Pty Ltd

1 Lock Way Riverview QLD 4303
 Phone: 07 3810 2100
 Fax: 07 3816 0356
 Web: www.jbsswift.com.au
 Email: info@jbsswift.com.au

Country of ownership: Brazil

Parent company:

JBS Swift

Background:

Swift Australia is Australia's largest meat processing operation. Swift Australia is owned by Brazilian based JBS Swift & Company, who are the world's largest meat processor with production facilities across four continents supported by a network of 20 international offices.

The company was founded by Jose Batista Sobrinho, also known as "Ze Mineiro" in 1953 in the city of Anapolis, in the state of Goias Brazil. In 2007 JBS Friboi purchased the US based Swift & Company, inclusive of its Australian entity AMH, to become the largest beef processor in the world.

Today, JBS remains a Batista family owned business operating across diverse areas as agribusiness, food, distribution and transportation, household cleaning products, asset management, and retail banking.

The Australian operation consists of four processing sites across Queensland including Dinmore (7 day, 11 shift operation), Beef City (5 day, single shift kill and double shift bone operation), Rockhampton (6 day single shift operation), and Townsville (7 day, single shift operation).

The company's four feedlots are located at Carroona, New South Wales, Prime City, New South Wales, Mungindi, Queensland and Beef City Queensland. The total one time capacity for the feedlots is 100,000 head.

Directors:

Iain Mars, John K Berry, Edison Alvares, Ross Keane

Senior management:

- Iain Mars, Chief Executive Officer
- John K Berry, Manger, Corporate and Regulatory
- Ross Keane, Manager Livestock
- Edison Alvares, Manager, Finance and Administration
- Jean Carlo Dilly, Manager, Sales and Marketing

- Neville Tame, Manger, Human Resources
- Osni Walter, Manger, Operations
- Michael Doyle, Manager Feedlots

Abattoirs: 4

- Beef City, Toowoomba, QLD Beef (A+)
- Dinmore, QLD Beef (A+)
- Rockhampton, QLD Beef (A+)
- Townsville, QLD Beef (A+)

Feedlots: 4

- Carroona, NSW
- Prime City, Griffith, NSW
- Mungindi, QLD
- Beef City, Toowoomba, QLD

Further processing facilities and locations

Foodpartners

Total combined 2007 throughput:

453,000t

Estimated share of national kill:

15.77%

Production split:

85% export, 15% domestic

Species split: 100% beef

Employees: 4,800

Sales turnover:

\$A2.6 billion (fiscal year end 06-07)

Brands:

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

Major export markets:

USA, Russia, Japan, Korea, European Union, Middle East, Chile, Brazil, Canada, Mexico & Taiwan.

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: tbros@teysbros.com.au

Country of ownership: Australia

Background:

Tey's is the largest Australian-owned red meat processor in the ranking. Established in 1946, Tey's is a vertically integrated, family-owned business with 6 processing facilities located throughout Queensland, the Northern Territory and South Australia, directly employing over 2,700 staff across a combination of single and double shifts, plant dependant.

In 2007 the Innisfail and Katherine plants did not operate but may be reopened when suitable stock, climatic and labour conditions are resumed. The Tey's feedlot located at Condamine, Queensland, has a capacity of 30,000 head and due to redevelopment is one of the most modern in Australia.

Tey's operates two further processing facilities including Murgon Leather, in Queensland, a well-regarded tannery specialising in wet blue and salted hides for export. Tey's Food Services was created in 2006 to allow Tey's to expand into the retail and food service areas across several key export markets which has been successfully orchestrated under the 'Tey's Gold' brand.

Company officers:

Allan Tey's, Gary Tey's, Graham Cubbin, James Packer, Ashok Jacob, Michael Johnson, Geoffrey Tey's, Robin Tey's, Kirsty Jackson (Secretary)

Senior management:

- Allan Tey's, Chairman
- Bradley Tey's, Chief Executive Officer
- Michael Brown, Chief Financial Officer
- Geoffrey Tey's, Executive Director of Livestock
- Tom Maguire, General Manager, Corporate Affairs and Innovation
- 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

Abattoirs: 6

- Beenleigh, QLD Beef (A+)
- Biloela, QLD Beef (A+)
- Innisfail, QLD (closed) Beef (A+)
- Rockhampton, QLD Beef (A+)
- Katherine, NT (closed) Beef (A+)
- Naracoorte, SA Beef (A+)

Feedlots: 1

- Condamine, QLD (JV with Itochu and Prima)

Further processing facilities and locations

- Tey's Food Services, Brisbane, QLD
- Murgon Leather Pty Ltd, Murgon, QLD

Total combined 2007 throughput:

344,933t

Estimated share of national kill:

12.01%

Production split:

80% export, 20% domestic

Species split: 100% beef**Employees:** 2,700**Sales turnover:**

\$A1.24 billion (fiscal year end 06-07)

Brands:

Royal Gold, Teys Gold, President's Choice, Aussie Premium

Major export markets:

US, Japan, Korea, Canada, European Union.

3. Nippon Meat Packers Australia Pty LimitedLevel 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

Country of ownership: Japan**Parent company:**

Nippon Meat Packers Inc., Japan

Background:

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 three processing plants, three 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 1,000 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 900 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 two cattle properties Walla Wallah (central NSW) and 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.

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 and Marketing
- Howard Halter, Managing Director, Oakey Abattoir
- Michael Hughes, Managing Director, Wingham Abattoir
- Simon Stahl, Managing Director, Mackay Abattoir
- Hyde Kojima, 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

Abattoirs: 3

- Mackay, QLD Beef (A+) Head capacity 850 head per day
- Oakey, QLD Beef (A+) Head capacity 1,200 head per day
- Wingham, NSW Beef (A+) Head capacity 800 head per day

Feedlots: 1

- 'Whyalla', QLD

Tanneries: 3

- Toowoomba, QLD
- Gunnedah, NSW
- Melbourne, VIC

Total combined 2007 throughput:

164,200t

Estimated share of national kill:

5.72%

Production split:

80% export, 20% domestic

Species split: 100% beef**Employees:** 1,650**Sales turnover:**

\$A1,050 million [fiscal year end 06-07 April-March (Japan fiscal year)]

\$A930 million [fiscal year end 07-08 April-March (Japan fiscal year)]

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.

4. Tasman Group Services Pty Ltd

PO Box 36, Altona North, VIC 3025

Phone: 03 9316 4413

Fax: 03 9314 1011

Web: www.tasmangroup.com.au

Email: info@tgs.net.au

Country of ownership: Australia**Background:**

Australian-owned, Tasman Group Services was established in Melbourne, Australia, in the early 1970's. The company has grown over the years with the acquisition of similar businesses to become one of Australia's largest multi-species meat processor, with a capacity to process in excess of 600,000 cattle, three million smallstock and 80,000 pigs annually.

The Group employs in excess of 1,800 people and has operations spread throughout south-eastern Australia including six processing plants (three in Victoria and three in Tasmania). Tasman Group sources top quality cattle, lambs and sheep from most states and can guarantee flexibility and consistency of supply through the utilisation of stock from its beef and smallstock feedlot, 'Yambinya', located

just outside Wakool in New South Wales. Tasman Group offers an extensive range of products to domestic and export customers in the retail, food service and manufacturing sectors. Its product range includes chilled and frozen veal, lamb, mutton and grassfed and grainfed beef.

Tasman Group Services has built up a strong reputation as an exporter of high quality beef and sheepmeat items to over 50 international markets and in late 2007 was presented with the TasPorts Agribusiness Award for demonstrated outstanding export achievement in the field of agricultural products, as part of the 2007 Tasmanian Export Awards. The award was in recognition of the substantial part export plays to the company's turnover, and to the Tasmanian economy.

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+)
- Yarrowonga, VIC Beef (A+)
- Longford, TAS Beef, lamb (A+)
- King Island, TAS Beef (A+)
- Devonport, TAS Beef, smallstock

Feedlots: 1

- Wakool, NSW

Further processing facilities and locations

- Longford, Tasmania

Total combined 2007 throughput:
163,072t

Estimated share of national kill:
5.68%

Production split:
70% export, 30% domestic

Species split:
65% beef, 35% sheepmeat

Employees: 1,800

Sales turnover: n/a

Brands:

Tasman Meats, King Island Beef, Longford Meats, Seattle Meats

Major export markets:

USA, Japan, Korea, Canada, European Union, Malaysia, Indonesia, China, Russia.

5. Cargill Beef Australia

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

Country of ownership: US

Parent company:

Cargill Inc.

Background:

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 two 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.

Directors (Cargill Aust Ltd):

Ralph Selwood, Andrew MacPherson, Gavin Joyce, Jeral Dsouza

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

Abattoirs: 2

- Tamworth, NSW Beef (A+)
Throughput 52,000t
Head capacity 200,000 hd pa
- Wagga Wagga, NSW Beef (A+)
Throughput 100,000t
Head capacity 312,000 hd pa

Feedlots: 1

- 'Jindalee' – NSW

Total combined 2007 throughput:
152,000t

Estimated share of national kill:
5.29%

Production split:
50% export, 50% domestic

Employees: 1,100

Species split: 100% beef

Sales turnover: n/a

Brands:

CAAB, Riverine Premium Beef, Excel Genuinely Better

Major export markets:

Japan, Korea, USA.

6. T&R Pastoral Pty Ltd

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

Country of ownership: Australia

Background:

Founded in 1988, the family-owned T&R Pastoral Pty Limited is one of the few multi-species meat exporting and trading companies in Australia, employing 1,400 staff across its feedlotting, processing and tannery operations.

With four processing locations – three in South Australia including Murray Bridge, Lobethal and Port Pirie and the North Dandalup abattoir situated in WA, throughput has increased significantly year on year, with processing capacity up to 195,000 cattle and 3,432,000 sheep and lambs per year.

T&R supplies a wide range of premium meat products such as chilled and frozen beef, veal, lamb, mutton and goat. The company is committed to delivering quality products and services that meet customer demands and build long-term relationships with them. T&R Pastoral exports to over 80 countries including the USA, European Union, Japan, Middle East and Korea.

Directors:

Robert Rowe (Chairman), Christopher Thomas, Simon Rowe, Darren Thomas, Brian James, James Rattus, Frank Porcaro, Allan Potter.

Senior management:

- Chris Thomas, Managing Director
- Darren Thomas, Chief Executive Officer
- Simon Rowe, Livestock
- Brian James, Executive Director
- Frank Porcaro, Marketing
- James Rattus, Operations

Abattoirs: 4

- | | |
|---------------------|----------------------------|
| • Lobethal, SA | Sheep, lambs (A+) |
| Throughput | 23,000t pa |
| Head capacity | 21,000 per week |
| • Murray Bridge, SA | Beef, sheep, lambs (A+) |
| Throughput | 110,000t pa |
| Head capacity | 45,000 smallstock per week |
| | 3,750 beef per week |

Further processing facilities and locations

- Longford, Tasmania

Total combined 2007 throughput:

133,000t per year
195,000 cattle per year
3,432,000 sheep and lambs per year

Estimated share of national kill:

4.63%

Production split:

90% export, 10% domestic

Species split:

40% beef, 60% sheepmeat

Employees: 1,400**Sales turnover:**

\$A380 million (fiscal year end 06-07)
\$A450 million (calendar year 2007)
\$A500 million (estimated fiscal year end 07-08)

Brands:

Clare Valley, Murray Lands Premium, Murray Bridge Meat, TandR

Major export markets:

USA, European Union, Japan, Middle East, Korea.

7. Fletcher International Exports Pty Ltd

Lot 11, Yarrandale Road
Dubbo NSW 2830
Phone: 02 6884 5833
Fax: 02 6884 2965
Web: www.fletchint.com.au
Email: mailbox@fletcher-international.com.au

Country of ownership: Australia

Background:

In 2007, Fletcher International Exports continues to be Australia's top ranked sheep and lamb processor with a fully integrated operation across farming, meat processing, hides, wool and by-product.

The company has long maintained the value of the whole carcass and has diversified its revenue streams accordingly, competing with strong branding across all business units on the world stage, accessing diverse and numerous export markets including USA, Middle East, Japan, Taiwan, China, EU and South Africa.

In 2007, Fletchers conducted a full upgrade and expansion of its chilled cutting and boning facilities at both the Dubbo (NSW) and Albany (WA) plants. Fletcher farming operations now extend to some 200,000 acres across the states of WA and NSW, allowing the company to maintain supply in tight market conditions.

Directors:

Roger Fletcher and 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

Abattoirs: 2

- | | |
|---------------|-------------------|
| • Dubbo, NSW | Sheep, lambs (A+) |
| Throughput | 39,000t |
| Head capacity | 2 million |
| • Albany, WA | Sheep, lambs (A+) |
| Throughput | 43,400t |
| Head capacity | 2 million |

Total combined 2007 throughput:

82,400t

Estimated share of national kill:

2.87%

Production split:

98% export, 2% domestic

Species split: 100% sheepmeat**Employees:** 1,365**Sales turnover:** n/a**Brands:**

Fletcher, Premium Fletcher Lamb

Major export markets:

USA, Middle East, Japan, Taiwan, China, EU and South Africa.

8. Australian Country Choice Production Pty Ltd

117 Colmslie Road
Cannon Hill QLD 4170
Phone: 07 3902 4141
Fax: 07 3902 4142
Web: www.accbef.net.au
Email: reception@accbef.net.au

Country of ownership: Australia

Parent company: Lee Group

Background:

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 and Sons in 1958. It is Queensland's largest privately owned agribusiness company employing more than 940 people, across its 15 owned and six leased rural properties, covering around 530,000 hectares including cattle breeding and backgrounding properties, feedlot operations and a state of the art meat processing facility in Cannon Hill, Brisbane.

ACC is dedicated to the supply of high quality beef and veal products to Coles Supermarkets and other export customers maintaining a 'plate to paddock' philosophy.

The Cannon Hill meat processing facility employs approximately 850 people in management, slaughtering, boning, further processing and retail packaging operations. The facility became a world leader in 2003 with the successful partnership project with Swires Cold Storage that saw the development of a 230 meter refrigerated overhead conveyor gallery that linked the ACC abattoir and processing plant with Swire's refrigerated storage and distribution facility built adjacent to the ACC plant. The facility was designed to have a capacity of up to 10 million cartons per annum for distribution. The facilities are USDA licensed, HALAL certified in strict accordance of SICMA procedures, Safefood Queensland/AQIS Certified for Organic processing, and Aus-Meat A+ accreditation under the inspection and monitoring processes of AQIS.

Each week Australian Country Choice has the built capacity to produce over two million kilograms of processed, value-added and retail ready beef and veal products for the Coles Group.

ACC is one of the few beef processing facilities in the world that can slaughter, bone, value-add, retail ready pack and distribute under one roof and unbroken cold chain.

ACC currently remains 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) and NATA accredited laboratory.

Directors:

Trevor Lee, Chairman

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
- John O'Kane, Executive Manager, Agribusiness
- Jim Titmarsh, General Manager Rural Production
- Damian Barsby, Manager Livestock – Properties and Feedlots
- David Daunton, Manger Livestock Cannon Hill
- Alan Kropp, Export Manager Export Sales
- Anthony Lee, Manager – Retail Ready

Abattoirs: 1

- Cannon Hill, QLD Beef (A+) Throughput 60,250t (primary processing)
Head capacity 1,000 per day

Feedlots: 2

- Brisbane Valley, Esk, QLD
- Brindley Park, Roma, QLD

Further processing facilities and locations

Integrated manufacturing, value-adding and retail ready packing facilities at Cannon Hill

Total combined 2007 throughput:

60,250t

Estimated share of national kill:

2.10%

Production split:

25% export, 75% domestic

Species split: Beef 90%, veal 10%

Employees: 950

Sales turnover: n/a

Brands:

Coles, Australian Country Choice

Major export markets:

Japan, Korea, Taiwan, South Asia, USA.

9. H.W. Greenham and Sons Pty Ltd

222 Lorimer Street, Port Melbourne VIC 3207

Phone: 03 9644 6500

Fax: 03 9681 8034

Web: www.greenham.com.au

Email: email@greenham.com.au

Country of ownership: Australia

Background:

HW Greenham and Sons Pty Ltd incorporates HW Greenham and Sons Pty Ltd and Greenham Tasmania Pty Ltd. Commencing business in 1933, Greenham was the first Australian company to set up a hot boning plant. The plant was built in Tongala, north-east Victoria in 1993. In December 2001, the company bought the closed Blue Ribbon meatworks at Smithton in Tasmania, establishing Greenham Tasmania Pty Ltd.

The Tongala plant processes mainly cast-for-age dairy cows for export to the United States for the Burger King organisation. The Smithton plant in Tasmania exports premium quality beef to the USA, Korea and Japan, buying dairy cows, bulls, heavy beef cows, Jap ox, calves and yearlings and has recently started selling its prime beef into the Australian market through its Cape Grim premium brand. The company processes more than 50,000 tonnes of beef annually and has a supplier catchment of some 3,000 properties extending across Tasmania, including King Island.

Greenham purchases the majority of its cattle direct from farmers close to the company's operating plants. At present 100% of the Tongala plant requirements are purchased direct from local suppliers through company-sponsored liveweight scale operations or local 'over the hooks' trading at the abattoir. The company has a policy of not deducting statutory charges such as transaction levies, yard fees or commissions from the farmer's payment, opting to pay these charges on the farmer's behalf.

An ardent supporter of education and training as a means to improving agricultural industries and supporting rural communities, Greenham provides two annual \$10,000 scholarships to young people in Victoria and Tasmania who intend to further their careers in either the dairy or beef industries.

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, TAS Beef (A+) Throughput 20,000t
Head capacity 72,000
- Tongala, VIC Beef (A+) Throughput 38,000t
Head capacity 168,000

Further processing facilities and locations

Cold Store – Port Melbourne

Total combined 2007 throughput:

58,000t

Estimated share of national kill:

2.02%

Production split:

90% export, 10% domestic

Species split: 100% beef

Employees: 360

Sales turnover: n/a

Brands:

Greenham, Natural Tasmanian Beef, Lovely Beef, Cape Grim Natural Beef

Major export markets:

USA, Japan, Korea, Taiwan.

10. Rockdale Beef Pty Ltd

Regulator Road, Yanco, NSW 2703

Phone: 02 6951 1199

Fax: 02 6953 5397

Web: www.rockdalebeef.com.au

Email: rdbeef@rockdale.com.au

Country of ownership: Japan

Background:

Rockdale Beef operates a modern integrated feedlot and abattoir complex, situated on over 2,000 hectares near Yanco, NSW.

Rockdale processes all beef categories including grainfed and grassfed types.

Rockdale produces a range of beef products that service all domestic and international markets. Product quality is underpinned by diligent quality assurance processes, and ISO Quality Accreditation (9001).

The company has successfully positioned itself as a quality beef

supplier to discerning customers and markets. Food safety is a pre-requisite for product quality.

In addition to Rockdale's ISO quality accreditation, the company also maintains ISO accreditation for Environmental management Systems (14001), and complies with the Australian Standard for OH&S (4801). Rockdale's customers can rest assured that quality is maintained, supported by an on-site NATA accredited Laboratory (ISO 17025).

Rockdale's knowledge and experience are extensive. The management team has many years of procurement, processing, logistics and marketing know-how – supplying the very best cost effective, value based outcome.

Rockdale's business philosophy is simple – delivering customer value, supported by stringent product quality and food safety.

Senior management:

- Paul Troja, General Manager
- Gary Thomas, Plant Engineer
- Jeff Ticehurst, Financial Controller
- Graham Flynn, Feedlot Manager
- Will Cowley, Production Manager

Abattoirs: 1

• Yanco, NSW	Beef (A+)
Throughput	54,870t
Head capacity	158,260hd

Feedlots: 1

- Yanco, NSW

Total combined 2007 throughput:

54,870t

Estimated share of national kill:

1.91%

Production split:

80% export, 20% domestic

Species split: 100% beef

Employees: 450

Sales turnover: n/a

Brands:

Rockdale Beef, Leeton Royal, Leeton Beef

Major export markets:

Japan, USA, Korea, New Zealand, South Africa.

11. Kilcoy Pastoral Company Ltd

PO Box 84, Kilcoy, QLD 4515

Phone: 07 5497 1277

Fax: 07 5497 2128

Web: www.kpc.com.au

Email: kpc@kpc.com.au

Country of ownership: Singapore

Parent company:

Harmony Investment Fund Limited

Background:

Queensland based Kilcoy Pastoral was established in 1953 by Damien Kennedy. The Kilcoy operation was purchased in June 2007 by a consortium headed by Harmony Investment Fund Limited, a Singaporean based investment company (with interests in WA based Harvey Industries Group). Harmony is a pan-Asian investment fund, with diverse investments in China, Indonesia and elsewhere in the region, across finance, manufacturing and other sectors. The company's other Australian investments include the Metal Storm Limited (defence technology company).

The plant boasts one of the best medium-sized slaughter floors in the country, housed in the former Fututech robotics project site. However, analysts suggest that the boning room has substantial potential for upgrades to lift capacity and efficiency.

The plant currently kills about 570 head a day, single-shift, seven days a week.

Its 550 staff process approximately 550 head per day of grainfed beef for over 20 export markets including Japan, USA, South Korea and the domestic market. Kilcoy also has rendering facilities providing export grade inedible tallow and meat and bone meal.

Kilcoy's 2007 throughput is slightly up on 2006 results, with plans for the redevelopment of the site.

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 and Livestock
- Peter Johnstone, General Manager Finance and Corporate Services

Abattoirs: 1

• Kilcoy, QLD	Beef (A+)
Throughput	54,200t
Head capacity	172,400hd

Total combined 2007 throughput:

54,200t

Estimated share of national kill:

1.89%

Production split:

85% export, 15% domestic

Species split: 100% beef

Employees: 550

Sales turnover:

\$A237 million (fiscal year end 06-07)

\$A265 million (fiscal year end 07-08)

Brands:

Kilcoy Diamond, Golden Jubilee

Major export markets:

Japan, USA, South Korea, South East Asia, Middle East.

12. JSA Jackson and Son Pty Ltd

PO Box 101, Armidale, NSW 2350

Phone: 02 6772 6616

Fax: 02 6772 6630

Web: www.countryfresh.com.au

Country of ownership: Australia

Background:

JSA Jackson and 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, Kachels Wholesale Meats Pty Ltd, 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 organisation and is one of the newest small stock plants in the country.

Wallangarra processes predominantly sheep and is also home to the company's by-product processing which includes meat meal, tallow, blood meal and casings, and Country Wool Exports.

Directors:

John Jackson, Graham Jackson, Helen McNeill, Neville Halloran, John McCluskey, Stephen Marshall, Jerry Wissink

Senior management:

- John Jackson, Chairman
- Graham Jackson, Chief Executive Officer
- Helen McNeill, Chief Financial Officer
- Stephen Marshall, Export Marketing Manager
- John McCluskey, Operations Manager
- Toni Young, Human Resources Manager

Abattoirs: 2

- Tamworth, NSW Lamb, sheep
- Wallangarra, QLD Lamb, sheep

Total combined 2007 throughput:

49,515t

Estimated share of national kill:

1.72%

Production split:

60% export, 40% domestic

Species split: 100% sheepmeat**Employees:** 580**Sales turnover:**

\$A290 million (fiscal year end 06-07)

\$A320 million (fiscal year end 07-08)

Brands:

Country Fresh Australia, Peel Valley Exporters, Southern Queensland Exporters, Country Wool Exports

Major export markets:

Mexico, USA, Canada, Japan, Middle East, European Union.

13. Company information withheld**14. 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

15. Harvey Industries Group Pty Ltd

PO Box 492, Harvey, WA 6220

Phone: 08 9729 0000

Fax: 08 9729 1810

Web: www.harveybeef.com.au

Email: info@harveybeef.com.au

Country of ownership: Australia**Background:**

Following its debut in the top 25 processors ranking in 2006, Harvey Beef returns in 2007.

Following the change in ownership from E G Greens to Harvey Industries, under the ownership of international private equity firms, Stark Investments, Harmony Capital and Elders, Harvey Beef has consolidated its position as WA's largest and oldest beef producer. In 2007, Harvey invested significant capital in improving the entire packing floor – allowing the company to increase production capability to approximately 800 head per day. This required the implementation of a second shift requiring employment of many new staff. Harvey also invested heavily in improving plant security to ensure the safety and well being of their workforce and product.

Directors:

John Nicholls and Suresh Withana, Will McEwin

Executive team:

- Michael Rapattoni, Chief Executive Officer
- Shane Wilkinson, Chief Financial Officer
- Todd Brooks, Chief Operating Officer
- Danika Mullins, Executive Marketing/ Communications Manager
- Justin Croser, Executive Sales Manager
- Michelle Chatfield, Risk and Innovation Manager
- Ian Woods, Commercial Manager

Abattoirs: 1

- Harvey, WA Beef (A+) Head capacity 2,950 per week

Further processing facilities and locations

- Harvey Industries Processing Centre (HIPC)
- Boning Room – Fremantle

Total combined 2007 throughput:

44,486t

Estimated share of national kill:

1.55%

Production split:

65% export, 35% domestic

Species split: 100% beef**Employees:** 654**Sales turnover:** n/a**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.

16. 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

Country of ownership: Australia**Background:**

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 three 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.

The main developments on the sites in 2007 were focused on the Tatura site, where Gathercoles installed a new lamb boning room and commenced a second shift operation.

Directors:

Graeme and 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
- Jack Winters, Tatura Supervisor
- Shane Dalton, Wangarrata Supervisor
- Peter Kittelty, Wangarrata Manager
- Daryl Sewell, Boning Room Manager

Abattoirs: 3

- Carrum, VIC Beef, sheep
- Tatura, VIC Sheep, pig
- Wangaratta, VIC Beef, sheep, pig

Further processing facilities and locations

Tatura and Carrum

Total combined 2007 throughput:

40,140t

Estimated share of national kill:

1.40%

Production split: 100% domestic**Species split:**

65% sheep, 25% beef, 10% pig

Employees: 390**Sales turnover:** n/a**Brands:** Gathercole**Major export markets:** n/a**17. Company information withheld****18. Tatiara Meat Company Pty Ltd**PO Box 970, South Melbourne
VIC 3205

Phone: 03 8646 9500

Fax: 03 9696 1596

Web: www.tatiara.com.au

Email: sales@tatiara.com.au

Country of ownership: Australia**Background:**

Established in 1979, Tatiara Meat Company is Australia's largest exporter of frozen lamb cuts. Based in Bordertown, on the south Australian and Victorian border, the company sits amongst Australia's prime lamb producing country.

Employing approximately 470 staff, the site at Bordertown processes approximately 8,000 head per day, producing approximately 200 different products for export to markets including France, Germany, USA, Japan, Korea, Taiwan and Canada.

A strong supporter of GE free produce, Tatiara has positioned itself as a provider of free-range lamb product – antibiotic, additive, artificial feed, genetic modification and hormone free.

Recent developments on the Tatiara site have included the construction of a new 1400m² boning room to their existing facility along with a 170m² carton storage mezzanine, two additional cold chain compliant loading docks and refurbishment of the old boning room into a refrigerated packing floor.

Directors:

Eckard Huebl and Gerard Janssen

Senior management:

- Eckard Huebl, Managing Director
- Willem van Doorn, COO
- William de Klein, Plant Manager

Abattoirs: 1

- Bordertown, SA Lamb Throughput 39,200t
Head capacity 1,750,000hd

Total combined 2007 throughput:

39,200t

Estimated share of national kill:

1.36%

Production split:

90% export, 10% domestic

Species split: 100% lamb**Employees:** 470**Sales turnover:**

\$A179 million (fiscal year end 06-07)

\$A174 million (calendar year 2007)

\$A194 million (fiscal year end 07-08)

Brands:

Tatiara, Good Country

Major export markets:

France, Germany, USA, Japan, Korea, Canada, Taiwan.

19. Stanbroke Beef Pty LtdGrantham Scrub Road
Grantham, QLD 4347

Phone: 07 4697 6188

Fax: 07 4697 6581

Web: www.stanbroke.com.au

Email: corporate@stanbrokebeef.com.au

Country of ownership: Australia**Background:**

Stanbroke Beef specialises in high quality grainfed and grassfed beef primarily for Asian export markets including Japan, Korea and South East Asia along with the USA and Russia.

The operation is fully integrated with supply sourced from Stanbroke's own 200,000 herd with the cattle finished at the company's 13,000 head 'Bottle Tree' feedlot located at Chinchilla, Queensland.

Processing is conducted at the Grantham plant, located just west of Brisbane. The plant is export registered and organic and halal accredited.

In conjunction with processing livestock from 'Bottle Tree', Stanbroke carries out

processing cattle on behalf of a select, high quality group of service customers.

Senior management:

- Brendan Menegazzo, Managing Director
- Mike Jackson, General Manager

Abattoirs: 1

- Gatton, QLD Beef (A+) Throughput 38,000t

Feedlots: 1

- 'Bottle Tree', Chinchilla, QLD

Total combined 2007 throughput:

38,000t

Estimated share of national kill:

1.32%

Production split:

75% export, 25% domestic

Species split: 100% beef**Employees:** n/a**Sales turnover:** n/a**Brands:**

Diamantina, Circle 8

Major export markets:

Japan, Korea, South East Asia, USA, Russia.

20. Company information withheld**21. Primo Australia Scone Abattoir**18 Hume Highway, Chullora
NSW 2190

Phone: 02 6540 2200

Fax: 02 6540 2202

Web: www.primosmallgoods.com.au

Country of ownership: Australia**Background:**

The Scone Abattoir is owned by Primo Smallgoods, the largest producer of ham, bacon and smallgoods in Australia. Primo's extensive infrastructure includes the operation of its own abattoirs (located at Port Wakefield and Scone), manufacturing plants, packing facilities and distribution warehouses.

The new Primo Port Wakefield pork plant is currently under construction following the fire in 2007, with new kill floor, boning room, offal room, chillers and load out area. State-of-the-art equipment has been sourced globally for the fit out.

The Primo Scone beef abattoir supplies to all major domestic retail outlets, wholesale and food service industries. The company's major export markets

include Korea, USA, Japan, Canada and Taiwan. Employing around 360 people, and operating a single shift to process approximately 600 head per day, the Scone site is one of the largest employers in the Hunter region.

The Scone abattoir processes grassfed and grainfed yearling prime cattle as well as export steer and selected cow, drawn from eastern NSW particularly the Hunter region.

Directors:

Paul Lederer and John Hunt

Senior management:

- Paul Lederer, Managing Director
- Michael Gilpin, General Manager Meat Division
- James Cutler, General Manager Primo Scone
- Len Rae, Trade Manager

Abattoirs: 2

- Scone, NSW Beef (A+) Throughput 35,000 ETCW Head capacity 150,000 pa
- Port Wakefield, SA Pig (A+) Plant currently being rebuilt after Feb 2007 fire, new plant due to be re-commissioned Sept 2008.

Total combined 2007 throughput:

35,000 ETCW

Estimated share of national kill:

1.22%

Production split:

50% export, 50% domestic

Species split: 100% beef

Employees: 360

Sales turnover: n/a

Brands:

Hunter Gold, Primo, Milton Farm

Major export markets:

Korea, USA, Japan, Canada, Taiwan.

22. CRF (Colac Otway) Pty Ltd

1 Tristania Drive, Colac, VIC 3250

Phone: 03 5231 9700

Fax: 03 5231 1477

Web: www.crco.com.au

Email: contact@crco.com.au

Country of ownership: Australia

Background:

Established in 2000, CRF (Colac Otway) is set amongst premier farming country located two hours west from Melbourne. As Colac's second largest employer and dedicated supporter of the local region, this locally-owned

regional success story commenced operations on a greenfield site and is a fully integrated lamb processing operation.

CRF prides itself on its comprehensive and integrated approach to process and quality control, and environmental and economic management.

Approximately half of product further processing is conducted on-site, with chilling, freezing and transportation undertaken by on-site sister business Otway Fresh. CRF also operates an export skin salting facility. This is the first appearance by CRF in the top 25 for several years.

Directors:

Jack Barclay (Chief Executive Officer), Allan McCallum (Chairman), Wayne O'Brien, Gary Flanigan, Simon Ramsay, Don Bacon-Hall, Allan McCallum

Senior management:

- Rebecca Michalik, 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

Abattoirs: 1

- Colac Lamb (export) Throughput 34,320t Head capacity: Process floor 1.56 million pa Further process 1.04 million pa

Further processing facilities and locations:

CRF (Colac Otway)

Total combined 2007 throughput:

34,320t

Estimated share of national kill:

1.19%

Production split:

35% export, 65% domestic

Species split: 100% lamb

Employees: 377

Sales turnover: n/a

Brands: n/a

Major export markets:

Japan, USA, China, Middle East, Taiwan, South America.

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

Country of ownership: Australia

Background:

Located in Bunbury, V&V Walsh is one of the largest and most respected multi-species processors located in WA. A family owned business established by Vern and Jean Walsh in 1957, sons Peter and Greg Walsh now operate the business.

V & V Walsh is a major meat supplier to Woolworths and processes a super premium meat range 'Amelia Park' working alongside Trim & Tasty Meats to distribute this range throughout Australia. V & V Walsh currently export to the Middle East, South East Asia and South Africa with a dedicated office in Beijing.

Processed on-site, V & V Walsh also distribute their organic blood and bone fertilisers throughout Australia and salted skins globally.

Directors:

Peter Walsh and Gregory Walsh

Senior management:

- Peter Walsh, Director
- Gregory Walsh, Director
- Paul Crane, Export Sales Manager
- Peter Cody, Plant Manager

Abattoirs: 1

- Bunbury, WA Beef, sheep Throughput 34,320t Head Capacity 400 beef / 3,000 small per day

Total combined 2007 throughput:

34,320t

Estimated share of national kill:

1.19%

Production split:

20% export, 80% domestic

Species split: 50% beef, 50% lamb

Employees: 300

Sales turnover: n/a

Brands:

Amelia Park Lamb

Major export markets:

Middle East, South East Asia, South Africa.

24. Northern Co-Operative Meat Company Ltd

10615 Summerland Way, Casino
NSW 2470

Phone: 02 6662 2444

Fax: 02 6662 2391

Web: www.cassino.com.au

Email: cassino@cassino.com.au

Country of ownership: Australia

Background:

Established in 1933, Northern Co-Operative Meat Company Ltd is located in Casino, the hub of the Northern Rivers in NSW.

The Co-operative's primary focus is to provide its customers with an efficient meat processing facility utilising a highly trained workforce and specialised equipment in order to maintain its ability to service all major global markets. Profits are re-invested into the facility to ensure it maintains its facilities and services.

The Co-operative has over 1,500 livestock producer shareholders who have their livestock processed at either of the Co-operative's processing facilities. The Co-operative operates a dedicated export beef processing facility and one of the largest wet blue leather tanneries in the southern hemisphere and a dedicated export pig processing facility.

Casino is home to the beef processing facility, wet blue tannery (Casino Hide Tanners), rendering facility, freezing plant and value adding. The Casino site has the capability to process 12,500 head per week. The plant operates two separate processing floors – the beef floor processing animals over 200kg and the veal floor all those under 200kg.

The pig processing facility is located at Booyong, ensuring both segregation and religious market requirements are met at the Casino plant. Throughput at the Booyong plant is not included in the overall tonne figure used for the ranking.

Directors:

Peter Carlill (Chairman),
George Bennett (Deputy Chairman),
Tom Amey, Ken Somerville, Frank Bray,
Lennard Blok, Chris Dockrill

Senior management:

- Gary Burrige, Chief Executive Officer

Abattoirs: 2

- | | |
|----------------|-----------|
| • Casino, NSW | Beef (A+) |
| Throughput | 30,226t |
| Head capacity | 520,000hd |
| • Booyong, NSW | Pigs |
| Throughput | 14,118t |
| Head capacity | 260,000 |

Total combined 2007 throughput:

44,344t

Estimated share of national kill:

1.05%

Production split:

65% export, 35% domestic

Species split:

80% beef/veal and 20% pigs

Employees:

694 permanent, 267 casual

Sales turnover: n/a**Brands:**

Cassino, CHT, CRSM

Major export markets:

USA, Canada, Japan, Korea.

25. 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