

feedback

Meat & Livestock Industry Journal Supplement

October 2005

TOP 25

PROCESSORS

TOP 25 RED MEAT PROCESSORS

Calendar year 2004

Processors respond to unique market conditions

Calendar year 2004 presented a set of extraordinary circumstances for the Australian meat processing sector and its major packers took up the challenge judging from the results reported in the latest *Top 25* ranking.

Processors in all quarters of the country vigorously pursued the opportunities that were presented last year by changes in key international markets. As a consequence, the top 25 was responsible for approximately 76% of Australia's total red meat production last year.

Despite drought conditions still prevailing in many parts of the country, processors in all states except NSW managed to achieve near-record levels of beef production against largely unchanged slaughter figures. Many processors described 2004 as a year in which the industry struggled to meet the altered market conditions that have emerged as a result of bans on US product in international markets.

HOW IS THIS CALCULATED?

The *Top 25* ranking has been published annually since 1991, identifying the major performers in the industry based on their throughput levels and attempting to provide some perspective on developments in the sector during the previous calendar year.

The ranking is based on estimated tonnes carcass weight (ETCW) of beef and sheepmeat of each company in 2004. Throughput for plants that have changed ownership during the year is attributed to the new owners. Credit for service slaughter stays with the abattoir where it is performed.

WHAT HAPPENED IN 2004?

The consistently higher numbers of feedlot placements in the Australian industry throughout 2004 have been noted in the press and in *feedback's* Top 25 Lotfeeders ranking. For processors in 2004 this translated into sustained competition for sufficient numbers of suitable livestock. The protracted drought conditions throughout the year, in combination with high levels of demand from North Asian markets, meant that a higher proportion than in previous years of the total slaughter was grain-finished.

Australia Meat Holdings Pty Ltd (AMH) was confirmed again as the country's largest meat processor. Its four Queensland plants last year produced an estimated 435,000t of beef. The company continues to reap the benefits of the expansion in capacity which took place at its Dinmore plant in 2002, along with re-organised shift arrangements at its Townsville and Rockhampton plants.

2004 AT A GLANCE

- AMH retained the mantle as Australia's largest processor with 435,000 tonnes carcass weight in 2004.
- The bans on US product in key world markets gave Australian packers and exporters an added boost last year, with the top 25's total red meat production up by 8%.
- Teys Bros moved to second place with its re-opened Lakes Creek plant.
- Higher tonnages put sheepmeat processors Fletcher and Southern Meats into the top 10.
- The top five companies processed around 49% of Australia's total beef and veal production.
- The Australian-owned component of the top 25 throughput has increased to an estimated 60%.

Based on Australian Bureau of Statistics (ABS) production figures for 2004, AMH controlled around 43% of Queensland beef and veal production or about 20% of national beef and veal production. The throughput increase of around 35,000t for 2004 is roughly equivalent to the production from one mid-sized abattoir.

Figure 1 – feedback's top 25 red meat processors for 2004

Rank 2004	Rank 2003	Organisation	Throughput ETCW 2004 (a)	Throughput ETCW 2003	Kill share % 2004 (b)	No. plants operated in 2004	Turnover \$ million (d)	Turnover \$ million prev. yr (d)	Employee Nos.
1	1	Australia Meat Holdings Pty Ltd	435,000	399,788	16.2%	4	\$3,100	\$2,500	4900**
2	3	Tey's Bros (Holdings) Pty Ltd	205,000	166,500	7.6%	5	\$929	\$737	2,500
3	2	Nippon Meat Packers Aust Pty Ltd	166,500	170,000	6.2%	3	\$750	\$700	2,200
4	4	Cargill Beef Australia	130,000	120,000	4.8%	2	\$400	375	1,000
5	5	Bindaree Beef Pty Ltd	106,000	96,600	3.9%	2	na	na	850
6	7	T & R (Murray Bridge) Pty Ltd	96,237	72,283	3.6%	2	\$350	\$320	1,200
7	8	(e)	87,000	72,279	3.2%	5	na	na	na
8	6	Fletcher International Exports Pty Ltd	74,000	84,450	2.8%	2	na	na	1,150
9	9	Midfield Meat International Pty Ltd	70,000	65,124	2.6%	2	\$220	\$220	540
10	14	Southern Meats Pty Ltd	55,000	46,675	2.6%	2	\$185	180	480
11	11	Australian Country Choice Pty Ltd	53,400	52,400	2.0%	1	na	na	665
12	10	Rockdale Beef Pty Ltd	52,800	52,509	2.0%	1	na	na	450
13	12	HW Greenham & Sons Pty Ltd	52,500	51,000	2.0%	2	\$230	\$200	470
14	=22	JSA Jackson & Son Pty Ltd	50,600	34,200	1.9%	2	\$185	\$165	580
15	13	EG Green & Sons Pty Ltd	49,800	46,700	1.9%	1	na	\$156	520
16	15	Kilcoy Pastoral Company Pty Ltd	45,600	42,081	1.7%	1	\$197	\$168	370
17	17	G & K O'Connor Pty Ltd	40,000	38,000	1.5%	1	na	na	300
18	18	(e)	38,200	37,800	1.4%	1	na	-	na
=19	-	Stanbroke Beef Company Pty Ltd	38,000	36,600	1.4%	1	na	na	na
=19	19	MC Herd Pty Ltd	38,000	37,000	1.4%	1	na	na	350
21	21	G & B Gathercole (Vic) Pty Ltd	35,250	35,200	1.3%	3	na	na	250
22	24	V & V Walsh Pty Ltd	34,300	31,759	1.3%	1	na	na	230
23	16	Northern Co-Operative Meat Company Ltd	33,647	41,741	1.3%	1	\$80	\$90	779
24	25	Norvic Food Processing Pty Ltd	32,000	30,985	1.2%	1	na	na	350
25	-	Tatiara Meat Company Pty Ltd	31,800	na	1.2%	1	\$189	\$189	470
Combined Total of Top 25:			2,050,634		76.3%	48	\$6,815		20,604

Notes:

- a. Throughput based on estimated tonnes carcass weight (ETCW) processed at plants under common ownership or control at 31 December 2004.
- b. Kill share based on estimated national production of beef, veal, mutton and lamb for 2004 of 2,685,926 MT carcass weight (Australian Bureau of Statistics figure).
- c. See company profiles for end-of-financial year details. Most figures are preliminary results for 12 months ended June 2005.
- d. Turnover figures are for the year ended 30 June 2005 unless otherwise noted.
- e. Data not approved by company.
** comprises entire AMH operation
In: Stanbroke Beef Company Pty Ltd; Tatiara Meat Company Pty Ltd
Out: Queensland Beef Company Pty Ltd; Valley Beef Pty Ltd
Data compiled by ProAnd Australia

Production at the re-opened Lakes Creek, Queensland plant boosted Teys Bros (Holdings) Pty Ltd (Tey's) into second place. The Rockhampton plant, reported to have the second largest processing capacity of any Australian abattoir, had been closed since July 2002. Teys' turnover for the 2005 financial year has surged to almost \$1 billion and its throughput level accounts for around 10% of Australia's beef and veal production in 2004.

Significantly higher tonnages for 2004 were also recorded by Bindaree Beef Pty Ltd (Bindaree), Cargill Beef Australia (Cargill), T&R Murray Bridge Pty Ltd (T&R) and a fourth company which declined to be identified in the ranking. T & R's throughput has increased due largely to a full year of production at its Lobethal, South Australia plant.

The top five companies – all beef-only processors – were collectively responsible for over one million tonnes last year or slightly under 50% of Australia's total beef and veal output, compared with 47% the previous year.

While beef dominates the industry and the ranking, it is worth noting that five of the countries' largest sheepmeat processors are included in the ranking and all reported higher production compared to 2003: T&R, Fletcher International Exports Pty Ltd (Fletcher), Southern Meats Pty Ltd (Southern), JSA Jackson Pty Ltd (Jackson) and Tatiara Meat Company Pty Ltd (Tatiara).

Fletcher's tonnage of 84,450t for the previous year included an allowance for production at Mudgee Regional Abattoir which it purchased in February 2004. The plant did not operate in 2004. Fletcher's has ranked in the Top 10 companies since 1999.

There are three multi-species companies in the Top 10, for which sheepmeat is an important component of throughput: T&R, Midfield and an unidentified group.

ENTRIES AND EXITS

Tatiara, after a one-year absence, re-entered the listing based on higher production levels and better than average carcass weights. Tatiara regularly appears in the *Top 25* ranking.

Stanbroke Beef Company Pty Ltd (Stanbroke) joins the ranking for the first time following the buyout of minority shareholders in Valley Beef Company Pty Ltd. Stanbroke, now a family-owned company, is the new operator of the

former Valley Beef processing plant at Grantham, Queensland.

Leaving the ranking is Queensland Beef Processing Pty Ltd (QBP) which recorded sharply lower throughput in 2004. The plant at Coominya, Queensland had featured in previous top 25 lists for more than 10 years. It was purchased from a Queensland-based wholesaler by offshore interests in March 2004 and closed in July 2005.

Overall the processing sector during 2004 was reasonably stable in contrast to the closures and changes in ownership recorded in the two previous years. At most levels, packers spent the year capitalising on their sizable investments in processing capacity (both new and acquired), recording higher throughput and meat production.

MEASURE FOR MEASURE

Tonnage by the top 25 as a group in 2004 increased by approximately 8% on 2003 levels, compared to a 5% increase in Australia's overall red meat production.

Figure 2 indicates the respective shares of the top 25 and the rest of industry in the period 1999-2004 on a species basis. In line with previous years, the top 25 accounted for around 80% of Australia's total beef and veal production in 2004.

But it was a different story in regard to the top 25's share of total sheepmeat tonnage which expanded to around 64% of total production compared with 58% in 2003 and 45% throughout the period 2000-2003.

Moreover, a feature which is not readily apparent from the top 25 data, but has emerged from ABS figures and from feedback received during the compilation of this year's ranking, is the increasing predominance of lamb in the total sheepmeat throughput (see Figure 3). The trend is particularly apparent in NSW where sheep numbers have been severely affected by drought over the past four years.

Figure 2: Top 25 share of production 1999-2004

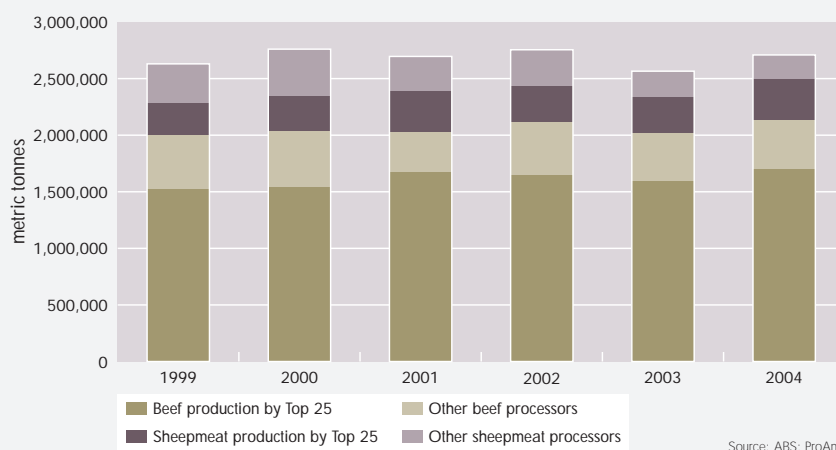
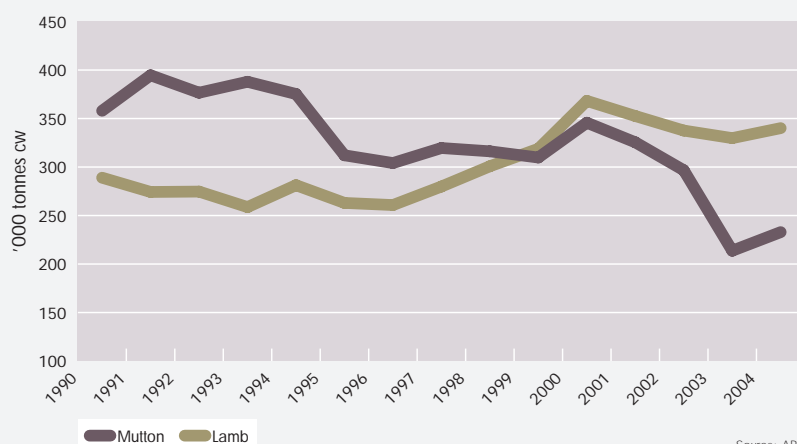


Figure 3: Australian mutton and lamb production



THAT PLANT'S BIGGER

Based on the financial details provided by 12 of the processing companies, the top 25 generated well in excess of \$7.5 billion in turnover in the 12 months ended June 2005 and employed almost 21,000 people. This accounts for roughly 73% of workers in the entire meat processing sector nationwide.

It is difficult, however, to make comparisons between enterprises and from year to year owing to differences in recording systems and company structure. At one end of the scale are companies that comprise integrated abattoirs, boning rooms and value-adding facilities. At the other end of the scale are companies that operate kill and chill facilities only, with product going off-site to other businesses for boning and further processing.

Companies noted again this year the critical shortage of workers available for training and business expansion.

Another indication that the industry worked more efficiently in 2004 is shown by average output per plant. There were 48 working plants controlled by the top 25 in 2004, an average of 42,700t per plant compared with 39,000t the previous year and approximately 28,000t in 1996. (Five plants owned by the top 25 companies did not operate in 2004.)

LONG-TERM INVESTMENTS

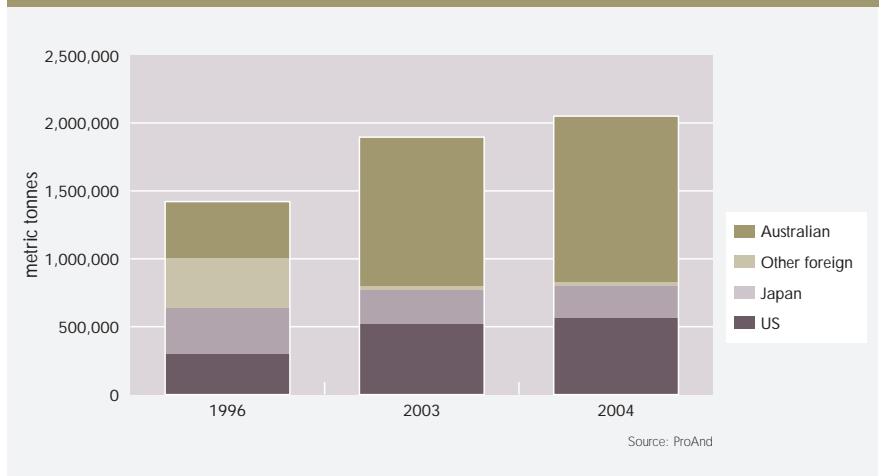
An important feature to emerge from the ranking this year has been the continued high levels of investment being undertaken by processors in improving their processing capabilities.

While most company spokesmen were reticent to quantify for publication the exact extent of their investments, around 30% of the companies listed in the ranking have recently completed or will soon complete significant upgrades in the slaughter floor capacity and primary boning departments of their plants.

All of this new plant and equipment is being put in place not only to address anticipated increases in long-term demand but also to address new food safety and inspection requirements, traceability issues and quality assurance programs.

Updated infrastructure is being complemented by heavy investment in expanded chiller and freezer capacity. The extent of investment in 2004-05 being undertaken by companies in the

Figure 4: Top 25 Ownership in 1996, 2003 and 2004



top 25 is estimated to be in the vicinity of \$130 million.

The works programs undertaken include complex product tracking systems supported by elaborate software programs, brand new boning rooms that depart from traditional industry norms in terms of manning and team structures and expanded slaughter capacity, in some cases by as much as 50%.

Clearly the companies making these investments anticipate not just a big future for Australian meat products and exports, but also the livestock numbers to sustain their economic viability.

Of note, too, are the number of new offal processing rooms being

considered or already underway to capitalise on the demand for green offal and similar specialised products uncovered in the absence of US product in North Asian markets.

AUSTRALIAN OWNERSHIP UP

There has been consistent interest over the past decade or so in the degree of foreign ownership of the Australian meat processing industry. As shown in Figure 4 it is estimated that around 60% of the throughput of the top 25 for 2004 was controlled by Australian-owned entities. This is the highest level of local ownership recorded since the inception of the *Top 25* ranking.

NOTES ON THE TOP 25 RANKING

- Each company or entity identified in the *Top 25* has approved the content of its profile.
- The ranking is based on throughput (ETCW) of beef and sheepmeat processed in abattoirs under common ownership or control in calendar year 2004. Product processed elsewhere on a service kill basis is not included in the company's own throughput but is attributed to the plant undertaking the processing.
- The estimated share of the national kill is based on the Australian Bureau of Statistics provisional estimate for beef, veal, mutton, goat and lamb production in 2004 of 2,685,926 tonnes.
- Most financial data reported in the *Top 25* is projected to the end of June 2005. Exceptions are noted in the individual profiles.
- The A+ mark denotes those plants holding the A+ AUS-MEAT accreditation as at 30 June 2005.
- ProAnd Associates Australia and MLA acknowledge the cooperation of plant and personnel at all levels in the compilation of this ranking.
- Data is compiled by ProAnd Associates Australia.

1. Australia Meat Holdings Pty Ltd

PO Box 139
Booval Qld 4304
Phone: 07 3810 2100
Fax: 07 3816 0356
Web: www.amh.com.au
Email: info@amh.com.au

Parent company

S & C Australia Holdco Pty Ltd

Background

Australia Meat Holdings (AMH) has held first place in the *Top 25* since the list's inception in 1991. AMH is owned by Swift & Company, based in Greeley Colorado, which is one of the largest beef and pork processors in the US. AMH is involved in meat processing, feedlots, trading and value adding operations. The company's processing operations are all located in Queensland and accounted for an estimated 40% of the Queensland cattle turn-off in 2004.

Dinmore is AMH's largest plant and processes around 18,500 head of cattle over an 11 shift, seven day a week operation and employs 2,300. The plant processes a full range of cattle from prime-fed to manufacturing grade animals. Dinmore is also EU-registered.

AMH's other grassfed plants are located at Townsville and Rockhampton. The Townsville plant is a single shift seven day a week operation and employs 880. AMH Rockhampton is a six shift per week operation and employs 500.

Beef City, located outside Toowoomba, is the company's dedicated grainfed plant. It is a five day per week operation and employs 700. It processes cattle drawn from AMH's four feedlots, which have a combined capacity of approximately 93,500 head. During 2005-06, Beef City's boning room will be redeveloped at a cost of approximately \$20 million.

AMH received an 'A' rating in 2004 from Reputex under their Social Responsibility Ratings of Australia's 100 largest companies.

AMH is both a Registered Training Organisation (RTO) and Self Insurer for Workers Compensation in Queensland.

Directors

Sam B Rovit
Edward Herring
John Keir
Peter White

Management

John Keir, Joint chief executive
Peter White, Joint chief executive

John Berry, General manager, corporate affairs

Brent Eastwood, General manager, trading division

Ken Flanders, General manager, finance and administration

Kevin Jones, General manager, Dinmore

Ross Keane, General manager, livestock

John Keaveny, General manager, feedlots

Tom Maguire, General manager, regulatory affairs

Joe Shepherd, General manager, information technology

Neville Tame, Group manager, human resources

Abattoirs: 4

Beef City, Qld	Beef (A+)
Dinmore, Qld	Beef (A+)
Rockhampton, Qld	Beef (A+)
Townsville, Qld	Beef (A+)

Feedlots: 4

Caroona, NSW	Mungindi, Qld
Prime City, NSW	Beef City, Qld

Throughput: 435,000 ETCW**Est. share of national kill: 16.2%****Major export markets:**

US, Japan, Korea, EU, Canada, Mexico, Taiwan

Employees: 4,900**Turnover:**

\$A3.1 billion (31 May 2004 – 29 May 2005)

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, Foodpartners

2. Teys Bros (Holdings) Pty Ltd

PO Box 15
Beenleigh Qld 4207
Phone: 07 3287 2188
Fax: 07 3808 0003
Email: tbros@teybro.com.au

Background

Tey Bros consistently ranks as one of the three largest processing companies in the country with significant investments in the feedlotting, processing and wholesale sectors of the industry. It operates processing and export activities for six plants including the

management of three Queensland sites under the terms of a merger with Consolidated Pastoral Holdings Pty Ltd in July 2002.

The Beenleigh, Queensland site, which processes a mix of grassfed and grainfed product, substantially increased its production capacity in 2003. Cattle from the feedlot at Condamine, Queensland, a joint venture between Teys and the Itochu and Prima group of companies, are normally processed here. The central Queensland plant at Biloela processes approximately 700 head per day of mostly heavy grassfed animals for Japan, China and Taiwan.

Teys Bros Innisfail runs as a hot beef boning plant, concentrating on the production of manufacturing product for the US market. It is a seasonal plant. The Naracoorte site runs on a one-shift basis for the Japan, EU and US markets, with heavy grassfed cattle being the standard types. The Katherine NT abattoir did not operate in 2004.

In July 2004 operations recommenced at the Lakes Creek complex in Rockhampton, Queensland. The plant had been closed two years earlier. This plant has arguably the second largest capacity of any Australian abattoir and its re-commissioning has played a large part in the increased tonnage for the Teys group in 2004.

Company officers

Allan Teys
Gary Teys
Graham Cubbin
James Packer
Ashok Jacob
Gary Hexter
Geoffrey Teys
Robin Teys
Kirsty Jackson (Secretary)

Management

Allan Teys (Chairman)
Bradley Teys, Chief executive officer
Gary Teys, Executive director of finance and administration
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

Abattoirs: 6

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

Feedlots: 1

Condamine, Qld (joint venture with Itochu and Prima)

Throughput: 205,000 ETCW

Est. share of national kill: 7.6%

Major export markets:

US, Japan, Korea, Canada, EU

Employees: 2,500

Turnover: \$929m

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

Background

The company is owned by Nippon Meat Packers, Inc of Japan and has developed significant investments in the production, feedlotting, processing and further value adding sectors since its establishment in 1978.

Nippon's processing capabilities spans the country's northern and southern regions with two large-scale integrated plants in Queensland and a major slaughter and boning operation located at Wingham, NSW. All three plants are approved for export to the EU.

Oakey Abattoir, situated in Queensland's Darling Downs, has undergone a major upgrade in the past year, particularly in its boning operations which now include a sophisticated product traceback system that links with other quality assurance measures in the supply chain. Oakey processes heavy middle and longfed cattle from the company's 'Whyalla' feedlot in addition to quality grassfed cattle for Asian and domestic markets, and is a certified organic processor.

Production at Nippon's second Queensland plant, Thomas Borthwick & Sons at Mackay focuses on grassfed

animals for export markets in Japan and North America. It also supplies grain finished and organically grown product to the domestic market. Mackay worked to its 1,000-head per day capacity during 2004 in response to strong demand and good livestock availability.

Wingham abattoir is an integrated slaughter and boning plant which handles grassfed and grainfed cattle.

In addition to its feedlotting and meat processing activities, Nippon owns New Wave Leathers, which operates wet blue tanneries at Toowoomba, Queensland; Gunnedah, NSW; and Melbourne, Victoria. A subsidiary, Beef Producers Australia Pty Ltd, is active in the domestic wholesale sector, while Nippon's export division trades a large percentage of the country's total beef export consignments.

Directors

Sumio Somura
Yoshio Tada
Kenichi (John) Tamagaki
Katsumi Inoue
Michael Harris
Jock Hudson
Shigeru Sawada
Toshiro Morishita
Toru Kurushima

Management

Kenichi (John) Tamagaki, Managing director, NMPA
Stephen Kelly, General manager – operations and planning
Jim Galbraith, Managing director, Oakey Abattoir
Michael Hughes, General manager, Wingham Abattoir
Simon Stahl, General manager, Mackay Abattoir
Hyde Kojima, General manager, Oakey Holdings
Michael Harris, Sales director NMPA and managing director, Beef Producers Australia
Andrew Ralph, President, Australian Premium Brands, Inc.

Abattoirs: 3

Mackay, Qld	Beef (A+)
Oakey, Qld	Beef (A+)
Wingham, NSW	Beef (A+)

Tanneries: 3

Toowoomba, Qld
Gunnedah, NSW
Melbourne, Vic

Feedlots: 1

'Whyalla' Qld

Throughput: 166,500 ETCW

Est. share of national kill: 6.2%

Major export markets:

Japan, US, Korea, South East Asia, EU

Employees: 2,200

Turnover:

\$750m (12 months to December 2004)

Production split:

85% export, 15% domestic

Species split: 100% beef

Brands:

Omugi-gyu, Olive, Oakey, Oakey Black, Borthwick, Borthwick Organic, BPA, CBP, Wingham, Wingham Gold

4. Cargill Beef Australia

PO Box 166
Wagga Wagga NSW 2650
Phone: 02 6938 3000
Fax: 02 6938 3092
Web: www.cargill.com
Email: aust.beef@cargill.com

Background

The company is the Australian subsidiary of the privately-owned Cargill Inc, which is involved in agricultural production and trading worldwide. Cargill operates two export-registered processing facilities in NSW and has ranked in the top five processors for the past three years.

Cargill's operation at Tamworth, NSW employs approximately 400 staff. Servicing the requirements of a major supermarket chain is a primary task at this site. Cattle processed at Tamworth are predominantly grassfed or grain-finished, with lighter carcass weights in line with domestic market requirements. Cargill provides detailed feedback about carcass characteristics to producers who consign stock direct to the plant.

The Wagga Wagga, NSW site has been upgraded during 2004-05: extensions to the boning room have increased capacity by 30% and the rendering department has installed a new high temperature continuous cooker which will process increased output. Livestock supply to the Wagga plant is supplemented by turn-off from the company's 'Jindalee', NSW feedlot which has a 17,000-head capacity.

Directors

Ralph Selwood
Dick Kelley
Bronwyn Mitchell

Management

Dick Kelley, General manager
 Andrew MacPherson,
 Value chain manager
 Greg O'Hare, Engineering manager
 Richard Lower, QA and technical
 services manager
 Shaun Crapp, Director of operations
 Bernard Smith, Plant manager,
 Tamworth
 Bob Griffith, Plant manager,
 Wagga Wagga
 Harry Waddington,
 Procurement manager
 Grant Garey, Feedlot manager

Abattoirs: 2

Tamworth, NSW	Beef (A+)
Wagga Wagga, NSW	Beef (A+)

Feedlots: 1

'Jindalee' NSW

Throughput: 130,000 ETCW

Est. share of national kill: 4.8%

Major export markets:

Japan, Korea, US, Canada

Employees: 1,000

Turnover:

\$400m (year ended 31 May 2005)

Production split:

50% export, 50% domestic

Species split: 100% beef

Brands:

Cargill Foods

5. 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 ranked in the *Top 25* since 1996 with the acquisition of the former Smorgon plant at Inverell, NSW. It is a specialised beef processor which has expanded into the domestic market in recent years while retaining a strong presence in major export markets. Throughput at its Inverell and Murgon, Queensland sites increased in 2004 with carcass weights largely unchanged from 2003. The Inverell plant has a capacity of approximately 1,000 head per day and processes predominantly grassfed steers. It also handles a percentage of grain-finished cattle for North Asian markets.

The Murgon plant, formerly operated by a producer cooperative, was acquired in 2000 and has undergone upgrading to the slaughterfloor and freezing departments. Murgon draws heavier grade grassfed animals from central Queensland and supplies product to North Asia in addition to the domestic market. The Orange, NSW abattoir did not operate in 2004-05.

Management

John McDonald, Chairman and managing director
 Leigh Belbeck
 John Belbeck, Director
 John Newton, Director
 Don Green, General manager,
 administration, finance and operations
 David Richards, Plant manager, Inverell
 David Pain, Plant manager, Murgon
 Danna Stephens, Group QA manager
 Robert Walters, Operations manager,
 Inverell

Abattoirs: 3

Inverell, NSW	Beef (A+)
Orange, NSW	Beef
Murgon, Qld	Beef

Throughput: 106,000 ETCW

Est. share of national kill: 3.9%

Major export markets:

US, Japan, Korea, Canada

Employees: 850

Production split:

65% export, 35% domestic

Brands:

Bindaree Beef, Uki, GH Elliott,
 Sapphire City, Weddell, Bindaree Gold

6. T&R (Murray Bridge) Pty Ltd

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

Background

The company owns and operates two multi-species plants in South Australia. T&R (Murray Bridge) Pty Ltd is privately owned by the Thomas and Rowe families in conjunction with other investments in livestock breeding, growing and feedlotting. A third plant, owned in conjunction with Midfield Meat International Pty Ltd at Mount Gambier, SA did not operate in 2004.

The Murray Bridge plant was formerly owned by Metro Meat Ltd and was purchased in 1999. It comprises an export-registered abattoir and boning room, freezing and storage, rendering facility and tannery. The abattoir runs a chain each for beef, mutton and lamb which supply on-site specialised boning rooms. The plant has undergone substantial improvement in the past four years including new chillers, blast freezers, plate freezers and upgrades in the beef and mutton boning rooms. Murray Bridge is licensed to process and bone sheepmeat and beef for most international markets. Product processed at Murray Bridge is primarily marketed under T&R's own brands.

During 2004 the company made significant improvements to the abattoir, boning rooms and chillers at Lobethal. A new beef system was installed and the mutton chain area was extended. This plant primarily undertakes service kill for major retail and wholesale customers from southern Australia. The plant achieved export registration in November 2004 and is also US-registered.

Directors

Robert Rowe (Chairman)
 Christopher Thomas
 Simon Rowe
 Darren Thomas
 Brian James
 James Rattus
 Frank Porcaro
 Allen Candy (Secretary)

Management

Chris Thomas, Managing director
 Simon Rowe, Livestock
 Darren Thomas, Livestock
 Frank Porcaro, Marketing
 James Rattus, Operations

Abattoirs: 3

Lobethal, SA	Sheep, lambs
Murray Bridge, SA	Beef, sheep, lambs (A+)
Mt Gambier, SA	Sheep (in joint venture with Midfield Meat International Pty Ltd)

Feedlots: 1

Muanu, SA

Throughput: 96,237 ETCW

Est. share of national kill: 3.6%

Major export markets:

US, EU, Japan, Middle East, Korea

Employees: 1,200

Turnover: \$350m

Production split:

90% export, 10% domestic

Species split:

50% beef, 50% sheepmeat

Brands:

Clare Valley; Murray Lands Premium; Murray Bridge Meat; Metro; T&R; Country Meadow; Corimex

7. Company details not confirmed**8. Fletcher International Exports Pty Ltd**Lot 11 Yarrandale Road
Dubbo NSW 2830

Phone: 02 6884 5833

Fax: 02 6884 2965

Email:

mailbox@fletcher-international.com.au

Background

The company has ranked in the top 10 for the past five years and is the country's single largest sheepmeat processor. Both its plants have been constructed as state-of-the-art facilities designed to extract maximum value from meat, skins and other co-products.

The tonnage published for Fletchers in the previous *Top 25* included production from the former Mudgee Regional Abattoir which it bought in February 2004. Fletchers has not released plans for the site but envisages it will be redeveloped as a beef-only plant.

The Dubbo, NSW plant operated a second production shift for most of 2004 due to improved livestock availability. The plant was opened in 1988 and now comprises an integrated abattoir, boning room, chamois factory and wool value-adding facility. The wool processing plant handles wool recovered from the company's two fellmongeries (in addition to other farm wool) for cleaning and wooltop making. The company trades these commodities in addition to its meat and offal products under the Fletchers brand.

The Narrikup, WA plant opened in 1998 and processes a high percentage of the smallstock in that state. The site employs state-of-the-art equipment and technology in its slaughter and boning divisions, energy usage and water and resource management. Production at Narrikup is mainly comprised of boneless and bone-in primals, further processed cuts and boneless manufacturing packs. The company reported an increased focus on lamb processing over the past two years.

DirectorsRoger Fletcher
Gail Fletcher**Management**Roger Fletcher, CEO
Gail Fletcher, Joint financial controller
Kent Dickens, Joint financial controller
Dave McKay, General manager, Dubbo
Gerald Webster, Fletcher Sheepskins
Melissa Fletcher, General manager, WA
Greg Cross, Assistant general manager, WA**Abattoirs: 3**Albany, WA Sheep/lambs (A+)
Dubbo, NSW Sheep/lambs (A+)
Mudgee, NSW Beef, sheep**Throughput: 74,000 ETCW****Est. share of national kill: 2.8%****Major export markets:**

EU, Japan, North America, Middle East, South Africa, South East Asia.

Employees: 1,150**Production split:**

98% export, 2% domestic

Species split: 100% sheep**Brands:**Fletcher; Premium Fletcher Lamb;
Fletcher Quality Chamois**9. Midfield Meat International Pty Ltd**Scott Street
Warrnambool Vic 3280

Phone: 03 5562 1644

Fax: 03 5561 5519

Web: www.midfield.com.au

Email: midfield@midfield.com.au

Background

The company is well-positioned in western Victoria to process grassfed beef for the export and domestic markets. It is also one of the country's larger sheepmeat processors and has made consistent investments in its slaughter, boning and environmental departments in the past five years. Midfield also holds a 50% share along with T&R (Murray Bridge) Pty Ltd in the sheep abattoir at Mount Gambier, SA. This plant did not operate during 2004.

A family-owned company, Midfield operates two export-registered abattoirs on the one site at Warrnambool, Victoria. One of the plants operates as a hot boning plant, supplying carcasses to the adjacent boning room facility in order to realise better boning yields and to minimise energy costs. This was

boosted in 2004 with the installation of six new plate freezers.

The Midfield Group also operates a wider supply chain business through the ownership of farms, a specialised dairy bull calf program that supplies the abattoirs, as well as a meat wholesaling operation based in South Australia.

During 2004 the company made further investments in their environmental management systems including the installation of micro-screening technology to reduce wastewater loads from the plant.

Directors

Colin McKenna, Chairman

Management

Colin McKenna, Chief executive officer

Abattoirs: 3Warrnambool, Vic (2) Beef, smallstock
Mt Gambier, SA Smallstock**Throughput: 70,000 ETCW****Est. share of national kill: 2.6%****Major export markets:**

US, Canada, Middle East, Asia

Employees: 540**Turnover: \$220m****Production split:**

70% export, 30% domestic

Species split:

60% beef, 40% smallstock

10. Southern Meats Pty LtdPO Box 244
Goulburn NSW 2580

Phone: 02 4824 0000

Fax: 02 4822 1085

Web: www.southernmeats.com.au

Email: craig@southernmeats.com.au

Background

Southern Meats is one of the country's pre-eminent sheep and lamb processors. The specialist plant at Goulburn, NSW, primarily focused on export markets, draws livestock from Victoria and NSW. At the Harden, NSW plant, Southern processes value-added lamb items, primarily for the North American market. Both plants incorporate purpose-built boning rooms for further processing of customer orders.

The company reported that livestock supply conditions in 2004 improved, with average carcass weights slightly higher and a second shift put into operation at the Goulburn plant. The Harden plant closed in the latter half of 2004 owing to stock shortages.

By-products management is a crucial factor in Southern's total operation and ensures that the maximum value is retained from each carcass processed. Skins collected from both plants are processed at Goulburn to drum-salted stage and then sold onto the export market by the company for further value-adding. The Goulburn rendering facility produces bleachable and bleached tallow in addition to bloodmeal and meatmeal.

Directors

Nick Peters, Chairman
Neville Newton

Management

Neville Newton, Managing director
Craig Newton, Marketing and general manager

Abattoirs: 2

Goulburn, NSW	Sheep, lambs
Harden, NSW	Lambs (A+)

Throughput: 55,000 ETCW

Est. share of national kill: 2.6%

Major export markets:

US, Middle East, South East Asia, Japan, EU

Employees: 480

Turnover: \$185m

Production split:

95% export, 5% domestic

Species split:

75% sheep, 25% lamb

Brands:

Fine Brand, Country Meadow, Southern Cross

11. Australian Country Choice Pty Ltd

117 Colmslie Road
Cannon Hill Qld 4170
Phone: 07 3902 4141
Fax: 07 3902 4142
Email: reception@accbeef.net.au

Background

Situated at Cannon Hill, Queensland, Australian Country Choice Pty Ltd (ACC) consists of a modern slaughtering, boning, value-adding and retail-ready packing facility. ACC is a family-owned private company which operates as the dedicated northern supply chain manager (beef and veal) for Coles Myer Food and Liquor division. The plant slaughters, bones and further processes yearling cattle and trade veal calves for distribution to Coles and Bi-Lo stores nationally.

Livestock processed at Cannon Hill come from the Colestock program. This is an integrated plate-to-paddock supply chain, developed in 1999 by Coles in conjunction with ACC, under which producer alliances in Queensland and northern NSW supply finished livestock to meet Coles' specifications. Approximately 50% of yearlings processed come from ACC's own Queensland properties and feedlots.

In September 2004, ACC's new value-adding facility for fresh sausages, stir fry, corned and pumped meats was commissioned. In addition, the company's new boning room facility commenced operations in June 2005. The room includes advanced features to address and improve occupational health and safety, product traceability, individual yield, temperature control, product flow and food safety requirements. Here, beef and veal primals are broken down for packing and ageing for distribution to Coles. ACC continues to pack primal and value-added beef and veal products into MAP retail-ready packs for shipment to Coles supermarkets along the eastern seaboard. ACC also exports a range of beef products on behalf of Coles to retail, wholesale and further-processing customers in the US, South Asia, North Asia and the Middle East.

Directors

Trevor Lee, Chairman

Management

David Foote, Chief executive officer
Ross Scholes, Executive manager, Cannon Hill operations
David Healey, General manager, finance and administration
Richard West, General manager, retail ready meat and value add
John O'Kane General manager, agribusiness

Abattoirs: 1

Cannon Hill, Qld	Beef (A+)
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Feedlots: 2

'Brisbane Valley' – Esk, Qld
'Brindley Park' – Roma, Qld

Throughput: 53,400 ETCW

Est. share of national kill: 2.0%

Major export markets:

Korea, South East Asia, Japan, Taiwan

Employees: 665

Production split:

75% domestic, 25% export

Species split:

80% beef, 20% veal

Brands:

Coles, Australian Country Choice, Lets Eat

12. 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.

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: 52,800 ETCW**Est. share of national kill:** 2.0%**Major export markets:**

Japan, US, Korea, New Zealand, South Africa

Employees: 450 over two shifts**Production split:**

80% export, 20% domestic

Species split:

100% beef

Brands:

Rockdale Beef, Leeton Royal, Leeton Beef

13. HW Greenham and Sons Pty Ltd222 Lorimer Street
Port Melbourne Vic 3207

Phone: 03 9644 6500

Fax: 03 9681 8034

Email: email@greenham.com.au

Background

Greenhams is a family-owned and operated company. Its hot beef boning plant at Tongala, Victoria was commissioned in 1993 and processes culled dairy cows and bulls. It draws livestock from saleyards and also directly from dairy producers in Victoria and southern NSW. The advantage of hot beef boning is that it significantly lowers costs in labour, refrigeration and storage. Product from Tongala is directed predominantly to the US market as manufacturing cow and bull meat.

The former Blue Ribbon plant at Smithton, Tasmania was acquired in 2001 and completely upgraded. It processes heavy grassfed and some grainfed animals drawn from Tasmania, King Island and Victoria. The company estimates that around 15% of throughput is derived from grainfed animals. Product is exported to Japan and other North Asian markets.

DirectorsPeter Greenham
Michael Webb
Geoffrey Tancred
Grant Ryan
Peter Greenham jnr**Management**Peter Greenham, Managing director
Grant Ryan, Finance director

Peter Greenham jnr, Manager

Paul Burchill, Operations manager,
TongalaRichard Leslie, Operations manager,
Smithton**Abattoirs:** 2

Smithton, Tas Beef (A+)

Tongala, Vic Beef (A+)

Throughput: 52,500 ETCW**Est. share of national kill:** 2.0%**Major export markets:**

US, Japan, Korea, Canada, Taiwan

Employees: 470**Turnover:** \$230m**Production split:**

95% export, 5% domestic

Species split: 100% beef**Brands:**Greenham, Natural Tasmanian Beef,
Lovely Beef**14. 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

JSA is family-owned and operated and has developed into a major sheepmeat processor with the expansion of its Queensland site and opening of its NSW facility in 2001.

The abattoir at Wallangarra, Queensland operates as a hot boning plant and processes most of the company's mutton production. This site also processes the by-products from both plants, including skins at the fellmongery which produces wool and preserved skins that are exported to overseas processors. The boning room at Wallangarra was upgraded in 2005, providing the company with increased flexibility.

The second plant, located at Tamworth, NSW, runs primarily as a lamb processing centre for the domestic and export markets. In 2004 the expanded boning room was opened, enabling the company to process boxed lamb for retail customers. Both of the plants are licensed to export to the EU.

During 2004 the company was able to source increased numbers of sheep for both plants. Consequently the Wallangarra plant operated a second shift for much of the year.

DirectorsJohn Jackson
Graham Jackson
Helen McNeill
Neville Halloran
John McCluskey
Stephen Marshall
Jerry Wissink**Management**John Jackson, Chairman
Helen McNeill, Joint CEO
Graham Jackson, Joint CEO
Stephen Marshall, Export marketing manager
John McCluskey, Operations manager
Jerry Wissink, Human resources manager**Abattoirs:** 2

Tamworth, NSW

Wallangarra, Qld

Throughput: 50,600 ETCW**Est. share of national kill:** 1.9%**Major export markets:**Mexico, US, Canada, Japan,
Middle East, EU**Employees:** 580**Turnover:** \$185m**Production split:**

60% export, 40% domestic

Species split:

100% lamb and sheepmeat

Brands:

Country Fresh Australasia, Peel Valley Exporters, Kings Pride, Southern Queensland Exporters, Country Wool Exports

15. EG Green & Sons Pty LtdPO Box 492
Harvey WA 6220

Phone: 08 9729 0000

Fax: 08 9729 1810

Web: www.egggreen.com.au

Email: info@egggreen.com.au

Background

This privately-owned company is the largest beef processor in Western Australia. The plant at Harvey, WA packs grassfed product for a range of overseas markets. It also processes grainfed product drawn from the company's feedlot located at Esperance, WA for the Japanese market. Substantial upgrades were made to the plant in the past two years including the slaughter, evisceration and associated areas of the beef floor.

Directors

Peter Green
John Wragg
Alan Green
Harry Bakker
Dr William Ryan
Deborah Pitter
Chris Wiener
Garry Minton

Management

Garry Minton, CEO
Ken Doble, Business development manager

Abattoirs: 1 (cg)

Harvey, WA Beef (A+)

Throughput: 49,800 ETCW**Est. share of national kill:** 1.9%**Major export markets:**

Indonesia, Malaysia, Singapore, Taiwan, US, Canada, Middle East, Japan, Korea

Employees: 420 – 580 (seasonal plant)**Production split:**

65% export, 35% domestic

Species split:

100% beef

Brands:

EG Green & Sons, Harvey Hide Exports, Harvey Meat Exports, Harvey By Products, Harvey Beef Excels, Harvey Beef

16. 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

Kilcoy Pastoral Company Limited was established in 1953 and processes high quality grassfed and grainfed products for North Asian and Korean markets. The export-registered plant operates a seven-day shift and draws cattle from the southern and central areas of Queensland. During 2004 Kilcoy concentrated much of its export efforts on the Japanese market and reported an increase in the proportion of grainfed product processed in the plant to around 35%. Kilcoy also performs a service kill for a select group of domestic wholesalers and further processors.

An important feature of Kilcoy's operations is the degree of carcass

feedback supplied back to growers. Categories include dentition, bruising, fat coverage and specific chiller assessment factors such as meat colour and marbling.

Directors

Ian Kennedy (AO), Chairman
Benedict Kennedy
Michael Carroll
John Gallagher
Tony Munns
Anthony Haines, Company secretary

Management

Tony Munns, CEO
Shane Clancy, Operations manager
Peter Johnstone, Chief financial officer
Brett Buktenica, Senior sales and marketing manager

Abattoirs: 1

Kilcoy, Qld Beef

Throughput: 45,600 ETCW**Est. share of national kill:** 1.7%**Major export markets:**

Japan, US, South Korea, South East Asia

Employees: 370**Turnover:** \$197m**Production split:**

85% export, 15% domestic

Species split:

100% beef

Brands:

Kilcoy Diamond, Golden Jubilee

17. G & K O'Connor Pty Ltd

Koo Wee Rup Road
Pakenham Vic 3810
Phone: 03 5941 2033
Fax: 03 5941 3870
Email: info@oconnoraustralia.com.au

Background

G & K O'Connor process grainfed and grassfed stock at Pakenham, Victoria from livestock sourced out of Victoria, Tasmania, South Australia and NSW. The company is owned in part by Japan-based Mitsui and Zenchiku trading houses with majority ownership by the O'Connor family.

Directors

Kevin O'Connor, Chairman
Kenji Shirasaki
Hisakazu Hayakawa

Management

Kevin O'Connor, Managing director
Owen Robinson, Sales manager

Greg Wareham, Production manager
Matthew O'Connor, Senior manager
Scott McPherson, Senior accountant

Abattoirs: 1

Pakenham, Vic Beef (A+)

Throughput: 40,000 ETCW**Est. share of national kill:** 1.5%**Major export markets:**

Japan, US, Korea, Taiwan, EU

Employees: 300**Production split:**

95% export, 5% domestic

Species split:

100% beef

Brands:

O'Connor

18. Company details not confirmed**= 19. 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

Stanbroke Beef Company Pty Ltd is now wholly owned by the Menegazzo family, which also owns the well-known Stanbroke Pastoral Company. Stanbroke Beef now includes the 13,000-head 'Bottle tree' feedlot near Chinchilla, Queensland, an export abattoir and boning room at Grantham, Queensland and the beef marketing office in Brisbane.

Stanbroke Beef specialises in high quality grainfed and grassfed beef, much of which is directed at the export market. It is also a pioneer in Meat Standards Australia beef for the domestic market, specialising in top quality yearling grainfed production. It has extensive accreditations including organic beef and halal beef programs. While most of Stanbroke Beef's production relates to its own cattle and its own markets, it also serves a number of high quality service customers, particularly for the expanding Wagyu market. Major customers include the Australian Agricultural Company's 'Kobe Cuisine' and '1824' brands and Stockyard Meat Packers.

Management

Peter Menegazzo, Chairman
 Mark Menegazzo
 Brendan Menegazzo
 Mike Jackson, Chief executive officer

Abattoirs: 1

Gatton, Qld Beef (A+)

Feedlots: 1

'Bottletree', Qld

Throughput: 38,000 ETCW

Est. share of national kill: 1.4%

Major export markets:

Japan, Korea, US

Species split: 100% beef

Brands:

Diamantina, Lockyer Valley

=19. MC Herd Pty Ltd

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

21. G & B Gathercole (Vic) Pty Ltd

Learmonth Road
 Carrum Vic 3197
 Phone: 03 9772 2533
 Fax: 03 9776 0137
 Email: justin@gathercole.com.au

Background

The Gathercole family company operates three domestic-registered abattoirs in Victoria. The plants provide services for wholesale and retail butcher customers located throughout southern Australia in addition to processing and marketing its own beef and sheepmeat products.

The company's main abattoir is located at Carrum, Victoria on the outskirts of Melbourne. The site processes beef and lamb for retail and wholesale customers. The Tatura plant processes and bones mainly lamb for a major retail customer. In addition there is a small plant at Wangaratta which is a mixed species plant geared to the service kill sector. Livestock for Gathercoles are sourced primarily from saleyards although the company also place cattle in feedlots for their wholesale beef business. Hides and skins are let out to tender weekly.

Directors

Graeme Gathercole
 Barbara Gathercole

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
 Kommet Wassdorp, Tatura supervisor
 Charlie Stephens, Wangaratta manager

Abattoirs: 3

Carrum, Vic Beef, sheep
 Tatura, Vic Sheep
 Wangaratta, Vic Beef, sheep, pigs

Throughput: 35,250 ETCW

Est. share of national kill: 1.3%

Employees: 250

Production split:

100% domestic

Species split:

65% sheep, 25% beef and 10% pigs

22. V & V Walsh Pty Ltd

PO Box 1713 South Western Highway
 Bunbury WA 6231
 Phone: 08 9725 4488
 Fax: 08 9791 4077
 Email: sales@vwalsh.com.au
 Web: www.vwalsh.com.au

Background

The company has an established presence in the Western Australian processing sector through its export-registered premises at Bunbury and its extensive wholesaling operations. V & V Walsh Pty Ltd is a family-owned company which has been associated with the state's meat industry for several decades. The multi-species plant was commissioned in 1994 and is the state's second largest processor after Harvey Beef.

Walsh's process cattle, lambs and sheep for its own export and domestic markets under the Amelia Park brand. The company also wholesales lambs for a major supermarket chain. Lamb is dispatched in carcass form and the beef boning room processes boxed beef cuts for further distribution through the chain's retail outlets.

Directors

Peter Walsh
 Gregory Walsh

Management

Paul Crane, Export sales manager

Abattoirs: 1

Bunbury, WA Beef, sheep

Throughput: 34,300 ETCW

Est. share of national kill: 1.3%

Major export markets:

Middle East, South East Asia,
 South Africa, Japan

Employees: 230

Production split:

60% domestic, 40% export

Species split:

70% beef, 30% lamb

Brands:

Amelia Park Lamb

23. 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

Background

The Northern Co-operative Meat Company Ltd (NMC) is livestock producer-owned and directed. The Board is made up of seven directors who are elected on a rotational basis by the members.

NMC processes all livestock for and on behalf of export and domestic customers licensed by the co-operative. A fee is charged for its services.

The co-operative is the sole owner of export establishment 239, a large export abattoir, boning and cold store complex. The plant has a dedicated veal floor, which has the capacity to process around 1,200 veal and calves daily. Processing of retail-ready and portion control items has become an important part of the co-operative's total business operation.

The co-operative also owns and operates a major tannery trading as Casino Hide Tanners and an export pig processing plant at Booyong, east of Lismore, trading as Cassino RSM Processing.

Directors

Peter Carlill, Chairman
 Tom Amey, Deputy Chairman
 George Bennett
 Ken Somerville
 Frank Bray
 Lennard Blok

Chris Dockrill

Management

Gary Burrige, General manager

Abattoirs: 2

Casino, NSW Beef and veal (A+)
Booyong, NSW Pigs

Throughput: 33,647 ETCW

Est. share of national kill: 1.3%

Major export markets:

US, Canada, Japan, Korea

Employees:

655 permanent, 271 casual

Turnover: \$80 million

Production split:

65% export, 35% domestic

Species split:

80% beef/veal, 20% pigs (tonnage above represents beef/veal only)

Brands:

Cassino, CHT, CRSM

24. Norvic Food Processing Pty Ltd

54 Kelly Street
Wodonga Vic 3690

Phone: 02 6055 0226

Fax: 02 6024 5925

Email: norvic.food@norvic.com.au

Web: www.norvic.com.au

Background

This is Norvic's second appearance in the *Top 25*. It operates as a full service export-registered facility and performs slaughter, boning and packing on behalf of its customers for major export markets. Norvic itself does not buy livestock or process any product on its own behalf.

Norvic specialises in the processing of bobby calves from the region's dairy industry and is also a major goat processor (skin-on and skin-off). In 2004 Norvic installed a European-designed system to improve the results of processing skin-on goat carcasses.

During 2004 Norvic processed very high numbers on behalf of its customers with the drought having an impact on average carcass weights for both species. Improvements made to the smallstock

chain in 2003, including an inverted dressing system, have underpinned an expanded processing capacity.

Approximately 10% of sheep production leaves the plant in carcass form. Most of the frozen mutton and lamb products are exported to Middle East and South East Asia, Japan, Mexico and US.

Goat carcass and goat portions in frozen form are mainly bound for buyers in the US. Customers can also have their product boned and packed through the boning rooms on-site.

Norvic management has integrated quality assurance systems into all aspects of the plant's operations to deliver meat safety and quality outcomes for its customers. A 'core group' of around 20% of the total workforce is appointed for their knowledge and leadership skills and have a duty of care for meat safety, environmental and occupational health and safety issues. The workforce receives incentives for maintaining consistently high standards for meat safety, co-product recovery and yield performance.

The plant is certified for organic processing; operates under AQIS-approved arrangement, offers Meat Standards Australia grading and is a member of the Greenhouse Challenge organisation, also Halal Certification.

Directors

Jon Hayes
Desmond Richardson

Management

Jon Hayes
Rob Lowe
Neville Hensell
Des Richardson

Abattoirs: 1

Wodonga, Vic Beef, sheep, deer, bobby calves, goats (A+)

Throughput: 32,000 ETCW

Est. share of national kill: 1.2%

Employees: 350

Production split:

100% export

Species split:

30% beef, 70% smallstock

25. Tatiara Meat Company Pty Ltd

Meatworks Road
Bordertown SA 5268

Phone: 08 8752 1233

Fax: 08 8752 2570

Email: sales@tatiara.com.au

Background

The company operates a purpose-built sheep processing plant at Bordertown, SA and is focused on production of quality lamb products primarily for the EU and North American markets.

The company was established in 1979 and the Bordertown plant was opened in 1982. It is regarded as processing a consistently high standard of bone-in and boneless lamb products for foodservice customers and retail distribution. The company has also developed a market for shelf stable meals into the foodservice and wholesale sectors of the UK market which are produced at its Melbourne premises.

Directors

Eckard Huebl
Gerard Janssen

Management

Eckard Huebl, Managing director
Kevin Solomon, General manager
Wayne Tink, Plant manager

Abattoirs: 2

Bordertown, SA Sheep

Throughput: 31,800 ETCW

Est. share of national kill: 1.2%

Major export markets:

US, Japan, Korea, Canada, Taiwan

Employees: 470

Turnover:

\$189m (12 months to June 2004)

Production split:

95% export, 5% domestic

Species split: 100% beef

Brands:

Tatiara, Good Country

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Feedback, the Meat & Livestock Industry Journal is produced and published by Meat & Livestock Australia Ltd (ABN 39 081 678 364).