

The Australian Nuffield Farming Scholarships



A visit to the United Kingdom

FEBRUARY TO AUGUST, 1978

**Report by Kim Kelly
of South Australia**

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The Australian Nuffield Farming Scholars Association was formed by ex-scholars in 1974 to continue the Scholarship scheme started in 1950 by Lord Nuffield in the U.K.

The U.K., Canada, New Zealand and Australia participate in the scheme and Australia, through the Australian Nuffield Scholarship Trust Fund, finance two scholars each year to travel and study for six months, principally in the U.K. and Europe.

The Australian Trust Fund has been supported by a large number of companies, organisations, individuals and ex-scholars.

Additionally, Qantas have given invaluable support by flying scholars to and from the U.K.

Scholars, upon their return, are expected to report on their experience for the benefit of all. Copies of their reports are freely available by contacting the Secretary, Australian Nuffield Farming Scholarship Association, c/- Royal Agricultural Society of Victoria, Showgrounds, Epsom Road, Ascot Vale 3032.

**Report by
Kim Kelly,
of South Australia**

of a visit to the
United Kingdom
February to August, 1978

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ARTICLE 1

MARK-UPS IN THE MEAT PIPELINE

Looking at the meat industry in Britain as a Nuffield Scholar the first thing that struck me was the high prices being paid to British producers. For instance, a day old Friesian cross calf, to be carried through for beef production, sells for \$160. A beast of 500lb dressed weight was bringing \$500, in July, 1978.

By comparison, the consumer in Britain is paying about three times as much as the Australian consumer, however the mark-up from farm gate to consumer is considerably less than in Australia. As I was interested in the meat industry I then compared the margins applying in Britain, U.S.A. and Australia, the results were startling (see table).

The prices and margins in the table were taken in April, 1978 for Australia and U.S.A., and the first week in July for Britain. The margins have of course altered in Australia as the price of beef has risen since April. However if we look at the producers' share of the consumer dollar over a long period in Australia during 1971-1973 the beef producers' share averaged 60%, in the period 1974-1977 it averaged 38%. With lamb the percentage of the consumer dollar received by Australian producers has not altered much during the period 1971-1977, averaging about 43%.

So we can see Australia is much less efficient in getting the meat from the farm gate to the consumer, at the least mark-up possible.

The industry should realise how important these figures are. For if we want to keep producers producing meat they have to receive more as the input costs continue to rise. Conversely, if we want the consumer to keep eating a lot of meat, we must keep the price down.

We are inefficient from the farm gate to the consumer. In other words we are doing things in our meat industry which either reduces prices to the producer, or raises the price unnecessarily to the consumer. The consumers in Britain and U.S.A. are receiving meat of as high, or higher standard as the Australian consumers yet at less of a markup from the farm gate to the retail outlets.

The industry must ask why? When the answers are found, then we can do something about it. I am surprised the A.M.L.C. and farm leaders are not informing producers and the industry about the high cost of distribution in Australia. I had to go overseas to find out there was a problem and how bad it was. During 1977 a visiting U.S. cattle producer was surprised how high the margins were in our industry. A year later little has been done to define what is wrong and what we can do about it. Why aren't farm leaders demanding information so they can force some action?

Killing costs are so high. Britain's killing costs are: beef \$20-\$25, lamb \$2.80-\$3.20, pigs \$5.50-\$6.20. These costs are not much different to ours.

Marketing costs would be higher in Australia because there is a lot more stock sold on a dead weight basis in Britain. Marketing costs are lower on a dead weight system than a live auction system.

Transport costs are higher in Australia because of distance. However, this only applies in outback areas because where an abattoir is reasonably close, costs would not be much different. It takes as long to go thirty miles in Britain as it does sixty miles in Australia, except on British motorways. Also fuel costs more in Britain than it does in Australia. Hides and offals are worth much more in Britain: beef hides are worth \$20, beef offal \$9 each, lamb offal \$2. Australian hides, now much dearer than before, are worth \$10-\$11. Offal prices are beef \$2-\$4, lamb 90 cents. This means that there is a difference of approximately \$15 per head per beast in return for hides and offals between Australia and Britain. This has a major effect on the margins having to be charged by the wholesaler in this country. Why the difference and can something be done about these low prices?

Certainly the costs of our wages in Australia must mean a greater margin is needed by the retailer before he covers his costs. A qualified butcher in Britain receives \$70-\$80 less than his equivalent in Australia.

That is one of the reasons why the retailers' share of the consumer dollar is — Australia about 40%, Britain about 24%.

Cannot we do something about this? One innovation in the meat industry in Britain is hot boning. This is not new and work is being done here in Australia. However, I saw a works in Britain which has taken on hot boning on a commercial basis, and is finding it very successful. The importance to the share of the consumer dollar is that we could use cheaper labour in Australian butcher shops, if the meat was already boned hot while at the abattoirs. On top of that there is a much better yield of meat using hot boning, and less loss through drip loss and evaporation.

Certainly much can be done to improve our very inefficient live auction selling system. Using classification, animals could be auctioned while still on the farm, and then sent direct to kill. We could reduce wastage and costs so that the wholesalers' margins need not be as great, and he should in theory, pass more of this to the producer.

I know very little about retailing and processing of meat, but it should be obvious to anyone that something is wrong. What I want to see is the meat industry as a whole look closely at its performance in this field, find out why we are so bad and then do something about it. It should be obvious to all sections of the meat trade that unless we are efficient by world standards, our meat industry will not survive.

If it wasn't for our climatic conditions and large farms, which keep our costs so much lower than Britain, our industry would be out of business tomorrow. If we let the present system drift along we will either have very little meat produced or very little meat eaten. If we can do something about the margins from farm gate to the consumer we will have plenty of meat at a price people can eat, for a lot longer in the future.

AUST. PRICES AND U.S.A. PRICES — APRIL, 1978
BRITISH PRICES FIRST WEEK JULY, 1978

COUNTRY	PRODUCER	% CONSUMER \$	WHOLESALE	% CONSUMER \$	RETAILER	% CONSUMER \$
BEEF						
AUST.	.63 c/kg	43.15	.91 c/kg	19.17	1.46 c/kg	37.68
BRITAIN	2.25 c/kg	74.01	2.31 c/kg	1.97	3.04 c/kg	24.02
U.S.A.	1.07 c/lb	65.64	1.17 c/lb	6.13	1.63 c/lb	28.13
LAMB						
AUST.	.83 c/kg	45.70	1.08 c/kg	13.50	1.82 c/kg	40.80
BRITAIN	2.53 c/kg	78.32	2.48 c/kg	1.54	3.23 c/kg	23.22
PORK						
BRITAIN	1.55 c/kg	68.28	1.75 c/kg	8.81	2.27 c/kg	22.91
U.S.A.	.94 c/lb	68.11	95.50 c/lb	1.44	1.38 c/lb	30.43

ARTICLE 2

MEAT CLASSIFICATION IN THE U.K.

As Australia moves towards classification we can learn so much from experiences of other countries. Especially when they have been classifying meat in these countries for a longer period.

In Britain, as a Nuffield Scholar, I was able to take a close look at what the Meat and Livestock Commission had been able to achieve with their classification scheme. Some of the reactions to the British Classification Scheme were disappointing. But they are still moving forward and they do at least have a working system which can be modified as the need arises. There lies the benefit of us looking at what they are doing and trying to avoid some of the pitfalls the M.L.C. have fallen into.

Classification is just one of the areas M.L.C. are involved with the meat industry in Britain. They are also responsible for market recording intelligence, meat research, meat promotion, and performance testing of sheep, pigs and beef. They have a budget of \$18 million approximately which is raised from levies of \$1.34 for cattle, 50 cents for pigs and 32 cents for sheep. Slaughter houses pay the levies and half to the producer and half to the buyer.

In 1968 the M.L.C. took over the six hundred staff involved with the assessment of stock for the old deficiency payment schemes. This no longer applied after Britain joined the E.E.C. except with sheep and fat cattle payments. It is these six hundred M.L.C. graders who now perform the dual roll, assessment of carcasses for deficiency payments, and for classification.

The present situation with classification is that 80% of all pigs, 25% of all beef and 25% of all lambs are being classified. It costs pigs 8p per head classified. (For beef and lamb the cost hasn't been finalised yet but maybe 5p per head for beef). The cost of beef classification can be kept low because the fat stock staff already operate in the abattoirs. If these Government schemes were to be discontinued beef and lamb classification would cost a lot more.

After seeing Britain's Classification Scheme I think there are two major pitfalls we must avoid. Firstly, we must keep our classification scheme as objective as possible in its measurements. In Britain they have changed their thinking on this and are now moving towards measurements with beef and lamb. It is significant that they have always objectively measured pigs on back fat, and they now classify 80% for all pigs. I saw examples and heard of others where the visual assessment was not consistent enough. I saw examples and saw the classifier employed by the meat company standing along side the M.L.C. classifier checking that the assessment suited the Company. This just adds another cost as only the one should be necessary if the animal can be measured and sold on that measurement. It is imperative that classification be tied into a new marketing plan. This has not been done by the M.L.C. Classification by itself will give feed back information on the quality of stock produced and this is important. But unless it is used as a tool for a new marketing system it will only be an added cost to the industry.

Australia must avoid making this mistake when incorporating classification into the meat industry.

Another problem they have in Britain is that the feed back material is supposed to be passed back by the slaughter house to the producer. I am sure it would be better for the M.L.C. to have the responsibility of getting the feed back to the producers.

It was very disappointing to see and hear numbers of producers and some of the trade very much against classification, after it being used for a period of years. Producers say

the want it in theory, but they seem to have gone very little way along the road to using it.

On the other side however they do have a scheme which is working, albeit not perfectly.

The education of producers and the trade is on the way, and it is not difficult to alter the present scheme if needed. One finds producers and meat companies committed to classification and it is those people who will eventually create a good scheme from the one they have.

We in Australia must avoid the problems they have encountered in Britian, but we must also get a scheme on the way. We must realise any change in the marketing is going to take a long time. A lot of people have to be re-educated.

ARTICLE 3

FOSTERING OF CO-OPERATIVES

Britain's entry into the E.E.C. has radically changed the marketing of Britain's agricultural products. Before entry the British Government guaranteed prices to British farmers. It didn't matter which marketing systems the farmer used, for he always had a deficiency payment to bring the price up to the guaranteed level. Therefore the pressure to set-up marketing co-operatives was small. Buying co-operatives were important and these grew very quickly during the past war era.

It was a different story after entry into the E.E.C. Suddenly all the E.E.C. farmers had access to the British market as did British farmers have access to the E.E.C. countries. But Denmark, Holland, Germany and France had developed big and efficient marketing co-ops with farmers who made good use of them. So there has been a very concerted effort in Britain to create efficient marketing co-operatives so the British farmer can compete better with the E.E.C. countries.

Government involvement in the co-operative movement has been through allocations of grants. These grants are administered by a body called the central Council of Agriculture and Horticulture Co-operation. The board of the Central Council is made up of farmers and people who have worked with or were involved with co-operatives. I am afraid many farmers still regard them as being civil servants and bureaucrats. But I was impressed by the ideas, aim and work of Central Council and there is no doubt the right fostering by Governments could be of great benefit to any co-operative movement. That is why, if such a body is going to influence the growth of co-operatives, it is imperative it not be manned by civil servants and bureaucrats. The expertise on such a Central Council must be from the co-operative movement itself, they have to know the peculiar problems associated with co-operatives. And they must be flexible, to change to new concepts of co-operation as they become available. Bureaucrats would be too involved with red tape to be flexible enough to administer grant money in the right areas.

The basic responsibility of the Central Council of Agricultural and Horticultural Co-operation is to make sure tax payers' money is well spent and to foster good co-operation among the industry. They administer all grants and have the structure to help and advise co-operatives. Direct grants to co-operatives fall into the following categories. (1) 65% maximum of the cost of a feasibility study before a co-operative is formed. This is very good because it forces members to justify why more money should be spent on their ideas.

It is very hard to ask farmers for money and then spend it on making sure they should have spent it. (2) 33% maximum subsidy on any new building or plant needed for the co-operative. (3) 75% maximum subsidy on any legal costs in formation. (4) 33% in the first year, 20% in the second year and 10% in the third year subsidy on the cost of key personnel. This is good because co-ops tend to go for cheaper personnel because it takes a while to grow big enough to employ the best.

Central Council also provides advice in drawing up rules, constitutions and other legal necessities. They provide a service for the setting up of a suitable accounting system, and will look at and advise the co-operative how to run its books for the first five years.

If a co-operative breaks any of its rules the Central Council can demand its money back. So if say a group of farmers set out to market hops, but get involved with something else. they would have to get permission from Central Council or return any grant monies.

One illustration of a new form of co-operation which shows the importance of Government grants, if well spent through a flexible Government body, is with Relief Labour Co-

operatives as they are called in Holland. They are really farmers grouping together to employ labour jointly for both insurance against sickness and for better use of labour.

This benefits not just farmers but country workers and towns, plus helps stop the drift from the country to the city.

Advantages to the workers found in Holland's Relief Labour Co-operatives are: — (1) Improved status amongst other rural workers. (2) Higher wages. (3) Full and continuous work. (4) Workers house not necessarily situated on a farm and tied to that farm. (5) Job satisfaction in working for a range of farmers and on a range of jobs. (6) Ability to borrow money from the co-operative. (7) Promotion structure which is not available on a single farm.

Advantages to the farmers are: — (1) Assurance of competent labour in the case of sickness or death. (2) Able to take time off from farm. (3) Only paying for the labour needed. (4) Able to obtain specialised labour at less cost. The co-operative is not aiming for a profit margin over and above administrative cost.

Conditions are very different in farming in Australia, however all farmers here are faced with lack of margins to employ all the labour they need full-time. Farmers cannot carry the cost of full-time labour just for peak labour requirements. This means (1) The farmer is attempting to do it himself, or letting non essential jobs go. (2) Farm workers are leaving the country for the city because of lack of job opportunities.

So there is a need for such group employment in Australia, but the system must be adapted for our conditions. It is at this stage that input of Government money would be of great benefit if spent well. Grant money could be given to interested groups to assess the opportunities and what systems and structure are best suited to Australian conditions. To gather this sort of money for a property feasibility study from farmers would be nigh impossible.

A QUESTION OF MARKETING

It is time farmers in Australia took a long look at our Statutory Grain Marketing Boards, and decided if the structures of these Boards should be updated to suit present conditions. There is no doubt the Wheat Board for instance brought order into the chaotic marketing system when formed in 1939. Stories told by our elders of export marketing of that time makes one shudder. The quickest way to bring the industry into order was to make the Board responsible for all wheat, and to have compulsory acquisition.

The question now is, is this structure best for the wheat farmer for present day conditions. We shouldn't as farmers continually relate back to conditions as existed in the days when the Wheat Board came into being. We should be looking at what is best for wheat farmers, not what is easiest for the Wheat Board.

British farmers do not have a Wheat Board or a Barley Board and nor are they looking to form one. Their production isn't insignificant for in 1975-76 they produced 4½ million tonnes of wheat and 8½ million tonnes of barley. It is also not valid to say that they only produce for the home market, because they exported \$270 million worth of cereals and cereal products in 1975. With this production farmers in Britain do not consider Statutory Marketing Boards for cereals are justified. Cereals are marketed through co-operatives and merchants. Admittedly the past history of deficiency payments on British agricultural production before Britain joined the E.E.C., led to a more organised marketing system with cereals than in Australia before our Wheat Board. Also now that Britain is in the E.E.C., statutory boards are not allowed by the Treaty of Rome. The British had to fight to keep the Milk Marketing Board during 1978 and this has a very good track record.

However, British farmers themselves do not want a Statutory Board for cereals, and are satisfied that they are getting a good marketing system using co-operative groups and merchants.

How do these grain marketing co-operatives operate?

There are two different sorts of co-ops in Britain at present. Firstly there is the more traditional co-operative structure which operates under the name of a co-operative, but acts as any other merchant. Secondly, there is a new breed of co-operative which provides a service for a group of farmers at the lowest possible cost.

The traditional grain marketing co-op tends to be under the wing of a large procurement co-operative and its administration costs are high. It usually buys the grain from the producer and then resells to the consumer and sometimes to its own mill if it has one. Producers participation isn't strong and most of the producers actually regard the co-operative as just another merchant.

The second sort of co-operative is far smaller. It has first and foremost commitment. In other words a farmer cannot join unless he commits a tonnage of grain to the co-operative. If the farmer does not supply this committed tonnage he is expelled. Secondly a farmer cannot join the co-op unless he is unanimously voted on by the existing members. The co-operative groups do not ask for members with open arms. The member has to ask to join and then be accepted. This leads to members of like interest and thinking, which helps the co-op to make better decisions quicker.

Thirdly the co-op does not buy the grain but obtains the best price it can for the already committed tonnage. This means, less capital costs and the co-op does not have a price which is open to excessive price cutting. All the co-op does is find the best price available for a large tonnage of grain from committed producers.

Many co-operatives in Britain still regard vertical integration as a very desirable goal to aim for. Some of the new co-operatives now regard this with a great deal of suspicion. An example of how vertical integration can work against the farmers was given to me by Eastern County Farmers. They had a feed mill under their control. They felt very virtuous

about how this vertical integration enabled grain growers to channel their grain direct into the mill. Although the farmers felt sure they were doing the right thing, neither the grain marketing co-op, nor the mill were doing well. In desperation Eastern County Farmers decided to separate entirely their grain buying and milling operations. The surprising result was the mill now uses very little of the grain grown by its members for its operation. The reason is the grain marketing co-op wants to sell for as dear as possible, and the mill to buy as cheap as possible. I think the moral of the story is we must forget about cliches and out dated philosophies and take a cold hard factual look at what is the best system for the marketing of Australian grain.

It is so easy for us farmers to drift along behind our industry leaders. We should ask ourselves is this or that idea really right for our long term needs. We should listen without prejudice to outside analysis, even if it goes against tradition. Surely any system that inhibits the growth of the new breed of grain marketing co-operatives to be found in Britian, must be wrong for the industry.

ARTICLE 5

SHEEP X-RAYS

There is a new idea offering for the sheep industry. For the specialists; the stud breeder; those interested in multiple births. Radiographic pregnancy diagnosis, or x-raying of sheep. The original work at the Rowett Research Institute, Aberdeen, Scotland was carried out purely as a routine service to facilitate studies on the nutrition of the pregnant ewe.

Extension of the initial studies evolved when consideration was given to the advantages gained when a studmaster had prior knowledge of what number of progeny a ewe would produce. As well as determining the presence, or lack of a fetus, it is possible to determine how many lambs the ewe is carrying.

Before dismissing the idea as impractical it is well to give careful thought to the advantages of such a service. Any grazier dealing with above average priced sheep could find radiography profitable.

The first marginal operation would be to dispense with all barren sheep from the lambing flock (this alone had economical advantages), then the remaining sheep could be divided into two flocks. One for single pregnancies and one for multiple.

Prior to lambing the feeding of each flock would differ. For single pregnancies, shorter ration, preventing an oversized lamb, whilst ewes carrying two or more lambs would have their feed supplemented, preventing undersized lambs and twin lamb disease.

At lambing the ewes with single lambs should require minimal attention, leaving the labour free to concentrate on the multiple births which tend to have more lambing problems. Even with the intensive systems I saw whilst in Britain this certainly would have been a great help. Most of the shepherds work was spent with the multiple births ewes. However with the extensive lambing systems generally used in Australia the gains would be far higher. My experience with lambing stud ewes is that always most time is spent with the multiple births. The singles, especially if the ewes haven't been on too high a plane of nutrition, and the lamb is small enough, need far less husbandry. Not that this means twins are undesirable but that there is a need for a more efficient lambing system. With the importance of keeping our costs down, such multiple pregnancy diagnosis does seem a really practicable way of keeping lambing costs down, but still making sure we keep as many lambs alive as possible.

Even though researchers have shown how beneficial twin lamb identification is, in practice with large ewe flocks the problem of identifying the twin lambs is very costly. Costly in time and also in disturbances of ewes and lambs and consequently miss mothering. If those breeders were able to identify the multiple pregnant ewes before lambing we would have the answer to this problem.

With labour costs soaring and the need to streamline every aspect of the business any process for eliminating time consuming hours must deserve consideration.

Radiographing thousands of sheep would appear a monumental, if not impossible task. This is not so and although there are still problems to be overcome, the concept and its advantages to the sheep industry is worth examining.

The Rowett Research Centre has obtained over 95% positive identification of foetal presence and numbers at between 70 and 90 days of gestation.

The research team used a powerful unit with a maximum output of 200 K.Vp and 1000 mA. The machine was of similar strength and design to those used for human radiography. The ewes were placed on their back and a compression band made tight over the lower abdomen, whilst assistants held the extended fore and hind limbs.

Obviously this method would be impractical for field use. A prototype unit has been used in Australia where large numbers are more easily handled.

The Australian concept was for a race to run the sheep into a caravan, which housed the radiographic equipment. At a point above the camera a section of the race, which suitably restrained the sheep, was lowered to the precise distance above the unit, obtaining a clear picture. Once the film was taken the sheep was raised and released into a race which cleared the animal from the caravan.

Perfection of this system or something similar would make it possible to handle up to 500 sheep per day which are the numbers required to make the unit economically viable.

According to Mr Wendham, the critical factor is to use equipment powerful enough to tolerate continual use. Anything underpowered becomes severely overheated as it must be run at maximum output. To ensure long life for the picture tube, which is the most costly item, he said it was advisable to purchase a tube which is more powerful than necessary, and operate it below its maximum output, thus ensuring a longer life.

An estimated cost using suitable equipment \$40,000. Radiographing 30,000 sheep per year, at a charge of 50 cents per sheep, it would cost \$15,000. The return would be \$4,000 capital repayments and \$4,000 interest and also meet labour costs of approximately \$3,000 leaving an excess to cover any hidden costs.

Before a suitable easy to transport x-ray unit was built a syndiate of sheep breeders would need to be formed. Breeders would indicate numbers of ewes to be x-rayed, at what time and where. With the varying lambing times from Southern N.S.W., Vic and parts of Australia would surely enable enough staggered lambing dates to make the system feasible.

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