



Australian Nuffield Farming Scholars Association

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*Report of the Study Tour to the
United Kingdom and Europe*

*By A. J. Lehmann
1994 New South Wales Nuffield Scholar*

SUBJECTS:

*Hemp Production, Manufacture and Marketing.
Producers Marketing, Especially Meat, Grain, Alternatives,
Diversification and Value Adding*

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An International Scholarship for Australian Farmers

The Nuffield Farming Scholarship Scheme is now firmly established in the United Kingdom, Australia, New Zealand, Canada, Zimbabwe and France and it is probable that other countries will join the scheme in future years.

Each country has its own independent Association responsible for funding, selection and administration.

The United Kingdom remains the focal point of the Scheme, with the United Kingdom Nuffield Farming Scholarship Trust providing an overall secretarial / liaison service.

Since 1950, more than 800 Nuffield Farming Scholars from the participating countries have criss-crossed the world studying a range of agricultural, trade, political and cultural issues.

Each country awards two or more scholarships annually and as a general rule, scholars from all countries assemble in the United Kingdom in February each year for approximately six weeks of group study before pursuing their individual programmes in the United Kingdom and / or other countries.

The interchange of scholars between countries is facilitated, costs are reduced and the standards of study enhanced by the Association and individual scholars in each country accepting an obligation to assist visiting scholars with itineraries, introductions, travel arrangements and accommodation.

This "Nuffield Network" has become a potent force within the overall scholarship scheme and it is constantly reinforced through the holding of a World Conference in one of the participating countries every three years.

These conferences are usually attended by over 150 former scholars at their own expense. They are concerned with the maintenance and improvement of the scholarship scheme and at the same time they provide an opportunity for former scholars to further expand and increase their knowledge of farming and related issues.

The Scholarship

The scholarships are awarded annually by the Australian Nuffield Farming Scholars Association to enable established farmers to travel to the United Kingdom and other countries for the purpose of increasing their knowledge of practical farming and the broader issues of agricultural production.

Obligations

Scholars are required to devote the whole of their time to a programme

approved by the Australian Management Council; to resume residence in Australia upon completion of the scholarship; to submit a written report to the Association covering the study programme completed under the award; and to communicate details of their newly-acquired knowledge and experience to other Australian farmers.

Eligibility

The scholarships are open to Australian citizens of either sex who are engaged in farming of any kind in their own right or as managers, and who intend to continue farming in Australia. The preferred age is between 25 and 40 years, although outstanding applicants outside of these age limits may be considered.

Tenure and Location

The scholarships are tenable for four months. Initially a minimum of six weeks must be spent in the United Kingdom; a group orientation study with the Award winners from other countries is undertaken during this period. Scholars are then able to pursue their individual study programmes.

The United Kingdom Farming Scholarship Trust, the national Farmers Union and the Ministry of Agriculture provide generous support and assist in the development and execution of these programmes. Should successful applicants have farming interests which are not practised in the United Kingdom, they are permitted to complete their study programmes in the country or countries best suited to their pursuits.

Application Procedure

The Australian Nuffield Farming Scholars Association allocate a scholarship to each of the States and the Northern Territory once every three years in rotation.

Applications are invited by advertisements in the daily press from February to May; final selection takes place in August and the scholars are expected to arrive in the United Kingdom in February of the following year.

Further information is available from:

The Secretary
The Australian Nuffield Farming Scholars Association
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AUSTRALIA

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The Nuffield Scholarship provides an opening introduction into Agriculture world-wide. The help, hospitality and friendship that was received was unbelievable, an honour to be part of, and an experience that will be remembered and influence my life.

I would especially like to thank Ian Macintosh, the Chairman of the trust and Murray Garnock, the N.S.W Chairman for allowing me flexibility with the tenure, which was a great help.

To our sponsors, who without their help the scholarship would not survive.

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UNITED KINGDOM

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My fellow scholars

Duncan McMaster	QLD	
Rodney Bradshaw	Alberta	Canada
Les Kletke	Manitoba	Canada
Jack Rigby	Ontario	Canada
Jean-Francois Marmier		France
Roger Barton		New Zealand
Tony Reilly		New Zealand
Trevor Gifford	Chipinge	Zimbabwe

who will long be remembered as friends and the experiences we shared and learnt from each other.

All the Nuffield Scholars, farmers and people who made us welcome and helped in our search for knowledge on my topics who are too many to note.

Introduction

My objective of study was to look at management systems of the milk fed lamb industry, especially supply, continuity and marketing; to look at hemp production and processing, winter crop systems including protein modification of wheat and tillage equipment to handle stubble and possible marketing possibilities for processed grain into the breakfast cereal market and uses for straw.

I left with a broad topic and tried to be flexible and follow the things that interested me the most, as with some issues I felt we had a greater understanding and as such those topics could not be expanded upon. Basic agricultural principals can be spread over many areas and similarities found, even though our production, climate and profits are quite removed.

The initial 6 week tour gave me a wonderful insight into European agriculture and an understanding of the policies and reasoning behind the common agricultural policy and backgrounding to base further travels on.

I decided to focus my entire studies in the UK. It is a country with an important and diverse agricultural sector, highly respected, profitable and possibly includes most facets of most industries. It is easy to get around, communicate, small enough to organise many appointments on a short schedule and has an excellent network of scholars to help in planning and source information from.

The UK Agricultural Scene

Agriculture in the UK is controlled by the European Union, (formerly the EEC) based in Brussels. This was originally set up as a social issue, to stop uneconomic farmers moving to the cities, depopulation of rural areas, maintain food supply and production and to keep the aesthetic look of the countryside.

But like many government run programs it is now a monster, costing far more to implement than the total agricultural production. It roughly costs 3% of GDP to implement, whilst agriculture produces 2.8% of GDP.

Farming/Agriculture is a highly profitable, low risk business. Farmers are profitable without subsidies, but are enjoying them whilst they are there.

Subsidies are now a direct payment per area of production, which is good for us as it has less effect on world prices.

Examples of current subsidies 1995, paid to farmers are:

setaside 10%	\$700/ha
cereals	\$600/ha
oilseeds	\$900/ha
legumes	\$850/ha
linseed	\$1100/ha
hemp/flax	\$1400/ha
cattle	\$300/head
sheep	\$50/head

With support levels as mentioned farmers average around 10% return on capital.

There was pressure for change to the subsidies, coming from

- taxpayers because of costs
- the enlargement of the EU to take in more eastern block countries
- unsubsidised parts of the industry ie turf, poultry, herb, pig etc.

GATT has had little effect, as world prices have risen as demand has risen, so reductions in exports have not happened.

The CAP now is a social issue, not an agricultural issue. It supports incomes or people rather than products. It was originally designed to encourage production of food after the shortages of post 2nd World War. Food production is as much about tradition as food.

The whole system has caused high food prices, excess production and farmers who are better at farming the system than their own farms.

2.2% of the UK population is involved in agriculture. It is a low risk environment, with relatively fertile soils, a cool damp climate with stable prices. The population in general is keen to keep the landscape looking the same. It looks as it does because of agriculture and I felt that the population were prepared to pay to keep it that way.

Farmers are well respected and have a good lobby system to sell themselves. They offer advice and solutions and offer many community services. For example, educational packages with rural themes to teachers, nutritional information for pregnant women and children, and information on fresh food and diet.

The supermarket chains have a huge influence on the marketing of produce. Seasonal supply has been replaced by imports from all over the world to fill production gaps. The supermarkets have a lot of control over deciding what the consumer wants. Consumers generally had preference for British product and had led to many marketing and labelling methods to sell the product.

In the UK animal welfare is a huge issue, there are limitations on travel time for livestock, castration and housing, for example, farrowing crates. These potentially will have a major effect on agriculture.

Hemp

With the growing trend of "green" agricultural practices and increasing environmental awareness, the possibilities for hemp are exciting.

Hemp cultivators now exist that contain close to no drug content. "Delta-9-tetrahydrocannabinol" (THC) is the cannabinoid responsible for the main psychoactive effects of most cannabis drug preparations. Typically the percentage of THC in hemp that produces a hallucinogenic effect is between 3% and 10%.

Fibre or industrial hemp has THC levels of 0.3% or below. At these levels it is incapable of producing hallucinogenic effects.

Hemp is a superior fibre for manufacturing paper because of its tremendous fibre length, low lignin content and high cellulose content. Hemp fibres are also excellent for making fabric. Hemp can also be used to make building materials, animal bedding and biofuel.

The outside portion of a hemp stem is referred to as the bark or bast fibre. Bast fibres produce very high quality paper and they are used to make fabric. This is mainly due to their long length.

The inner portion of a hemp stem is referred to as the cone or hurds. The hurds are used for making packaging and cardboard materials and horse bedding and building materials.

Hemp has excellent smothering canopy, and grows very quickly under the right conditions. As such it requires nil to low amounts of pesticides and herbicides. It suppresses weeds and soil born diseases. It is a good moisture seeker and has a deep tap root.

In France hemp hurds, water and lime are mixed to produce Isochanvre. It is stronger than cement and one-sixth the weight. Environmentally excellent building material, with excellent strength and insulation.

Hurds, the inner woody core are extremely absorbent, soaking up to 5 times their own weight in moisture. They are sold commercially in both France and England for both horse bedding and pelleted for cat litter.

The Hemp industry is still quite small in the UK, with around 2000ha grown in 1995. The industry is very dependant on subsidies, with growers getting \$1400/ha and rumours of capital grants to the processors.

It has many similarities in growing to Maize and can be handled by hay mowers and round balers.

There was considerable work and study being carried out by the Silsoe Research Institute in Bedfordshire on a unique mobile machine designed to strip fibre from plant tissue, as the present machinery does not recover as many long fibres as the new machine.

Crop yields are around 10t / ha of which 15 to 35% is fibre.

There are currently a few shops in the UK specialising in hemp products. The products they sell include seed, oil blends with straw and cotton for speciality paper, clothes, cigarette papers and tea bags.

Theft was a major problem in the first few years of farmers growing hemp. With the public now aware of the low THC varieties, theft is no longer a problem.

Farmer/Producer Marketing

Undoubtedly, the main reasons for successful producer marketing are

- the sheer density of population
- surplus capital derived from profitable agriculture
- high commodity prices
- low inputs, ie labour, freight, fertiliser and fuel
- a consumer willing to pay high prices for food.

The demand for quality fresh food by the consumer has also fuelled demand and farmers are

- expanding to increase returns
- value adding their product
- utilising their existing plant, labour and location better.

The most important factor of farmers selling their own products through the various outlets is the price premium achieved. This will measure the extent to which farm based marketing activities actually succeed in adding value to their produce, and not just cost. It is based on the higher price obtained from these activities over and above the base price which could have been achieved from equivalent sales of the product through regular outlets. The price premiums achieved varied across farms, products and outlets. In general, the highest premiums were obtained from manufacturing, then deliveries, down to farm sales.

I looked at a range of different enterprises which included dog biscuits, meat marketing, stockfeed mills, rat poison, breakfast cereal, organic biscuits, boteck breweries, malting race horse feed, compost, straw processing, turf, free range pigs and chooks, dairy products, lambs, farm shops, flax for linen, pick your own and ducks, to name just a few.

I will touch on just these as basic principals apply to all. Firstly, it is important to establish whether value is being added or just cost. Many enterprises required a huge investment of capital and became larger enterprises than the farm itself. To be successful, a lot of time and energy must be devoted to the speciality.

The consumer is more concerned about quality, freshness, continuity of supply and packaging, with the price being secondary.

Straw

The interest in straw has been encouraged due to the ban on burning. Straw has many uses which include animal feed, chicken and duck litter, mushroom compost and compact systems.

It is estimated that there are 4 to 6 million tonnes of straw available annually in the UK from the national harvest of around 20 million tonnes.

Straw has been, and still is being used for various types of power, from power stations to compressed blocks for home fuel. It takes more energy to compress blocks than they produce. Also straw fuel produces only half the heat of coal, therefore it has to be half the price to be economic.

Storage of large quantities is a problem, many old airfields were utilised.

Barley straw is popular as an animal feed, with some producers treating it with caustic soda and pelleting it to add value.

Compact systems utilise wheat straw to produce boards for either structural materials, insulation, furniture and cabinets. Straw traditionally being a low cost waste product and with a "greener" image than timber products has potential.

Many niche markets were being filled with straw being used for bedding. The straw was chopped, bagged, and had the dust extracted to add value.

Compost manufacture for the mushroom industry has become a very high-tech expensive operation. It now uses high value pasteurising machines to control bacteria before adding spores for mushroom growth. It utilises waste products, straw, water, chicken manure and stable manure and value adds it to around \$330 per tonne in around 3 weeks, of that 70% is water.

Other uses of straw for animal feed included dust extracted oat straw, mixed with lucerne and molasses to produce high protein and fibre horse feed.

Linseed straw, processed to remove fibres is being marketed as erosion control matting. Some incorporate either seed or fertiliser for sensitive areas, such as roadsides, parks and high wear areas such as football fields. Pregermination is used in areas where difficulties arise from short growing seasons and the fragile nature of the natural vegetation at altitude.

Flax, being under a similar heading, is presently grown more for subsidies than for linen, as the processing facilities are located in Belgium. It is quite a labour intensive crop requiring specialised machines for pulling, retting (natural wetting and drying to rot the outer sheath) and scutching (removal of seed and roots). It also requires a modified round baler so that it can be unravelled evenly. Some small niches are supplied in the thatching straw market for roofing.

Farm Lands

Some farms visited had so totally changed enterprises from agriculture so as to produce profit, I had to question what they had become.

Some included enlargement of the farm shop to include bakery, butcher, vegetable, delicatessen and nursery, and plans for a

restaurant. The rest of the farm had been devoted to landfill, car-boot sales, pay fishing and grass skiing.

Other farms used unused buildings for paid storage of fertiliser, vintage cars or caravan storage; rented cottages for holidays or farm stays, or sold buildings off farms to be redeveloped by commuters.

Grain

Many different methods of grain value adding were looked at, all with varying levels of capital investment.

Some small industries, or niche markets such as polished oats for the racehorse industry, provided a low capital investment to add 60% to the grains value. On farm feed mills which after considerable effort and work mixed grain and straights for around 20% increase in gross grain value. Others mixed their grain for pig feed to add value by selling it as pork. Organic grain was achieving around 100% premium over traditional (at 50% of the yield), but by processing and marketing it as biscuits the margin and cost was dramatically increased.

Other large farm based enterprises included dog food production and breakfast cereal production, both had multi millions of capital outlay, but had become the centre of the production of the farm. Both had huge staff numbers, which meant major increases in costs and risk, but through good marketing had increased the value of their farm production.

Another unusual method to value add grain was to get your barley contract malted, and use the malt to produce beer, supplying hotels, on a weekly basis. The operation had low capital input, and was selling approximately 20 barrels per week, to supplement the farms income.

Meat Marketing

Generally, red meat is expensive to the consumer, costing about 8 times the cost of white meat. Beef in particular is expensive in relation to quality, 70% of the beef is dairy based, so there is a major opening for quality meat.

This has lead to groups like the Scotch Beef and Angus Beef marketing higher quality meat, and labelling it so the consumer knows what it was or is.

Rare breeds, which are sold as the old fashioned taste, are also marketed well, particularly through farm shops.

The AMLC is trying to help by training butchers and menu planners for supermarkets to help consumers decide on what to do with different cuts.

Consumers are more interested in consistent quality and reliability of taste and flavour, the price is secondary. To achieve this, the scotch beef and lamb have formed a guild of suppliers. The guild gives quality assurance, supply of consistent quality product, and high standards of hygiene and food safety. Other changes to the carcase include post slaughter handling.

- encouraging Aitch bone hanging (rather than the normal system hanging carcasses by the hind leg)
- reducing rate of carcase cooling post slaughter
- increased hanging periods (14 days)
- heifers and steers slaughtered before 30 months
- carcasses be fat class 3 or fatter
- conformation class 0+ or better (Classes are E.U.R.O.P.E.) is similar to our class 4

Information is supplied to producers on what the group prefers. This includes calf rearing, finishing, selection, slaughter weights, bull beef, breeds, bull selection, cow breed etc. The farmers / producers become "Farm Assured Scotch Livestock", which gives the traceability, and the consumer independent assurance that the meat has been produced naturally, under high welfare systems and is a healthy product. It also includes careful handling and management prior to slaughter, which benefits both the producer and wholesaler in avoiding carcase damage, wasteful trimming, stress and dark cutting beef, dirty hides and hygiene problems.

Waste products

Australia has huge potential to take advantage of waste products in Agriculture. It is ecologically, environmentally and economically sensible.

The use of human and animal effluent as a farm fertiliser in our naturally infertile soils has huge potential. In the UK, the ban on ocean outfalls in 2003, has caused increased interest and necessity to make the system work.

In the UK, the effluent was spread free to farmers, and was reasonably high in Nitrogen, Phosphorus and Organic Matter.

Industry by-products such as lime and gypsum were also readily available at very low cost, as there was nowhere for industry to dump them.

We need in Australia a "doers" pay, where our population, of which 90% live within 10 km of the coast may have to subsidise the freight to get the by-products and effluent further to the areas where it could be used.

Study Objective

To briefly comment on my study topics of milk fed lamb, especially supply continuity and marketing, and winter crop systems including protein modification and tillage equipment to handle straw:

1. Milk fed lamb:

I found no enterprise specially trying to produce a regular supply of product on a weekly basis and direct selling. Some were arriving at certain periods, ie the Easter market, and others were

holding old lambs over to fill a gap when less were available. Many farmers were marketing their produce direct, either through a farm shop or specific mail order direct supply. Many of these suppliers brought in produce cheaper and sold on, rather than entirely controlling quality and supply with their own production, whilst others sourced rare breeds to market and fill production holes.

2. Tillage Methods:

Nearly all farm land is ploughed, and as such only a few trials and the odd "fiddle" by a farmer on minimum tillage. Straw is ploughed in near straight behind the headers, as the time between harvest and seeding is only 4 to 6 weeks.

The general belief from most farmers was that minimum tillage / direct drilling had been tried years ago and yields could not be as high as under that system. Their soils are fairly strong, and their climate being so kind help, but problems such as snails, resistant weeds and timeliness could all be addressed better with deep inversion cultivation, and I must agree appeared to be working.

Some work has been carried out on low cost systems which used less fertiliser, herbicides and cultivation, but also produced far lower yields. It is a more long term sustainable system, but was only attracting limited farmer interest

3. Protein Modification:

Wheat protein can only be modified when maximum yield potential is reached. Most UK farmers were nearly reaching their potential of around 8 - 10 T / ha.

Yields of feed wheat varieties were around 20% higher than of milling wheat, with only around 10% price difference. It was more profitable to grow feed wheats, with such high internal demand for feed grains.

Nitrogen price was about half our price, when combined with their higher grain price and subsidies, and high profit levels, huge amounts of nitrogen were added to crops giving protein levels above ours.

Some farmers growing milling varieties would spray foliar urea at the milky ripe stage at about 40 Kg / ha of Nitrogen to lift protein by $\frac{1}{2}$ to $\frac{3}{4}$ of a %, but only applied it when the temperature is cool or falling, for if it is hot or breezy it would increase scorching of the crop.

As such, I felt there was only limited amounts of knowledge to be learnt on the above topics, that is why I spent more time on marketing, manufacture and alternatives.

Conclusion

Value adding farm produce marketing and diversification is essential in our agricultural climate, as nothing in our agricultural system is stable or reliable.

If we fail to plan, we plan to fail, so as farmers we must try to add value to our product, as this will add stability both to our product pricing and therefore to our profit. We must be careful that we are adding value and not just cost as this would increase risk.

A well positioned niche, supply of a superior product that someone really wants will always create a premium and therefore a little more profit.

There was a much higher level of vertical integration in the UK, because of their high profits, surplus capital, but mainly population density.

I came home critical of many of our production systems here in Australia, especially industries based on grain feeding. I feel their production is more to do with cheap grain, than valuable output, and as such are unsustainable as higher grain prices are here for at least the foreseeable future.

Also we must decide what direction agriculture must go. Our inputs are inflated due to tariffs, and regulated labour and manufacturing sectors. Governments allow dumping of agricultural products onto our market and our competitors take little to no notice of GATT, Australia or deregulation. The only way to make them take notice would be to place an import tax or tariff on their produce, to protect Australian agriculture.

Agriculture has a big future, especially with environmentally friendly products which I think our consumers may place preference for in the future. The utilisation of effluent to a greater extent, especially in the cropping / arable sections, will aid not only our agriculture, but also the populated coastal belt that has nowhere to dump it.

We as farmers, must sell ourselves better to the urban / coastal fringe. We must convince them of the importance of agriculture, especially food supply, and how we do look after the land.

The Nuffield Scholars Association gave me a wonderful opportunity to study an agricultural system and to be constructively critical of our own system. The scholars, contacts and especially the inspiration that the scholarship gave, will be a lifetime experience.

The opinions expressed in this document are mine alone, and not necessarily those of the Nuffield Scholars Association.

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