

Consumer Roundtable

“THE VOICE OF THE CUSTOMER”

AGIC

28 July 2009



One year on.....

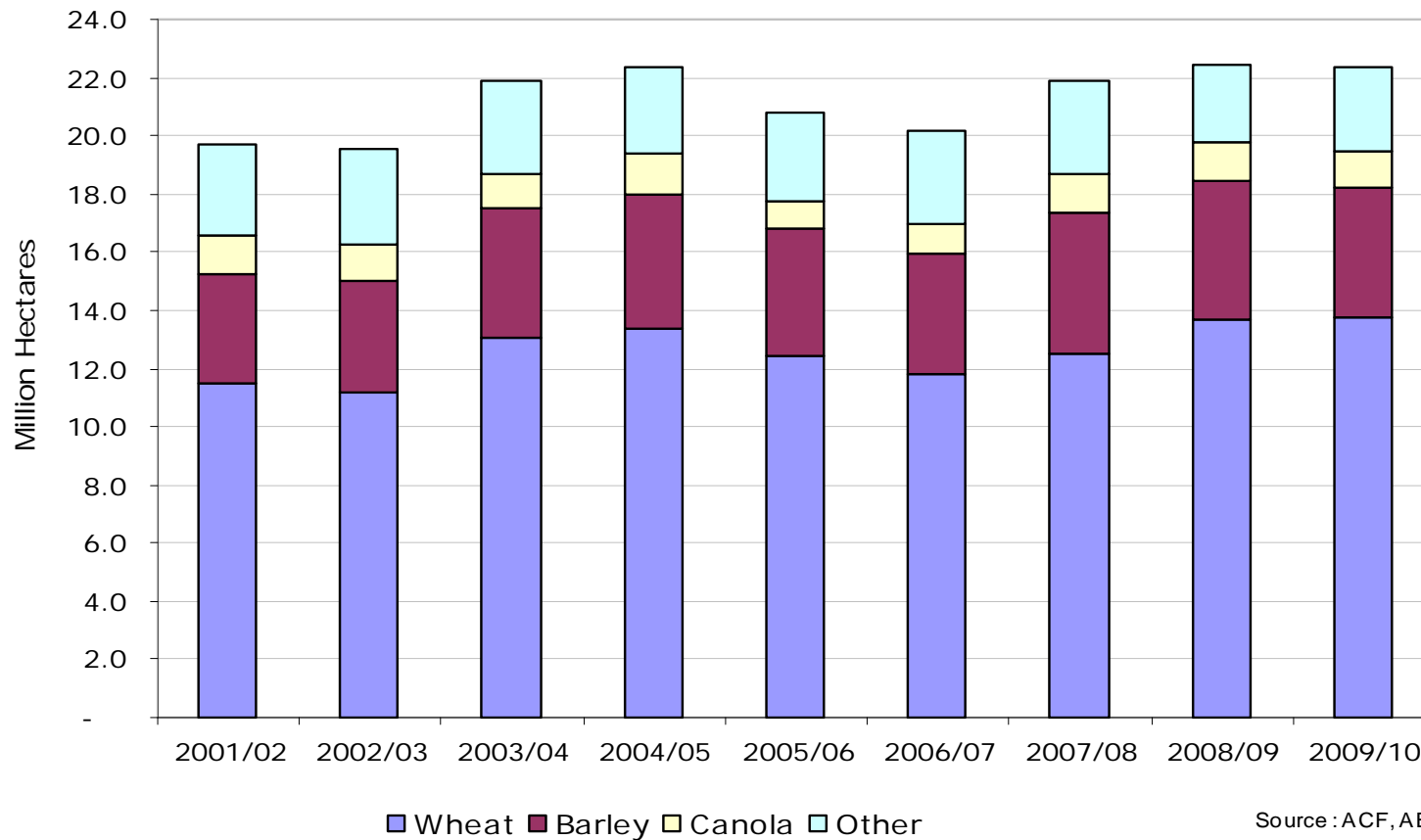
- ❑ One year on, what's happened (few facts)

- ❑ One year on, what does the customer think?
 - Joe Chan, Harvest Gain (Indonesia)
 - Tim Dewan, Global Grain (S-E Asia)

- ❑ Five years ahead – what needs to change?

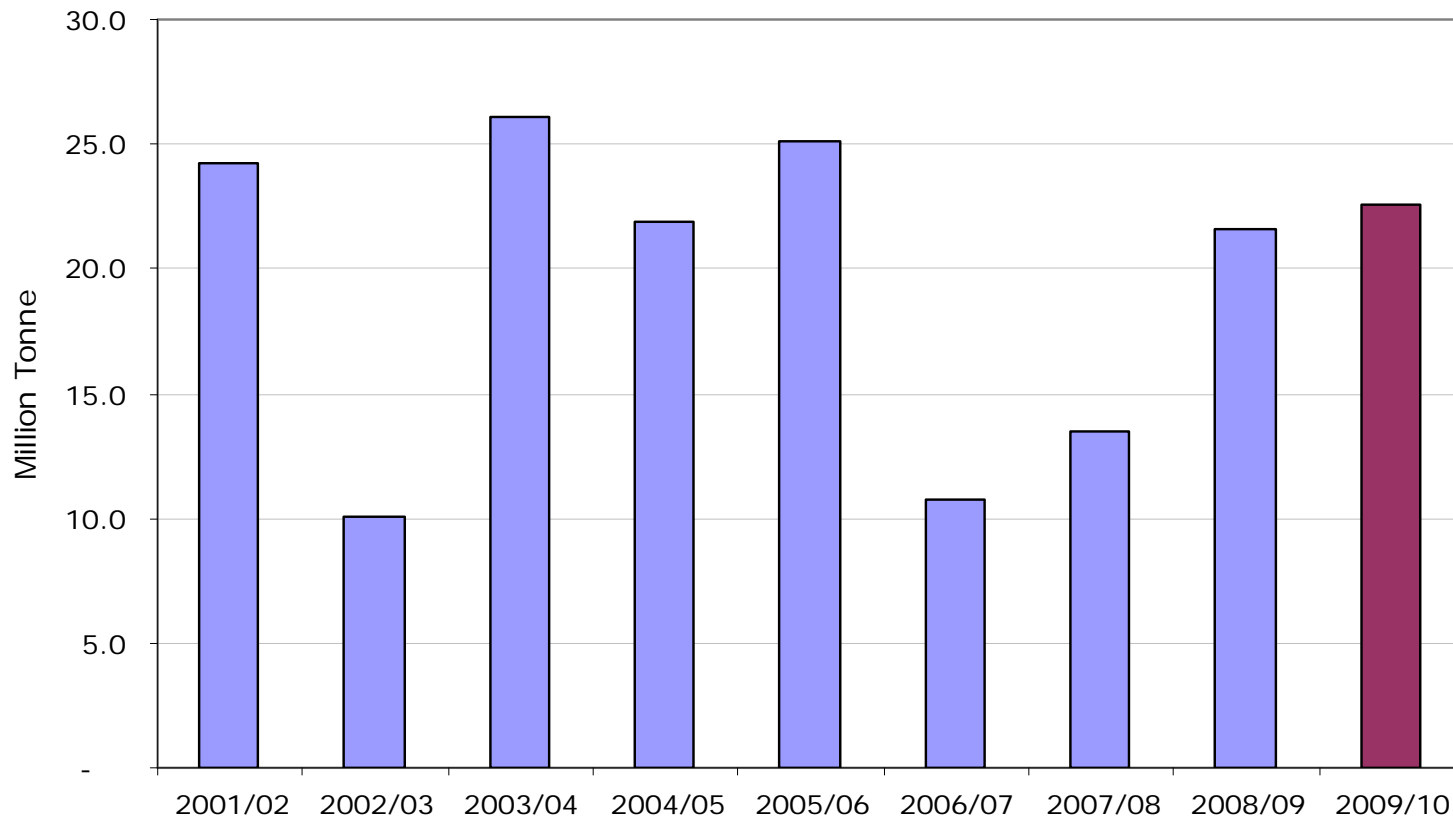
Australian Winter Crop – Planted Area

- Wheat, Canola – steady
- Barley – down slightly



Australian Wheat Production

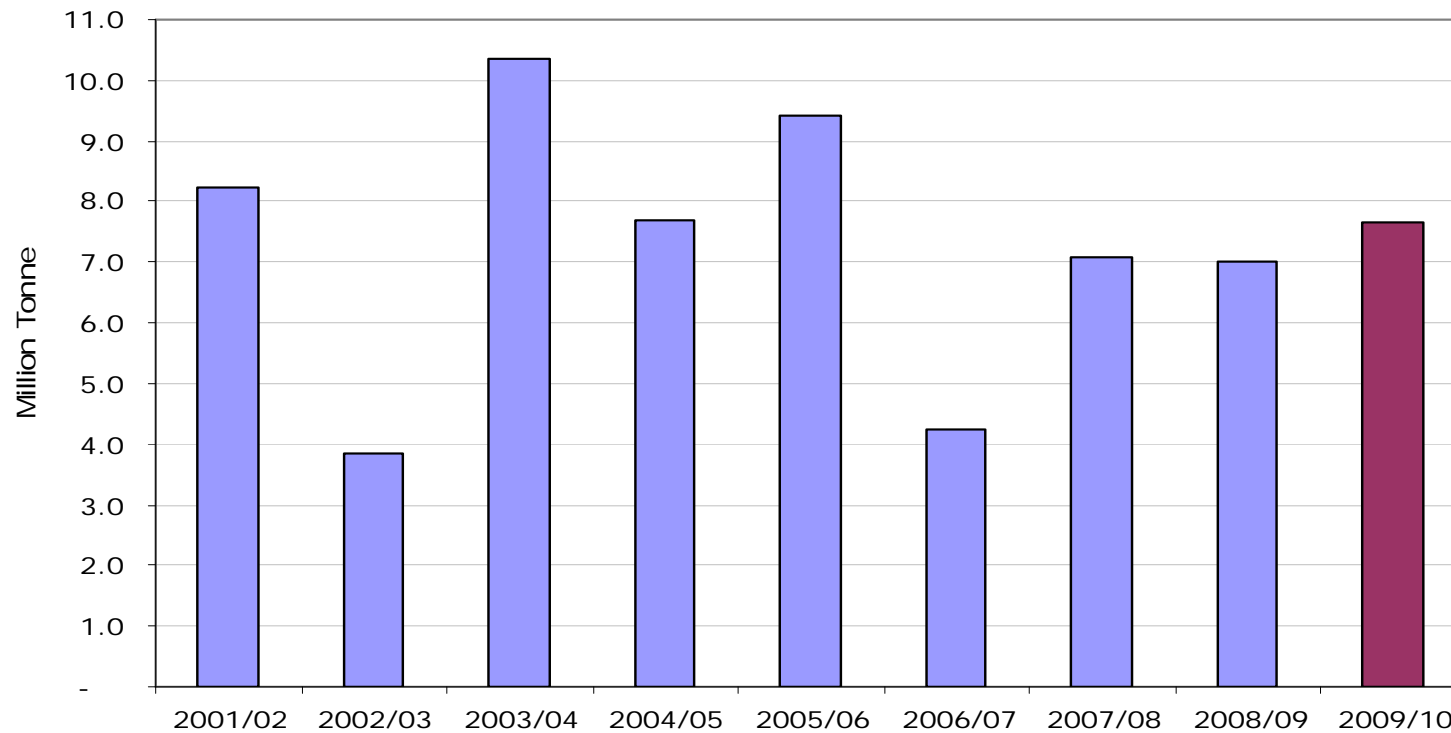
Today ~ 23 mmt. Depends on spring



Source : ACF, ABS

Australian Barley Production

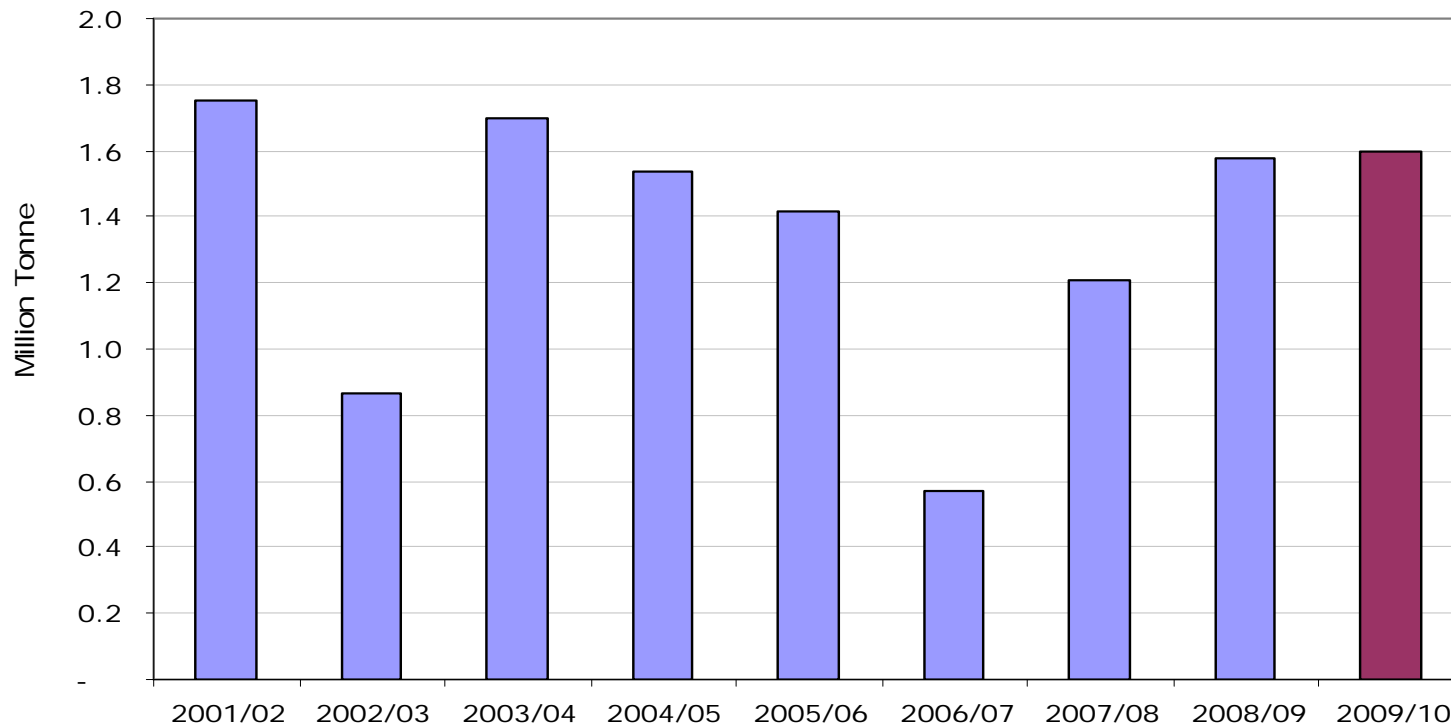
Today ~ 7.6mmt (Depends on spring)



Source : ACF, ABS

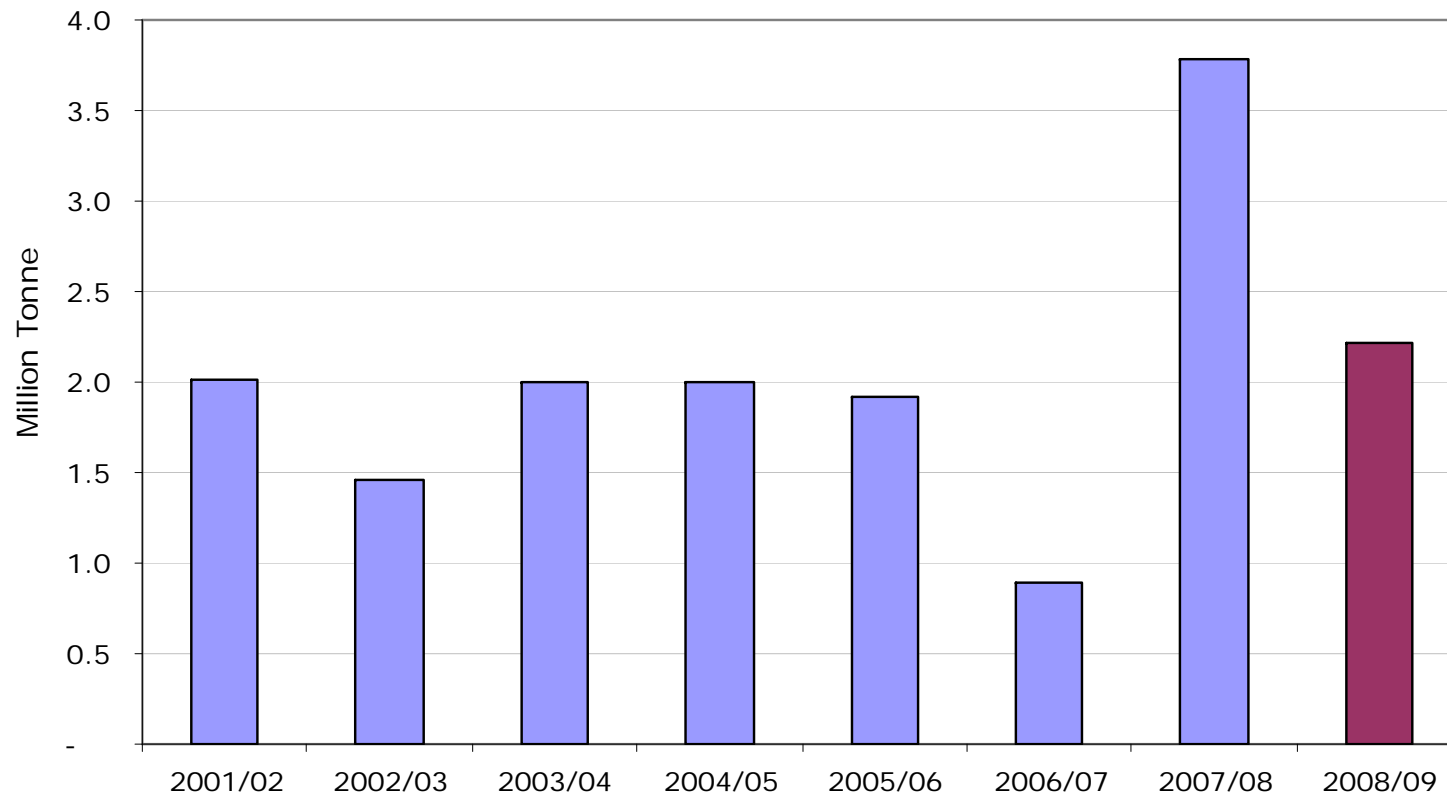
Australian Canola Production

Today ~ 1.6mmt (Spring?)



Source : ACF, ABS

Australian Sorghum Production

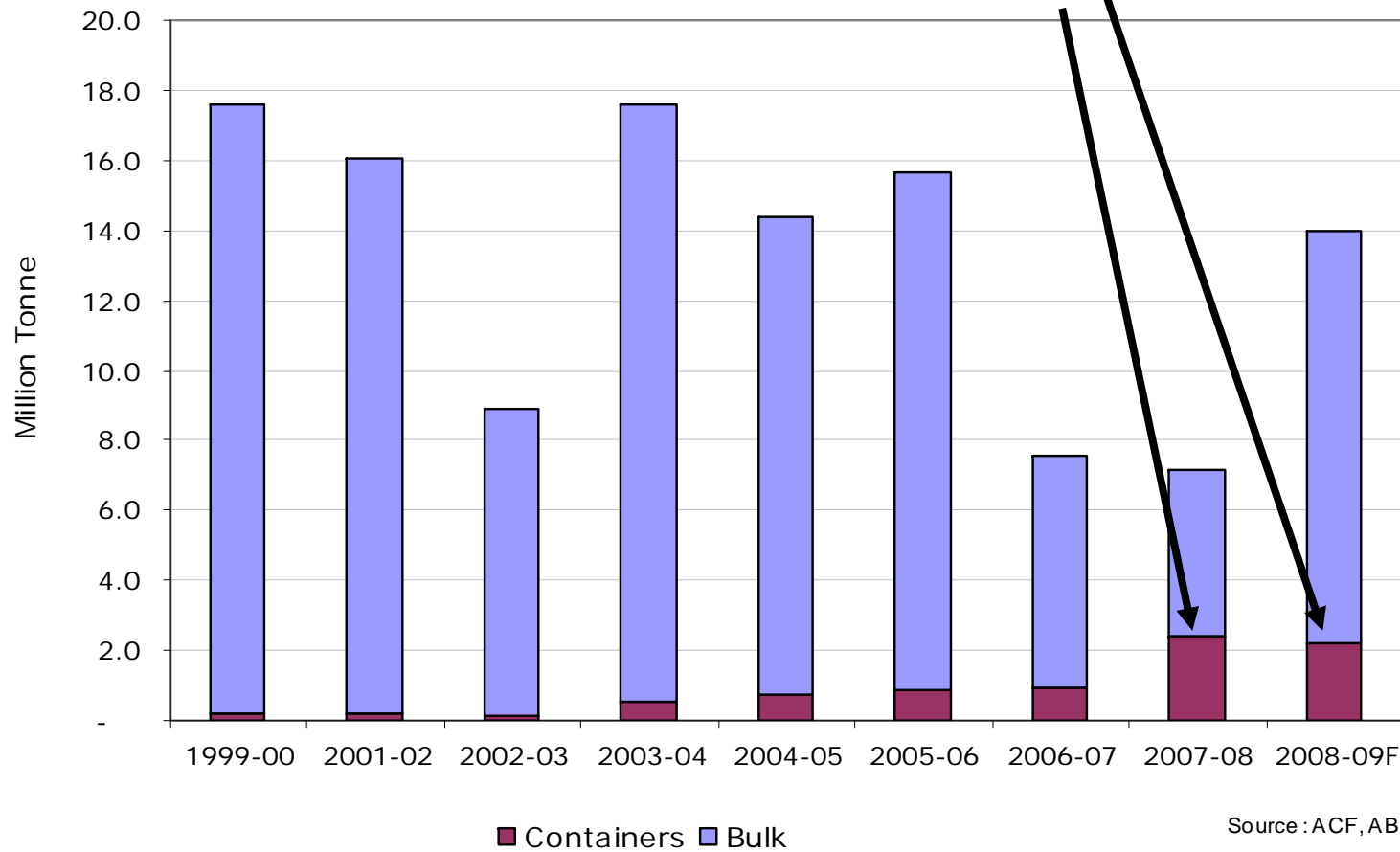


Source : ACF, ABS

What happened? - Wheat Exports

Containers & Bulk

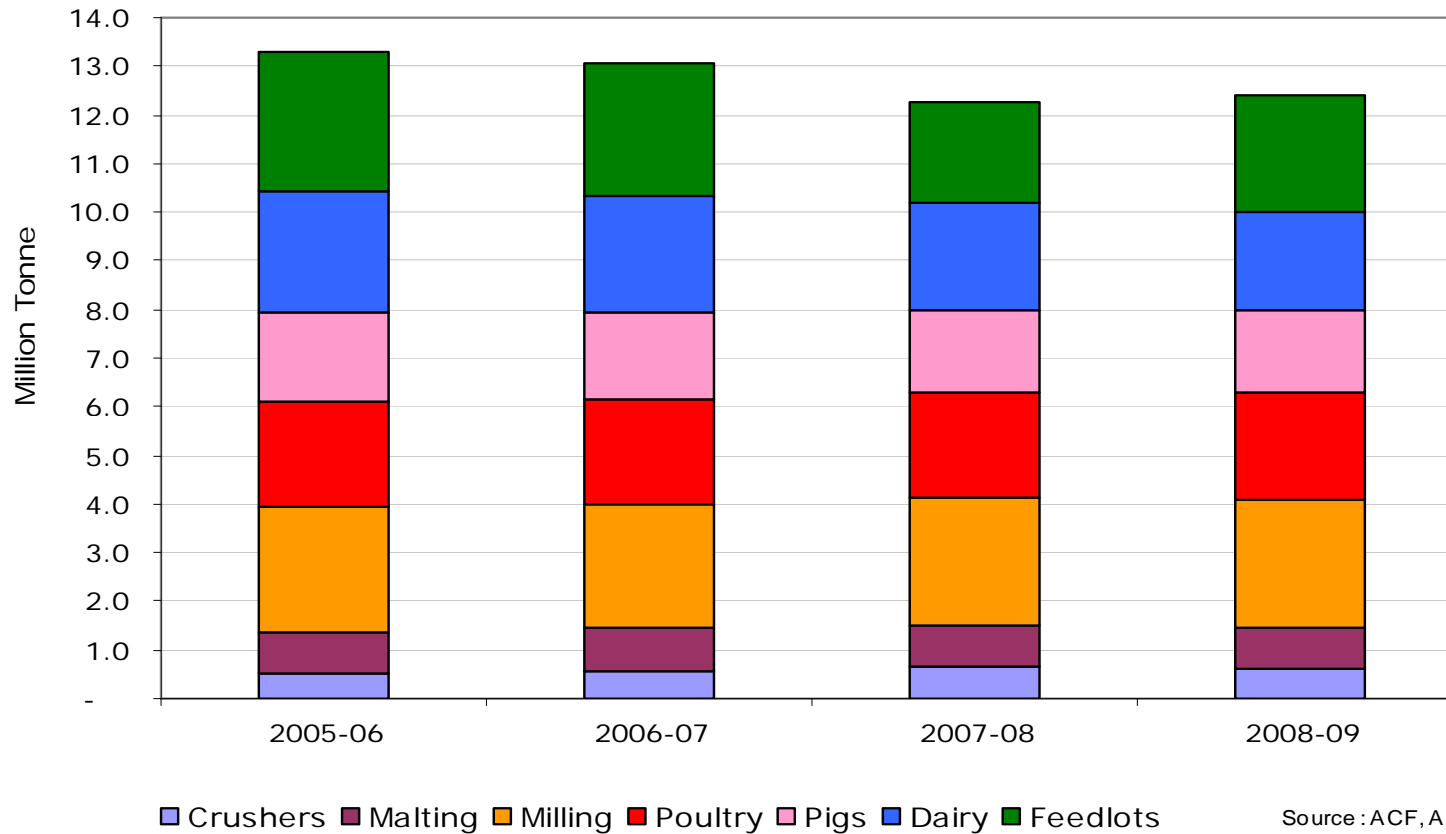
Containers – here to stay at 1.5-2 mmt?



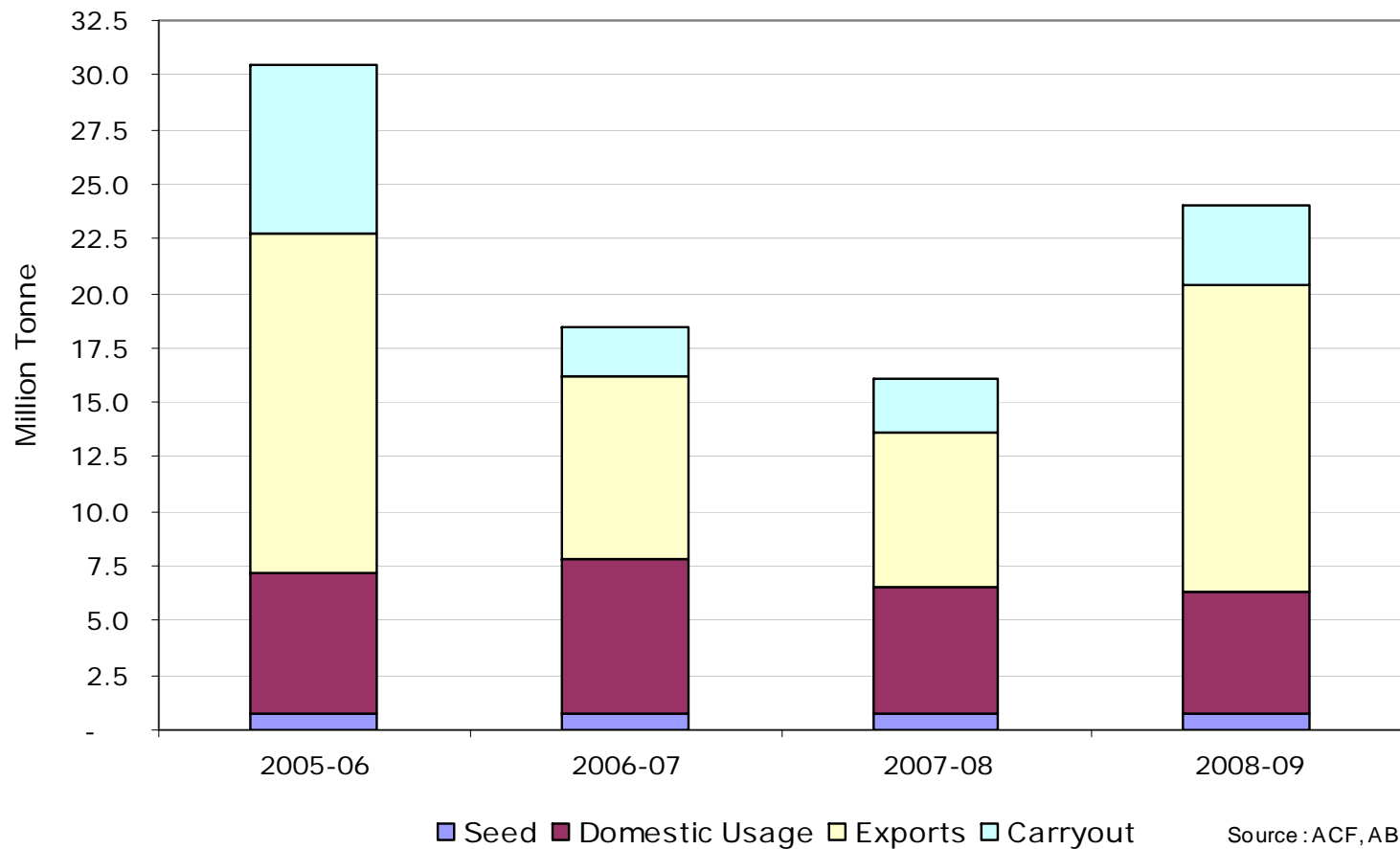
Australian Domestic Usage

All Grains

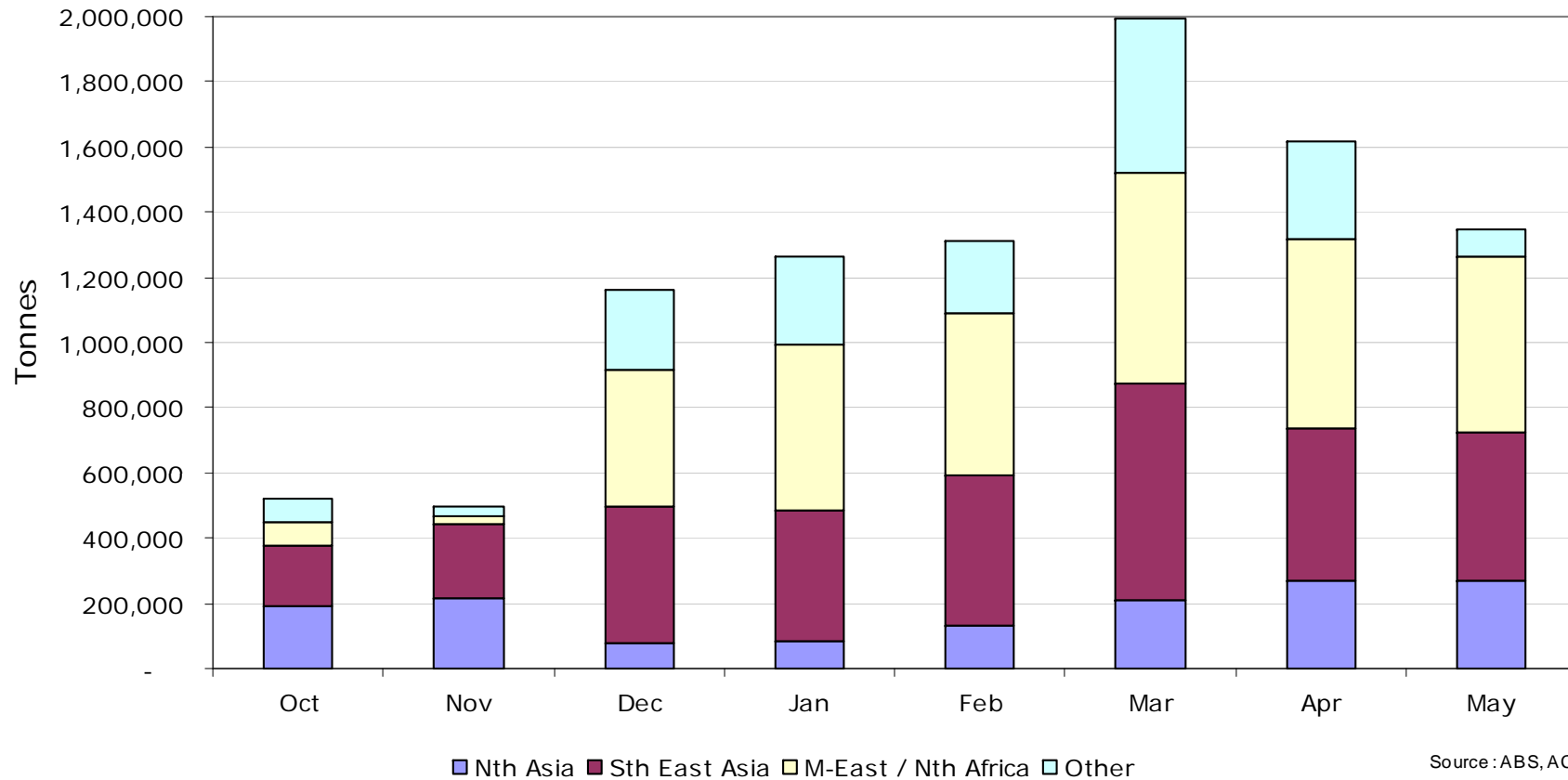
- Milling, Malting, Poultry, Pigs – steady
- Dairy – down
- Feedlots – up
- Watch sorghum carryout!!!



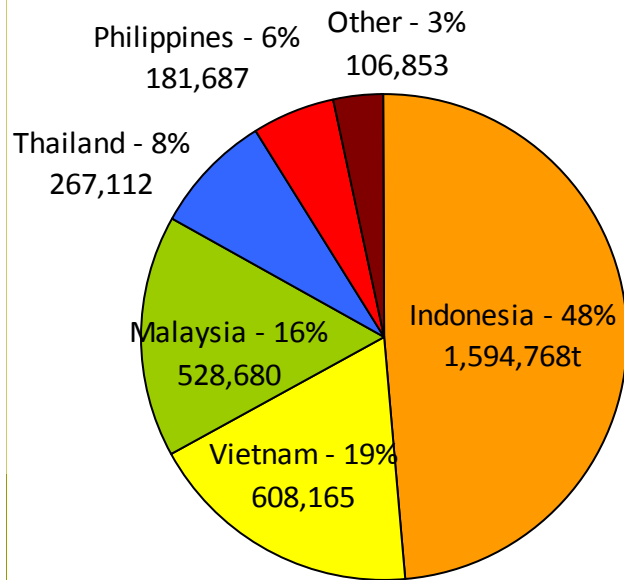
Australian Wheat Carry-Out



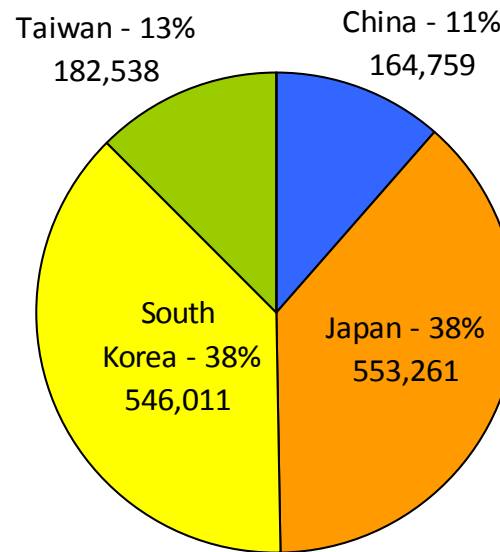
08/09 Wheat Exports – where to?



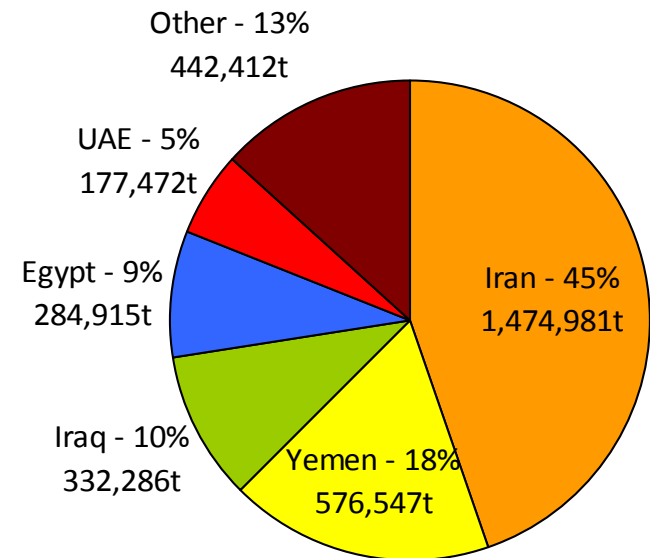
2008/09 Wheat Exports – where to?



S-E Asia



Nth Asia



M-East / Nth Africa

Top 15 Importers – Aussie Wheat

Destination	Export Tonnes	Proportion	Average (5yr)
Indonesia *****	1,594,768	16%	17%
Iran	1,474,981	15%	3%
Vietnam ***	608,165	6%	4%
Yemen	576,547	6%	2%
Japan	553,261	6%	8%
South Korea	546,011	6%	7%
Malaysia ***	528,680	5%	5%
Sudan	382,243	4%	5%
Iraq	332,286	3%	7%
Bangladesh	305,761	3%	1%
Egypt	284,915	3%	8%
Thailand ***	267,112	3%	2%
Italy	255,323	3%	2%
Taiwan	182,538	2%	1%
Philippines ***	181,687	2%	1%

Let's hear from the customer...

“ I can tell you that we are very upset at the mess we are facing now and the incompetence of the people involved in this logistical nightmare. We have shifted at least 500k mt of demand from Australia as we can't trust the system.” (email, March 2009)

- We must learn from this!