



Australian FUTURE GRAIN LEADERS Program

An initiative of GGA



Establishing Supply Chain Efficiencies within a Deregulated Market

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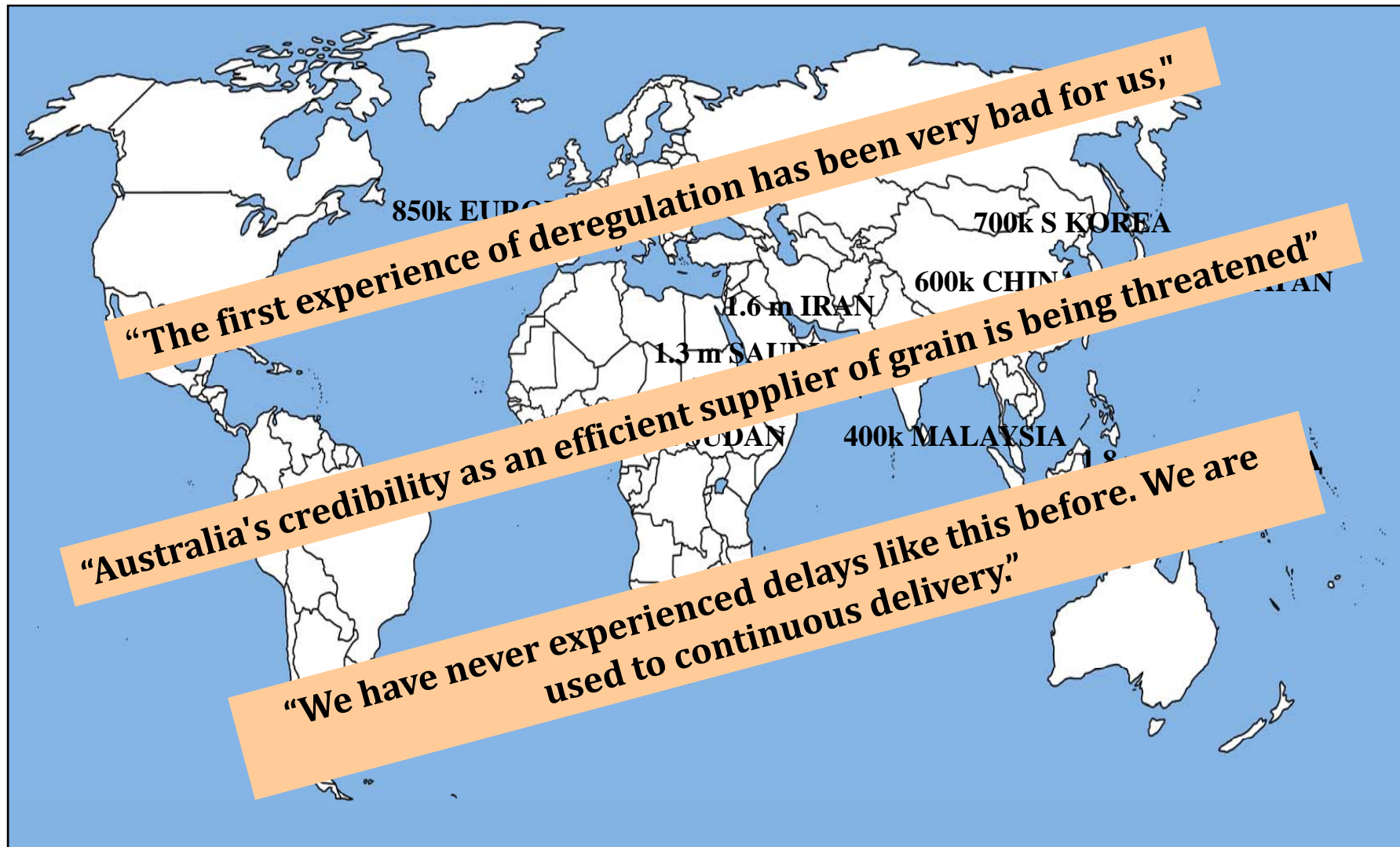


Life in Wheat Deregulation

- The first three quarters of the 08/09 season has seen 16 exporters execute bulk wheat from Australia (forecast 13 million)
- 08/09 YTD wheat execution totals 10.2 million tonnes (79%)
- In comparison in the 04/05 season only one exporter executed bulk wheat from Australia (forecast 13.2 million)
- Over sold terminal capacity meant acquirers expectations were not met, resulting in significant market destination backlash



Destination Perspective





Positives in Year 1

- Grower adoption of marketing methods
- Abiding for creativity / innovation (behavioral change) to drive efficiencies
- Differing methodology resulting in net benefit greater than cost

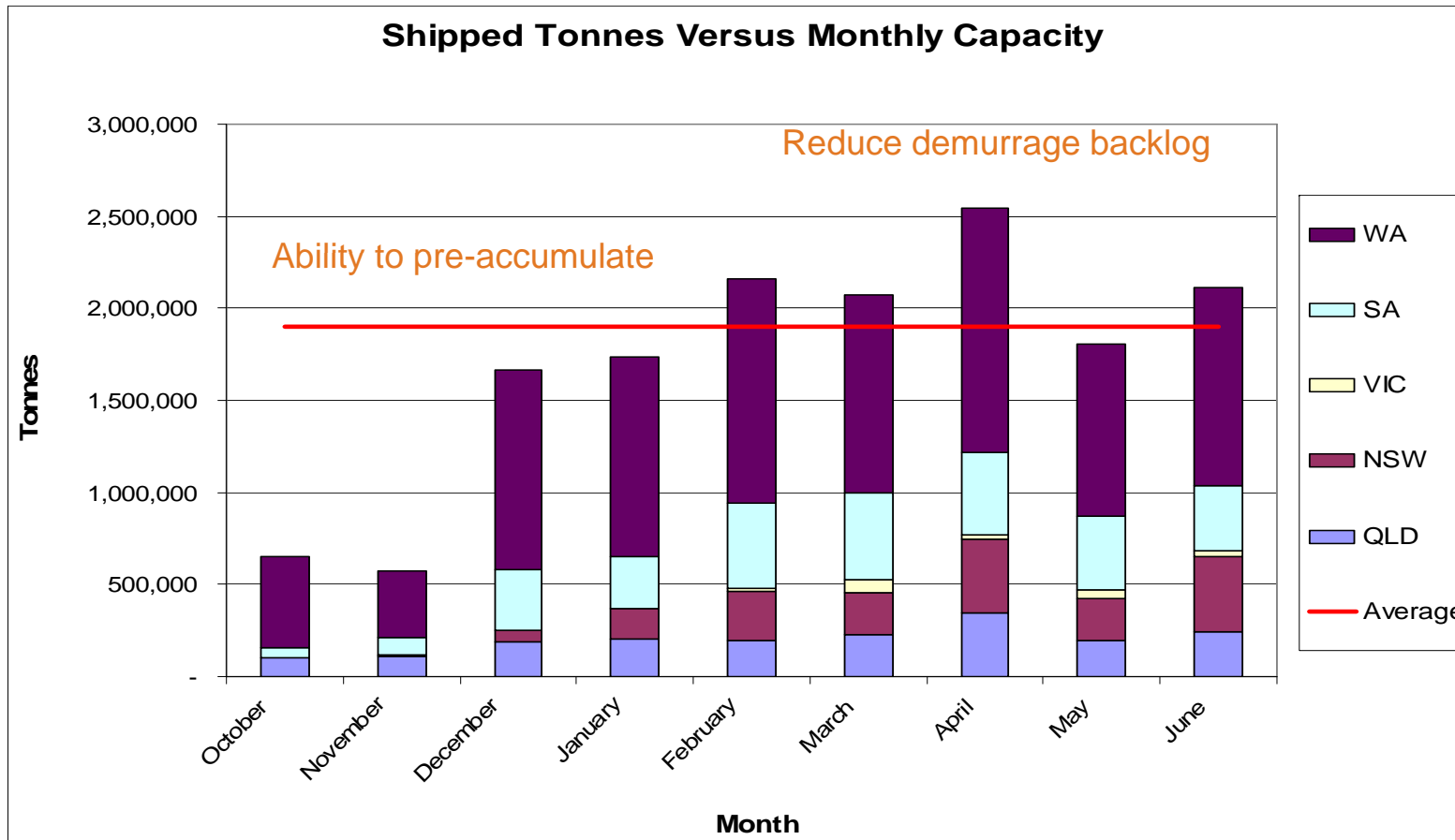


Overcoming Choke Points

- Industry individualisation needs to be a thing of the past
- Infrastructure owners ensuring key management strategies in place to deal with multiple marketers
- Matching supply versus demand trends via engaging the market on forward projections



Matching Supply V Demand





Summary

- Innovation and change needs to drive pipeline efficiencies to the Port
- Engaging the trade to allow for better forward planning to match the demand curve
- Ensuring that as an industry we are meeting the buyers requirements in a astute and orderly fashion
- Future will revolve around how competitive supply chains compete and not individual companies





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