

Agribusiness

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Wine



AGRIFOOD TALENT REPORT







Agribusiness in Australia: **top trends**

Gen Y:

do they want
what we've got?

Three reinvention stories

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With dramatic changes to business models across the agribusiness landscape, as well as the growing use of data and digital, new skills and new roles will be in demand in 2016. We unveil the key market trends shaping the agriculture business and talent landscape.



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The business of agriculture is undergoing enormous change. We talk to three Australian producers that have undergone a massive reinvention, to find out what they did, the challenges they had and the new skills they had to embrace.

Editor Amanda Falconer Sub Editor Jocelyn Hungerford Art Director Elinor McDonald

gribusinesses are in the midst of disruption.
One effect is that new business models are emerging. There's a shift to niche production of differentiated products or large-scale, volume production, with businesses in the 'middle ground' increasingly squeezed.

In this 2016 Agrifood Talent Report, we reveal the key changes agribusinesses are facing, and chart the reinvention of three Australian agribusinesses.

As these profiles show so clearly, these changes bring a need for new skills, especially in management, leadership and marketing.
Unfortunately, many mid-sized farmers and food producers lack skills in these critical areas.

Where will the capacity to adapt and reinvent businesses come from? As we outline in our article on *Gen Y: We want them, but do they want us?*, attracting these new skills to the business in the form of new graduates may be ideal, but it's also harder than it looks.

That's because of the well-known decline in those embarking on agri-related further education, but also the work preferences of those who do graduate, as revealed by our 2015 survey of graduate intentions.

However, one thing that agribusinesses can do, is appeal to emerging graduates by better understanding their needs and tailoring their recruitment and career development programs to suit.

In addition, businesses may train and develop existing staff to help create business reinvention. To do this effectively however, demands skills analysis and a human resources plan. In that, we'd be delighted to help.

Ray

Dr Ray Johnson, B.Sc.Ag., Ph.D. (Rural Science) Managing Director, Agricultural Appointments



"...these changes bring a need for new skills, **especially in management**, **leadership and marketing**."

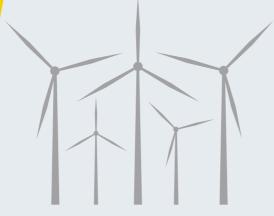


Market snapshot

With dramatic changes to business models across the agribusiness landscape, as well as the growing use of data and digital, new skills and new roles will be in demand in 2016.

Words: Chris Gillies





The big squeeze

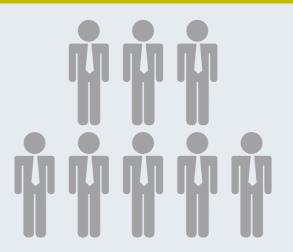
It's going to get tougher for Australian food processors as they compete with other countries that can process the same product more cheaply. This trend will squeeze mediumsized business and force them to either grow to capture economies of scale or focus on niche markets with high-end or premium products.



Technology, skills and innovation are key

To survive the big squeeze,
Food and Agribusiness
Solutions predicts Australian
food processors will invest in
technology, build highly skilled
workforces and innovative
cultures. This will help them
develop the products that meet
consumer expectations and
competitive advantage.

Collaborating with research organisations, Vocational Education and Training and other educational institutions will be key in jumping on this trend.



More suits, less boots

Mechanisation will do the heavy lifting once needed to operate processing and farms. This will increase productivity as business moves to a small, highly skilled workforce but it will also require a team of people who have the skills to service the technology.

Organisations like Food and Agribusiness Solutions and National Farmers Federation (NFF) predict this shift will create a new niche for agri-professionals, using the NBN to consult and help customers.



In recent years big business and high-profile investors have bought up agricultural assets, something that hasn't gone unnoticed by young investors looking for new opportunities. This new wave of ag-entrepreneurs, according to the NFF, consider the farm as an investment first and lifestyle second. Hampering their efforts to buy a farm will be the high cost of land, and without the benefit of a family farm or capital, these young investors are turning to leasing to gain a foothold.

Expect to see people weighing up the cost of renting the land against expected returns, using their skill and business savvy.

Love thy customer

People know what they want and demand they get it. Food is no exception. The everyday consumer has a more refined palate and, increasingly, expects food to taste and look a certain way. To meet these demands, farmers and processors will need to take advantage of detailed consumer insights. It won't be unusual for farmers to visit food processing plants and gain access to detailed consumer insights so that they can understand the importance of quality and other characteristics in their produce.

Understanding the consumer data and building relationships with processors will require analytical and relationship-building skills.



Paddock to plate, literally

Riverina barley growers Stuart Whytcross and Brad Woolner saw potential in the market to turn their malt barley into artisan malts for the booming Australian craft beer scene. They are not alone; more farmers are looking at ways they can process their produce to sell into a premium market. There's good reason to do this. It helps diversify and gives farmers a way to get a bigger slice of the pie by creating an integrated supply chain.

By collaborating with R&D, supply chain business and other farmers, they can build a new business that has the potential for a higher return.

The robots are coming; you'll love it when they arrive

The first wave of digital agriculture arrived with the onset of GPS and precision agriculture. Technology such as drones, moisture probes and mobile robotics that can weigh livestock in the paddock, will be interconnected via local wi-fi stations. This technology, assisted by the NBN, will help the farmer assess productivity, predict yields and receive alerts from an iPad should something need their attention.

Understanding how to use this technology will require skill in IT, but it'll also free up your time to focus on marketing, business management and buying or leasing the farm next door.

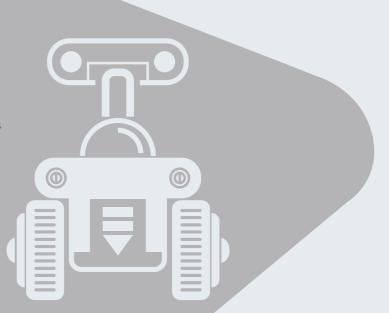
Clean and green isn't the only show in town

Australia has competition when it comes to its clean and green image, claims

Food and Agribusiness Solutions' General Manager, Michael Claessens. He warns other countries can also make this claim and that we can't rely on this claim alone. Instead, Australia's advantage will be in the development of deep consumer insight, strong relationships with buyers, and innovative products. Typically, Australia has been weak on building relationships but with three FTAs signed with major Asian markets, it's never been a more important time to overcome this weakness.

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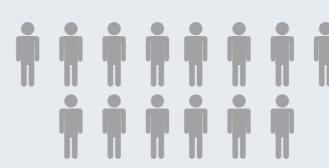
Farmers and processors will need to engage brokers who understand local customs in order to build strong relationships with buyers.



Your neighbour isn't over the back fence

If you're on the land and are wondering whether you could structure the business differently, you're not alone. According to Simon Talbot, the CEO of the NFF, farming families are looking at successful co-ops such as Bega Cheese, Murray Goulburn and CBH as alternative business models.

Unlike the traditional structure of a bricks and mortar co-op, farms can turn to technology to unlock the benefits of shared resources and increased buying and selling power through virtual co-operatives. So expand your horizons; your new business partner doesn't have to be over the back fence.



Get ready to sell, or courting the investor

The onset of new technology, or the need to upscale in order to remain competitive, will require capital. This may mean a farmer or processor has to look at selling, or finding an investor to get this extra capital. With agriculture expected to be the next Australian boom, there could be a lot more interest both domestically and internationally. But how do you know how attractive your business is, and who is going to be the right fit?

Understanding your business's profitability will require good systems and reporting.
You'll also need sound business savvy and an understanding of risk to ensure your business is operating smoothly and profitably before you can talk to investors.



Graduates on the rise

University graduates present a conundrum. On one hand, reports have shown a decline in agricultural studies, but on the other the NFF reports an increased interest in agriculture. The difference is a shift from traditional agricultural learning to one where the sandstone universities are working with industry to develop curricula that meet the future needs and challenges of global markets and technology.

Key to this is sound business management skills that can create not just the farmer who can drive the header but one who is comfortable talking about markets and who understands consumer demand.



The number of students graduating from agricultural science courses continues to decline, and those who do, aren't necessarily going on to work on farms. How do we make the industry more appealing, and why do we need to?





21%
OF STUDENTS
AIM TO
GO BACK
INTO FARM
MANAGEMENT

gricultural Appointments Managing Director
Dr Ray Johnson last year surveyed agricultural
science graduates and soon-to-be graduates
about their career intentions. He believes that an
industry-led communication program to encourage
people to aspire to life on the land is the only way to
really turn around this decline.

"We are an urbanised population, so there is no real agricultural communication into schools, and accordingly school leavers are not interested in agriculture as a career; it's as simple as that," Dr Johnson says. "What roles do you hear of all the time? You hear about urban-based roles – so people don't know about the great careers that exist in agriculture. There's not much that can be done unless the agricultural community starts a real communication program back into schools. The organisation that should do that is probably the National Farmers' Federation, but they are a shadow of their former selves; they don't have the money or the vision so it's not going to happen."

However, it's not all bad news for the industry

- opportunities abound for agricultural science
graduates. Agronomists in particular are rare, and
employers will go the extra mile to attract and retain
the best graduates. "The demise of the extension
services for the Department of Primary Industries has
been a real problem, so agronomists are hard to find,"
Dr Johnson says. "They can demand better pay, better
conditions, better training. Our advice for graduates is
to look for companies that will train them properly."

Agronomy is just one specialisation on offer when studying agricultural science, with animal science, agribusiness or environmental science also popular. Dr Johnson's 2015 survey of graduates reveals a broad range of career aspirations – many of which involved working off-farm. "Farm-level agriculture is often not on the agenda," he says. "We think of ag science as making a contribution to

From the field: Ray Johnson reports.

93%

WOULD LIKE
TO PURSUE A CAREER
IN AGRICULTURE

PREFER TO WORK
OUTDOORS

ARE MORE COMFORTABLE

PREFER TO
PREFER TO

"In 2014 Agricultural Appointments surveyed 81 students who were enrolled in agricultural science at one of the major universities in Australia. We asked them a series of questions such as whether they intend to pursue a career in agriculture (93% said that they were), and what field of work they were intending to pursue.

WORK WITH A SMALL

GROUP OF PEOPLE

IN A FLEXIBLE, ADAPTIVE

ENVIRONMENT

The answer to this latter question surprised us because there was such a diversity of career aspirations, ranging from farm management (21%), livestock production (19%), agronomy (15%), marketing (11%), research (18%), sales (9%) and financial services (7%). Often when we talk, for example, about the agronomic skills shortages in Australian agriculture, we just look at the total number of graduates and think that this applies directly to alleviating this shortage, but of course it does not, with only 15% of students looking to get into this area.

The other interesting point about this survey was how it highlighted the increasing skills that will come back into farm management into the future, with 21% of students aiming to go back into farm management. This bodes well for farm productivity into the future but not so good for agribusinesses."



"A big thing that came out of our survey is just looking at the total number of agricultural science people that graduate, is not going to tell you how many people end up in those two sectors."

Australian agriculture, whereas quite a few end up in environmental science and banking."

Graduate numbers can be hard to quantify in terms of the skills shortages we have in Australia. "There are very big shortages in terms of agronomists, skill shortages in terms of technical animal science people," he says. "A big thing that came out of our survey is just looking at the total number of agricultural science people that graduate, is not going to tell you how many people end up in those two sectors. If they're in the banking sector they are not on farm."

Dr Johnson comments that a lot more women were now graduating in agricultural science, which also presents problems to the industry, with skills not being utilised while women take time out to care for families. "It's now pretty much 50-50 for men and women and it's probably contributing to the skills shortage."

Higher education is also off the agenda. "The number of agricultural science graduates going on to higher degrees continues to decline. It's probably that research and development opportunities at universities in general have declined but I also think people are seeing that the higher degrees are not necessary; they want to get out into the workforce."

Dr Johnson says the uptake of VET (Vocational

From the field: Ray Johnson reports.

WHERE DO AG-SCIENCE GRADUATES INTEND TO GO?

2 1 % III

LIVESTOCK PRODUCTION



MARKETING

18%
RESEARCH

SALES S

FINANCIAL

Education and Training) courses had also declined, due to less interest in the industry and the closure of institutions that have offered the training in the past. "A lot of those ag institutions of old have closed, because demand and student numbers have dropped off so much."

These students weren't accessing university degrees instead – this area was also declining. "One year up it's up and the next year down, but overall the trend is very clear."

Dr Johnson says "Farm and agribusiness careers offer young people outstanding career opportunities; as an industry we just need to communicate this more effectively."

New courses on offer but...

Some universities are offering new degrees in an effort to attract more young people to work in the agricultural sector. These include a Master of Food and Packaging Innovation at the University of Melbourne, a Bachelor of Agrifood Systems at the University of New England, a Bachelor of Food and Agribusiness at the University of Sydney and a Master of Business Administration (Professional) in Agricultural Innovation at the University of Tasmania.

However, Ray Johnson says the number of children studying agriculture in high schools has dropped significantly in the past 15 years. For example in 1997, more than 2,200 year 12 students in NSW studied agriculture courses for their HSC. In 2012, that figure was down to around 1,300, according to Board of Studies figures.

Perhaps an even more alarming figure is the drop between year 10 students studying agriculture and those who go on to take it for the HSC. In 1997, 7000 year 10 students in NSW studied agriculture but just 2,200 took it for the HSC that year. In 2012, 6,800 students in year 10 studied agriculture but only 1,300 completed it in year 12.

Those low numbers filter right through into university. Currently only around 300 agricultural students graduate with degrees each year, with around another 400 graduating

in related degrees.

According to Emeritus Professor Jim Pratley of Charles Sturt University, this amounts to only around 20% of the graduates that are needed to fill the current job vacancies in farming and agribusiness.

"Capacity therefore looms as the most significant issue for the agricultural industry," Dr Pratley wrote in his report, *Professional Agriculture – a case of supply and demand.*





The game of agriculture has always been turbulent. Weather, markets, policy changes and outside forces have often disrupted the path to financial freedom, and now the digital age brings another challenging aspect.

Words: Mandy McKeesick

or many mid-sized farmers and food producers this has meant new business models must emerge, and with them the need for new skills, especially in management, leadership and marketing.

The reinvention of the family farm has also meant an increase and variance in job roles. Some of the new positions created can be filled by re-training existing staff, others require specialisation and tertiary education, and there is also the need for consultants to fill temporary gaps in knowledge and expertise.

So how can farmers and food producers who choose to change their business structure adapt? Where do they obtain the new skills required? How do they approach training? How do they appeal to university graduates who may have the aptitude but not necessarily the willingness to work in mediumsized operations?

For Meredith Dairy, Huon Aquaculture and Collaborative Farming Australia, reinvention has answered some of these questions – and a whole lot more.

ictoria's Meredith Dairy has changed from a traditional sheep and cattle enterprise to a multi-award winning sheep and goat dairy, producing hand-made cheese and yoghurt. Run by Sandy and Julie Cameron, the farm, an hour west of Melbourne, has been in the family for generations. Sandy's grandparents owned the property in the 1920s, but when the sheep industry collapsed in the 1990s it was time for a change. "It's been tough all the way," Sandy says. "It reached its nadir in the 1991 recession when a lot of farmers went broke, and that's when we said, 'Enough's enough – we're going to start a farm where we have control over our own destiny from now on."

Reinventing themselves and their business required an entirely different suite of skills as they moved from part-time sheep and beef producers with off-farm jobs (Sandy as a vet, Julie as a nurse) to running a successful dairy and cheese-making operation. 'We had to learn about business management, financial systems, human resources, sales, marketing, quality assurance, and waste management amongst others,' Sandy says. "Basically we had to learn the whole supply chain from growing grass to dealing with supermarkets."

They also had to learn how to make their product. Meredith Dairy comprises 4500 acres and runs up to 9000 dairy goats and 4500 sheep, of which 5000 goats and about 1100 sheep are milked daily. Cheese and yoghurt are made on site following each milking, making it the largest farm of its kind in Australia.

The business started with only Sandy and Julie and they had to learn every skill themselves. Today, Meredith Dairy employs over 90 people. "We have a sales and marketing team, managers for finance, human resources, sales and production. We have a building and maintenance team and of course the farm and production workers," Sandy says.

Many in the sales team have been with Sandy

Meredith Dairy:

from sheep and cattle to awardwinning dairy





"When we started,
most goat cheese
was of poor quality,
made from milk several
days old.
We make our cheese
every day to ensure
its freshness and
to create a quality
product."

and Julie for a long time and have grown with the business, learning to tell the good news story that is Meredith Dairy, but new jobs have attracted university graduates. "Our HR manager has a business degree; we employ a full-time accountant and have four people in our finance team; our production and QA managers have science degrees, and we now employ an engineer," he says. "We use consultants whenever we are short of knowledge. For example we used Ray (Johnson of Agricultural Appointments) to conduct a strategic review three years ago and that brought new ideas into the business."

The Australian public was initially shy of eating goat cheese. "When we started, most goat cheese was of poor quality, made from milk several days old. We make our cheese every day to ensure its freshness and to create a quality product," Sandy says. In-store tastings are an important part of marketing but so too is the digital transformation and use of social media within the business. "A lot of Facebook sites, in particular, appear to be done by a professional and have lost that personal touch, which is something we are very aware of. We want our communications to appear spontaneous and genuine. The same for Instagram – we don't go crazy on Instagram. We are not too obsessed with social media, although there are probably more things we could do."

Their son Angus is an important link in the digital transformation of Meredith Dairy. He lives in Melbourne and takes care of much of the marketing and website (www.meredithdairy.com) direction, including the production of videos to further educate and create that family atmosphere. In doing so, he taps into the younger, tech-savvy generation.

Meredith Dairy is continually growing and evolving and so too are the staff and training requirements for the future. "I'm currently learning more about logistics," Sandy says as he travels to Melbourne for meetings. "The learning doesn't stop."

hat is a sentiment echoed by Frances and Peter Bender who own and run the successful Huon Aquaculture enterprise, producing premium Tasmanian salmon. Starting their working lives as sheep and cattle farmers, the Benders' entrepreneurial spirit saw them eventually branch out into becoming contract salmon suppliers and ultimately led to the creation of their own home-grown brand.

Peter believes one of the keys to their success was the ten years they spent growing fish as contract suppliers – "we got the farming right first, which held us in good stead" – but as they moved into creating the Huon brand, it was sales and marketing skills they most needed to learn. "We employed, on a contract basis, an ex-Tassal managing director to help with our sales and marketing and from there we gradually built up our own skills," Peter says. To help them learn the processing part of the business they imported expertise from Scotland. "We have tried to get the best person in the field and then bring our own people up through the ranks."

Huon Aquaculture started with two pens of trout (approximately 30,000 fish) and one employee, and now processes about 5.5 million salmon per year and employs 550 people. Turnover is just on \$200 million, and the company listed on the ASX in 2014.

Through the years, jobs have been created in the hatcheries, the sea pens, the factories, in the workshops with boat builders and engineers, in the smoking plant and in sales and marketing. Some jobs are challenging to fill. "We can be washing 500 tonnes of fish (worth \$5 million) a day, so the guys have got to be very skilled, and they need a lot of qualifications for their own safety and for the well-being of the fish," Peter says. Due to the seasonal nature of some of the work, "it is also a juggle to find the right people and have them there when you need them."

In acknowledgement of their workplace ethos, Huon Aquaculture has been recognised as an Employer of Choice by the Tasmanian Government. "We do a lot

Huon Aquaculture:

from contract supplier to listed vertical producer





"We can be washing 500 tonnes of fish ... a day, so the guys have got to be very skilled, and they need a lot of qualifications for their own safety and for the well-being of the fish."



Huon Aquaculture sustainability dashboard

of staff training," Peter says, "and we have a bonus scheme for staff. We also offer career development and opportunities to advance within the company."

Although Huon aims for the top end of the market, the volume of fish they produce means they must seek multiple sales outlets. A selection of Huon products is available in supermarkets and their premium product, the Reserve Selection range, is available direct to customers from the website.

The website (www.huonaqua.com.au) fulfils another important aspect of the business, as it is the connection to the consumer. A Sustainability Dashboard gives real-time insights into the world of salmon, from water temperature and time to market to feeding and seal interactions. "We were the first company in the world to do something like that," Peter says. "It gives people confidence that we are open and transparent and answers a lot of questions."

This digital advancement makes Huon attractive to potential employees but so too does the use of highend technology, from net cleaning to water treatment. 'We have 30–40 university graduates working with us and many of our workers have a Certificate in Aquaculture. There is hardly a person in the business who doesn't have a qualification of some sort and we often joke that Frances and I are the least trained.' As technology continues to improve automation and there is less need for manual labour Peter foresees a greater need for a skilled workforce, but will continue to follow the Huon mantra: "Employing good people results in a positive work environment and farming success."

arming success has also come with an innovative reinvention of the family farm for two Mallee grain-growers from South Australia. John Gladigau and Robin Schaefer combined land, assets and skills to form Bulla Burra, a collaborative farming operation. With both partners bringing approximately 2000 ha to the operation, they then sold every bit of machinery they owned and bought a plant specific to the new venture. The partnership has seen increases in scale, efficiency and profitability and has in turn led to the formation of Collaborative Farming Australia, a company which brings the economic strength of the corporate world to smaller farms.

"When Robin and I were running our individual farms, we employed one person each, so one of the biggest things we had to learn was managing people; managing their expectations and creating roles, responsibilities and incentives," John says. "Then as Bulla Burra got bigger we had to learn more about business, compliance and the extra skills that come with that. We've become more professional, more accountable and more transparent."

John gained much of his knowledge through a Nuffield Scholarship, which saw him travel the globe to study collaborative farming ventures, but he is the first to admit that one person cannot know it all. "There is an expectation that we should be jacks of all trades and masters of everything but it is about identifying the skills people are best at; for example Robin brought to the business good agronomy skills. Then we needed some help with strategic agronomy, so we've brought those skills into the business by using brokers for marketing."

As the business evolved, the output of grain increased so that Bulla Burra now grows between 10 and 15 thousand tonnes of wheat, barley, canola and legumes per year over 11,000 acres. With the increased tonnage came more leverage when marketing the grain, but also the need for more staff.

Bulla Burra:

from two farms to collaborative enterprise





"...as Bulla Burra
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transparent."

"It's about valuing relationships, whether that be with bank managers, accountants, suppliers, employees or anyone who touches your business in any way," John says. "And it's not just lip service. We value them and we like to give back. We have found people who can specialise and who are passionate about certain roles; for example looking after logistics at harvest. If someone is passionate about something you need to feed that passion."

Bulla Burra now employs seven full-time people, including John and Robin. Andrew Biele is the farm manager – "we needed someone like Andrew," John says, "so we approached him and he came on board" – and then there are three farm workers and a new apprentice, who was recently runner-up in the Riverland Trainee Awards. "He's a great kid. We're proud of him," John says.

Along with the new job roles created at Bulla Burra has come a cultural change through digital media. Using the website (www. collaborativefarmingaustralia.com), Facebook and Twitter accounts, "we have tried to create a forum where people are comfortable to ask questions and where we will answer them quickly and honestly. It's about making people feel good about agriculture and making them want to work for us." The approach is working, with over 45 people applying for jobs through Facebook last year – far exceeding the positions available.

John envisages Bulla Burra will continue to grow and so will the need for specialised jobs and the training that comes with them. "We ask staff what they want to be trained in but we will also encourage them to seek those opportunities and bring them to us," he says as the farmers gather for the weekly Saturday barbecue. "We want staff to feel part of the team and part of the community, and it is really valuable to stop for an hour or two and have a couple of beers."

New skills for the new business

Meredith Dairy, Huon Aquaculture and Collaborative Farming Australia have many traits in common, as the businesses have reinvented from small operations into large, successful enterprises:

All have seen a need for increased sales, marketing, human resources and general business skills.

All have engaged short-term consultants to fill knowledge gaps and then trained their own staff with that acquired expertise.

All have identified the need, for specialised staff both now and in the future, and have created roles for university graduates and apprentices.

All have embraced digital transformation as a way of connecting with customers, and attracting inquiries and potential employees.

Brett Price of Agricultural Appointments recognises many of these traits within his own business. "We have dramatically changed sales and marketing since we started and changes to our '1940s' website have meant greater interaction with customers," he says, "but perhaps the most important employment focus for an expanding business should be a skills analysis and a specific human resources plan. Many managers experiencing a growth phase of their business feel frustrated when it comes to people skills and this can lead to strain, loss of productivity and slower growth. 'How do we get good people?' becomes a common question. Hiring people with increased skills, and training staff are essential to expanding."

Just as companies such as Meredith Dairy, Huon Aquaculture and Collaborative Farming Australia have employed short-term consultants to assist with the technical side of their business, so too should managers look at engaging a third party to assess their human resources needs. "In order to address the skills and training gaps a consultant can perform a skills analysis; can analyse workflow in a particular business and plan for the remuneration changes that come with greater skill-sets," Brett says.

As medium-sized farmers and food producers adapt to the changing game of agriculture and as new business models continue to emerge, it will be the recognition of the new skill-sets required and the training of new and existing staff that will contribute to their success.



OUR PEOPLE KNOW OTHER PEOPLE

Across agribusiness, food and wine, our people know and find other people.

"As a company that in the past has had a policy against using external recruiting firms, Agricultural Appointments has demonstrated adding such value to the recruitment process. The service they provide is unique and significantly reduces the time commitment ordinarily required by Senior Management to ensure the right candidate is sourced for a role."

Louise Cordina, CEO, Cordina Farms

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