



The Australian Cane Farmer

Leading farmers into the future

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Historic Handover of Australia's Oldest and Largest Sugar Business

CSR Limited's announcement to sell its Sugar and Renewable Energy business, Sucrogen, to Wilmar International Limited is a historic and industry changing move in the Australian industry.

The sale value of A\$1.75 billion is the largest transaction ever in our industry. The deal closed after rival bidder Bright Foods Group lowered its bid from A\$1.75 billion to A\$1.65 billion, after a fall in sugar prices.

The market has been divided on whether a demerger or a straight sale would be better for shareholders.

Wilmar is one of the largest listed agribusinesses in the Asian region, with a market capitalisation of approximately A\$31 billion.

Under the sale agreement between CSR and Wilmar, CSR has agreed to

defer its demerger of Sucrogen until 31 December 2010.

CSR says that Wilmar does not anticipate any significant changes in the short term to Sucrogen's management and operations. This includes its milling and refining operations and its export contract with QSL.

Mackay Sugar has a strong interest in the outcome as they hold a 25% stake in Sugar Australia and N Z Sugar, which are both 75% owned by Sucrogen.

Sucrogen's sugar mills crush just under 50% of Australia's sugar cane while their sugar refineries hold a majority of refining capacity.

Likewise farmers supplying Plane Creek mill will be very interested in how Wilmar will approach future business arrangements. All sectors of the Australian industry could be affected.



Ross Walker
Chairman



www.reefwisefarming.qld.gov.au

Reef Protection Package

ERMP and CRMP

The Sugarcane Environmental Risk Management Plan (ERMP) was mailed mid-June to cane farmers from Ingham north.

ACFA has warned Government that the delay in the production of the ERMP will make it very difficult for farmers to comply with the 30 September 2010 deadline. This effectively allows farmers only just over 90 days to complete and lodge the document. Unless Reef Protection Officers (RPOs) will be available 7 days a week, there will only be about 80 business days to assist farmers with understanding and completing the document.

The launch of the ERMP has converged with the busiest time of the year and ACFA will be keenly monitoring progress.

Farmers in the Mackay and Burdekin regions are not required to complete an Environmental Risk Management Plan (ERMP). They may, however, elect to complete a Chemical Risk Management Plan (CRMP) as an alternative to the strict requirements of 20m no-spray zones for certain herbicides.

A CRMP is a voluntary plan that may be prepared and submitted as an alternative to meeting strict requirements placed on the use of the herbicides atrazine, ametryn, diuron and hexazinone under the Chemical Usage (Agricultural and Veterinary) Control Regulation 1999 (Chemical Regulation).

Alternately, farmers may rely on identifying or establishing Effective Vegetated Treatment Areas (EVTA) on

their farm. Existing areas on farms such as grassed headlands, spoon drains or grassed swales may already meet the requirements of an EVTA.

Farmers will receive information on this from DERM and I encourage farmers to discuss this with their Reef Protection Officer (RPO).

Soiling testing and the nutrient calculator

Under the Reef Regulations, Soil needs to be sampled and tested, as a minimum, within the 12 months prior to the commencement of a new plant cane crop.

Farmers and fertiliser suppliers have been surprised by some soil test results with the subsequent maximum nutrient recommendations coming in at a lower than expected level.

Farmers may now be unwittingly under-nourishing their cane crops.

While many farmers have traditionally tested soil and used nutrition methods and services including the BSES Six Easy Steps, and agronomists to schedule crop nutrition, the Reef Regulations make soil-testing and nutrient calculation mandatory. They are no longer mere guidelines.

This means that soil testing is now a critical control point and the function of 'garbage in – garbage out' can render a soil test useless and severely limit the amount of fertiliser allowed.

It is important that farmers know how their soil test is being conducted and make sure that it is representative of the paddock. It is crucial that the sample is taken at the correct depth and site; to avoid any cane trash and to keep away from previous fertiliser bands.

Note that the greater the number of cores taken to form a composite

sample, the more reliable the analytical results for that sample will be.

Farmers should refer to the booklet provided by DERM; The method for soil sampling and analysis for sugarcane properties regulated under the Environmental Protection Act 1994.

If farmers have any questions or difficulties they should contact their RPO.

Australia's Energy Security

Martin Ferguson, Minister for Resources and Energy, recently announced a national trade deficit in crude oil, refined products and LPG of \$16 billion per year and estimated to be \$30 billion by 2015.

The national energy resource assessment released earlier this year says that, in the absence of major oil discovery, domestic crude oil production will continue to decrease while consumption is forecast to increase by an average of 1.3 per cent per annum out to 2030.

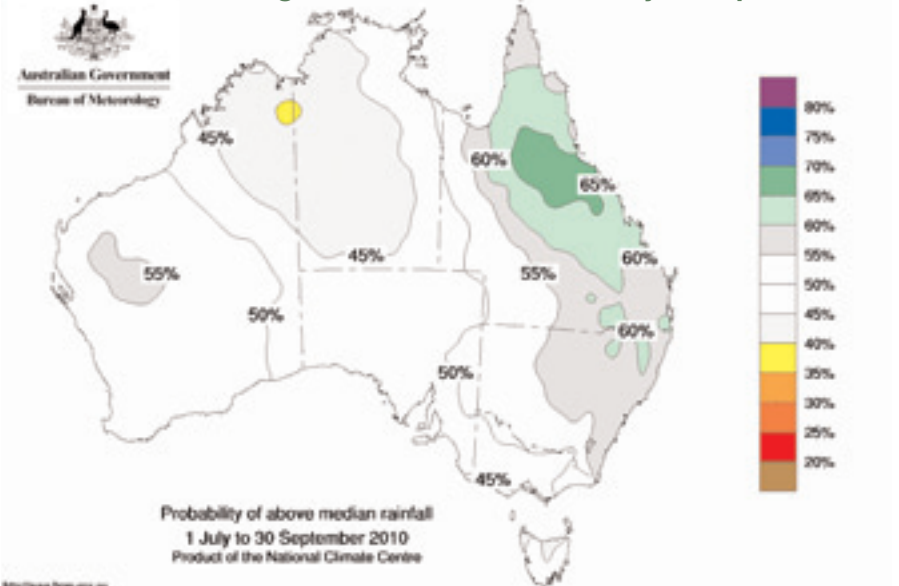
Australia has moved from oil self sufficiency in 2000 to being currently less than 50% self sufficient, to a projected 20% self sufficiency by 2030.

Renewable energy is clearly a major opportunity for Australia and the sugar industry. It requires a consistent and steady hand on policy settings to ensure the realisation of that potential and not the erosion of it, which has unfortunately been the experience to date.

Ross Walker

ACFA Chairman

Chance of exceeding the median rainfall for July to Sep 2010



Rainfall June 2010



Rainfall 1 April to 30 June 2010



Industry news

\$8 million for community action groups

The Australian Government has allocated up to \$8 million to help community groups protect the environment and support sustainable farming through its 2010-11 Caring for our Country Community Action Grants program.

Minister for Agriculture, Fisheries and Forestry Tony Burke, encouraged small community groups nationwide to apply for grants of \$5,000 to \$20,000 to help them take action to protect and revitalise the Australian landscape. "The funding can be used for a range of purposes, including for Landcare facilitators, removing weeds, planting trees, controlling pests and field days," Mr Burke said.

Eligible community groups may include:

- Community groups involved in coastal rehabilitation, restoration and conservation;
- Groups of farmers or land managers working on sustainable farming or improving natural resource management;
- Indigenous partnerships involved in protecting or improving the environment;
- Groups involved in biodiversity, environmental protection or managing natural resources.

The guidelines and hard copy application form are available from the Caring for our Country website www.nrm.gov.au or ph: 1800 552 008. Applications close August 2010.



SRDC SEMINAR - Leading the way for a more sustainable future

Associate Professor Susanne Schmidt recently presented a seminar at SRDC about her research which identified ways to improve nitrogen fertiliser application.

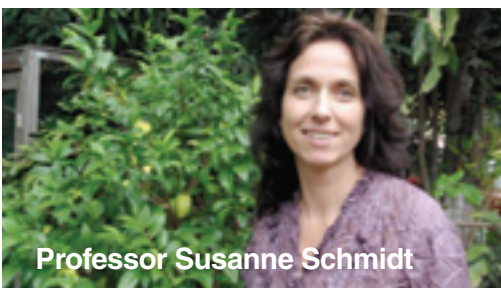
During the seminar Professor Schmidt summarised six years of collaboration between UQ and BSES researchers in the CRC Sugar Industry Innovation through Biotechnology which has identified traits and processes that provide promising avenues for improving nitrogen fertiliser use.

"The environmental impact of high levels of nitrogen fertilisation in agriculture is a problem of serious concern within the sugar industry," Prof Schmidt said.

"There is great pressure on sugarcane growers to reduce the environmental effects of nitrogen fertiliser losses from soil, due to the detrimental effects excess nitrogen can have on the surrounding environment.

"Through further research we hope to provide insight into better ways to boost the environmental sustainability of sugarcane production without excessive use of nitrogen fertiliser," Prof Schmidt said.

Contact: Prof. Susanne Schmidt on email susanne.schmidt@uq.edu.au or ph: (07) 33651050



Professor Susanne Schmidt

CRC SIIB Concludes

Seven years of successful sugarcane biotechnology research comes to an end recently as the CRC SIIB officially winds up its research activities.

The CRC's research and development activities ceased on the 30 June, while the CRC SIIB office staff will continue wind up activities at their St Lucia office through till 30 September this year.

CRC SIIB Chief Executive Officer Dr Peter Twine said the CRC outcomes were impressive and the CRC would leave behind a strong legacy for the Australian sugarcane industry for many years to come.

This legacy includes value-adding product options, platform technology/ knowledge for future biotechnology research and a cooperative research spirit that is already making Australia known internationally as a leader in the field of sugarcane biotechnology.

Dr Twine said the success of the CRC was proof that a cooperative venture between research, industry, government and commercial groups can make big advances in a short time frame.

The Centre's impressive efforts will improve the long-term commercial and 'green' potential of Australian sugarcane. Research has resulted in state-of-the-art breeding tools to help breed environmentally friendly and higher performing new varieties.

The CRC has also developed promising new products based on sugarcane such as a basis for numerous health products that could tackle diabetes, and a 'green' packaging product which could meet growing national and international demands for recyclable waterproof paper.

"Over the past seven years, our CRC has brought together some of Australia's and indeed the world's best agricultural biotechnologists to map out a new future for the Australian sugarcane industry," Dr Twine said. "And, 71 postgraduate and undergraduate students have been given the opportunity to work on real-life projects focused on commercial outcomes. "My belief is the many benefits to flow out of this CRC will combine to help achieve a more secure and profitable future for Australian sugarcane."

To ensure the best possible commercialisation of the Centre's intellectual property, the CRC SIIB has established Biotechnology Company, Sacron Innovations Pty Ltd. The Australian sugarcane industry and CRC SIIB participants have structured Sacron Innovations to enable strong business opportunities to flow on from the CRC's major research outcomes.

To find out more go to: www.crcsugar.com.au .

The CRC SIIB was established by the Australian Government under the Cooperative Research Centre (CRC) program, and supported by a powerful combination of sugarcane biotechnology expertise and commercial investment.

Since its inception in 2003, the CRC SIIB's researchers and students have been making great progress towards harnessing the true potential of Australia's richest energy crop. The CRC SIIB will keep its web site www.crcsugar.com active until June 2014 as an industry and science resource covering major achievements in sugarcane biotechnology.

Research programs such as this sometimes produce surprising outcomes where highly attractive projects do not go on to commercialisation, while others come to the fore and make commercial success. Overall this research has underscored the importance and the potential of the sugarcane plant as a bio-refinery and a commercial counterweight to the highly cyclical raw sugar market.

www.crcsugar.com/News



Coaching and mentoring Australia

This program aims to enable young women engaged in primary industries to develop their coaching, mentoring, leadership, communication and decision making skills, which can be used within primary industries, rural communities and their businesses. The workshop program will be facilitated by Rural Development Services and Ag Consulting in Brisbane on 19th and 20th August. This program is funded by the Department of Agriculture, Fisheries and Forestry under Australia's Farming Future. For more information contact Rowena Bell Rowena.bell@ruraldevelopmentservices.com

AgriFood Skills fellowships

AgriFood Skills Australia fellowships valued at \$10,000 each. The Fellowship program, offered in conjunction with the International Specialised Skills Institute, provides successful applicants with the opportunity to travel overseas and research a topic of particular value to the agrifood industry, examining innovative approaches that demonstrate potential benefits for, and application in, Australia. For an application form click here.

2010 Farm Managers' Program

Rabobank will again offer a Farm Managers Program (FMP) in 2010 with a focus on equipping young farmers with the nous to effectively manage big-picture agricultural issues. The FMP provides a forum for farmers to discuss issues such as the carbon economy, water availability, as well as issues for agriculture resulting from a skyrocketing population in China. Participants will focus on driving the strategic direction of their farm businesses to proactively handle change before it could adversely affect their bottom line. The FMP is on from October 18 to 22 with participants limited to 36. More information contact Skye Ward on ph: 02 8115 4139.

Applications open for QLD's top exporters

The Premier of Queensland's Export Awards are the state's highest recognition of export achievement. The annual program is open to all Queensland exporters, large and small, regional and metropolitan. Applications close Friday 23 July.

National Plant Health Strategy

Plant Health Australia (PHA) is seeking comments on the draft National Plant Health Strategy (NPHS) to enable the document to be finalised. The Strategy's release to government and industry by PHA Chairman, Dr Tony Gregson AM, signals the start of a period of consultation during which feedback and endorsement will be sought to enable the Strategy to be finalised.

The NPHS is designed to deliver a national strategic direction for the plant health sector focusing on the next ten year period. It is designed to incorporate all areas of the national plant health system and involve all stakeholders that have a shared responsibility and commitment to the plant health status of Australia. The draft NPHS has been developed through extensive stakeholder consultation to address challenges facing sustainable production and market access.

Comments should be directed to PHA's Program Manager, National Strategies and Policy Coordination, Nicholas Woods at nwoods@phau.com.au by phone on (02) 6215 7704 or fax (02) 6260 4321. The draft strategy is available in hard copy from PHA or can be downloaded from their website.

SRDC Events Diary

1-6 Aug: 19th World Congress of Soil Science Brisbane, QLD

13 Aug: SRDC Expressions of Interest applications for research projects close

03 Sept: SRDC Scholarship project proposals close

03 Sept: SRDC Grower Group Innovation Project proposals close

03 Sept: SRDC Capacity Building Project proposals close



SRDC *update*

A brighter future with ethanol

By Ian O'Hara and Kara Billsborough

While the successful production of Ethanol in Brazil has been widely recognised, one PhD student from the Queensland University of Technology believes when it comes to the future of biofuel production, Australia will tread a different path.

Since 2008, Ian O'Hara has been researching ways to increase ethanol production from sugarcane through the conversion of bagasse into biofuels.

Although Brazil has previously been used as a model for the future production of ethanol from sugarcane, Mr O'Hara highlights that it is important to recognise the significant differences that exist between the Australian and Brazilian industries.

"As a result of both the long-term government policy to reduce oil imports and the impact of the depreciated Real currency on production costs, the Brazilian sugarcane industry has expanded around new diversified facilities producing both ethanol and sugar from sugarcane juice," Mr O'Hara said.

Mr O'Hara's research does find that there are significant opportunities for biofuels production from sugarcane in Australia, but the approach is likely to be different to that of other rapidly expanding industries.

"Currently, the Australian industry is not expanding and we have established infrastructure for sugar production from juice," Mr O'Hara said.

In Australia, the level of fuel consumption continues to grow at the same time that domestic oil reserves are declining and imported crude oil products are on the increase.

During his research, Mr O'Hara modelled a number of scenarios looking at the economic impact of ethanol production on future industry revenue. He found that even in moderate ethanol production scenarios, it is possible for the existing Australian sugarcane industry to produce over 60% of Queensland's unleaded petrol requirements. In doing so, total industry revenue from combined ethanol and sugar production has the potential to increase by over one billion dollars.

"Sugarcane fibre is a lower value feedstock for ethanol production and the opportunity exists to increase total industry revenue through integrated facilities," Mr O'Hara said.

A future vision of the Australian sugarcane industry is for diversified bio-processing precincts, producing multiple bio-based products from sugarcane which is widely regarded as the best biomass feedstock in the world.

The sugarcane biomass research program at QUT together with the Sugar Research and Development Corporation, aims to develop novel, value-adding technologies and demonstrate these at pilot scale in the new Mackay Renewable Biocommodities Pilot Plant.

This program provides a preliminary step to a more rapid uptake of new bio-products and biofuel technologies which will enhance future development of the Australian sugarcane industry.

For more information about this research contact Ian O'Hara i.ohara@qut.edu.au or visit www.srdc.gov.au ■



The Mackay Renewable Biocommodities Pilot Plant is a pilot scale research and development facility for the conversion of cellulosic biomass (such as sugarcane bagasse) into renewable transport fuels (bioethanol) and other high value co-products in an integrated biorefinery.

SRDC project report updates

Some excellent examples of research projects recently completed are outlined below. These reports epitomise the wide range of research SRDC has funded and will continue to support to ensure a profitable and sustainable industry. Final research reports or articles published are placed on the SRDC website for all stakeholders to access . www.srdc.gov.au/ProjectReports

Final project reports

CHC002 - Development of a real time information system for Clarence harvesters

The Clarence Harvesting Co-operative was formed from the amalgamation of four harvesters cutting a total of between 350,000 and 500,000 tonnes of cane each year. This group discovered that access to near real time information about the supply chain was required to realise the benefits of the larger harvesting operation. SRDC provided funding to allow Agtrix Pty Ltd to develop the solution, which was called SHIRT (Supply and Harvester Information in Real Time). SHIRT provided harvesting crews with valuable information about what was happening in the transport and milling operations as soon as the information was available.

Feedback indicates that the information being supplied to the crews was very useful for their daily management. SHIRT was available for use at Harwood for most of 2009 and will be introduced to the other two NSW Mills in 2010. NSW Sugar has incorporated the maintenance of SHIRT into their Service Level Agreement with Agtrix Pty Ltd, thus ensuring that it will evolve with the business and the benefits from this project will remain available to members of the value chain.

BSS266 - Optimum canegrub management within new sustainable cropping systems

This project demonstrated that canegrubs can be effectively managed in canefields planted to new systems. Efficacy data was collected for insecticides applied in new systems; this data has been summarised in reports provided to relevant insecticide companies who will pursue formal registration of new use patterns with the APVMA. A new monitoring system for southern canegrub species has been widely accepted by growers. Guidelines for effective canegrub management in new farming systems have been compiled in a booklet to be distributed to interested growers and advisory staff. These results will

increase the capacity of growers to adopt sustainable and profitable farming systems, and will enable better targeting of insecticides against canegrubs to reduce crop loss and unnecessary insecticide use.

BSS335 - Building capacity for the Future Farmers group Mackay

A capacity building project held in March this year involved a workshop with 16 cane growers from the Mackay region. This group met with sugarcane industry leaders. All members of the Mackay Future Farmers believe the trip was very worthwhile and would recommend a similar trip to any other grower.

Current projects

BPS001 - Identifying management zones within cane paddocks: an essential foundation for precision sugarcane agriculture

This project aims to develop and promote techniques for establishing zones for targeted application of best management practices within cane paddocks. The zones will be identified by mapping features in satellite imagery, soil electromagnetic induction (EM) responses, actual soil properties, and sugarcane yields. They will be geo-referenced (assigned latitudes and longitudes) and viewed, queried, and analysed at various scales in a geographic information system that will integrate data collected from different sites and at different times. The resulting map units will allow the subsequent development and promotion of variable rate, site-specific, best management practices for sugarcane production and environmental stewardship. The

research will address two main questions (a) How do satellite imagery and EM map patterns relate to variations in space and time in soils, and in sugarcane yield? (b) Are there general relationships between image analysis, EM signals, yield, and soil properties that are widely applicable within and between regions?

CSE022 - A coordinated approach to Precision Agriculture RD&E

Precision Agriculture (PA) offers the potential to increase on-farm productivity and profitability by utilising new and emerging technologies that will assist in overcoming on-farm constraints through targeting inputs and operations. However, it is recognised that although various PA technologies exist and are available to growers in various forms, limited adoption has occurred. Further adoption of PA is not appropriate without technically-based skills to interpret information about in-field variability. The specific objectives of this project include:

- Coordinate and integrate an evaluation of PA technologies (i.e. yield monitoring and mapping) in collaboration with leading farmers, with emphasis on economics, case studies, communication and extension led by the key farmers;
- Provide the appropriate specialist integrative and interpretive skills to complement existing research and developing PA technologies
- Provide input into investigations aimed at 'ground-truthing' apparent variability within specific blocks of sugarcane.
- Develop standardised data collection, management and analysis protocols.
- Improve capabilities of EOs and to provide technical support via links to appropriate specialists.

BSS303 - Sugarcane biosecurity integrated plan

This project aims to enhance Australia's sugarcane biosecurity measures by thoroughly revising and updating the Industry's Biosecurity Plan to account for recent changes in legislation and in PLANTPLAN, and in light of lessons learnt from the recent smut response.

The objectives are to (a) Develop Incursion Management Plans for downy mildew, Ramu stunt, sugarcane longhorn borer, Eumetopina planthopper, sugarcane thrips and those moth borers not dealt with during SRDC project BSS249 and (b) Update all current Incursion Management Plans in light of new information, changed procedures and lessons from smut.

SRDC provides scholarships for emerging leaders

SRDC is offering two scholarships for two people to attend a Training Rural Australians In Leadership (TRAIL) residential course in Canberra from 25 September until 2 October 2010.

Facilitated by the Australian Rural Leadership Foundation (ARLF) this course is designed to improve the capacity of rural leaders to engage more extensively in issues and sectors across rural Australia.

SRDC's scholarship is open to emerging leaders involved in the sugarcane industry, including growers, millers, researchers, scientists, extension officers, business managers etc. Each scholarship is worth \$8500 for the course, plus some extra travel expenses will be provided by SRDC to travel to and from Canberra.

To apply for this SRDC scholarship, visit www.rural-leaders.com.au and download the TRAIL course application form and send to SRDC at apply@srdc.gov.au by Fri 13 Aug 2010.





Australian Government

Sugar Research and Development Corporation

CALL FOR RESEARCH PROJECTS

The Sugar Research and Development Corporation (SRDC) is calling for Expressions of Interest for Research Projects to commence from July 2011.

Priority will be given to projects which contribute to step changes in sustainable productivity in sugarcane growing, harvesting and/or milling in the following areas:

- Innovation in energy, biomass utilisation and product diversification.
- Reduction in production costs and/or improving the utilisation of capital.
- New and improved sugarcane varieties.
- Improvement in the uptake of new technologies and decision-making tools by industry participants.
- Reduction in exotic biosecurity threats, and improvements in managing endemic pests and weeds, including risks enhanced by climate change.
- Sustainable improvement in productivity in the face of climate variability.

Successful projects are expected to deliver a positive change to profitability and a high return to industry on research and development investment.

Expression of Interest applications for research projects must be submitted by email to apply@srdc.gov.au by 13 August 2010.

In addition, SRDC is calling for project proposals for Grower Group Innovation Projects, Scholarships and Capacity Building Projects, to be submitted by 3 September 2010.

For details on how to submit an Expression of Interest application or project proposal visit www.srdc.gov.au or ph: (07) 3210 0495.

July 2010 finds support

July 2010 traded down to US 13.00 c/lb on 7 May, before its resurgence. On 14 June the July 2010 contract settled at US 16.05 c/lb, 305 pts or 19% higher than 7 May values.



The Australian dollar (AUD) has been subject to considerable volatility, trading at AUD/USD 0.9388 on 12 April and as low as AUD/USD 0.8068 on 25 May. By 14 June the AUD had recovered some lost ground to close at AUD/USD 0.8587. The AUD's wide trading range reflects risk aversion associated with the emergence of global economic fears surrounding European sovereign debt levels, especially in Greece where government bonds have been reduced to "junk bond" status.



Having fallen for 13 straight weeks the market found support following the expiry of the May 2010 contract.

The recovery of raw sugar prices was led by white sugar price gains. The raw-white price differential reached USD 164/t as concerns emerged over the lack of white sugar availability for nearby delivery.

According to UNICA, 35.13 million tonnes of sugarcane were crushed in CS-Bz during the first half of May; an increase of 4.20 million tons on the previous fortnight as more mills commenced their operations. UNICA reports 93.86 million tonnes of cane have been processed since the harvest began on 1 April 2010. Total recoverable sugars (ATR per tonne cane) stood at 126.96 kg for the fortnight, a figure virtually identical to the same period in 2009 (126.46 kg of ATR). Sugar accounted for 42% of the fortnight's cane and ethanol 58%.

In its first estimates for the 2010-11 crop cycle, Czarnikow project a global surplus of 2.5 million metric tonnes following a 17.4 million tonnes increase in global production raw value, as producers respond to the high prices seen earlier this year. Sugar production is projected to increase in Centre-South Brazil by 5 mln tonnes, in India by 7.5 mln tonnes and in Thailand by 1 mln tonnes. Czarnikow also project a 2% increase in global consumption from 168 mln tonnes to 171.3 mln tonnes. They report, "while this will go some way towards reducing the tensions in the physical market it is unlikely to be sufficient to rebuild supply pipelines. As a consequence, we expect that the global market will remain fragile during the 10/11 crop cycle."

Kingsman also released its second estimate of the 2010-11 crop cycle. Kingsman increases its global surplus estimate for 3.99 mln tonnes to 5.17 mln tonnes.

Annual Review of the year 2009

Production

Queensland production for 2009 was 28.16 million tonnes, down from 30.17 tonnes.

This was not a good result but a dry crushing period helped push sugar content to high levels with a Qld average CCS of 14.7 for the year.

The industry has seen a declining area planted due to several years of farmers selling to MIS forestry, to 'blockies', movement into other crops, grazing and a general lack of financial incentive to plant sugar cane.

Cane Crushed (t) 2009	
North	5,406,675
Herbert/ Burdekin	11,154,318
Central	8,124,764
Southern	3,475,400
NSW	1,630,000
Australia	29,791,157

The 2009 area harvested was 344,102 hectares, down from 353,428 hectares for the 2008 crush. This is a disturbing trend and some millers have introduced schemes to bring land back in to production.

New South Wales harvested 1.63 million tonnes in 2009 down from 1.93 million tonnes in 2008. Both years have been disappointing due to negative impacts from frost, flooding and delays with commissioning the new cogeneration plants at Condong and Broadwater mills.

The uncharacteristic dry harvest season meant reduced harvesting and milling costs and the early finish ensured the 2010 crop was off to a good start. Irrigation costs were up in some areas, however, fuel and fertiliser costs were lower and this combined with high world sugar prices (the highest in 29 years) ensured farmers and millers profitability was improved.

The 2009 value of sugar production will be in excess of \$2 billion and this will allow farmers and millers alike to invest in new plant and equipment and carry out improved maintenance which augurs well for future years.

The global setting

The global financial crisis has been generally good for the industry. Initially the Australian dollar lost value against the US dollar which was good for all exporters, interest rates fell, farm and mill input costs fell (steel, fuel and fertiliser) and labour supply improved as the mining industry faltered. This combined with an increasing deficit in world sugar supply saw returns to the industry increase.

During 2008, the crisis saw liquidity dry up resulting in index funds and speculators withdrawing from the sugar market. However during 2009, liquidity returned to the sugar market which was positive and the Australian dollar again strengthened against the US dollar which reduced returns to the industry.

Brazil and India are the two major players in the world's sugar market. Brazil had financial and wet weather problems impacting negatively on their industry while India had dry weather which reduced their harvest.

Brazil's decisions on sugar vs. alcohol, US ethanol production and India's farmers' decision to move out of cane production were all factors that contributed to ICE No11 price movements contrary to the market supply and demand fundamentals.

However, the strong price rise during mid 2009 was driven largely by a supply shortage caused by the failure of the monsoon season in India and a wetter than normal harvest in Brazil during the second half of 2009.

As a result, prices rose to levels not seen in a generation. There will be a small increase in the area under cane in 2010 due to increased plantings and new ground in the Burdekin being introduced.

Mossman has reported a planting increase of around 10%, due to a mill planting incentive.

The market

Australian dollar returns for the 2009 & 2010 seasons are encouraging and futures prices appear strong as global demand has overtaken supply.

The financial crisis will have mixed results for our industry. Brazil may encounter problems funding projected growth and this is a positive for world sugar prices. On the negative side, low oil prices may see Brazil divert more production to sugar and less to ethanol in the short term. However, the long term trend towards ethanol should continue. The second half of 2009 saw both oil and sugar prices stronger.

Speculator activity initially declined and reduced liquidity and the amount of forward pricing available to millers and farmers. This was turned around somewhat during 2009 and augers well for the industry moving forward.

The global financial crisis seriously affected MIS forestry schemes and their impact on our industry should decline, at least in the short term.

ANNUAL REVIEW OF THE YEAR 2009

World Raw Sugar Production Dynamics

A gain in production in 2009/2010 is expected from:

Central America; South Africa; USA; China; Pakistan; The European Union (EU27); Brazil; India.

World Sugar Deficit 2009/10 (Estimate million tonnes)

Predictor	Estimate
Czarikow	-13.5
Kingsman	-11.9
LMC	-11.3
ISO	-7.3
Sucden	-4.0

World Sugar Balance 2010/11

Kingsman predicts a surplus of 3.99 million tonnes

This would require a production increase of 19 million tonnes (Source: QSL).

Financial Markets at 24 December 2009

AU\$ / US\$	0.8792
US\$ / Brazilian Real:	1.76
Crude oil – US\$ per barrel	76.55
Gold – US\$ / oz	1,088.15
Raw sugar contacts (ICE No.11) US ¢ /lb;	
March 2010	26.5
October 2011	17.59
RBA cash rate *	3.75%
Inflation (CPI)	2.1%

* On 2 December 2009 the RBA raised the cash rate 0.25 percentage points to 3.75%.

Freight

Global freight rates declined significantly during 2008 reducing the far-east premium for the majority of Australia's exports. However, during 2009 freight rates started to strengthen again.

Farm input costs

Fertiliser, chemical and fuel prices continued to reduce the viability of farmers with prices skyrocketing throughout 2008.

However during 2009, the price of fertilizer reduced dramatically due to falling demand as a result of the global financial crisis. Unfortunately, these lower prices may not last long.

Fertiliser Costs 23 Dec 2009 US\$

Bulk prilled urea (fob)	
St Petersburg	\$245
China	\$310
Bulk granular urea (fob)	
Gulf	\$308
China	\$325

During 2009;
Bulk prilled urea rose about US\$50/t.
Bulk granular urea rose about US\$60/t.

ANNUAL REVIEW OF THE YEAR 2009

Australia

Biofuels

The biofuels industry needs effective leadership from all levels of Government and definitive policies are required for renewable energy to play a role in reducing greenhouse gas emissions.

CSR Limited upgraded its ethanol distillery in Sarina in June 2008 which allows it to produce 60 million litres of fuel grade ethanol each year. The upgrade cost \$17.8 million and was completed during 2009.

Proposed R&D restructure

The Australian Sugar Industry Alliance (ASA) has proposed merging the BSES and SRDC into a restructured BSES. Considerable savings have been identified which ASA argues will lead to a more focused and efficient outcome. In the future, Sugar Research Limited at Queensland University of Technology may also be incorporated into the restructured BSES.

Sugarcane smut

The SRDC received \$2 million from the Rural Communities Program and this money will be spent over the next three years funding the Smutbuster project.

The BSES-CSIRO sugarcane improvement joint venture was successful in obtaining the funding for work towards the development of productive, smut-resistant varieties via the SmutBuster project.

The outcomes in terms of adoption of new, smut-resistant varieties by growers and the adoption of smut-resistance breeding strategies by the BSES-CSIRO sugarcane improvement program appear to have been very effective.

Resistant varieties are being widely adopted, additional resistant varieties are being released to the industry, and a comprehensive research program was developed to minimise the effect of sugarcane smut on the industry.

SmutBuster includes a substantial research component addressing a wide range of screening methods.

The SmutBuster program involves 400 crosses annually using parents with high breeding value but with smut-susceptibility levels exceeding those that are acceptable.

Some 30,000 seedlings are planted each year.

BSES Funding

In 2009 BSES announced its intention to implement a 55¢/t PBR commencing 2010.

BSES intended to notify farmers by 1 March 2010 to trigger the 55¢/t PBR.

Industry objection led BSES to postpone this on the basis that industry organisation and BSES would their 'best endeavours' to increase the **average industry contribution** from;

37¢/t in 2009 to,
44¢/t in 2010 on a voluntary basis; i.e. under the service agreement.

An agreed outcome must be achieved by mid 2010.

BSES warns that failure to achieve 44¢/t in 2010 will result in BSES triggering PBR in 2011.

For example, if in 2010, BSES collects 37¢/t (the same as for 2009),

53¢/t would be required in 2011 to catch up.

If this 53¢/t is to come by PBR, the PBR levy would need to be 66¢/t in 2011.

ANNUAL REVIEW OF THE YEAR 2009

This is because it is estimated that in 2011, about 80% of cane crushed would be PBR varieties & so only 80% of cane crushed would be levied.

Opportunities and Threats to sugar cane farming from climate change policy

The final Garnaut Review was released late in 2008 and presented the potential impacts of climate change on the Australian economy and recommended policies to minimise costs and maximise benefits to the nation. The Report says agriculture has a role to play in mitigating climate change. The Federal Government is considering a range of ways to address climate change and in December 2008 released details of the Carbon Pollution Reduction Scheme (CPRS), containing an Emissions Trading Scheme (ETS). Agriculture was to be excluded when the Scheme was to commence in 2011 with a decision on permanent exclusion or inclusion to be announced by 2013.

The proposal dominated the political landscape during 2009 until the United Nations Climate Change Conference (the Copenhagen Summit) in December failed to negotiate a binding international agreement. The conference was troubled by deadlock and the outcome, the 'Copenhagen Accord' is not legally enforceable.

On December 2, 2009, the Senate voted down the ETS causing a potential double dissolution election.

The CPRS could return to the national agenda in 2013, after the current Kyoto commitment expires. Once more this would have serious implications for agriculture as the CPRS model has the potential to increase costs for many farm inputs including fertiliser, fuel, electricity, water and transport.

A June 2009 ABARE study that found that even if agriculture was not brought into the scheme, farmers would face higher electricity, fuel and freight costs and lower farm-gate prices passed back by processors.

ABARE also found that broad acre incomes would slump by two per cent in 2011 and be down by up to fourteen per cent by 2015 – a hit of \$1,100 initially increasing to up to \$8,900 over four years.

In February 2010, the Federal Opposition announced its **Emissions Reduction Fund** to support CO2 emissions reduction activity by business and industry.

Through the Fund, it pledges to support 140 million tonnes of abatement per annum by 2020 to meet a 5 per cent target. The coalition claims "this is a once in a century replenishment of our soil carbon."

Environment

The Queensland Government's reef legislation commencing from 1 January 2010 has been politically motivated and the industry has not been impressed by the government's actions. ACFA believes the resources could have been better allocated.

The Commonwealth Reef Rescue Program has been more sensible and practical and will achieve results in a cooperative manner. The program provides matching funding to farmers who have invested tens of millions of dollars to improve farm practices and at the same time improve the environmental outcome.

The Queensland Government legislation has and will continue to result in increased costs and red tape for central and northern Queensland farmers.

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Ross Walker
Chairman

Most scientific reports state the Great Barrier Reef is in good condition. ACFA has worked closely with the Queensland Government to ensure more sensible and practical outcomes are achieved. Australian cane farmers recognise they have an important role to play in protecting the environment and are the leaders in their approach to best environmental practice. The vested interest groups (including the Queensland Government) attacks are opportunistic and self interest based.

QSL

Queensland Sugar Limited (QSL) has undergone major changes with a completely new Board led by Chairman Alan Winney and a new CEO Neil Taylor. Most millers in Queensland will be exporting through QSL in 2010 and the Company has continued to market sugar through the difficult global financial crisis. QSL has performed well, however the changes that have occurred have lessened farmer's influence and control in the operations of the company that has a large impact on their viability.

The development of a number of pricing options has resulted in many farmers locking in prices up to 5 years ahead. In times of high sugar prices, the ability to lock in these prices years ahead is a valuable management tool and is being widely embraced. It does not, however, mean getting the best or highest price and most in the industry who locked in prices for the 2009 season will receive lower returns than those who did not forward price.



Stephen Ryan
General Manager

Other developments

CSR announced plans to demerge its sugar and energy business during 2009.

In December, CSR announced that the CSR Sugar division was to be renamed "Sucrogen."

However a federal court ruling in February 2010 blocked the proposal because of a concern over the ability of CSR to meet future asbestos claims.

Another interesting development was the purchase by QSL of an 8.5% stake in Tully Sugar. QSL states it has nothing to do with Maryborough Sugar's interest in Tully Sugar.

In November 2009, BSES Limited and Dupont signed a commercial alliance to develop GM Sugar Canes. The alliance aims to boost productivity and profitability through biotechnologies that result in GM varieties, new planting and farming systems, and greater biofuels capacity. ACFA supports this move and realises the potential benefits as enormous.

In February 2010, Mackay Sugar announced contracts had been issued for the construction of a \$120 million power plant at Racecourse Mill. The plant will have the capacity to produce 1/3 of Mackay's electricity requirements from bagasse. The plant will be operational by the end of 2012.

In closing 2009 was a good year and the prospects for 2010 are potentially better.

These years don't come along too often and prices will inevitably fall. The ACFA wishes to record the organisation's appreciation for members support as we continue to represent and work for you.



Don Murday
Northern Region Director

Northern - Mossman

The 2010 Mossman crushing season commenced on 16 June.

The first week crushed a stop-start 13,000 tonnes. At 24 June mill average was 12 CCS, with the crop coming in heavier than estimate in some areas and lighter than estimate in others. Occasional light showers have not affected the harvest.

The ERMP roll-out is going to present a problem as farmers are busy with harvesting and planting. The mandatory nutrient calculator is also causing difficulties in the Mossman area. Maximum nutrition allowances are coming in 'way' under the expected levels that farmers know is needed to run a profitable industry. This needs to be remedied urgently!

Don Murday
Northern Director



John Blanckensee
Northern Region Director

Northern - Mulgrave, Babinda, Innisfail & Tully

Bundaberg Sugar's Tableland mill was the first mill in the far north to commence the 2010 crush.

Skies are very heavy with little or no rain falling. A dry season would be a welcome sight after continuous drizzle and overcast conditions for the previous couple of months. Yellow spot appears to be more active this year, particularly in Q200 and Q186 varieties. Once again a good dose of sunshine would be welcomed.

Cane grubs have again caused significant damage to crops on the area. Hot spots are in the Silkwood, Moresby, Kurrimine, Japoonvale and Mena Creek areas, with light to moderate infestations in the Daradgee and Garradunga areas.

Most farmers are using control measures, but not all. Farmers must realise that this is an industry problem and all farmers, in susceptible areas, will be affected sooner or later. **Don't rely on your neighbour for your grub control!**

For more information contact your preferred chemical supplier or your productivity board or BSES extension officer. The level of damage is 1.5 to 2 grubs per stool before economic harm is reached; so growers beware, you don't need many grubs before tonnes and dollars per ha start affecting your crops viability.

Farmers' budgets and patience have been sorely tested as research has yet to solve this tenacious problem. In a few short years we have managed to work around orange rust and smut and farmers ask; when will we reach effective grub control?

Grubs have always been around and are a problem in most areas on the cane

industry. Our arsenal of grub-control weapons is limited but we have to keep treating and researching in a well coordinated manner, otherwise the viability of the most susceptible parts of the industry will be seriously in doubt.

Finally my heaviest criticism is to the large areas of ex-cane land now under tree plantations that have been abandoned or are in receivership. These properties have regrowth of volunteer cane, vine, grasses, etc. This has the potential of a fire hazard and is a breeding ground for pests and diseases; not the least, grubs and pigs.

When are the authorities going to step in and clean up this problem? Passing the buck is not acceptable!

John Blanckensee

Northern Director



Carol Mackee
Herbet Region Director

Herbert

Crushing commenced in the Herbert on the 21st June, 2010.

The weather conditions have seen farmers getting ground ready with some early planting. At the present time we have overcast windy conditions, with very little rain. A bit of a shock after the lovely days we have been experiencing.

Grubs are causing concern in the Herbert and farmers need to continue the recommended treatment.

At the present time mobs of pigs have been moving around and farmers need to be ever vigilant. It is a never ending battle to control these feral pests. Cockatoos have also been giving the cane a hiding as it has matured, with some paddocks 'sweeter' than others.

The abandoned MIS (tree plantations) in the Herbert have left behind an environmental disaster for local landholders. These plantations have become a breeding ground for pests and weeds, including the declared, environmentally damaging grass, hymenachne, along with feral pigs, etc.

While farmers are facing Environmental Risk Management Plans and other constraints, just what is the Government doing with regard to fixing this mess? So far it has been left to farmers who have faced over 10 years of tough economic times trying to defend their boundaries from declared weeds and pests that are breeding on public and derelict sites. Farmers are not being treated fairly and the Environment Minister needs to look at the big picture, not penalise farmers.

Carol Mackee

Herbert Region Director



Margaret Menzel
Burdekin Director

Burdekin

The Burdekin harvest had an eventful early start, with an early start to mill performance issues, including Kalamia being out of action, resulting in cane transfers to Invicta mill (despite its own share of performance issues) and a mill worker's strike in time for Kalamia's return to production.

A strike by QR over the State Government's planned assets sale added to the mix. Localised rain has resulted in some supply delays; however these have not been widespread or prolonged.

District CCS began poorly, rising to an average of 12.7 over the district, to 23 June. The total crush over the four Burdekin mills, to date, is in excess of 400,000 tonnes.

The Australian Cane Farmers Association Collective met ahead of the season to finalise negotiation issues for the Cane Supply Agreement for 2010 and to discuss relevant issues.

The commencement of the 2010 harvest, with only interim contracts in place for all collectives, again confirms the failure of the so-called "deregulation" process put in place by the Queensland government. Cane farmers are again supplying the 2010 harvest with the prospect of no bargaining power to negotiate a fair contract as their bargaining power has already been signed away under the interim agreements.

With cane continuing to be harvested, the whole process is shown up as a complete farce. It is now immaterial to CSR/Sucrogen whether they continue negotiations, or whether the grower bodies approve the generic agreements

that CSR/Sucrogen have submitted to them. District collective groups or individual growers have little difference between agreements and suffer the same difficulties in their negotiations for proposed changes.

The Annual General Meeting of the Australian Cane Farmers Association, Burdekin Branch has overwhelmingly supported the re-election of Frank Scarabel as Chairman, Ian Shepherdson as Secretary and has elected Enzo Arboit as Vice-Chairman for the coming year.

Discussion centred around the QCA review of water prices and members resolved to form an Australian Cane Farmers Association water committee to represent growers' interests across the state, on irrigation issues. Membership would be paid at 1cent per tonne and membership would be extended to both members and non-members alike. A membership form has been drawn up and is now available from the local director, Margaret Menzel.

Burdekin Productivity Services has advised growers to ensure that all hygiene procedures are followed with machinery movements and planting and harvesting equipment, within and between farms. Failure to follow the procedures can be a costly exercise – prevention is still better than cure.

Advice from Burdekin Productivity Services has confirmed that "Q183 continues to exhibit good field tolerance to smut under heavy infestation pressure on the BSES research farm in the Bundaberg region. BSES intends to trial Tellus under similar conditions in the near future."

Growers are advised that the Reef Wise compliance record books are now available for use. Reef Rescue grant

recipients for Round 2 should have completed a Farm Productivity Assessment (FPA), the 6 easy steps and chemical accreditation courses. I recently held a workshop for growers to complete their FPA on 25th May at the Synergy Offices in Queen Street, Ayr. Dave Millard conducted the course and it received a 'thumbs up' from all participating growers. Further courses can be held if required by contacting me on 0407 779 700.

Growers have requested more workshops to discuss industry events and requirements as a group environment provides an ideal avenue for discussion and response to any difficulties encountered by the participants.

Margaret Menzel

Burdekin Director & Jnr Vice-Chair, Australian Cane Farmers Association.



Ross Walker
Central Qld Director

Central Queensland

The crushing season is progressing well with good harvesting conditions. CCS continues to increase and with a recent strengthening in the world sugar price the outlook is encouraging. It does appear however that initial tonnage estimates may not be achieved, which is disappointing.

In the Mackay Sugar area, Q228 started out with the highest sugar content followed by Q185, Q208, Q226 and Q205. PRS at 6 July was 12.45.

Ground preparation for planting is well advanced and when warmer weather approaches planting will get into top gear.

Smut is widespread across the district with some varieties heavily infested.

Plane Creek variety performance ranking up to the week ending 3 July was KQ228 –14.63 CCS, Q221–13.98 CCS, Q185 – 13.84 CCS, Q135 – 13.66, Q209 – 13.59 CCS & Q208 – 13.57 CCS. A CCS of 15.98 in a sample of KQ228 from the Koumala area was recorded.

Mill average CCS for the season to date was 13.42.

The QUT Biorefinery opening was on Friday 9 July at Racecourse Mill, with Premier Anna Bligh officiating. The project has the potential to provide valuable diversification options for the region.

Ross Walker

Central Region Director



Mike Hetherington
Southern Director



Connor O'Malley and Mike Hetherington inspect Gary Walk's (not pictured) two row planter. He and his crew built it out of single row units. 41 acres a day!

Used mostly to plant Bundy Sugar farms.

Connor O'Malley, an Irish visitor worker was having a look at it. He thought it looked much better than a wholestick planter!

Southern Qld

Crushing is under way. Sunday 20th June saw most harvesting operations setting out on their shakedown runs with trucks on the roads around Maryborough and papers printing photos of mills puffing a bit of trial run smoke.

Rainfall has been well below average for May and June, at one tenth of the average! This has allowed much of the water-logged ground to pick up a little. In fact we have irrigated continuously from mid-May to mid-June and then only stopped to make ready for the harvest. When the Sunshine Coast has a few millimetres it must have been a dry session.

2010 Water Allocations are 100 percent, thanks to a wet summer, so July will be a busy month for irrigation equipment maintenance. The reasoning behind this is, from looking at the records, the last dry May - June preceded the 1982 drought.

Arrowing of some varieties has growers wondering when to cut these varieties. It has been many years since such prolific arrowing has occurred in the region and so management issues will need to be revisited.

The Irrigation water pricing policy debate has gone quiet, but will reappear with the next phase of the QCA enquiry.

Producer pricing has been brought forward with mills actively encouraging growers to become involved in some form of 'owner-driver' pricing.

Bundy Sugar and ISIS Cane Services have struck a deal to swap cane tonnage from their respective areas to reduce transport costs. Cane grown on ISIS Cane Services land and cane growing on Bundy Sugar land is being sent to the nearest mill. Individual growers are not involved. The deal is between corporations. Rightly or wrongly, sentiment is still strong with individual growers as to who crushes their cane, so none of the 40,000 tonnes is from privately grown farms. Cane from the Bullyard area, north of Bundaberg is going to Bundy Sugar on rail and cane in the Farnsfield area south of Bundaberg is going to ISIS Mill on rail. Road transport is therefore reduced. Comical if it hadn't cost us all so much!

Milliquin has had a few million spent on modifications to extract more sugar. This has the benefit of reducing the amount of crop required to fulfill orders and counters the effect of urban sprawl eating into the crop.

ISIS Board structure has changed again. Mark Hochen has been elected Independent Chairman of the Board. From a farmers point of view this could be seen as a loss of the ability of farmers to run their own business. Historically this owner operator system is what has kept the ISIS Mill alive. Modern times may have created an environment where farmers no longer have the skill/ability/education to manage a sugar mill. Time will tell!

Got to go, bins are not self-filling!

Mike Hetherington
Southern Region Director.



Robert Quirk
NSW Director

NSW

NSW Season kicks-off

All mills in NSW have kicked off the 2010 crush. Condong Mill started on 21 June, Broadwater 1 July and Harwood 29 June. While the crush will not be a record, the tonnages per hectare will be respectable.

The NSW Sugar Milling co-op has engaged a member of staff to work towards bringing some of the land that has been lost to production over the last several years back into sugar cane. With acceptable sugar prices expected over the next several years we think the project will be successful.

There is an air of optimism in the industry that has not been present for some time.

Our three mills all started the season on burned cane this year. From the 4th of August Condong mill will move to green cane harvesting for a trial of 100,000 tons. During the period of the trial no burned cane will be accepted at the mill for crushing. The local cane growers executive will assist the mill staff to organize the trial and to ensure equity of harvest during the trial period.

The trial will start with growers providing cane with about 50% of the available extraneous matter (no topper running and extractors running at 600 rpm).

If this still causes problems at the mill then we will increase extraction until the mill can handle (crush and make sugar) what we send in.

The three cane growers executives in NSW have been organizing chemical accreditation courses for their growers to renew their certificates and for the few who have not done the course at all. The course runs for 2 days and in NSW farmers must renew their certification every five years.

Let us hope that the season is a productive one for all our growers and that we have an early finish without too many stoppages, at the mill or by wet weather. That is a big call but we can only hope!

Robert Quirk
NSW Director

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