



JULY 2015

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Government Reviews Recommend Intervention for Cane Farmers

By Stephen Ryan

On June 24 2015, the Senate Rural and Regional Affairs and Transport References Committee inquiry into Current and future arrangements for the marketing of Australian sugar published its eagerly awaited report.

The recommendation:

The committee recommends the development and implementation of a mandatory sugar industry Code of Conduct, acknowledging that, provided appropriate stakeholder consultation is undertaken, the work of the Sugar Marketing Code of Conduct Taskforce may provide a foundation upon which a Code of Conduct may be established.

The Senate Committee was tasked with investigating the current and future arrangements for the marketing of Australian sugar, including:

- The impact of proposed changes on the local sugar industry, including the effect on grower economic interest sugar;
- Equitable access to essential infrastructure;
- Foreign ownership levels in the industry and the potential to impact on the interests of the Australian sugar industry;
- Whether there is an emerging need for formal powers under Commonwealth competition and consumer laws, in particular, whether there are adequate protections for grower-producers against market imbalances; and
- Any related matters.

One day later the Abbott Government's Sugar Marketing Code of Conduct Taskforce recommended to Agriculture Minister Barnaby Joyce and Small Business Minister Bruce Billson that a mandatory Code of Conduct be adopted for the sugar industry. **Continued page 5 >**

ACFA holds membership levy for 2015 season

ACFA Board of Directors are pleased to announce that the membership levy for the 2015 season will remain unchanged.

The levy will be held at 14c per tonne + GST, capped at \$2,500 + GST.

Anyone wishing to join ACFA, should contact Head Office on (07) 3839 1900, or download a membership form from www.acfa.com.au

Chairman's Comment

Much has been written on the subject of raw sugar marketing and the future of QSL. Despite this, the arguments aren't always discussed in context.

The following is an outline of the issue in its historical and industry context.

The situation

For the last century the Queensland sugar industry has been based on a partnership between growers and millers. A formula has defined the economic interest (EI) for growers and for millers.

Vesting

Vesting the title of sugar in the QSL Government and finally in QSL kept market power from skewing to either millers or growers, while the formula for the division of sugar monies provided incentive to either sector to improve their performance.

How did these guidelines come to be?

Market power wasn't always held in balance. A century ago the natural monopoly of mills had revealed a market failure or imbalance where mills had more information and market power to force price and logistic decisions onto growers. This led to the Royal Commission of 1912, which identified **the appropriate role for Government to ensure competitive and fair markets.**

QSL's CEO Greg Beashel makes a valid argument: "At the heart of this issue are the principles of value, risk, trust and transparency. Price is one aspect of the value proposition and should not be considered in isolation. Pricing is one of the four pillars of our industry system, along with financing, marketing (selling) and bulk storage, handling and shipping."

This is what ACFA has been arguing – **the need for choice and a formal right to it!**

After such wisdom and foresight in the early twentieth century, how have we repeated the error of the past?

The problem: the elephant in the room

The elephant in the room WAS, IS & HAS ALWAYS BEEN, the ownership or control of the physical sugar.

The deregulation of the Qld sugar industry

The Beattie Government had a view to deregulate the Qld sugar industry. It wanted to remove administrative burden and hand structures back to the industry on a commercial footing. Mills saw their opportunity and growers saw the risks.

The Qld Government, along with industry signed a 'Heads of Agreement' and a 'Memorandum of Understanding' which agreed that the statutory marketing system would be replaced by a voluntary marketing arrangement, which would function with full participation in, and support for QSL. Soon after, two mills pulled out.

From January 2006, the Voluntary Marketing Arrangements (VMA) took effect.

In 2008, growers & millers vacated the board of QSL in favour of a fully independent board.

The VMA transitioned into the Raw Sugar Supply Agreement (RSSA), where all participants marketed their export raw sugar through QSL.



Don Murdy
Chairman

2015 ACFA Director Elections

Australian Cane Farmers Association (ACFA) can advise that Directors from the Northern, Herbert and Southern regions stood un-opposed in the 2015 elections.

Congratulations to Don Murday, Carol Mackee and Michael Hetherington on their re-election.

Mill sales

Over time, 15 Australian mills have been bought by overseas interests. I do not believe that foreign ownership alone is the issue, as the long-term agenda displayed by these owners could easily be the same if owned by an Australian-based company.

The issue is that these companies are part of global businesses and they are trying to integrate their Australian assets into that global model; whereas those loyal to QSL wish to support the Queensland brand, which is a competing model.

Nonetheless, these recent buyers made assurances to the FIRB that they would participate in the industry, as is, and not seek dramatic changes.

The unravelling of industry marketing cooperation & the recognition of GEI sugar

The test of the glue of marketing solidarity came in 2010 when a disastrous wet season and the over-confidence of some mills that they would complete the crush, forced QSL to close out futures positions at a loss of over \$105 million.

Here is where farmers first learned of the RSSA, which was not mentioned in some Cane Supply Agreements (CSAs) and certainly not understood, particularly in terms of the financial connection to pool performance.

Mills met with QSL and under an interpretation of the RSSA, defined a trading loss as an administrative cost, so that growers were forced to absorb two thirds of the loss.

Growers Seasonal Pool exposure to this loss was via the shared-pool. Growers Committed Tonnage exposure was via the administrative charge.

Court proceedings are still open on this issue, which seriously eroded trust and confidence in the joint marketing system. Some of the millers involved have subsequently blamed QSL, arguably in order to deflect the heat from themselves and serve particular objectives.

RSSA – Option B

In 2012, Wilmar sought to market its own EI sugar via a loophole in the RSSA.

This required a renegotiation of the RSSA where mills could buy back their EI sugar from QSL, but not the growers' EI.

Before option B had been negotiated, Wilmar pushed for its own version of 'grower choice' where it could also buy back the growers' EI.

Canegrowers & ACFA rejected this on the bases that;

1. The industry hadn't yet implemented option B and Wilmar was already pushing ahead;
2. QSL was to be used as a bench mark while Wilmar would offer a premium to attract growers away from QSL;

3. Value in the Queensland brand would be destroyed by the fact of many sellers of Queensland sugar to only several powerful buyers;
4. Wilmar would compete with QSL while being the largest member of QSL, controlling the Miller class votes (a conflict of interest);

Miller/grower negotiations

Canegrowers & ACFA met with millers until early 2014 but MILLERS WOULD NOT RECOGNISE THE RIGHT OF GROWERS TO ASSIGN THE MARKETING OF GROWER EI.

Since the deregulation of raw sugar marketing, mills have closely guarded the ownership of sugar- they will not give it up easily.

Joint proposal of ACFA and Canegrowers

ACFA & Canegrowers have put aside past differences over sugar marketing to work together in the growers' best interest.

We have made joint submissions to the Qld Cabinet, the Senate enquiry, the Federal Task Force and the Agriculture and Environment Committee. Standing together is the only way to communicate a clear and confident message to Government about the grave threats we face and the solutions we bring.

Back to the future

The current Government reviews are the first time the issue of market imbalances in the sugar industry have been reviewed by the Commonwealth in more than a century, since the 1912 Royal Commission on the sugar industry. This illustrates the seriousness of the matter and acknowledges that in the absence of statutory mechanisms to ensure a pro-competitive market, the mills will march the farmers back 100 years. Deregulation has replaced a statutory monopoly with regional private monopolies.

CHAIRMAN'S COMMENT

The importance of QSL

QSL manages the four pillars of sugar marketing:

1. Marketing;
2. Pricing;
3. Financing advances;
4. Logistics.

The Queensland brand is a long-term producer-seller model. It is the envy of the sugar world; especially of those who would benefit from its destruction.

It is enviable because;

1. It is industry owned;
2. It manages the four pillars;
3. It is efficient under a single management;
4. It offers transparency;
5. It offers quality assurance;
6. It has the ability to deliver the right product, on time, every time.

Managing risk

Farming involves managing risk. As farmers, we know our businesses & we sometimes think that our miller will always remain the same. The reality is that mill staff move on and mill ownership and corporate priorities change.

Totally committing to a miller is not managing risk. Totally committing to QSL is managing risk because it is our own business.

A dangerous seduction

Some farmers are being influenced away from QSL by claims of better performance by their mill. As for any incentives to leave QSL for a rival, farmers need to be sure that the 'carrots' offered don't turn into 'sticks', in the longer-term.

In the sugar market, small tonnages can at times do better than larger pools but when things go wrong; there is not the benefit of pooling.

Be warned, that if QSL goes there will be no alternative to benchmark a mill's market performance; there will be little or no transparency unless a mill chooses to offer it; mills will be able to charge arbitrary administration fees for sugar pricing;

Farmers do not and will not have the market power to force their mill into any position of contract.

The solution – the options

During the 2015 election campaign, the Newman Government was about to legislate for Grower Choice – it can happen!

1. State solution: amend the Sugar Industry Act 1999;
2. Federal solution: a Mandatory Code of Conduct under the Competition & Consumer Act 2010.

The Senate enquiry into sugar marketing investigated market power and the need for redress. The federal taskforce into sugar marketing investigated how a code of conduct could balance market power.

If legislation is to be the solution, it must provide that:

1. Millers and growers must negotiate in good faith;
2. Cane supply contracts must:
 - a. Link the price of cane to the price of sugar;
 - b. Provide the grower with the right to choose the entity which will market the 'grower economic interest' sugar;
3. Mill owners must not discriminate against growers which choose to have an entity other than the mill owner or their affiliates market their grower economic interest.
4. There must be an affordable and timely pre-contractual arbitration process.

Conclusion

The deregulation of the raw sugar marketing in the Australian sugar industry has, as predicted, led to market forces taking control. Despite claims made, the proprietary miller models are not choice models. These exclusively package-up growers into the supply chain of their miller as captive suppliers.

The deregulation of raw sugar marketing removed vesting, a state-based statutory monopoly in favour of mill-based, regional, private monopolies – in effect local 'single desks'.

The role of government identified by the Royal Commission of 1912 has not changed. It is to establish a regulatory structure that prevents the misuse of market power, addresses market failure and establishes a competitive market.

I urge you to make your wishes known to all decision makers, especially your local State and Federal members of parliament – this will probably be our last chance!

Don Murday

Chairman

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The Taskforce, which was established by the Agriculture Minister Barnaby Joyce and Prime Minister Tony Abbott in December 2014, was set up to investigate competition and marketing issues facing the cane sector following moves by foreign millers to exit traditional arrangements with Queensland Sugar Limited.

Taskforce Chair George Christensen said that the taskforce had recommended a mandatory Code of Conduct that addressed these key points:

- *A mechanism to distribute relevant interests in the quantities of sugar obtained from cane between growers and millers;*
- *A link between the price paid for cane and the selling price of sugar;*
- *The ability to choose marketing services;*
- *Non-discriminatory provisions;*
- *A mechanism to resolve disputes.*

The Taskforce terms of reference were to investigate:

- *The concept that growers' have an "economic interest" in the sugar they supply to the mill;*
- *The growers' ability to choose a marketing entity for their "economic interest";*
- *Transparency of sugar marketing activities;*
- *The mill supply contract negotiation process;*
- *Protecting growers from discrimination by millers;*
- *Arbitration where agreement cannot be reached as part of a contract negotiation process;*
- *The encouragement of investment in high-quality mills, milling procedures and marketing arrangements;*
- *The facilitation of financial returns for growers;*
- *State and Commonwealth Acts relating to the sugar industry and competition; and*
- *Codes of conduct in other industries.*

The taskforce recommended the following:

The taskforce has determined that there needs to be a Code of Conduct on order to resolve the current impasse over marketing arrangements. In almost all cases, growers and millers are diametrically opposed on two key points; recognition of Grower Economic Interest (GEI) sugar, and the grower's right to a choice over who markets that GEI.

The overarching fact is cane growers operate in markets which are not truly free as they are, by and large, forced to sell their product to a single monopoly miller. The overreach by millers, in seeking to further entrench a lack of competition in the market by monopolising the marketing of sugar has caused widespread anxiety and a growing lack of confidence in the future of the sugar industry amongst growers; both family farming enterprises and corporate farmers alike.

The taskforce also determined that such a code needs to be mandatory due to the fact that milling sector has indicated its unwillingness to be a party to a code of conduct.

Based on the input from individual growers and grower collectives who represent almost the entire grower body, the key factors to be covered by the code are listed below:

- *A mechanism to distribute relevant interests in the quantities of sugar*



Stephen Ryan
ACFA General Manager

GENERAL MANAGER'S COMMENT

obtained from cane between growers and millers;

- *A link between the price paid for cane and the selling price of sugar;*
- *The ability to choose marketing services;*
- *Non-discriminatory provisions;*
- *A mechanism to resolve disputes.*

Katter Australia Party Bill

On 19 May Shane Knuth MP, Member for Dalrymple introduced the Private Members Bill Sugar Industry (Real Choice in Marketing) Amendment Act 2015 to “ensure cane growers across Queensland have a choice in the marketing of their own product and retain existing market arrangements.”

“This Bill addresses the imbalance in market power currently existing between mill owners and growers, and protects one of our largest, yet struggling industries.”

“This is something the cane growers, Australian Cane Farmers Association (ACFA) and CANEGROWERS are all calling for,” he said. “The Bill has been a collaborative effort of these groups and will ensure that the industry remains sustainable and will allow it to grow and prosper.”

“The amendment we are proposing has almost zero cost to Government but provides huge benefits to the industry,” Mr Knuth said.

“Unless this issue is addressed the anti- competitive actions of corporate monopolies will have no obstacle when it comes to taking advantage of our producers,” he said.

“We hope to be able to work with the government and opposition on this, politics really has not place disrupting such a positive step in the right direction.”

The KAP Bill is a commitment from meetings held in Ingham and Innisfail on 14 and 15 April this year.

Sugar Industry (Real Choice in Marketing) Amendment Bill 2015 Public briefing

The Sugar Industry (Real Choice in Marketing) Amendment Bill 2015 has been referred to the Agricultural and Environment Committee, which will examine the Bill and report back to Parliament.

On Wednesday 15 July 2015 the Member for Dalrymple, Mr Shane Knuth MP, briefed the committee on this private members' Bill.

The committee must provide its report to the House by 14 September 2015, after which the Government has time to respond. Unless the Government classes the Bill as ‘urgent’, it would appear unlikely that the second reading debate would occur before the February 2016 sitting.

The LNP announces a Bill

On 1 May, Shadow Agriculture Minister Deb Frecklington said she would prepare a Private Members Bill for the Queensland Parliament to introduce pro-competition amendments to the Sugar Industry Act 1999.

“Cane growers up and down Queensland’s coast need certainty for fair competition in sugar marketing and dispute resolution with mills,” Ms Frecklington said.

“We are determined to investigate this issue and find an appropriate solution”

Ms Frecklington said she was calling on the Labor Government and Katter Party to support legislative change to manage the marketing arrangements under the Sugar Industry Act 1999.

“If the only resolution to this situation is legislative changes then the LNP will take the necessary action to progress these changes and bring them before the Queensland Parliament,” she said.

“It is important growers are given input into the price they receive for their sugar as well as having their concerns heard regarding sugar marketing.”

Conclusion

Time is ticking for cane farmers: each day that passes is a day closer to an eventual upturn on the world sugar price. When that happens, there will likely be a stampede of farmers wanting to hedge their income. Unless Government intervenes, the mills outside QSL hold all the cards and time is on their side. They are ready and keen to sign growers up to their proprietary systems

Stephen Ryan

General Manager

Climate Outlook for July to September

Issued 25 June 2015

The Bureau of Meteorology recently issued its monthly and seasonal climate outlooks for July to September - A generally wetter-than-average season is more likely for parts of the west, while drier in the far southeast. For most of the country, warmer nights are likely, with warmer days likely for the southern coastline and parts of northern Australia.

The outlook for the next three months indicates:

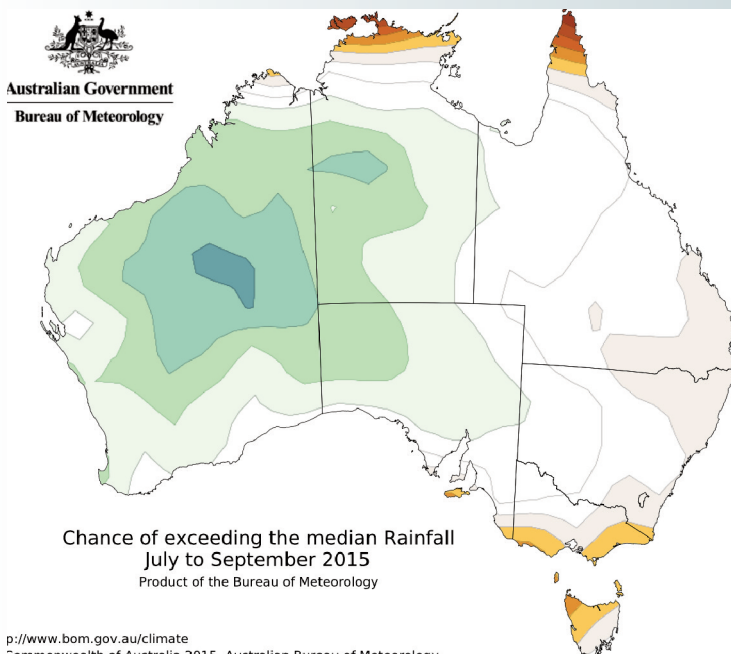
There is an increased chance of a drier three months over southern parts of southeast Australia, but an increased chance of a wetter three months over central and northern WA, as well as adjacent areas over the WA border. Most of eastern Australia has a roughly equal chance of a wetter or drier July to September.

July to September days are likely to be warmer than average across the southern coastline of mainland Australia, Tasmania, and large parts of northern Australia. Overnight temperatures are likely to be warmer than normal for most of Australia, except for an area across the SA-NSW-Victorian border.

Updated each month, Climate Outlooks provide a key service for many Australian sectors that need to look at the months and season ahead for their planning, such as the resources, agriculture and rural sectors, as well as emergency services.

Climate Outlooks indicate likely temperature and rainfall trends over monthly or seasonal timescales, and are driven by large-scale shifts in the climate such as El Niño or La Niña events. By contrast, weather forecasts are currently produced out to seven days, and are used in short-term planning.

For more information, or to watch or share the video visit www.bom.gov.au/climate/ahead/





ACFA Chairman Don Murday with young mill work Mitch Zunker at the Cairns Sugar Terminal



Case IH tractor specialist, Ken Ohnell, talking to the delegates about the Magnum Rowtrace 380 CVT

Next Gen delighted by participation at Case IH Step UP! 2015

March was a busy month for Next Gen with the program hosting Case IH Step UP! 2015 in Palm Cove in Far North Queensland.

With the event only being the second one ever held, organisers were very pleased to see a 160-strong delegation turn up for the two days to discuss the future of the Australia sugar industry.

The event began with a Welcome Function which gave attendees a chance to network with other farmers, researchers, harvesters and millers from all regions of the industry while exploring the trade exhibition.

The first official day of Case IH Step UP! 2015 saw delegates return to the Conference Centre to hear industry experts discuss advanced farming practise, Bonsucro, Smartcane BMP, new technologies and machinery.

One stand-out speaker for many was Michael Camilleri, Owner and Manager of Maalacan Engineering, Director of Australian Cane Farmers Association and cane farmer. Michael's passionate talk about innovation and focusing on the things you can change, not the things you can't was received with an animated round of applause and left delegates discussing their ideas for innovation enthusiastically.

'It's heartening to see so many young faces taking such a keen interest in the topics discussed at Case IH Step UP!,' Michael said.

'I think if the enthusiasm of the bunch of people we saw at the Conference is anything to judge by, our industry has a bright future ahead.'

The day also featured a Case IH machinery display which included a harvester and an array of tractors including the 2015 Tractor of the Year, the Magnum® 380 CVT,



The technologies and machinery panel with Ken Ohnell (Case IH), Jack Robertson (DAF), Allan Blair (DAF) and Michael Camilleri (ACFA) moderated by Brian O'Connell from Australian Sugarcane magazine.

CASE IH STEP UP! 2015

the only one currently in Australia. Delegates were also fortunate because US Case IH tractor specialist, Ken Ohnell, was on hand to give a personal tour of the machines.

The delegation welcomed 2013 Nuffield Scholar, Joe Muscat, to the Conference Dinner to hear about his study and travels that he has undertaken as part of his scholarship. The group was captivated by Joe's presentation and motivated by the work he is conducting on his farm in the Mackay region.

The final day of the event saw sugar research and extension discussed, along with sugar marketing and finance & succession planning.

CEO of Queensland Sugar Limited (QSL), Greg Beashel's presentation was received with interest as he outlined QSL's vision for the future of raw sugar marketing in Queensland. Juanita Maiden from MacDonnells Law was also received very well, discussing the extreme importance of careful succession planning for family farms.

'Juanita's presentation was highly informative and was delivered in a very clear way. I think it was of great benefit to the young farmers, as well as to the older ones in the room,' Next Gen Officer, Gerard Puglisi, said.

Delegates also had the opportunity to attend two field trips whilst at the event. One of the trips offered was to Sweet Farm Tours in Mossman to see first-hand the diversification of the Puglisi family farm. The other saw delegates travelling to the Cairns Sugar Terminal where QSL Industry Relationship Manager, Carla Keith, gave an in-depth tour of the facility. This was followed by a trip to the Barron Delta to hear from Derek Sparkes about the important nitrogen trials he is conducting there.

Next Gen was very pleased with the high level of industry support that was shown for Case IH Step UP! 2015, with key industry bodies such as QSL, SRA, ACFA and CANEGROWERS partnering with Next Gen for the event.

'Case IH Step UP! 2015 was the success it was because of the support from our sponsors, particularly the team at Case IH, as well as the exhibitors, speakers and, of course, the delegates,' Gerard said.

'I would like to thank all of those who took the time away from their farms and other jobs to contribute to the event. I hope that we can keep in touch with the help of the Next Gen program and continue the discussion about how to ensure a sustainable future for our industry.'

Photos and speaker presentations from Case IH Step UP! 2015 are available at nextgenstepup.com.

More information about the Next Gen program can be found at nextgenfarmer.com.



Delegates at the Case IH Conference dinner

Industry News

24 July 2015

Sugar is key to Trans Pacific Partnership trade agreement success

Sugar will be the word on everyone's lips at what looks set to be the final round of big trade talks in Hawaii this week. The Australian sugar industry says there is an unprecedented magnitude of opportunity for Australian sugar in the Trans Pacific Partnership talks, but it is important not to underestimate the size of the task at hand. They say Australia will need all its resolve to stay strong and focussed on getting the much talked about improved access for Australian sugar over the line.

24 July 2015

Bitter experience prompts last push for sugar to be included in TPP

The Australian sugar industry is making a final push to get sugar included in the Trans Pacific Partnership Trade agreement, as talks resume in Hawaii. Australian Sugar Industry Alliance trade committee chairman Paul Schembri says that, with a bitter history in free trade agreements, cane growers were determined not to be left out again.

23 July 2015

Yellow canopy syndrome and rain prompt Queensland sugar crop forecast downgrade.

A combination of unseasonal wet weather and the mysterious yellow canopy syndrome mean Queensland's cane crush is now unlikely to realise the 33 million tonnes forecast..

23 July 2015

Cane growers and millers discuss the mixed results around Queensland for the crush

Canegrowers says overall the Queensland crop is likely to be lower than first forecast, despite record-breaking crushes in parts of Queensland.

16 July 2015

SRA announces appointments to Research Funding Panel

The Sugar Research Australia (SRA) Board has announced new appointments to the Research Funding Panel (RFP).

The RFP provides a crucial role in overseeing SRA's contestable research grants process and broader research investments.

16 July 2015

Wilmar takes temporary pricing off the table but tells growers 'door still open' on sugar marketing

Australia's largest sugar producer, Wilmar, has signalled to growers it will not forward-price sugar supplied to its mills beyond the next season.

13 July 2015

Mackay Sugar worried urban expansion inside proposed ring road will put pressure on its Racecourse Mill

Milling company Mackay Sugar says the proposed route of a new ring road around Mackay, will place its Racecourse Mill under pressure from urban growth. The proposed route runs to the north of the mill, leaving it stranded inside the ring road, along with the city.

10 July 2015

Sugar marketing laws under the spotlight

A parliamentary committee will examine proposed amendments to

the Sugar Industry Act 1999 to give cane growers choice in how their sugar is marketed.

9 July 2015

Cane growers and Mackay Sugar agree on payments for cane with sub-standard sugar content

Cane growers have struck a deal with milling company Mackay Sugar that results in them receiving payment for cane below the standard sugar content level.

9 July 2015

'Tri-partisan' approach key to sweet outcome

With the hearing set for next week Member for Dalrymple Shane Knuth is confident his Sugar Industry (Real Choice in Marketing) Amendment Act 2015 will pass the scrutiny test when he addresses the Parliamentary Agriculture Resource and Environment Committee.

9 July 2015

Sunshine and sugar

Cane growers in NSW have voted to sell 50 per cent of their sugar milling operations in the state's north east in a move that paves the way for growth against a backdrop of declining global sugar prices.

6 July 2015

Feral pigs run rampant, cause \$7 million damage to Mackay's cane crops in 12 months

Feral pigs caused \$7 million in damage to cane crops in Queensland's Mackay region last year, up from \$6.5 million the previous year. Mackay Area Productivity Services (MAPS) project officer, Shane Hare, said the figures taken from collected agricultural data, showed the severity of feral pigs' impact on the industry.

5 July 2015

Ag White Paper delivers \$2.5 billion in concessional loan access to farmers

Through the Agricultural Competitiveness White Paper, the Australian Government will give drought-affected farmers greater certainty about in-drought assistance by establishing a new concessional loans scheme, available over 10 years.

3 July 2015

Sugar farmers push for TPP inclusion

Trade Minister Andrew Robb has made market access for Australian farmers, including into the United States, Canada, Japan and Mexico, a key bargaining point in the Trans-Pacific Partnership (TPP).

2 July 2015

World Heritage Committee decides against declaring reef as 'in danger'

The United Nations' World Heritage Committee has decided against declaring the Great Barrier Reef as "in danger", but says it will closely monitor the situation over the next four years. The committee's 21-nation members met in Bonn, Germany, to debate a draft decision that had recommended the reef not be listed.

2 July 2015

Australian Owned Sunshine Sugar formed

The growers of New South Wales Sugar Milling Cooperative have voted with strong support for the proposal to merge the refining and milling operations under the Sunshine Sugar partnership. Over 83% of growers voted in favour of the proposal. The new arrangements see Manildra buying

a 50% ownership in the milling operations from New South Wales growers and the Sunshine Sugar partnership operating the milling and refining operations as one business on a 50/50 ownership basis.

29 June 2015

Sugar industry campaigns against Trans Pacific Partnership

The Trans Pacific Partnership which has been in negotiation for years could be a reality within weeks. Expectations are rising that one more meeting of regional trade ministers is all it will take to conclude a deal. The campaign against the agreement has ramped up as Australian sugar cane growers urge MPs to block it.

25 June 2015

Code released on sugar marketing

The nation's cane growers heartily welcome the release of a proposed mandatory code of conduct for sugar marketing by the federal government taskforce today. The release of the code follows hot on the heels of the Senate recommendation in favour of a mandatory code of conduct to address the serious commercial imbalance against the nation's cane growers in their negotiations with the country's largest sugar millers.

25 June 2015

Taskforce recommends Sugar Code of Conduct

The Abbott Government's Sugar Marketing Code of Conduct Taskforce will today recommend to Agriculture Minister Barnaby Joyce and Small Business Minister Bruce Billson that a mandatory Code of Conduct be adopted for the sugar industry.

25 June 2015

Sugar millers 'had their chance', now Senate committee tells government to act on marketing war

More than 12 months after the dramatic exit of three major sugar milling companies from the \$1.6 billion Australian export sugar pool, a federal parliamentary inquiry has found the government should intervene.

25 June 2015

Australian-first: Cane farmers to get access to details of overseas sugar sales

A proposal by Wilmar Sugar Australia will see cane farmers' grower economic interest recognised and an independent Grower Transparency Committee formed to give farmers access to Wilmar's Australian sugar sales.

24 June 2015

Senate Marketing Report: No Surprises - Industry Needs to Sort it Out

The Australian Sugar Milling Council (ASMC) today acknowledged the release by the Senate's Rural and Regional Affairs and Transport References Committee of its report on current and future arrangements for the marketing of Australian sugar.

23 June 2015

SRA announces research investment of \$17.5 million in 2015/2016 with priority on key impact areas

Sugar Research Australia (SRA) has today announced its research investment agenda for 2015/2016, which will deliver research and development outcomes that provide direct benefits to sugarcane growers and millers.

Results from trials undertaken in the Burdekin region show improved sugar cane growth following use of Great Land®.

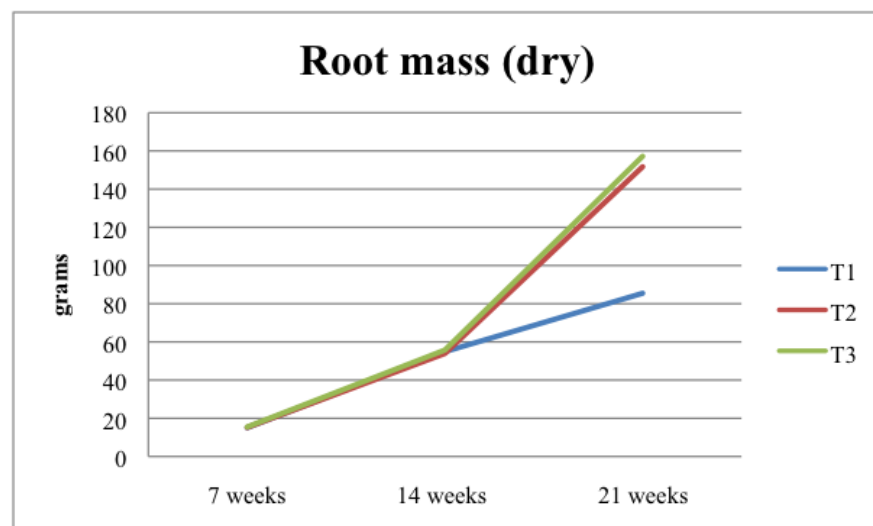
With a great deal of focus being applied to soil health and plant nutrition management in the sugar cane industry, as well as Reef Regulations and other environmental issues facing cane growers it's timely to report on some very promising results in trials using microbial organisms to promote the growth of sugar cane.

These plant growth promoting microbials help enhance crop growth by making nutrients in the soil more readily available for uptake by the plant's root system. One such product is Great Land, manufactured in South East Queensland by Terragen Biotech Pty Ltd.

Trials using Great Land have shown improved sugar cane root stock mass and above ground biomass.

In September 2014, Farmacist Pty Ltd was engaged to conduct a series of pot trials using Great Land. Jayson Dowie, Senior Agronomist with Farmacist, conducted the study with the aim to specifically examine the product's impact on root growth and root mass on a widely grown variety of sugar cane.

Sugar cane (KQ228 variety) was grown from one-eye setts and harvested at 7 weeks, 14 weeks and 21 weeks. The cane was subjected to three different treatments, a control (T1), an application of product equivalent to 100 L/ha (T2) and an application equivalent to 200 L/ha (T3).



Setts at 7 days old showing differential development between treated and non-treated setts

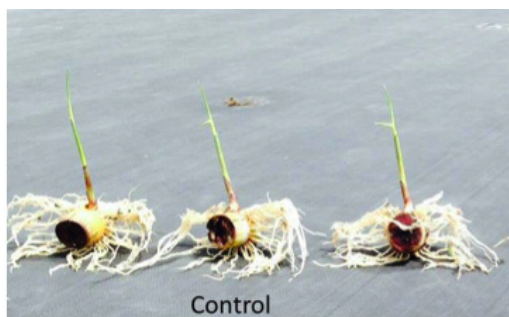
Following the application of Great Land differences in root biomass and plant biomass (above ground) were observed after 21 weeks growth. When harvested at 21 weeks the plants in the 100 L/ha group had dry root mass **78% greater** than the control group. In plants that had an application equivalent to 200 L/ha the dry root mass was **84% greater** than the control group.

Similarly, the above ground biomass of the plants that had the equivalent of 100 L/ha was **49% greater** than the control group after 21 weeks growth. For those that received the equivalent of 200 L/ha the mass was **72% greater** than the control group.

"An important finding from our initial trials is the observed increase in root mass. This indicates that the plants will have a stronger anchor in the ground which should benefit cane growers," said David Yunghanns, Managing Director of Terragen Biotech. "We are also planning to conduct an extended version of this recent study to get results from cane that will be grown for more than 21 weeks," he added.

"In field trials are also underway, supervised by Farmacist, in both the Mackay and Burdekin regions and we expect to receive the results in August this year. We anticipate the results from our in field trials will build on the pot trial work," added Yunghanns.

Other results obtained from soil incubation tests conducted elsewhere in



Setts at 7 days old showing differential development between treated and non-treated setts

Australia in over 200 farms over a 2 year period show improved levels of various soil nutrients. Another important finding from the soil incubation tests is that through the use of Great Land it is possible to reduce the use of inorganic fertilisers and plants are better able to handle periods of abiotic stress including low moisture conditions. "We believe the results coming out of our product research indicate that Great Land could provide real benefits to cane growers," added Yunghanns.

If you would like more information about Great Land® contact Terragen on (03) 9018 2230 or go to www.greatland.net.au

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10 April 2015

Mackay Sugar and MSF Sugar sign joint crushing deal

Mackay Sugar and MSF Sugar today entered into an agreement to toll crush up to 250,000 tonnes of Mackay Sugar contracted cane at the Tableland Mill in the 2015 season.

The agreement, which is still subject to satisfaction of a number of conditions, will see the Tablelands cane transported to MSF Sugar's Tableland Mill for crushing as opposed to Mackay Sugar's Mossman Mill.

Mackay Sugar CEO Quinton Hildebrand said the tolling agreement allows MSF Sugar to utilise their current spare capacity at the Tableland Mill and provides for a shorter season length for Mackay Sugar's Mossman and Tablelands growers.

"Mackay Sugar will be responsible for the marketing of sugar and molasses toll crushed by MSF Sugar and will have sole responsibility for cane payments to growers under the collective Cane Supply Agreement.

"Mackay Sugar will now engage with Tablelands Canegrowers to determine the cane to be crushed under the toll crushing agreement to optimise the logistics for both the Tableland and Mossman mills," Mr Hildebrand said.

MSF Sugar CEO Mike Barry said that "Tableland Mill will revert back to a 7 day operation in 2015 and is looking forward to working with Tableland region growers to mill their cane in an efficient manner".

Mackay Sugar's Mossman Mill is expected to handle a crop of 1 million tonnes in the 2015 season and Tableland Mill anticipates a crop of 650,000 tonnes; the two mills will commence the crushing season on 11 May and in the second week of June respectively.



**Mackay
Sugar**

Monday, 20 July 2015

QSL Market Update

Shaun Tupou, QSL Treasury Analyst

Market Commentary

Sugar

Despite trading solidly, raw sugar futures failed to maintain a three-day rally which saw the OCT15 contract trade to a top of 12.80c/lb. Choppy trading toward lower prices followed as OCT15 bottomed out at 11.92, and closed at 11.96c/lb – 49 points down on the week. Friday's Commitment of Traders report was the feature event of the week, a considerable shift in non-index funds net position.

Spread activity for the week mirrored that of the flat prices. Some early-week strengthening in the front of the board found a top of -115 points before tumbling over the latter part of the week, where the October/ March spread weakened a further 25 points to -140 before settling at -139 points. No doubt with the large shift in non-index funds announced on Friday, reactive market action will be seen in the coming session.

The latest Commitment of Traders report was released with a bang on Friday, with the most notable news being the sharp shift in non-index funds net position. Between reporting periods the non-index funds moved from net short 46,000 lots to net long 8000 lots – a 54,000-lot swing. This was possibly a reaction to the unfolding situation in China and Greece, and specs cleared up their short position to sit net long. Additionally, the Brazilian Real managed to trade up to a 3.11-high following the dominant Chinese and Greek headlines, before weakening to settle at 3.18.

The monsoon in India that started well has since slowed. Estimated rainfall in the region now sits about 3% lower than the average and it appears to have begun moving inland toward the biggest cane growing areas. Heavy rainfall in the CS Brazil region may well be El Nino-related, however the coming week is forecast to be dry. As El Nino gains some attention and with a forecast run of drier weather on the cards, it begs the question of whether we may run a similar path to last year, albeit somewhat delayed.



Currency

It was a volatile week for the Australian Dollar, as it covered a 147-point range between 0.7497 and 0.7350. The AUD slumped 100+ points over a mid-week session which saw Federal Reserve Chair Janet Yellen confirm a further interest rate increase this year. Partnered by some stronger US data and the 'yes' vote to a Greek bailout, the remainder of the week saw a choppy AUD clawing back above 0.7400 before settling weaker at 0.7378. Greek banks are expected to re-open today with the concerns which forced recent closures diminishing. However, the AUD appears vulnerable to the downside as the USD is set to remain firm and AUD factors remain under pressure.

Going forward, this week we see limited local data with the RBA minutes, CPI data and a speech by Governor Stevens of note. The US has mortgage applications, home sales, jobless claims and market manufacturing data over the course of the week.

This report contains information of a general or summary nature. While all care is taken in the preparation of this report, the reliability, accuracy or completeness of the information provided in the document is not guaranteed. The update on marketing and pricing activity does not constitute financial product or investment advice. QSL does not accept any responsibility to any person for the decisions and actions taken by that person with respect to any of the information contained in this report.



QSL loads the Transformer at the Cairns Bulk Sugar Terminal

Friday, 20 March 2015

QSL shipment makes history

A new chapter in the history of the Queensland sugar industry was written in Cairns recently when Queensland Sugar Limited (QSL) loaded the first shipment of high-polarity Brand 1 sugar bound for Japan.

The cargo of 26,000 tonnes of North Queensland raw sugar set sail from the Cairns Bulk Sugar Terminal for one of QSL's Japanese refining customers aboard the Transformer.

QSL General Manager Trading and Risk Dougall Lodge said although QSL had a 50-year history with Japanese sugar refiners and had already exported over 21 million tonnes of raw sugar to Japan to date, this cargo marked an important milestone.

"The Japan-Australia Economic Partnership Agreement, which came into force on 15 January this year, now enables us to export Queensland's high-quality Brand 1 sugar to our Japanese refining customers," he said.

Mr Lodge said QSL, Australia's largest raw sugar exporter, was hopeful that the Trans-Pacific Partnership (TPP) trade negotiations currently underway would result in further reductions to the existing levy for high-polarity Australian sugar sold into Japan.

QSL is a not-for-profit organisation which provides raw sugar marketing, finance, risk management and logistics services to the Queensland sugar industry. It operates Queensland's six bulk sugar terminals, located at Cairns, Mourilyan, Lucinda, Townsville, Mackay and Bundaberg.

Tuesday, 23 June 2015

QSL Statement - Legal Action

On Tuesday 23 June 2015, Wilmar instituted separate legal proceedings against QSL in relation to certain costs associated with the 2010 sugar production season.

In relation to these separate legal proceedings now instituted by Wilmar against QSL, QSL rejects Wilmar's claims and intends to vigorously defend them.

As per the statement issued by QSL on 19 June 2015, the Queensland Supreme Court last Thursday, dismissed the application by Wilmar to join QSL to current legal action being taken against Wilmar by a group of Burdekin cane growers. The Supreme Court also dismissed the application by Wilmar for the 2 legal actions to be heard together, such that any legal action by Wilmar against QSL will be heard separately. The reasons for the Court's decision will be issued by the Court shortly.

Wilmar's claim against QSL has been listed on the Supervised Case List, which means it will be actively managed by the Court. The legal action between the group of Burdekin cane growers and Wilmar is also on that list. Given that the 2 legal actions relate to the 2010 sugar production season, it may be that QSL will be required to give evidence at the Wilmar/grower legal action. However, as noted above, the legal action by Wilmar against QSL will be heard separately from the legal action by the group of Burdekin cane growers against Wilmar.

We will keep members advised on developments, as appropriate.

Sugar Research Australia

Industry Update



24 June 2015

SRA announces investment agenda for 2015/2016

Sugar Research Australia (SRA) has just announced its research investment agenda for 2015/2016, which will deliver research and development outcomes that provide direct benefits to sugarcane growers and millers. We are investing \$17.5 million in research for 2015/2016, and are prioritising the research on four impact areas that need urgent attention for the Australian sugarcane industry. These critical impact areas are Yellow Canopy Syndrome (YCS); conventional and genetically modified plant breeding; harvesting efficiency; and adoption.

Our industry faces ongoing challenges that require substantial research investment, but these issues need immediate attention and solutions.

The \$17.5 million investment includes \$4 million via SRA's contestable funding pool for projects starting in the 2015/2016 financial year, with these projects having a strong priority on these four impact areas.

This includes two significant projects to tackle the YCS problem, including a project to examine the root systems of affected plants, and a project to examine leaf sucrose and the link to diseases and physiological disorders.

SRA's investment is funded by the statutory levy of 70 cents per tonne of cane, to which growers and millers each contribute 35c per tonne of cane each. This investment in research is supported by matching funds of about \$5.5M from the Federal Government and \$4.15M from the Queensland Department of Agriculture and Fisheries (DAF).

SRA Board's northern visit informative

The SRA Board met in mid-June with SRA investors in Cairns, Innisfail and

Ingham. The regional visit format for SRA Board meetings continues to be an important means for the Board meeting directly with growers, millers, and other including CANEGROWERS, productivity boards and other industry organisations.

It was also an important opportunity for the Board to discuss current research and other activities directly with staff at the SRA facilities at Meringa and at Ingham.

Each evening the Board met with local growers and millers at a function, where Chairman Paul Wright AM also presented to the audience on current SRA activities. The event in Ingham also saw a presentation by Dr Peter Allsopp, Executive Manager – Development, to explain SRA's enhancements to the Herbert plant breeding program.

Nearly 200 SRA investors attended across the three functions.

Herbert region growers and millers to benefit from plant breeding program improvements

SRA has announced significant enhancements to sugarcane breeding in the Herbert region. SRA's breeding programs across the industry continue to bring new and improved sugarcane varieties through the development pipeline for the industry, and an important part of that process is working with local industry needs.

The enhancements to plant breeding in the Herbert include a stronger emphasis on selecting varieties with good pachymetra resistance and with lower flowering, to ensure varieties are being developed that maximise returns to industry. SRA varieties trials will also be changed so that potential varieties can be tested in a range of different conditions to see how they perform.



Neil Fisher

**By Neil Fisher,
Chief Executive Officer**

24 June 2015

SRA will also be ensuring that varieties ratoon well by working with Herbert Cane Productivity Services Limited to harvest some varieties under commercial conditions.

There will also be changes at the SRA farm, including additional staff, new and refurbished equipment.

These changes will deliver positive outcomes to Herbert region growers and millers and will have broader benefits across the industry.

It will help SRA continue to have new varieties moving through the pipeline to become a commercial reality in the paddock. Together with the Herbert initiative of Target 85, we expect to see local yields increase significantly.

Herbert region grower Michael Pisano has welcomed the enhancements.

"I congratulate the Board and management of SRA in having the foresight to make these enhancements to the breeding program in the Herbert," Mr Pisano said. "The resources that are being put toward the problems we face in the Herbert is something that the local industry strongly welcomes."

24 July 2015

SRA announces appointments to Research Funding Panel

The Sugar Research Australia (SRA) Board has announced new appointments to the Research Funding Panel (RFP).

The RFP provides a crucial role in overseeing SRA's contestable research grants process and broader research investments. A national recruitment process was undertaken in recent months and suitable candidates were interviewed by an RFP selection committee, comprising Director-General of the Department of Agriculture and Fisheries (Queensland) Dr Beth Woods and two SRA directors.

The RFP will now be led by the new Chair, Mr John Pollock, who has

resigned his position on the SRA Board to take on the role of RFP Chair. Mr Pollock was a Director of BSES from 2006 to 2013 and also of SRA since its formation in 2013. He has extensive experience in natural resource management, primary industries and corporate management, and has been involved in the sugarcane industry as a grower, researcher, public policy officer, and research manager and funder.

Mr Pollock is joined by new RFP members Dr Jeremy Burdon and Mr Gary Longden, while existing RFP member Dr Andrew Wood has been reappointed. Dr Ian Johnsson contributes to the RFP as its SRA Board Director.

Mr Longden adds crucial milling expertise to the RFP. Dr Burdon is a former head of CSIRO's Plant Industry Division and brings a vast wealth of crop science experience to the table.

SRA also extend our thanks to the retiring RFP members Dr Nils Berding, Dr Paul Donnelly, Mr Laurie Watson, and Professor Alan Johnson, who formerly held the position of Chair.

Research planning workshop

SRA Researchers and Development Officers met in Townsville in mid-July to discuss research activities and planning for the year ahead and beyond. The research planning workshop was an important way of bringing together our researchers from across SRA to ensure SRA's research, development and extension continues to deliver valued outcomes for sugarcane growers and millers.

At the workshop, the group placed a strong emphasis on the targeting of research according to the immediate challenges and opportunities surrounding the four Impact Areas facing the Australian sugarcane industry. These Impact Areas are Yellow Canopy Syndrome (YCS), minimising harvest losses, conventional and GM plant breeding, and improving the adoption of research. Industry is continuing to inform SRA that these issues need urgent attention and the SRA Board has recognised these issues as having a strategic priority.

A second section of the forum then also discussed the research agenda in the context of current gaps within the eight Key Focus Areas (KFAs), as well as future research that may develop following the outcomes of research reviews into trait use efficiency, molecular breeding, precision agriculture, and nitrogen use efficiently.

As a next step from the workshop, the group identified leaders to develop the ideas further with a focus on the Impact Areas as a priority and, subsequently, to look at gaps within the KFAs.

This work will occur in consultation with industry and it will identify areas of collaboration within SRA and also externally. This planning will form the start of SRA's focus for Preliminary Research Proposals (PRPs) from coming project calls.

Most importantly, SRA is ensuring that we are focusing on research that is achievable, that it will have a significant positive financial impact for our investors, that it addresses a gap, that it is developed in consultation with industry, and that it comes at a realistic cost in relation to the outcomes.

Smartcane BMP app takes record-keeping to the paddock

Dozens of sugarcane growers have downloaded the new Smartcane BMP smartphone app to give it a try ahead of its formal launch.

Comments from this first wave of users, who saw it unveiled at the Next Gen Step Up! conference in Palm Cove, are being used to fine tune the service further.

The app provides a convenient and portable method of recording farm activities and it feeds directly into a growers' Smartcane BMP account.

Everything from chemical use, cultivation, fertiliser application and irrigation events can be entered from anywhere. All records are securely stored and treated as confidential.

Why an app?

Record keeping not only provides important information for you as a grower to better manage your farm but can also provide important information in supporting you towards accreditation in the Smartcane BMP program.

Since the commencement of the Smartcane BMP program in December 2013, facilitators have received a consistent message from growers that record keeping was both onerous and a major barrier to achieving Smartcane BMP accreditation.



So firstly a paper based Smartcane record keeping manual was created which is now freely available from facilitators and also online at the Smartcane website where you can also enter records and save them to your computer.

This was only part of the solution, however, as there was a need to develop a method from growers to record what they do when they do it. So developers started working on an app for smartphones with advice and testing from facilitators and grower. The app now allows you to collect and upload your records using your phone and it's linked directly to your Smartcane BMP account, automatically updating your records as you record them.

What does it record?

The app supports the following recording keeping operations:

- Ameliorants
- Chemicals
- Cultivation
- Fertiliser
- Herbicides
- Irrigation
- Calibration Fertiliser
- Machinery Service

How do I get it?

Any grower registered with Smartcane BMP can download the app for free from either Google Play for Android or the iTunes app store for Apple devices. Just search for 'smartcane records'.

If you need to register with Smartcane BMP first visit www.smartcane.com.au or contact your local Smartcane BMP facilitator.

Bonsucro response to Fairfood report 'Give them a Break'

Fairfood International has published a report into Chronic Kidney Disease of Non-traditional causes (CKDnT) affecting sugarcane workers in Central America.

The subject is undeniably important and the article provides an appropriate opportunity to highlight to members that Bonsucro will be looking at how serious issues within the sugarcane supply chain such as CKDnT can be addressed in an systems-wide approach.

Bonsucro would like to clarify the position of the Bonsucro Production Standard in relation to CKDnT. As you may know, the Standard was recently revised after a two-year process and an updated version came into force on 26 September 2014. When revising the requirements, the case of CKDnT was specifically referred to when improving or adding several indicators:

- “2.2.5 All workers present on the field and/or mill have access to drinking water in sufficient quantity” (core indicator – must be complied with to be certified),
- “2.3.2 Maximum number of hours worked (normal and overtime)” - added to the Standard with the specific objective of providing workers with decent working conditions.
- Additionally the Standard increased its guidance on “2.2.2 Main health and safety risks are assessed and measures for mitigation of risk are implemented” (core indicator) which has been strengthened to offer more support to the implementers. The various stakeholders consulted agreed this technical improvement was relevant to prevent the occurrence of the disease and improve the conditions of workers.

Regarding to the organisation of workers, the Standard supports the implementation and compliance with the ILO conventions and requires that workers are offered the freedom to choose to organise themselves and to use their bargaining rights.

An important point related to the implementation of the Bonsucro Standard is the applicability of its requirements to any workers present on the fields listed as part of the unit of certification, irrespective of their contractual relationship.

The Standard was developed through a multi-stakeholder approach engaging with actors from NGOs, to farmers, millers, end users, intermediaries and other organisations who are active in the sector. Fairfood participated in the public consultations.

If any Bonsucro members would like to discuss responses to the article in relation to Bonsucro and the Production Standard, please contact joe@bonsucro.com.



Kondinin Group Australia Farmer of the Year 2015

We are pleased to announce the Gerard Puglisi has once again been nominated for a division of the Farmer of the Year awards.

Last year Gerard was named a finalist in the Diversification category, in which he has been nominated for again.

As Next Gen Officer Gerard is the driving force behind the program, which encourages and supports young cane farmers, harvesters, millers and researchers into a career in agriculture, with the program going from strength to strength since being established in 2012.

Gerard is also the only farmer on the global Bonsucro Standards Review Committee. The Committee is tasked with analysing and evaluating the current Bonsucro Standard to ensure that it continues to promote measurable standards in key environmental and social impacts of sugarcane production and primary processing while recognising the need for economic viability.

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