

OUR
VOICE
GROWING
QUEENSLAND



CANEGROWERS
ANNUAL REPORT

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Vision

The industry's influential peak body, working effectively with growers, districts and stakeholders to deliver industry prosperity



Mission

Leading a strong, profitable and innovative sugarcane industry, supporting growers and their communities with passion, professionalism and a unifying voice



Values

- » *Accountability to our members*
- » *A focus on issues relevant to our members Credibility, integrity and professionalism*
- » *Open and effective communication between growers, organisation units and external publics*
- » *Community consciousness*



Goals

- » *Superior advocacy impact*
- » *Outstanding service*
- » *Highest quality, collaborative CANEGROWERS governance*
- » *Develop a positive external environment for cane growers*
- » *Recognise and manage diverse grower needs while maintaining organisation unity*
- » *Provide a foundation and structure for future industry development and planning*



Chairman's Report

Owen Menkens

It has certainly been a challenging year for growers and the Queensland sugar industry.

The 2022 crush could be described as one of the worst in many years due to wet weather and poor mill performance. Many areas did not finish harvesting until January 2023, with over a million tonne of standover cane left in the paddock.

We did have some wet weather at the start of the crush, but the overall reliability of many mills was the greatest factor in the late finish and amount of standover.

Once the harvest extends into late-December, the higher humidity and rainfall tends to reduce CCS and cutting becomes more difficult, not to mention uneconomical.

Many growers have begun questioning whether the mills can even crush the entire crop, which is concerning, especially considering current world price.

CANEGROWERS has been looking at ways to address this issue, both through trying to attract workers to the industry, as well as developing an industry-wide measure of mill availability that can be used by districts in their negotiation process.

Mill availability has declined in recent years, so it is important that this part of the industry continues to improve. Mills need to concentrate on their core business of milling rather than marketing, which has taken up far too much of their resources over the past decade.

No sooner had the 2022 crush ended, than Sugar Terminals Limited (STL) made the shock announcement that it planned to insource the operations of the industry's bulk sugar terminals from 2026, ending a long and extremely successful commercial arrangement with Queensland Sugar Limited (QSL) for terminal operations.

This decision caused much discussion and concern amongst the growing community, and CANEGROWERS called on the parties to come together to resolve the process.

Our major focus has been to ensure the terminals operate efficiently and reliably. There should be a forward operating and business plan for the terminals, which should always prioritise sugar access, and do so on an equitable basis to avoid monopolistic behaviour.

The good news over the past year has been the world sugar price, which surged throughout the year due to a large global deficit.

Many growers received pool prices of \$650 a tonne, which is the highest level for many years.

The Thai crop was smaller than expected and India is exporting less sugar on the world market due to their expanding ethanol industry.

The case against India at the WTO brought by Australia and other countries has certainly had some effect on their desire to export, which is good for the world price going forward.

Speaking of trade, as the 2022-23 financial year came to an end, QSL was preparing to send the first shipment of tariff-free Australian sugar to the United Kingdom in half a century, under the newly signed Australia-UK Free Trade Agreement.

This shipment to UK refiners Tate & Lyle Sugars was only secured thanks to the hard work of growers accredited in the industry-led Smartcane BMP program.

While CANEGROWERS has worked closely with the Australian Government over a number of years to secure tariff-free access for Queensland sugar under the free trade agreement, Tate & Lyle was only interested in importing sustainably grown sugar.

The alignment of Smartcane BMP to Bonsucro, ProTerra and VIVE means that there is a market for certified sustainable sugar and hopefully Smartcane BMP certified growers will start to see the benefits of any premiums going forward.

The blockchain traceability platform developed by CANEGROWERS and KPMG is the key to certifying sustainable credentials.

CANEGROWERS has also been heavily involved in the negotiations of an Australia-EU Free Trade Agreement. Unfortunately, this has been a much more difficult discussion due to the EU's sensitivity around agriculture.

Sugar was not the only thing to increase in price over the year, with fertiliser and chemical prices



reaching levels never seen in our industry.

CANEGROWERS conducted a review of the fertiliser supply chain, looking at international and local influences on the price that growers pay.

The major driver of higher fertiliser prices is the international price, which is why CANEGROWERS is seeking to forge closer relationships with manufacturers to try to obtain the best deal for growers.

We hope to include world urea price information in our CANEGROWERS Marketing Information Service updates to give growers some idea what future prices may do.

We continued rolling out our Business Essentials course across all the districts this year.

I would encourage all growers to engage in this course, as it offers training around business management, risk management, and succession planning.

It is also a fantastic opportunity for growers to engage one-on-one with our policy managers and our legal counsel.

We have also added a lot of this information to the CANEGROWERS member portal on our website.

I encourage growers to log into the portal to see all the information that is available there.

The portal contains podcasts and videos that pertain to current issues in the industry.

We also have a cost of production tool, workplace health and safety guide for cane farms, an electricity tariff selection tool, and the transport access guide for farm equipment.

CANEGROWERS also hosted an industry stand at the EKKA for the first time in many years.

Thanks to the efforts of the Brisbane staff, working closely with Sugar Research Australia and Sunshine Sugar, the stall was a tremendous success.

Virtual reality headsets, which took visitors on a virtual journey through the industry, were kindly donated by Sunshine Sugar.

This was a huge draw card, with many thousands of children and their families visiting during the week of the event.

This kind of exposure is great for our organisation and our industry, especially in the heart of the city.

“*The good news over the past year has been the world sugar price, which surged throughout the year.*”

I would like to thank all those who have contributed to CANEGROWERS over the 2022-23 year. This includes our Policy Council and Board members.

I would also like to thank the district directors and staff who keep the organisation heading in the right direction.

I would like to thank the Brisbane staff who implement the policy decisions of the organisation, especially CEO Dan Galligan who works tirelessly on behalf of the organisation.

Finally, I would like to thank the grower members and their families who keep this great industry and organisation afloat.

I wish everyone the best for the 2023 crush and look forward to catching up with members on my travels around the state. ■



CEO's Report

Dan Galligan

Out of the fog of COVID, 2022-23 should be remembered as a year when the Australian sugar industry roared back into life. On the back of a high global commodity price, the industry is humming. And while we battle the traditional challenges, the rhetoric of optimism should translate into genuine positive returns for growers.

CANEGROWERS has continued to support its core strategic objectives on behalf of individual growers, our district communities, and in service to the entire sugarcane industry.

We have begun implementing our new strategy, finalised in 2022.

The motivation and commitment of our new Board, led by Chairman Owen Menkens, has provided the perfect balance of renewed enthusiasm and new perspectives, as well as deep experience and a respect for the lessons that is reflective of our industry's long history and legacy.

Our organisation's strategic objectives are focused on services to deliver outcomes and I will use my report this year to highlight a few examples against each of them.

Strategic theme 1: Superior advocacy

Advocacy is at the heart of CANEGROWERS' purpose. Our strong grower membership provides us with a mandate and a responsibility to advocate in the best interests of growers at local, state, national and international levels.

We have maintained a close relationship with industry and political leaders, with some notable highlights.

These include multiple meetings with the new Federal Agricultural Minister Senator Murray Watt, a personal meeting with Queensland Premier Annastacia Palaszczuk, and numerous meetings with a range of relevant state and federal ministers in the energy, agriculture, state planning, and environment portfolios.

Further, we have used our relationship as a tier one member of the Queensland Farmers' Federation (QFF) to literally open doors across the political and bureaucratic spectrum, while also delivering services on our behalf.

At the federal level our involvement with the National Farmers' Federation (NFF) has leveraged Commonwealth political relationships around water, trade and environment portfolios.

Strategic theme 2: Outstanding service

We continue to focus service delivery on the issues that affect the everyday business opportunities of growers. One of our many key objectives is ensuring we are improving opportunities for farm profitability.

Our increased focus and delivery of monthly Marketing Information Services is now backed up by our business essentials / cost of production training, which includes succession planning and skills development.

These are all services that have received resoundingly positive

feedback from attendees.

Equally, our districts have been working closely with Queensland CANEGROWERS to inform, advocate and implement programs around pigs, rats and weed control.

Strategic theme 3: High quality collaboration

Our 13 districts are the front door to the CANEGROWERS organisation. We are a large industry, whose diversity can often be overlooked.

The great strength of the CANEGROWERS district model is that it allows our diversity to be celebrated, such that growers can set their own priorities and resources at the district level, but we still harvest the enormous opportunity and efficiency in collaborating on policy and strategy as district representatives and managers come together at least three times a year at our Policy Council.

The Council drives policy and strategy decisions for the organisation, and on this front, it was a very busy year.

New policy outcomes and strategic decisions were made around climate change, reef water quality programs and targets, an investigation into the fertiliser supply chain, marketing best practice guidelines, transport compliance and permitting, Sugar Research Australia (SRA) investment and strategy, young growers leadership programs, regional land use, planning and rating practices, productivity services, leadership of Sugar Plus, and a campaign around attracting, retaining and training our workforce.

“It should be remembered as a year when the Australian sugar industry roared back into life.”

The list is extensive and the work of the council to provide leadership, insight and make decisions on the priorities of the organisation that take account of their local priorities, but also take a view to working together as an industry, is valuable and we thank them for their efforts.

Strategic theme 4: Robust partnerships

We work closely and collaborate with our districts. In so doing the message from our districts has always been clear – let’s work together in the interests of the industry as whole.

Therefore, we use the Policy Council and our industry networks to work closely with supply chain partners, particularly SRA, who we both inform and advise. We also co-invested with SRA in various programs, including enhanced efficiency fertiliser trials, greenhouse gas emissions research, a new lifecycle analysis, and nutrient use efficiency.

We lead a partnership with the Australian Sugar Milling Council (ASMC) to deliver the objectives of our trade strategy within which we provide an opportunity to consult with all sugar marketers.

While CANEGROWERS holds a seat on the grower representative forum with Queensland Sugar Limited, we have also continued to discuss marketing best practice with all industry marketers.

The decision by Sugar Terminals Ltd (STL) to insource terminal operations, announced in January 2023, has brought our existing relationship with STL into focus.

With this organisation too, we have consistently expressed the view of our Policy Council representatives, and seek to focus on encouraging outcomes that support industry stability and growth.

Strategic theme 5: Industry evolution

The opportunity for profit for the average cane grower is directly related to the global sugar price.

For this reason, CANEGROWERS has, for decades, been the voice of the industry when it comes to trade policy, and we invest heavily to ensure the interests of growers and the industry are represented in trade discussions.

During the year this was particularly evident as we progressed work in the United States and the United Kingdom.

A huge milestone in our work came with the completion of the UK-Aus Free Trade Agreement, which opened up a market that has been essentially closed for nearly 50 years.

We were proud to also be the first industry in the world to use blockchain technology to see a shipment of traceable, sustainably produced sugar sent to South Korea in November 2022.

This outcome could not have been achieved without the efforts and commitment of growers who continue to adopt Smartcane BMP.

While a high sugar price provides a strong foundation for a positive future, we have been encouraging growers to not become complacent.

We were proud to partner with ASMC, SRA, and other growers

organisations to release the Sugar Plus – bioenergy roadmap, funded and supported by state and federal governments.

Sugar Plus is not a masterplan that tells growers what they must do.

Instead, it lays out the potential for the industry to have both a profitable and sustainable sugar supply chain that sits complimentary to alternative supply chains built on our significant potential in the emerging bioenergy economy that includes Sustainable Aviation Fuel.

The State Government has already engaged with CANEGROWERS to seek our insight into how these new industries can be developed in a way that benefits growers. This demonstrates the value of our efforts to bring together the industry under Sugar Plus. It shows our capacity and willingness to get on the front foot and look well over the horizon to see the potential for growers and our communities.

This year’s report outlines our efforts in much greater detail. I would like to thank all growers and staff for their support during the year and I commend readers of the report for taking the time to look back with us and reflect on our achievements with a view of challenging ourselves to even greater outcomes over the coming year.

I would like to extend my appreciation and gratitude to the staff at CANEGROWERS at district and state levels, who despite coming from many different backgrounds and skill sets, all believe and give passion and commitment to this tremendous organisation on a daily basis. ■



About the industry

A total of 32,592,784 tonnes of sugarcane were harvested and transported by road and rail to be crushed at 22 mills in Australia's sugar regions during the 2022 season which ran from May to January.

The cane was harvested from 328,111 hectares of farmland from Mossman in far north Queensland to Grafton in northern New South Wales.

The average Commercial Cane Sugar (CCS) achieved for the season was 12.73 units.

In Queensland, 31,263,560 tonnes of sugarcane was harvested from 315,114 hectares.

This was an increase of almost 2.8 million tonnes on the 2022 season's result, due to an excellent growing season with dramatically improved average yield, despite some incidence of cane stood over in some milling districts.

Export destinations for 85% of Australia's raw sugar production included South Korea, Japan and Indonesia. The remainder was refined for domestic consumption.

The world sugar market is volatile and growers are able to manage their price risk and moderate some of the impact through sugar marketers.

Growers enjoyed the continued growth in sugar prices during the harvest season, with prices rising steadily from

October through to the close of the last contract at the end of April.

Prudent risk management ensured that the entire crop was not priced prior to the season and this allowed many growers to price at least some of their sugar on a rising market.

Futures prices for the subsequent seasons were also well above the long-term average and holding well at the time of this report.

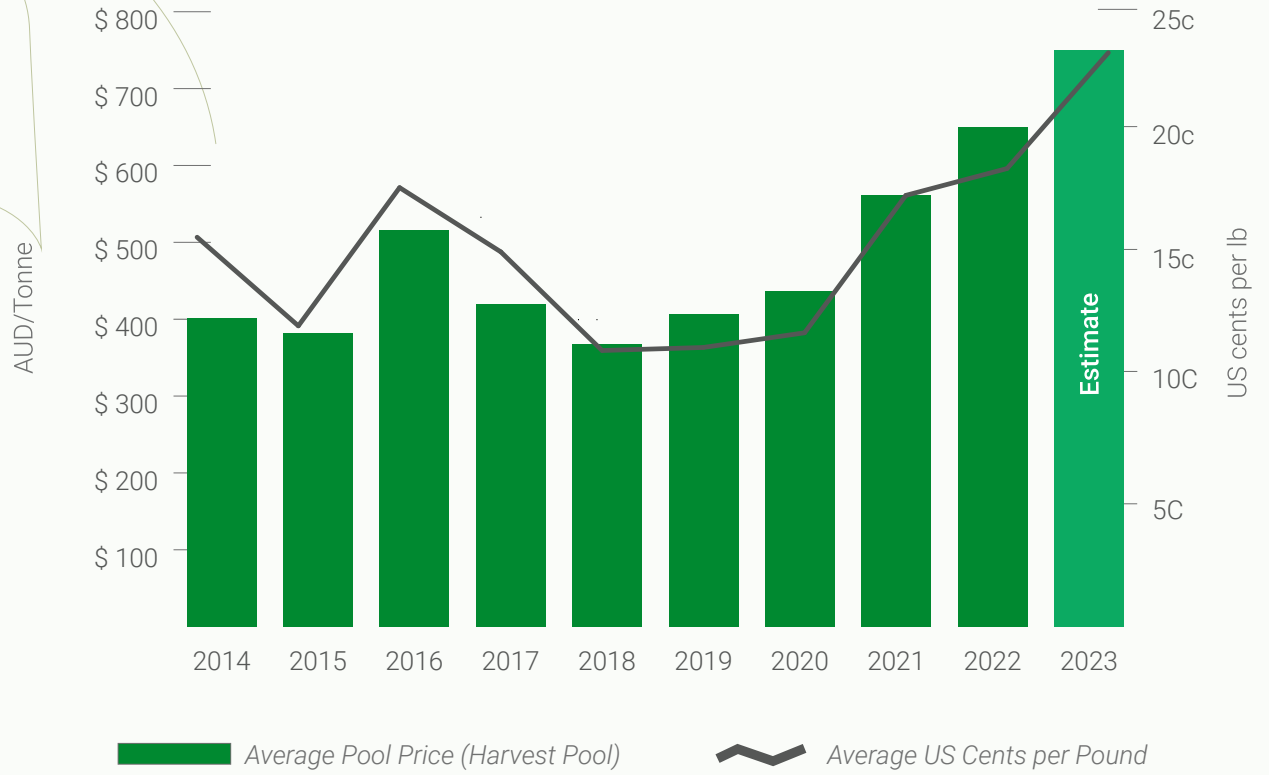
The CANEGROWERS Marketing Information Service is also available to keep growers informed about the major market drivers. ■

TABLE 1

AUSTRALIAN PRODUCTION OF CANE AND SUGAR IN THE 2022 AND 2023 SEASONS								
Mill Area	TONNES OF CANE CRUSHED		TONNES OF SUGAR IPS (EST)		CCS		HECTARES HARVESTED	
	2021	2022	2021	2022	2021	2022	2021	2022
Mossman	733,290	754,403	76,957	86,278	12.29	12.07	9,108	8,500
Tableland	536,946	559,850	76,251	78,267	13.98	13.73	5,571	5,389
Mulgrave	943,354	1,016,543	111,344	162,587	11.62	12.48	11,264	11,139
Innisfail	1,477,840	1,708,282	168,927	172,656	11.41	11.65	21,684	21,041
Tully	2,513,802	2,879,289	317,336	356,456	12.38	12.27	28,863	29,377
Herbert River	3,797,258	4,531,004	484,884	576,797	12.73	11.59	54,986	49,496
NORTH QLD	10,002,490	11,449,371	1,235,699	1,433,041	12.38	11.99	131,475	124,942
BURDEKIN	7,883,080	8,213,611	1,173,826	1,154,513	14.40	13.83	65,505	65,505
Proserpine	1,556,299	1,854,437	227,227	267,595	14.43	12.78	19,901	19,696
Mackay	5,334,837	5,548,893	745,097	708,991	13.73	12.64	63,666	57,560
Plane Creek	1,367,692	1,490,591	194,226	214,198	14.37	12.84	17,487	16,490
CENTRAL QLD	8,258,828	8,893,921	1,166,550	1,190,784	13.97	12.70	101,054	93,746
Bundaberg	936,828	1,085,255	129,725	140,860	14.18	13.15	11,893	11,647
Isis	711,959	860,121	100,215	115,142	13.71	12.75	8,876	9,725
Maryborough	469,125	566,344	66,459	76,092	13.76	12.88	7,391	7,317
Rocky Point	250,065	194,936	35,050	27,564	14.14	13.20	2,783	2,232
SOUTH QLD	2,367,977	2,706,656	331,449	359,658	13.95	12.97	30,943	30,921
QUEENSLAND	28,512,374	31,263,560	3,907,523	4,137,996	13.53	12.76	328,977	315,114
Condong	459,077	395,211	56,372	48,324	12.21	12.18	4,198	3,833
Broadwater	588,541	409,864	76,161	49,081	12.67	12.11	5,039	4,881
Harwood	562,885	524,149	68,319	62,208	11.90	11.65	4,686	4,283
NSW	1,610,503	1,329,224	200,852	159,613	12.27	11.95	13,923	12,997
AUSTRALIA	30,122,877	32,592,784	4,108,375	4,297,609	13.46	12.73	342,900	328,111

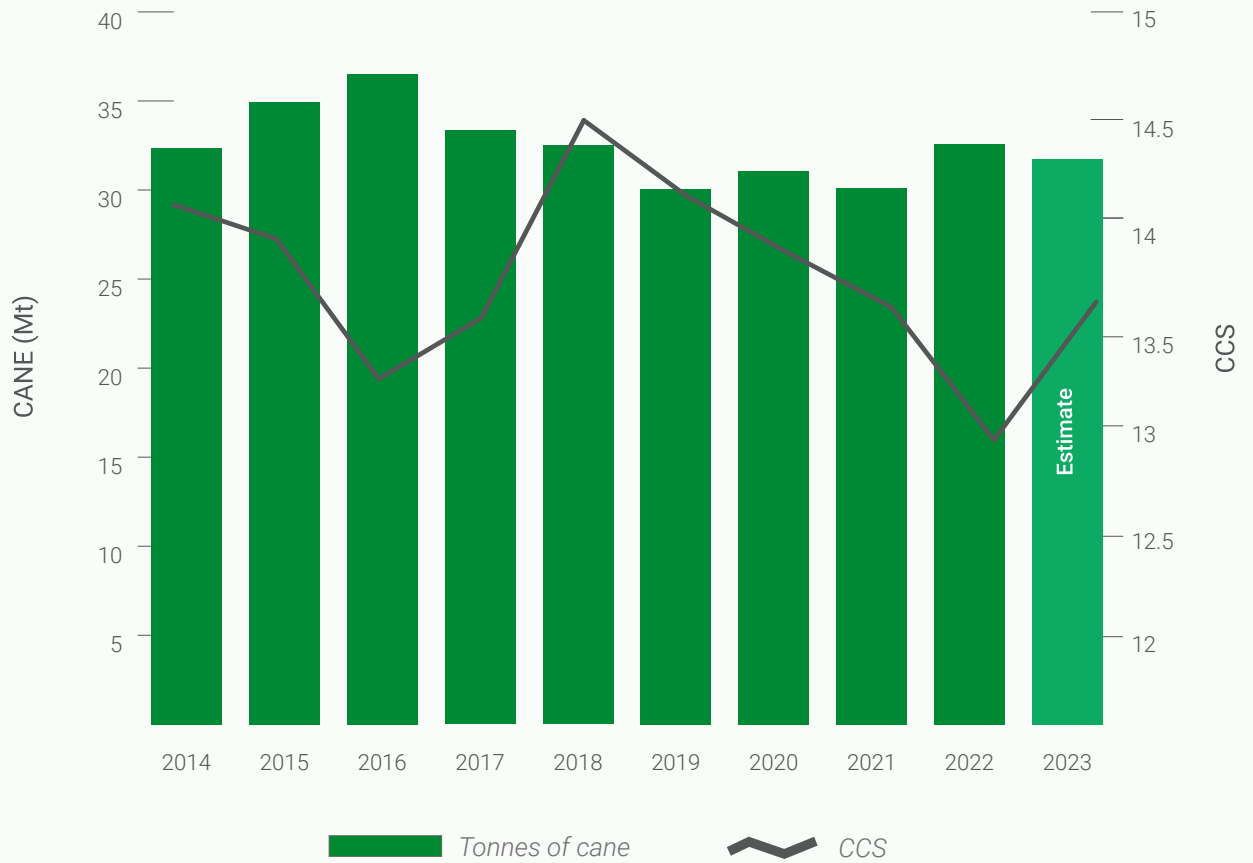
GRAPH 1

World Sugar Price



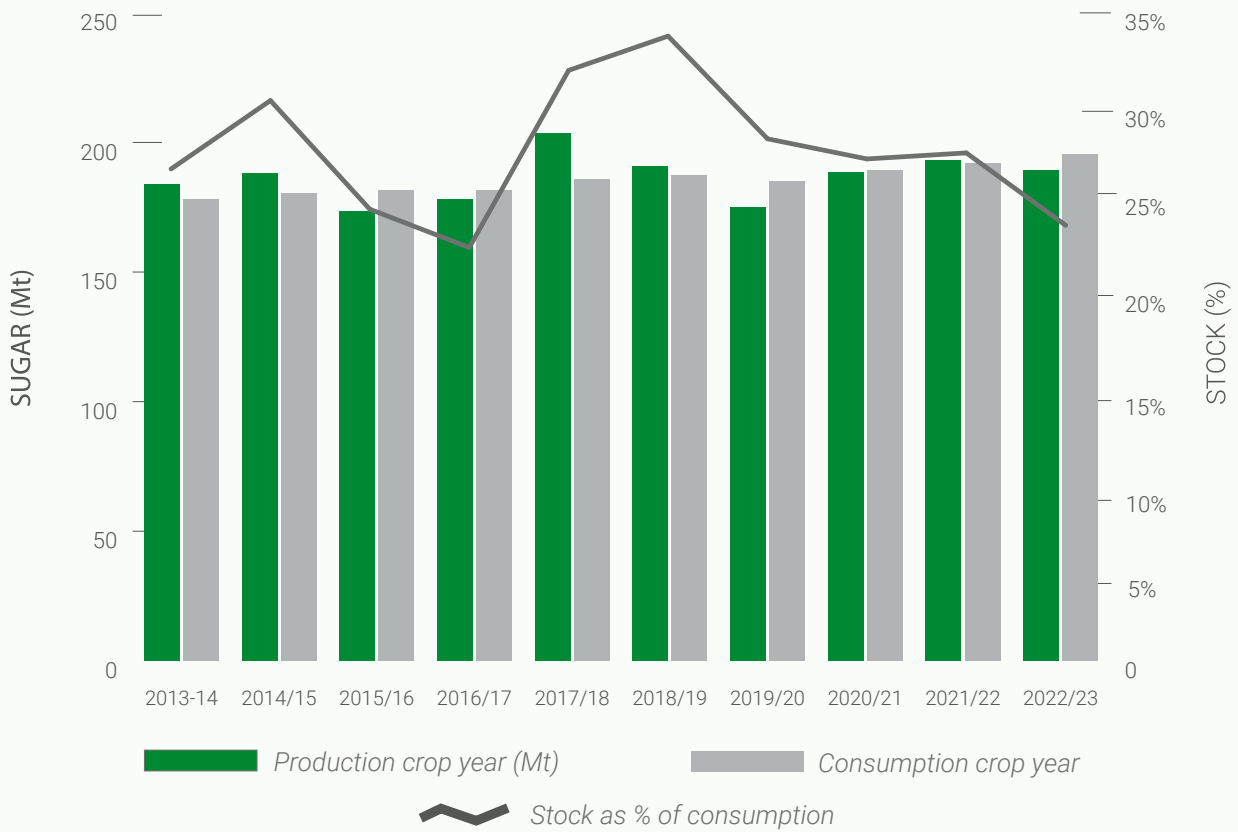
GRAPH 3

Australian Production



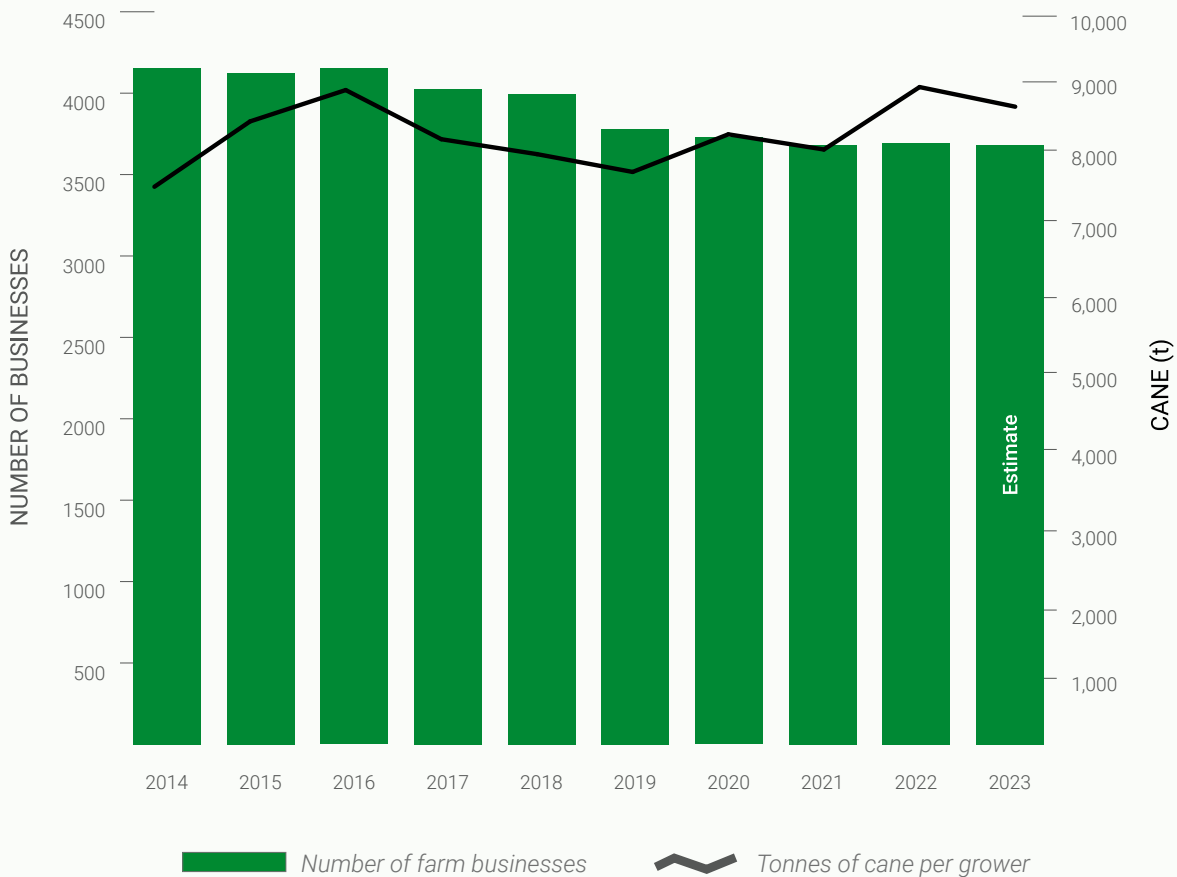
World Sugar Production and Consumption

GRAPH 2



Australian Industry Trends

GRAPH 4



Statistics compiled sourcing data from Czarnikow, United States Department of Agriculture, CANEGROWERS Australia and the Australian Sugar Milling Council.

Financial Overview

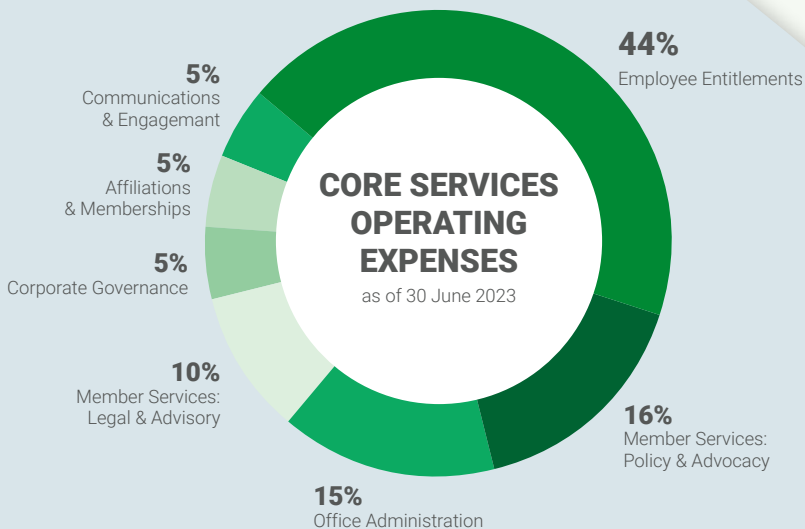
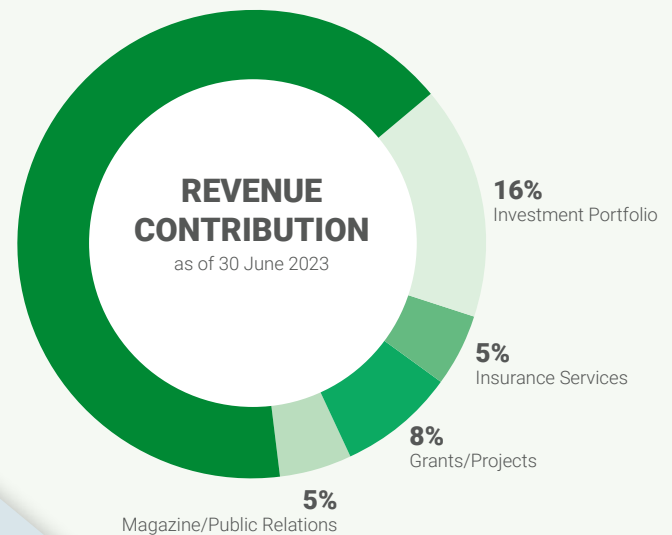
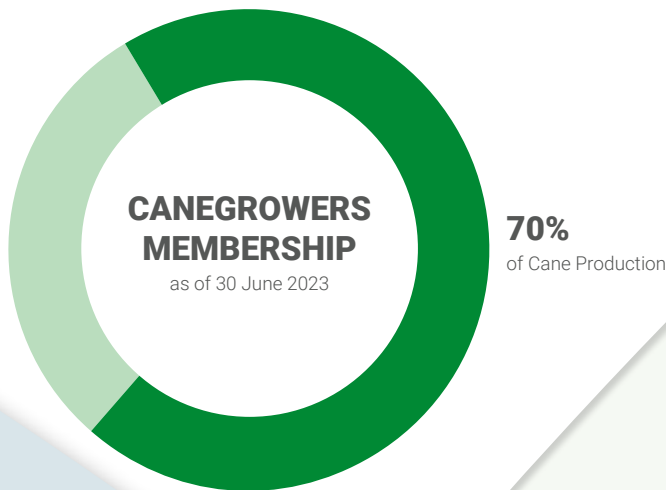
The organisations financial performance for the year reflected a controlled budget off the back of a challenging crush.

The company has recorded an underlying trading profit of \$12,635 (2022: loss (\$127,514), before recognising the net change in fair value of financial assets.

CANEGROWERS relies on the membership levy (66% of total revenue), it is the backbone to implementing our strategy, delivering services and outcomes for growers. Additional revenue is earned from the organisations investment strategy which returned 16% to the bottom line, providing important support to the operational needs of the organisation, along with capital growth to strengthen reserves.

The audited statutory Annual Financial Report of CANEGROWERS for the year ended 30 June 2023 is available as a separate document to members and can be downloaded from the members portal on the website, www.canegrowers.com.au.

Members can also ask for a copy from the Company Secretary by phoning the Brisbane office on 07 3864 6444. ■



About CANEGROWERS

CANEGROWERS is a not-for-profit public company with the sole purpose of promoting the interests of sugarcane growers.

The organisation comprises the state company (Queensland Cane Growers Organisation Ltd) and 13 districts.

CANEGROWERS is represented by 85 elected directors and almost 100 dedicated professional staff, providing grower services, industry advocacy, and communications.

Board:

The Queensland CANEGROWERS Board is comprised of eight Directors elected from the Policy Council with at least one director from each of the four (Far North, North, Central and Southern) cane growing regions.

The Board performs the core functions of corporate governance, financial and risk management, audit and compliance. The Board sets the company's strategy and corporate policy and delegates responsibility for management to the CEO.

The Board is required to meet at least quarterly or at such other times as required to fulfill its obligations to the company and its grower members.

The Board returned to meeting in person this year, including holding meetings in the regions, visiting Tully and Rocky Point.

Policy Council:

The CANEGROWERS Policy Council is made up of 19 growers nominated by the district companies. This has reduced by one since 2021-22, due to the closure of the Mill in Maryborough and growers in this region contracting to supply to Isis Mill.

As the preeminent grower representative forum, the Policy Council provides strategic guidance for the CANEGROWERS group and industry policy as it relates to the grower community.

The strong regional representation ensures industry-wide views and issues are brought forward for consideration and solutions can be collaboratively discussed.

The Policy Council formally meets three times a year with frequent and ongoing communication on key issues at other times, including attendance at Committee meetings. CANEGROWERS district managers meet monthly and after each Policy Council meeting.

Policy Committees:

CANEGROWERS convenes three Policy Committees made up of members of the Policy Council and staff; Economics and Trade, Environment and Sustainability and Farm Inputs and Research.

The role of the committees is to investigate emerging issues and take recommendations to the Policy Council with a view to establishing industry policy positions as they relate to growers' needs and to guide strategic decisions.





MEMBERSHIP

CANEGROWERS represents the producers of 70% of the available sugarcane tonnes grown in Queensland.

The strength of this voluntary membership shows the relevance and need for a cane industry specific organisation led by growers.

Membership also reflects the value that CANEGROWERS offers to growers through products, services, advocacy and benefits. This value starts with the Districts and is bolstered by Queensland CANEGROWERS in Brisbane.

The membership fee schedule, based on a levy placed upon each tonne of cane produced, is published in the *Australian Canegrower* magazine prior to the start of the season.

Queensland CANEGROWERS has implemented a maximum cap on membership fees. No grower paid more than the equivalent of 55,000 tonnes for the 2022 season, regardless of their production.

Membership policy has developed around a number of principles:

- ▶ **Membership is voluntary.**
- ▶ **Membership is conditional on the applicant meeting eligibility criteria.**
- ▶ **Membership relates to financial contributions being made in each season on all tonnes of cane supplied by the member's farm or farms irrespective of mill area.**
- ▶ **The membership fee is struck at a rate per tonne of cane supplied to the relevant mill and is for the aggregate of the state and local companies.**

The emphasis for 2022-23 was building on the successful initiatives delivered in the previous year, including free crop insurance, regional member meetings, and the engagement of young growers and emerging leaders.

The membership engagement strategy guides the activities for member engagement with the goal of increasing awareness around the products, services, tools, and benefits offered to growers and members.

PARTNERSHIPS

Australian Cane Growers' Council: The Australian Cane Growers' Council (ACGC) is the forum for the nation's sugarcane producing states of Queensland and New South Wales.

ACGC presents a common voice in national and international forums on behalf of cane growers. ACGC is a controlled subsidiary of CANEGROWERS.

CANEGROWERS Chairman Owen Menkens is Chairman of ACGC while the Directors include growers, Mark Mammino, Joseph Marano and Ross Farlow (NSW). With an easing of restrictions on travel, in-person participation at both national and international forums recommenced.

Australian Sugar Industry Alliance: CANEGROWERS plays a lead role in the Australian Sugar Industry Alliance (ASA).

ASA aims to bring the industry together on matters of common industry interest.

These have been identified as trade and market access issues, protection

and support for the industry social license to operate, and working together on the industry's Sugar Plus vision.

Owen Menkens and Mark Mammino represent CANEGROWERS.

CANEGROWERS has continued to provide financial support to ASA for both operational and project-based issues. Extensive in-kind support is also provided by CANEGROWERS staff through participation in key strategy meetings and workshops.

AFFILIATIONS

Queensland Farmers' Federation

Federation: Queensland Farmers' Federation (QFF) is a united voice for more than 13,000 primary producers across cane, cotton, horticulture, dairy, nursery and garden, poultry, pork and intensive animal industries.

As a tier 1 member, CANEGROWERS works with QFF on issues such as water and energy pricing, biosecurity, farm business planning, land use planning, workforce planning, education and training, and workplace health and safety.

CANEGROWERS' representative, Mark Mammino, attended QFF members' council meetings along with CANEGROWERS CEO Dan Galligan.

National Farmers' Federation:

CANEGROWERS, through ACGC, is a founding member of the National Farmers' Federation (NFF), the peak national representative and lobby group for 130,000 Australian farmers.

NFF provides a vital forum for cane growers to influence national policy. CANEGROWERS Chairman Owen Menkens is a Members' Council representative of the NFF.

During 2022-23 the NFF continued to lead national discussions on policies across a range of areas including climate change, biosecurity, trade, industrial relations and workplace health and safety.

The NFF and its members have a vision for Australian agriculture to exceed \$100 billion in farm gate

output by 2030. The Roadmap identifies the opportunities and challenges, along with policy and actions to achieve it. A Roadmap Report Card is prepared each year.

CANEGROWERS works in partnership with the NFF on its Diversity in Agricultural Leadership Program which seeks to support the development of female leaders in the sector.

World Association of Beet and Cane Growers:

CANEGROWERS is a member of the World Association of Beet and Cane Growers (WABCG) which unites 30 national and regional sugarcane and sugar beet producer associations on five continents. CANEGROWERS is represented by Chairman Owen Menkens.

WABCG returned to in person meetings late in 2022.

Australian Farm Institute:

CANEGROWERS is a corporate member of the Australian Farm Institute (AFI), created to carry out a strategic role on behalf of Australian farmers.

It utilises funding provided via membership fees to carry out or commission research projects on strategic policy issues of importance to Australian agriculture.

The AFI holds annual policy forums to discuss research findings and to allow opportunities for industries (growers and staff) to collaborate on complex issues.

Primary Industries Education Foundation Australia:

CANEGROWERS is a member of the Primary Industries Education Foundation Australia (PIEFA), a not-for-profit company formed to promote educational information and resources within schools through the provision of credible and relevant material to teachers.

CANEGROWERS worked closely with PIEFA during the year to produce a curriculum-aligned primary school education resource that is now available to schools across the country.

SERVICES

Insurance: CANEGROWERS, in partnership with local district offices, has qualified insurance brokers in cane growing regions to provide independent insurance advice, a wide range of insurance options (covering farm, commercial, business, liability, vehicle, home, landlord and contents) and service for members and local communities at competitive prices.

Members automatically have access to the Crop Insurance cover as part of their membership.

Legal Services: Legal services are provided to CANEGROWERS, including district offices and grower members, through a retainer arrangement with Chris Cooper of CJ Cooper & Associates.

Chris Cooper assists individual growers through a phone-in legal service that is provided free of charge to members. Mr Cooper provides advice and assistance to CANEGROWERS district companies with issues including the renewal of cane supply agreements.

Mr Cooper informs incoming and existing Board members throughout the CANEGROWERS organisation about corporate governance obligations and their legal duties and the expectations of their roles as grower-elected representatives.

CANEGROWERS Marketing Information Service:

CANEGROWERS developed the Marketing Information Service (MIS) to assist members to navigate the competitive landscape of marketing services and products.

The service provides weekly and monthly updates (including a video briefing), which has been designed to provide a consistent format focussed on the main market drivers that can help growers follow the complex sugar market using consistent logic to cut through to the more fundamental market drivers. CANEGROWERS has expanded this service by building in a business essentials training course that supports growers to understand their cost of production. ■



Year In Review

Through a wide range of tailored and targeted programs and services, CANEGROWERS works for growers, and their improved productivity and profitability.

AGRICULTURAL CHEMICALS

CANEGROWERS promotes the safe and effective use of agricultural chemicals, based on science and the advice of the national regulator - the Australian Pesticides and Veterinary Medicine Authority (APVMA).

CANEGROWERS continues to be part of the Executive Committee of the National Working Party for Pesticide Application (NWPPA). The NWPPA deals primarily with issues around spray drift. It includes representatives from spray manufacturers, grower groups, spray applicators and research and development corporations across viticulture, horticulture and broadacre agriculture.

CANEGROWERS is also a member of a new national forum designed to improve liaison with the APVMA. Some of the issues under discussion include:

- ▶ **Review of the Agvet Regulatory System.**
- ▶ **Implementation of a spray drift management tool.**
- ▶ **Accommodating autonomous spraying technology.**

During 2022-23, an extended harvest season in several districts led to significant areas of standover cane which induced localised outbreaks in the population of rats. CANEGROWERS successfully applied to the APVMA for the renewal of a permit to aerially apply zinc phosphide baits in lodged and standover cane.

Lack of practical and effective options for aerial control of vine weeds remains a concern for growers. CANEGROWERS is working with SRA to look at two options:



- ▶ **The feasibility of trial work to establish residue levels for MCPA, to provide data that is required for a permit permitting aerial application.**
- ▶ **The efficacy of helicopter application of 2,4-D using Accu-Flo nozzles, which should justify a case for much reduced downwind buffers.**

BIOSECURITY

Biosecurity awareness and preparedness is critical for the ongoing profitability of the Australian sugar industry. CANEGROWERS is the industry member of Plant Health Australia (PHA) and the signatory to the Emergency Pest Plant Response Deed (EPPRD). This deed is administered by PHA and determines the cost-sharing and management of responses to any pest or disease incursion. CANEGROWERS works closely with Sugar Research Australia (SRA) on these matters.

An update of the Sugarcane Industry Biosecurity Plan is being finalised by SRA and PHA with support from CANEGROWERS. This plan identifies industry's priorities for actions and

investments that will minimise the risk of incursions by new pests while also maximising the chances of an effective response to such an incursion.

Red Witchweed (RWW) is a parasitic plant that attaches to the roots of certain grasses and can impact the cane, grains and grazing industries through trade, market access and risk of further spread.

The first phase of the five-year RWW eradication program at Habana, Mackay was completed in 2019, with a significant reduction in the annual emergence of plants and good progress in reducing the amount of seed in the soil. Success of the program has only been possible due to the excellent cooperation and assistance of the growers in the area.

A second phase of the program commenced in late 2019 and is due to finish in 2025. The cost-sharing arrangements with government and industry partners for this additional phase was agreed to, with the cane industry continuing to contribute 10% of the costs. Progress to date with eradication is very promising,

including an estimated reduction of 94% in the soil seedbank of RWW and elimination of the seedbank expected within another two years. Consequently, there are now very few detections of germinated plants.

Infestation of exotic Fire Ants remain a major issue in the Rocky Point district, with a recently released copy of a 2-year-old review of the national eradication program outlining inadequate funding and ineffective strategies. CANEGROWERS continue to advocate for a revamped program that is adequately funded, well managed, and works closely with landholders.

BUSINESS ESSENTIALS

The CANEGROWERS Business Essentials series continued as part of the Farm Business Resilience Program, which is a government-funded initiative to provide professional development opportunities in strategic business management.

Under the program, a series of Business Essentials modular workshops were staged in districts and attended by a broad range of growers, from the very experienced, to the new entrants. Growers participated enthusiastically and added further skills, knowledge, and tools to their capability. The workshops took participants through aspects of farm business financial management, risk management, sugar pricing strategies, as well as information sessions on farm business transition. Growers were provided with useful tools that they could take away and put into practice on their farms.

Business Essentials workshops will continue to be provided after the conclusion of the harvest season.

CANE ANALYSIS AUDITORS

Cane analysis at the mill is an essential part of determining a grower's cane payment and the auditing of this analysis ensure its integrity.

CANEGROWERS provides an advisory service to the auditors and district offices. This includes weekly scrutiny of audit reports, on-call troubleshooting, workshops to share information, proactive activities to encourage and promote good analysis programs, and general advice on cane analysis programs. The annual cane analysis auditors' workshop was held in Cairns and attended by auditors, district managers and some mill staff.

There were discussions with ASMC and SRA with regard to maintaining the BSES Laboratory Manual for Australian Sugar Mills and with SRA on maintaining the NIR capability to provide a trusted independent third party.

CANE BURNING

Cane burning remains an important management tool for many growers in Australia. CANEGROWERS liaised with Queensland Fire and Emergency Services (QFES) to maintain the Notification for Burning of Sugar Cane in Queensland, which allows the burning of sugarcane provided all the conditions of the Notice are met. If all the conditions cannot be met growers must obtain a permit from the local fire warden.

DISASTER MANAGEMENT, RECOVERY AND RESILIENCE

CANEGROWERS was part of the SEQ Flood Event Recovery Taskforce to assist in the recovery process for the flooding events from summer of 2021/22. This work continued in the 2022/23 year. Through QFF, the Industry Recovery and Resilience Officer program was available in the Bundaberg, Fraser Coast, Gold Coast City, Burnett and Sunshine Coast local government areas.

CANEGROWERS had an Industry High Risk Weather Season Briefing through the National Emergency Management Agency to understand the Bureau of Meteorology forecast for probability of flooding in the coming season and the preparedness of response services.

DIVERSIFICATION

In July 2022 the industry released its shared vision and roadmap: Sugar Plus – Fuelling the Future of Food, Energy and Fabrication. Sugar Plus envisions a vibrant, transforming industry, sustainably producing sugar and bioproducts at the heart of regional communities.

CANEGROWERS has been actively participating and providing leadership to further the Sugar Plus objectives with focus on better business-as-usual and value adding to current operations.

CANEGROWERS Diversification Policy objective is to supplement growers' income from raw sugar sales with significant alternate income from farmland and sugarcane without risking mill closure.

CANEGROWERS has represented growers at meetings and workshops including Government departments, biotech organisations, researchers, fuel companies, airlines and consultants to ensure that growers are included in the discussions.

Each cane growing district has different strengths and opportunities. Support to enhance these qualities and attract interest is critical for future development of value-add developments.

ELECTRICITY

During the year, the Queensland Energy and Jobs Plan was released. The headline objective of the plan is for Queensland to reach a target of 70% renewable energy by 2032.

This is an ambitious plan that will be disruptive in many ways and will require advocacy effort to ensure that results do not come at the expense of irrigators.

CANEGROWERS, as a member of QFF, NFF and the Australian Agricultural Industries Electricity Taskforce, is continuing its efforts to ensure growers voices are heard during the evolution of this plan and will continue to keep a focus on driving lower and efficient electricity prices for food and fibre production.

CANEGROWERS once again engaged in the Queensland Competition Authority's process for the Determination of Regulated Retail Electricity Prices in regional Queensland for 2023-24.

During this process, CANEGROWERS reiterated the call for tariff options which reflect seasonal irrigation demand balanced with energy generation availability to provide affordable electricity rates for producers.

Network charges presents a significant bottleneck for alternative energy solutions and CANEGROWERS again called on the QCA to recommend to government that the Community Service Obligation (CSO) that enables the implementation of the State's uniform tariff policy, be paid to Ergon Network and not to Ergon Retail.

The network cost in regional areas is the key cost difference that the policy aims to neutralise.

CANEGROWERS supported the introduction of the "solar soaker" tariff which incentivises usage during times of high renewable generation capacity (daylight and high-wind periods).

This tariff (T22C) provides an opportunity for growers to adapt their irrigation practices and make use of cheaper energy during those periods of availability (time-of-use considerations).

In providing feedback about the new tariff, CANEGROWERS has recommended an adjustment to the peak period window, that this be made adjusted to 5pm to 8pm, particularly in the summer months.

CANEGROWERS has updated the electricity pricing tool to assist growers to make informed decisions about their tariff selection and explore whether there are opportunities to make savings by switching to the T22C time-of-use tariff, or the interruptible supply tariff 34.



ENVIRONMENT AND SUSTAINABILITY

The work of CANEGROWERS aims to build and secure the industry's reputation for environmental stewardship and social responsibility - to maintain and build community confidence, to minimise government regulations, and to demonstrate the sustainability of Queensland sugar to domestic and export supply chains.

CANEGROWERS works collaboratively with industry partners and the supply chain to improve the sustainability of the cane growing industry. It argues against regulation of farming practices and promotes voluntary approaches for supporting practical and cost-effective management changes that will have lasting benefits for both farms and the broader environment.

CANEGROWERS works for policy settings that recognise and reward improvements in farm productivity and environmental management. During 2022-23, work continued to focus on strengthening the industry's social licence to operate and to meet the sustainability requirements of markets. Key actions have focussed on:

- ▶ **Increasing grower participation in the Smartcane BMP program.**
- ▶ **Ensuring policies and programs for reef water quality are voluntary, evidence-based, realistic and fair.**

- ▶ **Effectively reporting and communicating industry's sustainability credentials.**
- ▶ **Meeting the emerging demand for sustainably sourced sugar.**
- ▶ **Managing biosecurity risks.**
- ▶ **Ensuring grower access to safe and effective pesticides.**

GREENHOUSE GAS EMISSIONS AND CLIMATE CHANGE

CANEGROWERS released a new policy on Climate Change that takes a critical look at the risks and opportunities for growers, and identifies the knowledge needs and policy settings that will help industry be on the front foot.

The policy includes priorities for discussion with SRA including:

- ▶ **Investigating reasonable and practical emissions reductions targets for our industry based on existing technologies, and identifying gaps where future research is needed.**
- ▶ **Investigating the emissions profile of our industry, and any potential unintended outcomes of commonly suggested remediations.**
- ▶ **Identifying any new methodologies for the Emissions Reduction Fund suitable for sugarcane farmers that would increase uptake of emissions-reducing farm management practices.**

CANEGROWERS has commissioned QUT to develop emissions profiles for representative cane farms in three regions, and to test the sensitivity of these emissions to gradual changes in management of nitrogen fertiliser, fuel use, herbicides, and electricity generation for irrigation. This will help inform short-term targets for further reductions in emissions.

CANEGROWERS is evaluating emissions calculators appropriate for cane farms, including the Cane-LCA tool. Reliable emissions profiles and farm-based calculators will ensure industry can be on the front foot with meeting any reporting requirements of financial institutions or supply chains. The latter entities will increasingly need to report their 'Scope 3' emissions – those emissions that are produced by their suppliers or clients and, therefore, are outside of their direct control.

FERTILISER

CANEGROWERS instigated a detailed investigation into the fertiliser supply chain with the objective of identifying opportunities to reduce fertiliser prices for growers. Contact has been established at a Queensland state level with most players in the supply chain and CANEGROWERS has built a stronger understanding of the fertiliser supply chain.

The largest component of the fertiliser price to the sugarcane industry was the world price and this cannot be influenced with Australia representing only 2% of the world fertiliser market and the sugarcane industry only 5% of that 2% with very little local manufacturing capacity.

However the connection between local prices and global prices is still not fully transparent.

The report recommendations were to provide growers with fertiliser market and pricing information, develop options for individual growers to better negotiate with retailers to reduce supply chain costs and look at options to aggregate fertiliser volumes at a district level.

INDUSTRY SUSTAINABILITY

Off-farm impact on water quality is the major environmental issue influencing perceptions of our industry's sustainability credentials, through its potential influence on the health of waterways, estuaries and inshore waters of the Great Barrier Reef (GBR). However, communities and markets are also interested in issues like greenhouse gas (GHG) emissions, the health and safety of workers, and fair work practices. Consequently, Smartcane BMP has modules that cover these and other issues related to environmental stewardship and social responsibility.

CANEGROWERS continues to influence a number of sustainability initiatives and opportunities to ensure there is a targeted and coordinated industry approach that builds on the pivotal role of Smartcane BMP. These initiatives and opportunities include:

- ▶ **An SRA project to develop a sustainability reporting framework for farm and mill sectors, which overlaps significantly with project work to improve trade access for sugar, funded by the Federal Government.**
- ▶ **The ongoing development of a sustainability framework for Australian agriculture by NFF – to underpin the credentials of all Australian agriculture.**
- ▶ **An SRA project that is updating estimates of the environmental footprint of both farms and mills using Life Cycle Analysis.**
- ▶ **Increasing attention to ESG reporting by corporates and other entities – this stands for Environment, Social and Governance aspects of sustainability. GHG emissions are the main issue in any such discussions (see Climate change section).**

With supply chains and financial institutions having increased need to report their GHG emissions, and other aspects of sustainability, there may be rewards for growers certified in Smartcane BMP.

MEMBERSHIP ENGAGEMENT

CANEGROWERS continued to implement the priority activities from its Membership Engagement Strategy including regional member meetings in districts, engaging younger growers and emerging leaders, and promoting products, services and member benefits. An exciting new initiative was endorsed by the Board to create a CANEGROWERS mentoring program to support the development of younger growers in the industry.

The Membership Reference Group met regularly through the year and provided valuable insight, ideas and advice to guide the activities and initiatives for the Membership Engagement and Innovation portfolio.

CANEGROWERS worked with district offices to hold face-to-face meetings with growers across districts in the 2022-23 calendar year.

The CANEGROWERS Chairman, CEO and members of the Board attended most meetings with senior staff from the Brisbane office. The meetings were well received by growers.

MEMBER BENEFITS

CANEGROWERS members received free crop insurance for the 2022 season capped at 55,000 tonnes. This benefit ensures members are covered against fire, hail or transport losses, giving members peace of mind that their crop is covered, while lowering operating costs for growers.

CANEGROWERS continued to offer excellent deals on farm inputs from BOC, health insurance from Queensland Country Health Fund and general insurance via CANEGROWERS Insurance brokers.

Members could also access reciprocal benefits from QFF and member only benefits including marketing information services, regional road access guides, workplace health and safety guides, legal services, and business support tools such as a cost of production calculator and electricity tariff selection tool.

PROFESSIONAL DEVELOPMENT AND ENGAGEMENT WITH YOUNGER GROWERS

Professional development is a valuable service to offer our members, particularly our younger growers who may not be aware of the research, advocacy, and services that the sugarcane industry does for growers or what CANEGROWERS offers to growers and members.

CANEGROWERS hosted six young growers from Mossman and the Cairns region and two staff from SRA's Meringa Station as part of a professional development program in February 2023.

The program was designed to get a better understanding of the work CANEGROWERS does, see firsthand the plant pathology, pest and disease research undertaken by SRA, see farming practices and diversification in other districts and meet and network with other young growers and industry people.

This was the second young grower visit to Brisbane and these professional development opportunities for younger growers has come from the work CANEGROWERS Cairns Region has initiated in their region.

CANEGROWERS will continue to support this positive initiative with the goal of rolling it out in other districts.

NFF Young Farmers Council

CANEGROWERS representative for the NFF Young Farmers' Council, Justin Blair from Proserpine, continued to participate in the program which is designed to engage with the diverse youth networks within agricultural industry bodies across Australia.

The Young Farmers' Council has worked on several policy initiatives and have met with politicians in Canberra through delegations to Parliament with the support of NFF.

RESEARCH, DEVELOPMENT AND EXTENSION

CANEGROWERS works closely with SRA to provide a view on RD&E strategic direction to ensure the sugarcane industry remains world competitive. SRA has been through significant change and CANEGROWERS has supported the current SRA Strategic Plan 2021-2026 which is being implemented.

The SRA Annual Investment Plan 2022-2023 was completed but not fully implemented with a limited number of projects funded.

District Productivity Plans have been completed and their implementation commenced. district managers and district delivery officers have a focus on district plans and priority identification. Translational Researchers and project staff have

increased direct engagement with growers through workshops and problem identification. Laboratory Services (Indooroopilly, Tully and Meringa) have been maintained and overall greater interaction with researchers is working well. Priority issues have been biosecurity, variety development, crop protection with chemicals under pressure and adoption of known methods and principles.

The Productivity Services are supported and remain a district level issue to decide on the level of service expected.

There were some districts with lower than expected adoption of new varieties and high levels of RSD and Pachymetra. SRA and Productivity Services were encouraged to work closer together through the District Productivity Plans.





CANEGROWERS provided input to the Federal Department of Agriculture, Water and the Environment – Levies Legislation which seeks to streamline and modernise the agricultural levies legislation. The SRA levy collection process was deemed to be adequate for sugarcane industry.

CANEGROWERS is a member of the SIX EASY STEPS Advisory Committee (SESAC), which reviews relevant Australian Society of Sugar Cane Technologists' (ASSCT) papers and other publications for possible recommendations to enhance the guidelines. The SIX EASY STEPS toolbox information for enhanced efficiency fertilisers (EEF's) has been completed.

CANEGROWERS is on the steering committee for the SRA Life Cycle Assessment of Raw Sugar Manufacturing. Unfortunately this project has been held up due to lack of cane production input information.

Support for ASSCT is ongoing and CANEGROWERS was represented on an opening session panel at the 2023 conference, which discussed Sugar Plus.

REEF WATER QUALITY

CANEGROWERS continues to encourage, initiate and collaborate in voluntary programs and projects that support growers to make cost-effective practice changes that reduce the risk to downstream environments. We participated in a number of relevant forums including:

- ▶ **The Reef 2050 Advisory committee which includes all key stakeholders and advises government on the design, implementation and evaluation of reef programs, including those related to water quality.**
- ▶ **A broad stakeholder group providing advice to the government review of land management targets for Reef water quality.**

There has been little progress by government in reviewing aspects of the Reef 2050 Water Quality Improvement Plan (Reef 2050 WQIP) during 2022-23, including:

- ▶ **No action to re-commence the review of land management targets after the first effort failed.**

- ▶ **No apparent progress with review of the Paddock to Reef program, or the water quality targets, or the spatial prioritisation of catchments.**

The review of the Scientific Consensus Statement on Reef water appears to be in progress, through a hierarchy of peer reviews that appear to focus on process rather than substance, and with no engagement with a wider range of scientists or stakeholders.

The government inaction is concerning, especially when they continue to rely on practice targets and flawed practice frameworks to both prioritise investments and report on progress.

To help get much needed reform, CANEGROWERS released a Policy Position on Reef Water Quality in relation to 'Arrangements under the 2050 Water Quality Improvement Plan' (WQIP). The review of the Reef 2050 WQIP is an important opportunity to achieve these, and start to restore growers' confidence in its relevance and credibility. But this was frustrated by lack of government commitment or urgency for this review.

The Australian Government announced over one billion dollars to a new nine-year Reef Trust program, with around half of this committed to water quality. CANEGROWERS proposed a new localised and collaborative approach to identifying the best opportunities for practice adoption that will benefit water quality. We await a response from the Reef Trust program staff.

An environmental payments scheme, Reef Credits, was launched in 2020 to use government and private sector funds to pay landholders in Reef catchments for changes in management that improve water quality. Despite multiple approaches from CANEGROWERS to help address our concerns on the protocol for Dissolved Inorganic Nitrogen (DIN) reductions from practice change, there has been no action from the proponents. Our concerns relate to potential impacts on cane supply,



promotion of spurious approaches to nutrient management, and the transparency in calculation of payments to the grower.

SMARTCANE BMP

Smartcane BMP is the industry's platform for:

- ▶ **demonstrating its sustainability credentials to both the community and the supply chain, and**
- ▶ **supporting and recognising the use of good farm practices.**

The Smartcane BMP Program has surpassed 160,000 hectares of accredited land, taking the percentage of total cane area accredited in Queensland to over 40%. This year also saw the largest number of reaccreditations since the inception of the program in 2014, with over 70 enterprises successfully extending their accreditation for another five years.

With such buy-in to Smartcane BMP from Queensland cane growers, the viability for the long-term production of sustainable sugar has been cemented.

The Smartcane BMP program has been supported by the Queensland Government since its inception, providing funding for facilitators, auditing and administration of the program. Phase 3 of the program was ceased in December 2022, and the Phase 4 project commenced in January 2023 with funding from both the Queensland Government and CANEGROWERS. Over the next three and a half years, the project aims to re-accredit 460 enterprises, plus add another 30,000 ha of newly accredited cane land.

SUSTAINABLE SUGAR

Meeting sustainability criteria and managing expectations for Environmental, Social and Governance (ESG) targets set by food and beverage manufacturers, customers and consumers is creating opportunities for value creation but also placing demands on growers to provide data.

Since 2015, CANEGROWERS has been working to get more value to growers using Smartcane BMP. One of those opportunities is showing to sugar buyers how we produce sustainable sugar. Part of the approach has been to align Smartcane BMP with international sustainability frameworks including the Bonsucro Production Standard, the VIVE Sustainability Program and the ProTerra Standard.

VIVE

In 2022, Czarnikow acknowledged Smartcane BMP as equivalent to the VIVE program which offers a pathway to demonstrate sustainable sugar to end-buyers using Smartcane BMP accreditation as the on-farm component. CANEGROWERS continued to work with Czarnikow VIVE during the 2022/23 FY to support sustainable sourcing opportunities.

Bonsucro

CANEGROWERS continued to engage with Bonsucro on sustainable sugar and opportunities for cross-certification between Smartcane BMP and Bonsucro's Production standard to reduce costs and improve traceability options for Queensland sugar. Smartcane BMP achieved alignment with Bonsucro in 2017.

Bonsucro has launched its National Interpretation Australia Project to benchmark the Bonsucro Production Standard v5.1 (BPS) against Australian and Queensland legislation and regulations to inform Bonsucro in its revision of the standard.

CANEGROWERS engaged with the consultants to ensure the work recognises the Smartcane BMP program and its alignment with Bonsucro, its acknowledgement of meeting reef regulations and supporting sustainability conditions in trade agreement negotiations.

ProTerra

The alignment work between the ProTerra standard and Smartcane

BMP for sustainable sourced sugar was completed in 2022 and in June 2023, ProTerra offered conditional support for a Smartcane BMP / ProTerra Certification.

This support provided an equivalent ProTerra certification which would be valid for 1 year from the date of a Smartcane BMP audit and certification.

While the accreditation process for Smartcane BMP module 7 and 8 are not yet finalised, the recognition offers future benefits for growers to access sustainable markets through the ProTerra standard.

American Sugar Refining

CANEGROWERS continued to support social verification audits commissioned by American Sugar Refining Inc (ASR) for sugar produced in Queensland.

In September 2022, the Proserpine mill, Plane Creek mill and three Smartcane BMP accredited growers from each mill area participated in audits using the ProTerra standard. The social verification audits were requested by ASR to demonstrate the sugar they are buying from Australia can meet the sustainable sourcing and ESG criteria required by their business.

ASR will be conducting further social verification audits using the ProTerra standard in Tully, Innisfail, Tableland and the Burdekin in 2023. CANEGROWERS will continue to assist ASR with these requests as this work supports our sustainability credentials.

The Coca Cola Company

The Coca Cola Company continued to recognise Smartcane BMP as meeting their sustainable sourcing requirements. CANEGROWERS met with Coca Cola European Partners (formally Coca Cola Amatil) to discuss their ESG, sustainable sugar and traceability needs which can be supported through Smartcane BMP and the KPMG Origins traceability platform. These discussions are ongoing.

Tate & Lyle

Tate & Lyle are sourcing Queensland sugar through the Australia-UK Free Trade Agreement (A-UKFTA) and acknowledged Smartcane BMP accreditation for on-farm sustainability to meet customer needs and the expectations of the UK government, community, and consumers. In June 2023, CANEGROWERS provided a proposal to Tate & Lyle to support the traceability of sustainably sourced Queensland sugar underpinned by Smartcane BMP and the KPMG Origins traceability platform.

TRACEABILITY OF SUSTAINABLY GROWN AUSTRALIAN SUGAR

The Sustainable Sugar Project - Enhancing the traceability of sustainably grown Australian sugar to improve access to international markets using blockchain technology has concluded.

CANEGROWERS worked with KPMG Australia to prototype and develop the traceability platform using blockchain technology and mass balance calculations to trace sustainable sugar entering the supply chain from Australia.

The project had four-phases with the goal to build a blockchain platform to demonstrate traceability of Smartcane BMP accredited sugar, and identify opportunities for value creation and deliver this for growers.

- ▶ **Phase 1: Project Scope and supply chain mapping.**
- ▶ **Phase 2: Technology scoping and user experience testing.**
- ▶ **Phase 3: Minimum Viable Product and pilot program.**
- ▶ **Phase 4: Build and deploy.**

Phase 4 of the project delivered an end-to-end pilot of the traceability platform using Smartcane BMP accredited sugarcane and sugar heading to Asia for export.

On 18 November, the first shipment of fully traceable, sustainably produced raw sugar was loaded for export at the Port of Townsville.

The shipment was a proof-of-concept trial that linked sugar produced from sugarcane grown by Smartcane BMP accredited growers to a buyer in South Korea.

The export pilot tested traceability from the bulk sugar terminal to the customer and involved a 25,000-tonne shipment of sugar sold by QSL, through sugar trader Czarnikow.

Smartcane BMP and the traceability platform can deliver value through specific traceability events, data, and Smartcane BMP accreditation. Research investigating value for growers in the Queensland sugar industry identified opportunities in carbon markets, sustainable finance and supply chains.

Sustainable finance products such as sustainability linked loans are being developed by financial institutions to support their ESG needs.

The demand for sustainable sourced products is also growing, which could offer benefits to growers in the future.

Planet Shapers

CANEGROWERS produced a TV segment for a sustainability program called Planet Shapers, a free-to-air magazine style TV show that airs on the 10 Network.

The 7-minute segment was a positive story explaining how sugarcane growers in Queensland were demonstrating their sustainability credentials using Smartcane BMP.

The segment showcased industry and farming practices and how blockchain technology being tested by CANEGROWERS can assist with provenance and traceability.

Planet Shapers went to air on 17 September 2022. The show was promoted through social media and the *Australian Canegrower* magazine and is available to view on TenPlay and the CANEGROWERS website.

TRADE POLICY AND MARKET ACCESS

Sugar is produced in more than 120 countries. In many of them it is an industry viewed as politically sensitive,

resulting in a range of tariffs, import quotas, production quotas, price supports, subsidies and other support measures. These combine to make sugar one of the world's most distorted commodity markets.

An important strategic priority for CANEGROWERS is to improve market access opportunities for Australian sugar by substantially reducing market access barriers and reducing trade distorting domestic supports and export subsidies, distortions that adversely impact world sugar prices.

Working closely with government, the essence of the strategy is twofold; to ensure new market access opportunities for sugar are included in all new trade agreements (multilateral, regional and bilateral) and to ensure trade rules are enforced.

The World Trade Organization's (WTO) finding that India's domestic support policies on sugar are distortionary is yet to be resolved following India's appeal.

Australia, with support from the Global Sugar Alliance, continues to apply pressure at the WTO to enforce compliance as well as to restore the WTO dispute settlement system and appellate body.

However, India's policy decision to switch its support from sugar to ethanol has eased the pressure on world sugar prices. The development of India's ethanol production capability serves two purposes.

It reduces their level of sugar exports and lowers emissions. Despite non-compliance with their WTO obligations, India has reduced its sugar exports this year, down from record levels due to both its ethanol program and poor growing conditions in some locations.

ATMAC

The funding CANEGROWERS secured through the Department of Agriculture, Fisheries and Forestry (DAFF) Agricultural Trade and Market Access Cooperation (ATMAC) program has supported Australia's engagement with India.

The ATMAC program is also supporting CANEGROWERS ability to validate Australia's sustainable sugarcane production credentials. The materiality assessment will provide a better understanding of the information required to substantiate our sustainability credentials in a rapidly changing market.

The third ATMAC project has been underway to map opportunities to enter new markets for raw sugar in Asia and elsewhere based on contestable market share, market size, potential returns and considering regulatory and counterparty risks.

This will also provide recommendations on relevant trade policy settings required, and an engagement strategy for pursuit of those markets.

CANEGROWERS' fourth ATMAC project was commissioned, and is currently underway.

This project is examining potential new markets for value-added bio-products for the industry based on an analysis of attractiveness and risks, technical and market access issues and Australia's comparative advantage.

FTAs

Australia successfully negotiated a Free Trade Agreement with the United Kingdom (A-UK FTA). This agreement has allowed commercially meaningful access for Australian sugar to the UK market.

Through the FTA, Australian access is a structured progression from an initial 80,000 tonnes, increasing on 1 October each year by 20,000 tonnes for eight years, after which there will be open access to the market.

It is important that Australia maintains a diversified export portfolio of sugar markets in order to manage access risks over time.

As the end of the 2022/23 year approached, QSL was preparing to send the first shipment of sugar to the UK in over 50 years.

The negotiation of an Australia-EU FTA stalled with agricultural products being a major impediment to reaching a deal. While the terms for access for sugar were unsatisfactory, those for beef, lamb, dairy products, and wine were also disappointing.

The Australian government, with the support of CANEGROWERS determined that it would be better to walk away than to accept a substandard arrangement.

CANEGROWERS meets regularly with Australia's Minister for Trade and senior government officials to ensure trade issues affecting sugar are fully understood and to support Australian Government efforts to secure a more favourable and profitable export market environment for sugar.

CANEGROWERS works closely with QSL and collaboratively with the ASMC to improve the terms of trade for Australian sugar and coordinates and manages the activities of the Global Sugar Alliance of exporting countries with a like-minded approach to trade policy.

TRANSPORT

Safe access to roads is critical to farming and harvesting operations. During 2022/23, Department of Transport and Main Roads (TMR) have agreed to some long-standing requests from CANEGROWERS.

Firstly, TMR agreed, in principle, to approve permits for 3 years. It is not

known if any specific conditions are required for this to apply.

Secondly, agricultural vehicles (vehicles between 3.5m and 4.0m wide) will no longer be restricted to a 5km travel limit on critical roads north of Rockhampton, if using two pilots.

CANEGROWERS kept the National Heavy Vehicle Regulator (NHVR), TMR and Queensland Police Services (QPS) up to date on the likelihood of and need to extend the crushing season into the Christmas curfew period for some districts.

As a result, a process was put in place to approve permits on a case-by-case basis which included an adequate travel management plan.

There have been some load restraint compliance issues with B doubles on critical roads, however, after communication with TMR/QPS the issues have not escalated.

NHVR have not been able to provide a regulatory advice or an exemption notice to replace the CANEGROWERS loading guidelines.

CANEGROWERS will work with mill cane supply and transport managers and the ASMC to gather district level data and assess practical load restraint methods.

Transport workshops have been held in five districts to cover the National Ag Notice, permit application, and chain of responsibility.



One issue arising was the current need for a separate permit application for tracked harvesters to cross public roads.

This issue was resolved with NHVR. Adding crossing places to the National Agricultural Notice is being investigated.

CANEGROWERS sits on the Queensland Ministerial Freight Council and also works with the Queensland Transport Logistics Council as required.

WATER

Water is an essential input for all of agriculture. Sometimes it is provided free as rainfall, but much of the time it must be stored and used as irrigation water to be applied to the crop at the right time and at the right amount.

The cost of irrigation water comes from the storage and delivery of water to farms. The sugarcane industry's irrigation schemes are centrally managed, and pricing is regulated by the Queensland Competition Authority (QCA).

Governance provisions for Water Management Areas are provided within Water Plans. These are developed to sustainably manage Queensland's water resources by balancing the needs of water users and the environment.

Water plans have a 10-year life, which can be extended to 20 years under provisions in the Act. Many plans have recently expired or will soon, which can lead to potential undesirable changes for irrigators.

CANEGROWERS has worked to ensure that industry stakeholders are aware of any plan replacement processes, and facilitated consultation between our growers and the department to ensure their voices are heard and needs are met under new Water Plans.

CANEGROWERS goal has been to ensure that regulated prices for water are efficient and do not impose an unnecessary burden on irrigators.

This year the Queensland government endorsed that irrigation prices in all Sunwater and SEQ water supply schemes will be capped at the QCA's assessed cost reflective levels (often referred to as the lower bound price).

Previously, prices had been frozen until the cost reflective levels surpassed the existing rates, however this inequitable practice has now ceased and those schemes above the lower bound price have subsequently been adjusted downward to the lower bound price.

The current regulated price path endures through to 2024/2025.

Sunwater is preparing their pricing proposal which will be reviewed by the QCA including a round of public consultation. This year, Sunwater has provided a series of customer and stakeholder consultations to help inform their proposal.

CANEGROWERS will continue to engage in the process and will review the final proposal once available in November 2023 to ensure that the outcome is aligned with consultations, and that fair pricing principles are applied.

WORKFORCE DEVELOPMENT

Shortage of suitable workforce has been a significant issue particularly harvester and haul out drivers and farm hands.

A workforce task group was set up to investigate the workforce shortage issues and develop strategies and actions to address them.

There was a successful renewed and enhanced advertising and social media campaign aimed at a national audience with the jobs board linking employer and employee.

Support was provided for district level campaigns as required aimed mostly at attracting local or travelling workforce participants e.g. noticeboards on CANEGROWERS buildings, backpackers, van parks, truck stops, public notice boards.

Sugarcane was included a number of agriculturally-focussed workforce recruitment campaigns, including Harvest Trail and Agri-Labour Australia. CANEGROWERS worked with the coordinator of Operation Grain Harvest Assist to develop a process to attract armed forces veterans into the sugarcane workforce.

As a member of the Rural Jobs and Skills Alliance, CANEGROWERS has been involved in the Queensland Agricultural Workforce Summit, the Queensland Agricultural Industry Workforce Plan 2022-2026 to ensure sugarcane is included in providing a platform for attracting, skilling and retaining workforce.

Through the National Farmers Federation CANEGROWERS provided input into the National Jobs and Skills Summit with the priorities to streamlining labour migration, provide industry-friendly VET reform, simplifying Fair Work system and removing obstacles to working.

WORKPLACE HEALTH AND SAFETY

The safety of members, their families and workers is a critical issue for CANEGROWERS.

The CANEGROWERS Workplace Health and Safety Guide was maintained with monthly checks on links to resources.

Application has been made for continued membership of the Rural Industry Sector Standing committee which provides advice to the Office of Industrial Relationships Board.

CANEGROWERS is on the steering committees for the Rural Plant and Cane Rail Safety Code of Practice. It is unlikely that the content will be changed, however these are part of regulation and there is a need for significant communication material and processes to inform growers. ■



District Reports

MOSSMAN

In the year ending 30 June 2023, CANEGROWERS Mossman continued with the company's core business of representing growers, members, and industry at the local and state level, as well as providing them with assistance, information, and advice where needed.

The 2022 season was the fourth year of continuous crushing operations for Far Northern Milling Pty Ltd (FNM). Unfortunately, a toll-crushing agreement could not be reached between FNM and MSF at Tableland Mill. Outside workers were still in short supply but, overall, both the mill and harvesting contractors managed quite well with existing employees.

The FNM 2022 season crop estimate of 776,296 tonnes of cane was slightly lower than the final 2021 tonnage. However, given there was no toll-crushing for the season, the start date of 20 June 2022 was a little later than ideal. Mossman's crushing got off to a very rough start with wet weather and factory maintenance issues plaguing the first three weeks.

The 2022 final tonnage came in at 97.2% of estimate, at 754,403 tonnes of cane. The split was 481,156 tonnes of cane for Mossman coastal growers (includes 478 tonnes condemned) and 273,247 tonnes of cane for Mossman Tableland growers. Unfortunately, due to time constraints and weather conditions, there was 15,429 tonnes of cane stood over on the Tableland.

Mossman Mill finished crushing on 23 December 2022, 27 weeks after starting. Due to the very poor start to crushing, average factory availability was very low at 75.9%. Major areas of lost time were attributed to boiler control and steam generation issues, crystallisation issues, feeding the milling train and wet weather interruptions. There was also 70.2 hours attributed to running out of cane. Mossman mill averaged 246.8 tonnes of cane per hour due to using one boiler.

The CCS was again disappointing with averages below 2021 levels. Mossman mill averaged 12.07 CCS for the season, coastal growers averaged 11.4 CCS (almost half a unit of CCS below 2021 season), and Mossman Tableland growers averaged 13.24 CCS (just over a half a unit of CCS below 2021 season). This lower result meant a lower sugar make for Mossman Mill which was 86,328 tonnes IPS sugar.

FNM contracted coastal cane was harvested across 6,330 ha, with the coast averaging 75.3 tonnes of cane per hectare. Coastal final mill average sugar price for 2022 was \$657 and the final corresponding mill average cane price was \$44.43 per tonne. However, a \$2 per tonne of cane towards the mill Sustainability Levy was deducted from most growers via their cane payment formula, bringing the final mill average cane price to \$42.43 per tonne of cane.

CANEGROWERS Mossman provided local growers and members with assistance in harvesting contract preparation and monitoring of various activities under the Cane Supply Contract via the Industry Management Group and Bargaining Agent meetings.

CANEGROWERS Mossman continued involvement with the Douglas Marine Advisory Committee, Wet Tropics Waterways group, and the Douglas Chamber of Commerce. Company staff and directors attended various Bargaining Agent meetings, industry meetings and QCGO Committee and Policy Council meetings.

We also continued to promote CANEGROWERS Insurance and Smartcane BMP accreditation and we continue to sponsor the local show, the Next Gen Show Cane Display, the FNM Productivity Awards, and the Mossman Christmas Street Party.

TABLELAND

Tableland Mill commenced crushing on 14 June 2022 and finished crushing on 1 December 2022. Total cane crushed through Tableland Mill was 559,839 tonnes, in 26 weeks.

The 2022 crushing season commenced at the Mossman Mill on 15 June 2022 and concluded on the 23 December 2022. A total of 754,403 tonnes were crushed through Mossman Mill in a 27-week season.

The total crush for the district was 833,086 tonnes, with a weighted CCS of 13.56, and an average cane per hectare of 105.35.



Due to weather and logistic constraints, this season saw standover cane of 15,000 tonnes for suppliers to Mossman Mill. This was approximately 5.5% of the estimated crop.

John Barbetti continued to work with local cane growers as they continued their Smartcane BMP accreditation journey. There were 20 accredited businesses, totalling 2,979 ha of cane. Smartcane BMP is a useful tool to help meet the requirements of record keeping for Reef Regulations. There have been three five-year reaccreditations completed.

N and P Budgets need to be in place before the start of next season. The main solution to meet all of these requirements is good record keeping. If growers need help setting up N&P Budgets or want to become accredited for BMP, they should contact the CANEGROWERS Tableland office.

During the 2022 crushing season, one replicated variety trial was planted and four RVT's were harvested. KQ228 continued to be the best-performing commercial variety across all four trials, followed closely by Q208.

Operation of the Approved Seed Plot continued with sales of 93 tonnes of approved seed cane to 12 growers.



The most popular variety was SRA32 with 11 growers purchasing 39 tonnes. A further hectare of clean seed was planted to provide approved seed to growers in 2023 of the varieties KQ228, Q240, Q208 and SRA28. SRA9 and SRA37 were accelerated to the plot for maximum propagation in 2023 and release in 2024.

Sampling of 22 on-farm seed sources for Ratoon Stunting Disease (RSD) was conducted across nine farms. All samples tested negative for RSD. The majority of blocks were plant cane with only four ratoon blocks included in the sampling program.

During the past 12 months, members were represented on various committees and working groups, including the Tinaroo Water Committee (previously Mareeba Dimbulah Irrigation Area Council), Queensland CANEGROWERS Electricity Committee, Ergon Energy Irrigation Tariff Forum, CANEGROWERS Queensland Policy Council, Harvest and Transport Council for FNM, Electrical Safety Forum.

Thank you to Drewe Burgess, John Barbetti and Angela Sturgess for their ongoing work over the last year.

CAIRNS REGION

CANEGROWERS Cairns Region has remained engaged on numerous

fronts and has continued to represent the district in all cane industry matters, in particular, environment, sustainable agriculture, and sustainably produced sugar.

An additional challenge to the local industry's sustainability around Cairns is the encroachment of urban development. CANEGROWERS Cairns Region committed significant funds to conduct an audit of land use within the region hoping to better understand how this issue can best be addressed. The outcome will assist in providing government and council with an insight into the issues facing the local sugar industry.

In partnership with MSF Sugar, CANEGROWERS Cairns Region is hopeful that it can collectively play a crucial role in guiding future town planning decisions.

The company has continued in the role of Project Coordinator for the Great Barrier Reef Foundation Mulgrave Russell Water Quality Project. The reason for involvement is to ensure any investment within the catchment offered on ground value for members.

The JCU TropWater Mulgrave Russell Water Quality Monitoring Project continued this year, with stakeholders receiving the great news that in partnership with the Reef and Rain Forest Research Centre, Project 25, had won the



National Banksia Sustainability Award - Agriculture and Regional Development Award. This was a wonderful outcome for the grower-driven project.

Support has also been provided to the investigation into the declining CCS within the region. The expertise of Sugar Research Australia has been engaged to analyse the historical trends and data from several production areas. The outcomes were well accepted and endorsed by stakeholders, with the project now moving on to stage two.

Whether it be within the district schools and education, or the community in general, CANEGROWERS Cairns Region continued to engage and promote the cane industry. The highlight this year being a community sugar industry promotion and vision at the Gordonvale Sugar Solstice. More than 2000 people attended this event.

CANEGROWERS Cairns Region has continued to engage with local schools to promote the industry as a career pathway. St Rita's School in Babinda was the most recent to get a visit from directors and staff.

The students were taken through some of the basics, from harvesting and milling to the production of raw sugar. A farm visit was included, where the students saw cane being planted and all the work that goes into growing a sugar cane crop.



The outing gave CANEGROWERS Cairns Region a great opportunity to demonstrate to the students, and particularly the teachers, the great work that is being done around reducing our environmental footprint.

Professional development for the benefit of the Young Growers Group, Farmers Teaching Farmers 2023 was rolled out again this year. The four days included opportunities for engagement with staff to discuss advocacy, products, services and benefits. The program included a visit to SRA Woodford station to observe plant pathology, pests, and disease research along with a field trip to Bundaberg and Isis districts to share experiences with likeminded younger growers. Once again, the trip was deemed to be very successful and seen as a good investment.

The company's four row direct drill bean planter and variable rate mud applicator remain in high demand. Over the past seven years the purchases have proved their worth via hectares covered, plus the fact that some growers have now gone ahead and purchased their own implements after seeing the success of the practice change.

INNISFAIL

CANEGROWERS Innisfail maintained a high level of membership once again, representing approximately 80% of the eligible membership area (including affiliate members).

Despite wet weather delays early in the season, the South Johnstone factory was the second mill in Queensland to complete crushing, with the 24-week season concluding on 1 December.

A total of 1,708,282 tonnes were crushed for the assigned area, with 1,492,378 tonnes at South Johnstone and 215,904 tonnes transferred at MSF Sugar Limited's Mulgrave Mill. Disappointingly, final CCS for the year was 11.63 units and average tonnes per hectare was 82.

The Board of CANEGROWERS Innisfail acknowledge the efforts of all parties involved in the timely



removal of the crop, including MSF Sugar staff, harvesting contractors and their operators, transport operators, terminal staff and, of course, the local cane farmers and their families.

CANEGROWERS Innisfail Board and Managers maintained a strong working relationship both locally with MSF Sugar staff and abroad with Thai mill owners, Mitr Phol. Ongoing discussions with the Mitr Phol Board once again focused on concerns around the regions declining productivity and CCS.

MSF Sugar spearheaded an initiative aptly named, "Grow Together" partnering with each respective CANEGROWERS organisation to ensure industry sustainability.

MSF Sugar's continued investment in factory maintenance and cane railway infrastructure was reassuring for growers and was reflected in the exceptional mill performance for the duration of the 2022 season.

Increasing feral pig populations continued to cause unprecedented economic losses in the Innisfail region. CANEGROWERS Innisfail partnered with Cassowary Coast Regional Council and MSF Sugar to trial measures such as aerial culling and cluster baiting in known hot spots.

The National Feral Pig Coordinator, Dr. Heather Channon, also visited



the region to learn more about these trials, share her learnings, and offer advice on a sustainable control program. Local growers are commended for the time and effort they dedicated to this issue.

Smartcane BMP continued to perform strongly in the Innisfail District with new accreditations and reaccreditations awarded during the year. Over 90% of the area is benchmarked and approximately 60% is accredited.

The Cassowary Coast Reef Smart Farming (CCRSF) project entered its second year of delivery. Unlike other water quality programs, CCRSF focuses on identifying and removing productivity constraints, thereby improving nutrient use efficiency.

CANEGROWERS Innisfail staff have worked in partnership with key industry stakeholders such as SRA and Terrain NRM, as well as highly respected specialists including, Professor Bernard Schroeder and Dr John Pickering. The three-year project is funded by the Great Barrier Reef Foundation.

TULLY

An above average crop for the 2022 season totalled 2,879,289 tonnes, with a final yield of 98.01 tonnes per hectare. The final yield was approximately 13 tonne per hectare above the ten-year average.

The crushing season commenced on 26 May 2022, with the last bin tipped on 16 December 2022. The 2022 crop was the third largest in the 98 years of Tully Mill's history. The only two crops larger than 2022 were in 2015, which totalled 2,898,012 tonnes, and 2016, which totalled 2,935,957 tonnes.

The eight sub-districts totalled 29,376.82 hectares, with Murray, Riversdale, Euramo and Kennedy supplying over two million tonnes or 72% of total tonnes supplied, coming from south of the Tully River.

The adoption of Smartcane BMP continues to increase with approximately 90% of the Tully District accredited in the program. The five-year reaccreditation process continued with support from our CANEGROWERS staff.

The deterioration of harvester numbers in the industry continued to be a concern. The replacement costs of equipment, in particular harvesters and haulout gear, almost eliminates new groups from forming. Financial impacts will have to be passed on, but farmers have no way of passing on their costs. Other impairments to industry are the lack of skilled labour, particularly at harvest time.

CANEGROWERS Tully has a Board representative on the Cassowary Coast Regional Council Economic Advisory Committee, which has been active since July 2022. In addition to the Economic Advisory Committee, from August 2023, CANEGROWERS will also have a representative on the Cassowary Coast Regional Council Rating Advisory Committee.



Interaction with other industry entities remained strong, with regular updates with Sugar Research Australia District Manager Phil Patane and staff, Tully Cane Productivity Services (TCPST), and Tully Sugar (TSL) representatives, in particular TSL's agronomist Greg Shannon. Tully Variety Management Group (TVMG) led by Greg Shannon and Peter Sutherland (TCPST) provided regular updates on varieties and constraints.

Regular farm visits and information sessions were held throughout the Tully district to ensure that growers have every opportunity to attend. TVMG provided updates on the varieties that are available and best suited to the area that growers are in, as well as information on diseases like Pachymetra, RSD and Aluminium Saturation.

Feral pigs were still an ongoing problem for landowners. The Cassowary Coast Council area is 4701 square kilometres, with 70% of the area national parks.

Feral pigs had an enormous impact on the national parks, ecosystems, and water courses, not to mention the financial impacts. Control is burdened to freehold landowners, with very little to no assistance from government.

HERBERT RIVER

Early 2022 saw moderate rainfall in from January to March which was ideal for cane growth. However, this rainfall more than doubled in April and May, which saturated paddocks. Rain continued to interrupt the 2022 season.

There was a total of 35 rain-affected days. This also contributed to a poor CCS which resulted in a 30-year low of 11.59 CCS average for the district. Furthermore, the rain-affected season resulted in approximately 4,900 hectares of standover in the district, which represented roughly 450,000 tonnes of cane.

The overall size of the harvested crop for the 2022 season was 4,531,000 tonnes, with approximately 49,700 hectares of cane harvested at an average yield of 91 tonnes per hectare.

Mill performance was very disappointing throughout the 2022 season, with a number of breakdowns and a lower-than-expected reliability rate. Once again, the mill transport sector struggled to keep the cane up to the mill, and late bins were again a prominent issue for the harvesting sector throughout the season.

The combination of wet weather and poor mill performance caused the season length to be extended to 27 weeks, and the last day of harvesting was 22 December.

Lower Herbert Great Barrier Reef Foundation (GBRF) Program and Major Grants Project

CANEGROWERS Herbert River continued as the Partnership Coordinator of the Lower Herbert Great Barrier Reef Foundation (GBRF) Program for a second year. We farewelled Caroline Coppo as the Coordinator and welcomed Carola Bradshaw as the new Coordinator for the program.

CANEGROWERS Herbert River was successful in obtaining funding to coordinate and manage the Major Grants Project. Grower Incentive Grants were part of the Major Grants Project which aims to improve the quality of water flowing from the Herbert River catchment to the Great Barrier Reef lagoon, while at the same time improving or maintaining productivity and profitability of the Herbert sugar industry.

The CANEGROWERS Herbert River Board and management considered it is vital for CANEGROWERS Herbert River to be involved in the program to ensure the Herbert River District and sugar industry were at the forefront of water quality improvements, and that productivity and profitability were not jeopardised.

The Major Grants Program granted approximately \$1.1 Million in the first 2 rounds, with another \$550,000 to be granted in the third round. The total contribution to the local economy including growers' contribution was approximately \$3.7 million.

Smartcane BMP

Smartcane BMP is really a win-win for the farmer and the environment.

Completion of the three core modules satisfy the requirements of reef regulations and positions a grower to consider how the remaining modules can support business improvement.

Through an excellently facilitated program, growers are given valuable templates which are extremely helpful in maintaining and keeping records.

The Major Grants Project had assisted with the grower uptake of Smartcane BMP. Once accreditation has been achieved, growers are seen as above the requirements needed to satisfy reef regulations and compliance.

The Herbert had 106 accredited growers by 30 June 2023, which

represented 42.3% of area under cane.

Acknowledgement

CANEGROWERS Herbert River directors acknowledge that the 2022 season was incredibly challenging for all sectors in the sugar industry and thank our members for their support throughout this difficult year.

BURDEKIN

The 2022 season commenced on 14 June 2022 and finished on 7 January 2023. Over a long crushing period of 29.6 weeks, a crop of 8,213,611 tonnes was crushed and an average CCS of 13.64 was recorded, which was the lowest since the 2011 season.

The extended season length and lower CCS was due to a combination of 47 days of lost crushing time due to wet weather, poor mill performance and inadequate cane transfer decisions from Wilmar.

Had the factories run more reliably, the district would have had an earlier and more respectable finish and would not have left 1,134 hectares of burnt cane and standover in the paddock, when Wilmar called time on the 2022 season.

Canegrowers Burdekin Ltd (CBL) has a superior CSA with Wilmar and for those growers who involuntarily left standover in the paddock, the negotiated conditions in the CSA triggered a compensation payment from Wilmar of \$19.88/t of cane from a \$300,000 standover pool.



This is a benefit the other collectives do not have. CBL also has a clear and specific benchmark dry crushing period in our CSA (i.e. performance guarantee payment) and for the 2022 season, members received a payment of 38c/t for the South Bank and 2c/t for the North Bank.

Cane transfer to optimise district crushing capacity with the intent to achieve uniform finish dates across all four mills remained a source of frustration for growers. Like the 2021 season, Wilmar transferred too little cane too late. Their preference was for a higher cost transfer model for the simple reason of control.

CBL stood alone in asking for the early transfer of cane. CBL also put forward cane transfer proposals which Wilmar sidelined as being too administratively complex. In the last week before Christmas, there was a last-ditch attempt for cane transfer when Wilmar agreed to keep Invicta Mill open on a cost sharing basis. Disappointingly, the transfer program was cut short due to mill performance.

The late finish also resulted in a compressed maintenance season. To Wilmar's credit they managed to complete an ambitious work program in time for the commencement of the 2023 season. Sugar Research Australia (SRA) hosted local Field Days at their Brandon Station. CBL supported this good local initiative with a stall.

On 7 October 2022, the CBL Board hosted a meeting with local Member for the Burdekin, Dale Last and provided him with an industry update on important issues.

CBL's AGM was held on 30 November 2022, with guest speakers from Lower Burdekin Water. These were Chairman Russell Searle and Manager David Sartori, who provided an update on the Warrens Gully Systems Capacity Upgrade.

In the off-season, CBL met with Wilmar on 8 February 2023 for a review of the 2022 season. CBL discussed concerns around mill

performance, which needed to get to 90%: management of equity where unharvested cane "remains to the end" adjustments were not adhered to: and the requirement for more proactive decisions on cane transfer. CBL requested an ex-gratia payment to growers who were left with burnt cane in the paddock, which was declined by Wilmar.

On 21 February 2023, CANEGROWERS ran a Business Essentials and Succession Planning Workshop which was well received by attendees.

The State Valuation Service revalued Burdekin sugarcane land up by an average of 15%. On 18 April 2023, CBL representatives met with the Burdekin Shire Council and provided an industry update and requested a reduction in rates via a lower cent in the dollar amount to help cushion the 15% land valuation increases. The Council agreed to this request.

Water was a key issue in 2023 with a number of reviews due, including the Burdekin Basin Water Plan Review. CBL participated in the preliminary public consultation phase for this review.

CBL representatives attended a public forum with representatives from Department of Regional Development, Manufacturing and Water on 4 April 2023.

On 18 April 2023, Wilmar held a forum with grower collectives to announce the 2023 season estimate of 8.4 million tonnes, provide mill start dates, and update on maintenance and capex.

In 2022/2023, CBL implemented the change in financial year reporting periods to 31 December and held the first AGM on the new reporting basis on 18 May 2023 at the Ayr Showgrounds Hall.

The guest speakers were Wilmar Senior Management, who provided an update on 2023 season and mill maintenance. Owen Menkens, in his capacity as Chairman of CANEGROWERS, provided an update on advocacy, projects and other

work undertaken by Queensland CANEGROWERS.

At the AGM, CBL acknowledged the contribution of Michelle Andrews who celebrated 20 years of service with CBL.

The Burdekin Shire hosted the Australian Hand Cane Cutting Championships at the Home Hill Showgrounds on 27 May 2023, which CBL helped sponsor. It was a successful event that saw growers come from other districts to compete in this time-honoured event that celebrates the ways of yesteryear.

The 2023 season commenced shortly thereafter on 6 June 2023 as planned and up until 30 June 2023 the factories had put in a steady performance to make the most of a dry start for the 2023 season which was a relief for many.

CBL would like to thank its members for their ongoing support and loyalty, which is greatly appreciated. CBL will continue to do our best for you.

PROSERPINE

Proserpine Mill ended with 1.85 million tonnes delivered for the 2022 season. This was well above the previous five-year average of 1.52 million tonnes and was largely the result of improved growing conditions. Tonnes were also added from an extended season and growing period.



A combination of early rains and poor milling performance took the crush to 11 January 2023, one of the latest finishes on record. The mill average CCS finished on 13.56, approximately half a unit lower than expected for an early-December close. Fortunately, January CCS deliveries were higher than anticipated, a welcome result with sugar prices rallying to their highest levels in four decades.

From mud-filter and fungal problems to loco challenges and staff shortages, the 2022 milling season was challenging for all involved.

The cost and medium-term revenue impacts on both growers and harvesting groups was hard felt, hopefully not to be repeated. Weekly mill audits continued with NIR spectroscopy playing an important role as a cross-check for growers' sample results.

Despite a shortened off-season, the mill did well to attract new staff and get through a majority of the maintenance program before the start of the 2023-24 season.

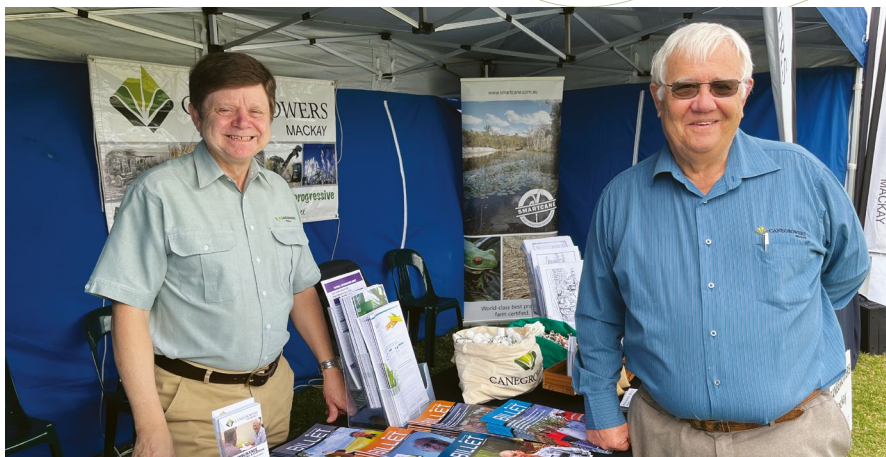
There were 12 Board meetings held by the Proserpine District Canegrowers Cooperative (PDCC).

There were additional ad hoc meetings convened that dealt with mill performance, the collective cane supply agreement and ongoing Sugar Terminals Ltd insourcing issues.

With the AGM held in November 2022, a preseason meeting was also held in June 2023, which was well attended by members. For the first time, the 2023 Show Cane event presented a Young Farmers trophy and introduced new variety sections.

CANEGROWERS Proserpine continued to deal with various member issues including easement and siding disputes, lease agreements and transport legislation with the support of QCGO.

Regional assistance was also made available to growers looking to access QRIDA Drought Preparedness



Grant funding, with further help extended to growers wanting to complete a financial budget as part of the QCGO Drought Resilience Program.

Support to Sugar Services Proserpine and both Kelsey Creek and Six Mile Irrigation Cooperatives continued. This included administrative functions for the transfer of water allocations, billing, and debt recovery.

There was also support given to Sugar Research Australia in the finalisation of the online tool, Harvest Mate.

The performance of CANEGROWERS Insurance met budget expectations despite an extremely challenging and competitive environment, while assistance with fire perils insurance claims progressed.

CANEGROWERS Proserpine had two staff changes during the year. This included the retirement of long-serving manager, Mike Porter.

During 14 years of service, Mike became an integral part of the Proserpine grower community and will be sorely missed. Newly appointed manager, Brendon Nothard, began his role on 9 January 2023.

Jess Harrison also replaced Trish Chesham as insurance and admin officer. Her position was also extended to include a part-time role as the Smartcane BMP facilitator to assist with future Proserpine grower accreditations.

MACKAY

With each passing year, the Mackay-Plane Creek District's four mills have taken growers into longer harvests. The 2022 harvest was an extraordinary year, with the crush extending into January.

Wilmar Plane Creek finished its 30-week crush on 7 January 2023, with a 23-year record throughput of 1.49 million tonnes. An estimated 150,000 tonnes remained in paddocks as standover. Mackay Sugar's three mills steamed off in a monsoonal barrage on 13 January 2023 having processed 5.55 million tonnes across 31 weeks. Upwards of 400,000 tonnes remained unharvested.

That large quantity of standover presented a challenge for growers, harvesters and millers as we moved into the 2023 crush in June.

Both the Mackay and Plane Creek Area committees have maintained strong positions with millers on mill performance, unacceptably long crush duration, harvest scheduling, and cane supply agreements.

As the 2022 season wore on beyond the optimal harvest window, Mackay Area Committee successfully campaigned for a payment for <7CCS/<75% purity cane for growers, extended to cover standover cane in the 2023 harvest. This had not been covered in the Cane Supply Agreement and was achieved through strong collective representation.



The organisation was proactive when it became obvious that the season would run overtime and engaged with the National Heavy Vehicle Regulator and the Department of Transport and Main Roads to arrange permit workshops for oversize vehicles operating over the Christmas curfew period.

Road safety advertising on radio over the Christmas period helped to ensure everyone knew the oversize vehicles were in operation over this period.

Membership remained strong in 2022-23, with CANEGROWERS representing 75.8% of Mackay area growers and 96.91% of Plane Creek. In total, our membership has 81,517 ha under cane.

Recruiting labour and industry training has remained an important activity.

Emerging opportunities in bio-commodities remained as a major topic for the region, with CANEGROWERS Mackay represented in the Greater Whitsunday Bio-futures Leaders Group.

It has been exciting for the sector to engage as the producers of feedstock for novel plant-based proteins manufacturing, and in the sustainable aviation fuel space.

Over 2022-23, several world-leading precision fermentation firms sent delegates to the Mackay region expressing strong interest in establishing operations here. The key priority for CANEGROWERS Mackay is to remain part of negotiations, and to realise a premium for growers on their sugar used in any value-add diversification.



It has been highly positive to see strong collaboration across local industry and all levels of government to work on these opportunities, and it is expected that the region will see shovels to ground within the next two to three years.

Bio-futures opportunities have been realised in no small part due to the consistent effort and championing of our late CEO of 15 years, Kerry Latter, who passed away after a short and intense battle with cancer on 18 June 2023.

This was indeed a sad end to 2022-23, with tributes flowing across local media and from all levels of industry and government. Staff and elected representatives worked together to ensure the organisation continued to function in a highly efficient manner, providing quality advocacy and grower service that Mr Latter fostered during his many years with CANEGROWERS Mackay. Michelle Martin has now moved into leadership as District Manager, effective from 7 August 2023.

BUNDABERG

Bundaberg CANEGROWERS staff and directors continued to concentrate on being proudly member-focussed and, providing representation, leadership and services while promoting unity in the interest of growers.



Bundaberg CANEGROWERS resourced strong advocacy campaigns targeting sustainable electricity and water pricing, water security and availability, transport, cane-firing, and water quality-related issues, including Reef Regulations.

Our continued leadership ensured that federal, state and local government politicians were in no doubt about the impacts of policy on members as well as the community, and our concerns in relation to these issues.

Bundaberg CANEGROWERS welcomed Tanya Howard into the role of manager on 1 July 2022. Tanya has been part of the board's succession plan for the past three years and was well placed to take on the roles of our core business, including the negotiation and aftercare of the Cane Supply and Processing Agreement, and the Cane Analysis Program, as well as the many day-to-day operational aspects of Bundaberg CANEGROWERS.

Bundaberg CANEGROWERS continued the pursuit of reversing the Environmental Protection (Great Barrier Reef Protection Measures) and Other Legislation Amendment Bill 2019 that included the Burnett Mary region in the "Reef Regulation" process for the first time in 2019.

The inclusion of the Burnett Mary catchment is scientifically unjustifiable, primarily because growers cannot impact the reef which at its most southern point is at least 80 kilometres to the northeast of the river systems and the prevailing currents predominantly flow south, not north.

Growers who supply Millaquin Mill gained access to the QSL Direct Portal following the joint efforts of Bundaberg CANEGROWERS, Bundaberg Sugar and Queensland Sugar Limited (QSL), with the signing of a new Sugar Marketing Agreement effective from the 2023 Season onwards.

The Queensland Competition Authority (QCA) issued its retail



electricity price determination for regional Queensland for 2023-24 on 9 June 2023.

New prices set by the determination took effect from 1 July 2023. All tariffs have increased, and a new 'solar soaker' tariff has been introduced, which aims to maximise the incentive for consumers to use electricity during the day when network utilisation is low and solar PV generation is high.

Bundaberg CANEGROWERS continued to assist members with the Electricity Bill Check Service to ensure growers are on the most suitable tariff for their usage patterns.

Bundaberg CANEGROWERS has a contingent of auditors at Millaquin Mill to ensure growers are receiving a fair deal and all weights and measures are accurate and in line with the Bundaberg Cane Analysis Program.

Arrangements continued with Oreco and assistance continued to be provided on behalf of Bundaberg growers to ensure payments and administration of the Oreco contract continued as agreed.

Bundaberg CANEGROWERS continued to build relationships with Bundaberg Sugar Services Limited, Bundaberg Regional Irrigators Group and the Grain in Cane Co-operative to create synergy and minimise duplication.

The 2022 crushing season continued until 30 December 2022, due to the high amount of wet weather during the season.

The 2022 season crop estimate was 1,070,361 tonnes with the final tonnage being 1,085,255 tonnes from a total area harvested of 11,647 hectares. Bundaberg Sugar was able to achieve a very credible performance by Millaquin Mill.

The 2022 seasonal pool price was based on a final pool price of \$608.87 plus \$10.53 US quota premium and \$43.60 shared pool premiums, to give \$663.00 per tonne of IPS.

ISIS

The 2022 crushing season commenced on Tuesday 14 June and continued for the next 31 weeks, with the district experiencing one of the longest and wettest crushing seasons in years.

Isis District growers were joined by Maryborough growers, who also supplied Isis Central Sugar Mill under a toll crushing agreement with MSF.

The last bin for the 2022 season was tipped on Monday 9 January 2023, with 860,121 tonnes crushed from the Isis District.

A total tonnage for the season of 1,422,854 tonnes was the second highest seasonal throughput in the mill's history. CCS was down, with an average of 12.75 achieved.



Given the long, wet crushing season, CANEGROWERS Isis met more regularly with Isis Mill representatives and kept a very close eye on grower harvesting equity, a declining CCS, and bin supply in a section of the Wallaville district where part of the rail line was closed for repairs.

CANEGROWERS Isis completed a review of our cane supply agreement after lengthy negotiations, with several significant changes being made including growers having the ability to make pricing nominations through the QSL Direct platform.

We continued to actively engage with many groups over a wide range of issues affecting the sugar industry, such as water, electricity, rates, and reef regulations.

This engagement extended to organisations such as SunWater, Ergon Energy, government departments and private corps.

We kept a close eye on the Paradise Dam wall reinstatement project. Both the Chair and Deputy Chair are members of the Paradise Dam reference group and continue to actively lobby for the wall reinstatement to occur in the shortest time possible with minimum impacts to irrigators.

CANEGROWERS Isis managed grower sugarcane trash supply contracts and payments, with local business ORECO.

We worked with growers on issues such as electricity tariff selection, lodging disaster assistance recovery grants, obtaining fire permits, and keeping growers up to date with changes to the sugar industry award. We continually communicated with the growing community, consistently striving to make things easy for them by providing pertinent information at the time when it was needed the most.

We actively represented the interests of growers and the industry on various committees at the local and state level. Activities included hosting school, university, and volunteer groups from within and

outside our district and accompanied them on mill and farm tours, promoting and educating the groups on the sugar industry.

We continued to work closely with the Isis Sugar Partnership members, Isis Central Sugar Mill, and Isis Productivity Services for the benefit of all growers and the local industry.

MARYBOROUGH

A rollercoaster with plenty of variation would be a good description for the year in the Maryborough District.

In August 2022, the four-man CANEGROWERS board became five when Greg Touzeau offered to fill the director role left vacant at elections. Greg has worked well with the board and offers a different perspective to many discussions.

The proposed sale of Maryborough Mill and the associated recommissioning work continued to progress. Meetings were held to discuss transport arrangements, potential for new cane varieties, and proposed additional infrastructure for bio-gas production. This activity had growers feeling positive for the future.

AEG continued to promise a successful start for 2023 season, but cracks were appearing in the process. As the end of the year drew closer, promises of a deposit to assist with preparations for 2023 did not eventuate. Even when MSF employed staff to begin recommissioning work in October, concerns were held for the whole transaction.

In December, the final verdict from MSF was to cancel the contract of sale and put off the employees.

Wary of such a development, the board had prepared discussions with Isis Mill to ensure growers had a mill to supply for 2023. By March, the growers had been released from Maryborough Mill CSA and were offered a CSA by Isis Central Sugar Mill. This also brought in QSL for



marketing services and the bulk of the growers were ready to supply and price sugar by April.

Sunshine Coast growers have been heavily impacted with the move to Isis Mill through significantly higher transport costs and the 2023 season will see only around one-fifth of the supply achieved in 2022 season, which was 52,000 tonnes.

The remaining Maryborough District growers will also be dealing with higher transport cost going forward.

2023 and beyond will see further changes as CANEGROWERS Maryborough develop the relationship with Isis Central Mill and Isis CANEGROWERS.

The 2022 season was extremely wet with over 60 days lost to weather. Access to fields was a constant issue, which saw the season extend to 31 weeks, finishing in January 2023.

Several farms in the district suffered flood damage during the three floods earlier in the year and recovery works were ongoing.

A significant amount of cane could not be cut and frustration among the growers was understandable. The result was 566,344 tonnes supplied of an estimated 638,000 tonnes available.

The wet conditions had a significant impact on the CCS, resulting in a



season average of 12.87. Total area under cane was 8,356 Ha.

The off-stream water project, which was the source of many conversations throughout the year, had not yet evolved into a physical project.

SunWater is the lead organisation, but the federal funding initially offered toward the project has been removed and SunWater indicate they are working on a revised model for the project.

ROCKY POINT

Rocky Point growers have had to learn to be patient due to factors well outside their control.

There were many crush start dates set prior to the actual commencement of the 2022 crush. These dates came and went with no smoke from the chimney at the mill. It was extremely frustrating to have a mature crop in the paddock and experience the latest start on record. The 2022 Rocky Point harvest got underway on 29 October 2022, with an initial estimate of 366,000 tonnes of cane.

The mill and cogen were plagued by constant breakdowns, which continued for the duration of the season.

Despite only having 34% of the crop harvested, the mill decided to stop crushing on 21 December 2022 and restart on 12 January 2023.

CANEGROWERS Rocky Point was unable to convince the mill to only take public holidays off over the Christmas period.

The 2022 season concluded on 5 February 2023, the latest finish on record. Approximately 50% of the crop was harvested, and for the second year in a row, it was extremely disappointing to not be able to capitalise on strong sugar prices and to have standover as a significant portion of the crop.

A total of 194,936 tonnes were crushed in 2022, at a season-average CCS of 13.10.

On a positive note, the cogen plant was purchased by the miller in January 2022. The miller spent, and intends to continue spending, a significant amount of money on the plant to improve reliability.

With the growers in Rocky Point experiencing huge losses in 2022 due to priced sugar positions not being filled and lost income from the unharvested crop, the CANEGROWERS Rocky Point negotiating team, after many months of negotiations, had a 'compensation package' to the growers incorporated into a new CSA, which was signed on 19 June for a period of five years.

The major change is that our sugar will now be marketed and priced by Manildra Harwood Sugar in NSW.

Growers will no longer be taking on any risk associated with sugar pricing, which is a positive position to be in given the uncertainty around the reliability of our mill. CANEGROWERS Rocky Point members will also finally be receiving US Quota after many years of being denied it.

The two-year Services Agreement with Sugar Research Australia terminated in June 2023. While it has been challenging and time consuming developing and executing productivity activities for the district, we have seen some positive results for our growers.

CANEGROWERS Rocky Point intends to sign another two-year agreement with SRA, with some reduced reporting requirements.

Red Imported Fire Ants remain an issue across the district, with high numbers of nests on most farms.

CANEGROWERS Rocky Point continued to work with Biosecurity Queensland and the Fire Ant Suppression Taskforce ("FAST") in an attempt to suppress the fire ants.

CANEGROWERS Rocky Point continued working with the Gold Coast City Council to improve the Woongoolba Flood Mitigation Scheme, which benefits all growers. ■



CANEGROWERS Board



Chairman,
Owen Menkens



Senior Vice Chairman,
Mark Mammino



Vice Chairman,
Joseph Marano



QCGO Board,
Michelle Fischer



QCGO Board,
Joseph Borg



QCGO Board,
Kevin Borg



QCGO Board,
Chris Bosworth



QCGO Board,
Stephen Calcagno



CANEGROWERS Policy Council

Mossman – Matthew Watson

Tableland – Claude Santucci

Cairns Region – Stephen Calcagno

Innisfail – Joseph Marano

Tully – Bryce Macdonald

Herbert River – Chris Bosworth
& Steve Marbelli

Burdekin – Owen Menkens, Greg Rossato,
Steve Pilla and Glenn Betteridge

Proserpine – Glenn Clarke

Mackay – Kevin Borg, Greg Plath, Joseph Borg
and Bill MacDonald

Bundaberg – Mark Pressler

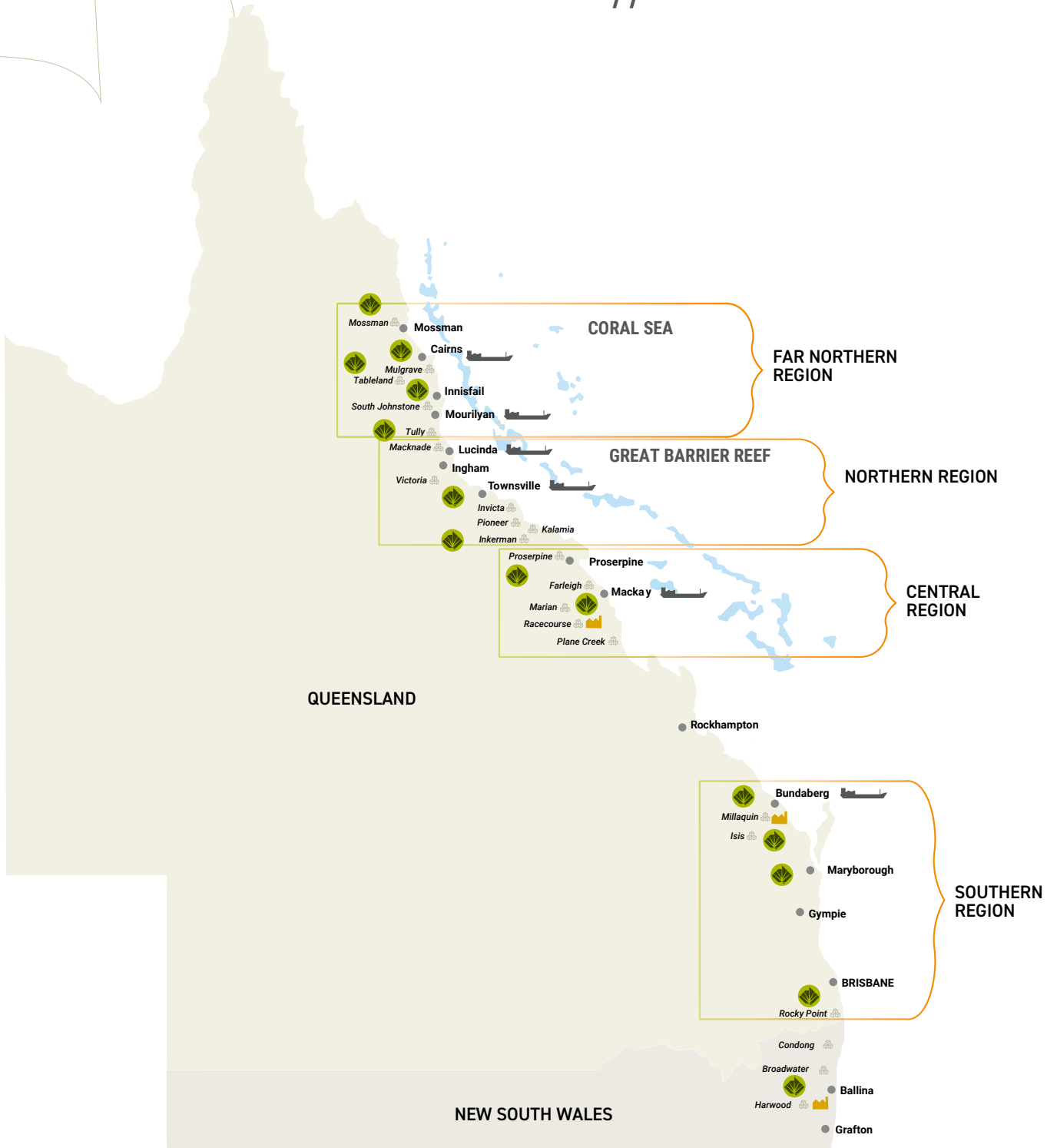
Isis – Mark Mammino

Maryborough – Roger Bambling (ceased April 2023)

Rocky Point – Michelle Fischer

Brisbane – Dan Galligan, CEO &
Jodie Mittelheuser, CFO.

CANEGROWERS District Offices



CANEGROWERS Offices
 Sugar Mills
 Sugar Refineries
 Bulk Sugar Terminal Ports

CANEGROWERS Mossman

Mossman Canegrowers Ltd.

ABN: 55 111 943 616

Centenary Building, Shop 1, 1 Front Street
PO Box 789, MOSSMAN Q 4873Manager: **Evelyn Matthews**

T: 07 4098 2377 | F: 07 4098 3567

CANEGROWERS Cairns Region

CANEGROWERS Cairns Region Ltd.

ABN: 62 111 567 429

Mulgrave: 29 Norman St
PO Box 514, GORDONVALE Q 4865Manager: **Sarah Standen**

T: 07 4056 1251 | F: 07 4056 3669

CANEGROWERS Innisfail

Innisfail District Cane Growers Organisation Ltd.

ABN: 11 111 471 124

Aust Sugar Industry Museum, 18-24 Bruce Hwy
PO Box 67, MOURILYAN Q 4858Manager: **Sandra Henrich**

T: 07 4063 2477 | F: 07 4063 2488

CANEGROWERS Tully

Tully Cane Growers Ltd.

ABN: 13 112 000 414

59 Butler St
PO Box 514, TULLY Q 4854Manager: **Elisha La Fauci**

T: 07 4068 4900 | F: 07 4068 2351

CANEGROWERS Herbert River

Herbert River District Cane Growers Organisation Ltd.

ABN: 55 106 007 925

11-13 Lannercost St
PO Box 410, INGHAM Q 4850Manager: **Frank Scardamaglia**

T: 07 4776 5350 | F: 07 4776 5380

CANEGROWERS Burdekin

CANEGROWERS Burdekin Ltd.

ABN: 43 114 632 325

141 Young St,
PO Box 933, AYR Q 4807Manager: **Greg Watson**

T: 07 4790 3600 | F: 07 4783 4914

CANEGROWERS Proserpine

Proserpine District Canegrowers Cooperative Ltd.

ABN: 41 948 426 763

88 Main St
PO Box 374, PROSERPINE Q 4800Manager: **Brendon Nothard**

T: 07 4945 1844 | F: 07 4945 2721

CANEGROWERS Tableland

Tableland Canegrowers Ltd.

ABN: 84 114 759 376

Shop 8, 166 Byrnes St
PO Box 1359, MAREEBA Q 4880Administration Officer: **Angela Sturgess**

T: 07 4092 6065 | F: 07 4092 5857

CANEGROWERS Mackay

Mackay Canegrowers Ltd.

ABN: 24 111 817 559

120 Wood St
PO Box 117, MACKAY Q 4740Manager: **Michelle Martin**

T: 07 4944 2600 | F: 07 4944 2611

CANEGROWERS Bundaberg

Bundaberg CANEGROWERS Ltd.

ABN: 66 110 868 801

32 Bourbong St
PO Box 953, BUNDABERG Q 4670Manager: **Tanya Howard**

T: 07 4151 2555 | F: 07 4153 1986

CANEGROWERS Isis

CANEGROWERS Isis Ltd.

ABN: 69 110 648 041

48 Churchill St
PO Box 95, CHILDERS Q 4660Manager: **Joanne Hall**

T: 07 4126 1444 | F: 07 4126 1902

CANEGROWERS Maryborough

Maryborough Canegrowers Ltd.

ABN: 56 111 775 583

106 Bazaar St
PO Box 172, MARYBOROUGH Q 4650Manager: **Cameron Waterson**

T: 07 4121 4441 | F: 07 4121 6115

CANEGROWERS Rocky Point

Rocky Point District Cane Growers Organisation Ltd.

ABN: 32 111 827 251

1214 Stapylton - Jacobs Well Rd
WOONGOOLBA Q 4207Manager: **Kate Armitage**

T: 07 5546 1481 | F: 07 5546 1481

CANEGROWERS Queensland

Queensland Cane Growers Organisation Ltd.

ABN: 94 089 992 969

L7, 201 Charlotte St
PO Box 1032, BRISBANE Q 4001CEO: **Dan Galligan**

T: 07 3864 6444 | F: 07 3864 6429

OUR VOICE GROWING QUEENSLAND



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WWW.CANEGROWERS.COM.AU