The On-farm Impact of Climate Change Policy cont.

emissions. The government then makes available a volume of emission permits, which these organisations bid for, and can trade amongst themselves.

Those organisations required to participate (called covered organisations or ETS participants) then have a choice of either finding ways to reduce emissions, buying more permits from other organisations that have been able to reduce their emissions, or paying a fine based on the volume of emissions they released which they did not hold permits for. One further option (depending on the rules of the ETS) can be that ETS participants pay non-participants to carry out activities that are recognised as removing greenhouse gases from the atmosphere (such as planting trees).

Once implemented, and ETS will have the effect of making emission-related products more expensive, and for Australia that means electricity and fuel in particular. Given the fundamental role that fuel and electricity have in most economic activities, this inevitably means that many other goods and services will also be more expensive – especially in regional Australia.

Agricultural businesses are not likely to be required to be direct participants in the ETS during its initial stages, because of the uncertainties associated with measuring agricultural emissions, and the administrative difficulties associated with trying to administer annual greenhouse activity statements from 130,000 farm businesses. However, New Zealand has proposed that agricultural businesses there will become direct participants in the ETS from 2013, and Australian policymakers see some benefits in having both Australian and New Zealand farmers operating on a similar basis.

The fact that agricultural businesses will not initially be required to be ETS participants does not mean that agriculture has been 'let off', and farmers will not need to respond to the implementation of the ETS. Agricultural businesses will be impacted by higher energy and energy-related costs, and in a few years also face the prospect of being required to be direct participants in the ETS and to find ways to reduce the greenhouse emissions arising from their businesses.

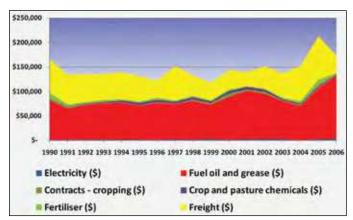


Figure 3. Energy and energy related farm inputs – Northern Territory beef enterprises.

Different sub-sectors of agriculture will be impacted in different ways by the ETS, both before and after agriculture is required to be a direct participant. As figure 3 highlights, ABARE farm surveys show that the average N.T. beef enterprise purchases approximately \$160,000 worth of energy and energy-dependent farm inputs each year, and the cost of all these will be increased as a result of the introduction of the ETS. Together, these inputs are approximately 15% of the average total inputs purchased by N.T. beef producers each year. A 20% increase in energy and energy related input costs would increase average beef N.T. beef total farm input costs by 3%, but would have a much bigger percentage impact on farm business profit, because of beef producers inability to pass on additional costs by demanding higher cattle prices.

While agriculture remains an 'ETS uncovered sector', N.T. beef producers are probably in a better situation than average broadacre farmers in the rest of Australia, who on average have 30% of annual farm inputs costs associated with energy or energy-dependent inputs. Crop producers, in particular, have up to 46% of their total input costs associated with energy or energy-dependent inputs, and will face significant increases in their operating costs as a result of the ETS.

If (or once) agriculture becomes an ETS covered sector, a different situation will emerge. Those sub-sectors of agriculture that are responsible for producing a relatively high level of greenhouse emissions will be more impacted by participating in an ETS which requires businesses to produce less and less emissions each year, or to pay for those emissions that are produced. This means that any farm businesses with a heavy reliance on cattle or sheep production will be more affected by direct participation in the ETS. Figure 4 puts this issue in context, by providing a profile of the greenhouse emissions estimated to be produced by a N.T. beef farm running an average of 15,000 head of cattle on 50,000 hectares, and using diesel for electricity generation.

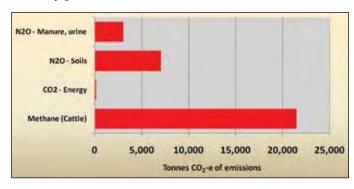


Figure 4. Greenhouse emission profile of an N.T. beef enterprise running 15,000 cattle.

The On-farm Impact of Climate Change Policy cont.

This enterprise would be estimated to be producing around 34,000 tonnes of greenhouse emissions each year, with greenhouse emissions measures as tonnes of Carbon dioxide equivalents (CO²-e). As can be observed, by far the biggest source of emissions is in the form of methane from cattle (cattle burps), with the number as high as it is due to the fact that a tonne of methane is regarded as resulting in 21 more times the amount of warming as a tonnes of carbon dioxide in the atmosphere. When the current price of a permit to release a tonne CO²-e of greenhouse emissions is around \$A 40 in the european ETS, some idea is obtained of the potential cost should Australian beef producers be required to purchase emission permits for even a small proportion of their annual emissions.

The whole question of farm sector greenhouse emissions is made all the more complex because of the way international greenhouse accounting rules specify farm-sector emissions should be counted. This is best explained by reference to Box 1, which provides a somewhat simplistic picture of the annual cycling of carbon in a one hectare area of highly productive irrigated pasture in southern Australia. The figure shows the flows of carbon from the atmosphere to the pasture and soils, and through cattle grazing on that pasture. However, international greenhouse accounting rules dictate that only the methane and nitrous oxide produced by the cattle are counted, and none of the carbon dioxide or nitrogen fixed from the atmosphere each year in annual pasture growth is netted of the cattle emissions. As a result, the greenhouse account of a beef operation is essentially a gross emission rather than a net emission figure. Efforts are currently being made in international forums to have these accounting systems changed, but there is not a great deal of optimism that change can be achieved in the near future.

A further point to consider in thinking about ways in which agriculture might respond to the introduction of the ETS is that agriculture is the only sector of the economy that is regarded as having reduced annual greenhouse emissions since 1990, as Table 1 shows. Were it not for a reduction of almost 40% in net agricultural emissions since 1990 (as a consequence of reduced sheep numbers and bans on land clearing by the NSW and Queensland governments) Australian emissions would be significantly above the national Kyoto Protocol target of limiting annual emissions to 108% of 1990 emission levels during the period 2008-2012. Unfortunately, agriculture appears unlikely to gain any credit for this emission reduction when the ETS commences, or in the future if agriculture becomes an ETS-covered sector.

While the introduction of an ETS will present many challenges for Australian agriculture, it may also present some opportunities. In situations where ETS-covered businesses cannot easily reduce emissions, they can opt to pay non-participating businesses to carry out actions that 'offset' emissions by removing greenhouse gases permanently from the atmosphere. Tree plantations are the prime example of this. The potential exists that those farm businesses that have the potential to establish tree plantations of areas of land may be able to generate revenue from these. A high yielding plantation may sequester upwards of 20 tonnes CO²-e of

	Emissions Mt CO ² -e		Change in emissions (%)
	1990	2006	1990 – 06
All Sectors	552.6	576.0	4.2%
Primary Industries	258.9	188.3	-27.3%
Agriculture, Forestry and Fishing	226.8	136.2	-39.9%
Mining	32.1	52.1	62.5%
Manufacturing	65.1	69.3	6.5%
Electricity, Gas and Water	136.3	204.5	50.0%
Services, Construction & Transport	48.9	59.5	21.5%
Residential	43.5	54.5	25.2%

Table 1. Australia's Direct Greenhouse Gas Emissions by Economic Sector 1990, 2006(a)

greenhouse gases per annum, and at rates of \$20 - \$40 per tonne, this could provide an important source of farm income, or at least neutralize some of the added new costs.

In conclusion, the introduction of an ETS in Australia will herald major changes, and present considerable challenges and some opportunities for Australian farmers. Being fully informed of developments and actively considering what those developments might mean for individual farm businesses seem the best way to be prepared for these developments, and to minimise the risks they pose for farm businesses.

Mick Keogh Australian Farm Institute

Mick Keogh

Mick Keogh grew up on a farm in southern NSW. After obtaining a Bachelors degree in Wool and Pastoral Science at the University of NSW in 1980, he managed a beef cattle research station on the NSW North Coast for several years. He was subsequently employed as a researcher at the University of NSW, where he completed his Masters degree in 1984.

Over the next eight years he was employed as an agribusiness consultant, participating in a wide range of industry and government funded consultancy projects, often as the lead researcher.

In 1992 he joined the NSW Farmers' Association, and was subsequently appointed General Manager, Policy. In that position, he was closely involved in a wide range of issues impacting on the farm sector, at both state and national levels. He also authored a wide variety of publications on farm-sector issues.

In late 2003, he was appointed Executive Director of the newly established Australian Farm Institute in conjunction with its Institute's Research Advisory Committee, the Institute commissions strategic policy research and produces a wide variety of publications on contemporary issues influencing Australian agriculture.



The Cattle Industry, Ready to Bounce Back

NTCA Annual Conference 2008

1998-2007: A most extraordinary decade

The past decade has been a most extraordinary one for the Australia cattle industry due to the following.

- 1. Australian consumer spending on beef jumped by 70% over the decade, to A\$6.6 billion.
- 2. The outbreak of BSE in Japan in late 2001 cut beef exports to this, our largest export market, by over 50%.
- 3. This was followed by outbreaks in Canada and the US in 2003, which left Australia as the only major supplier of imported beef to Japan and Korea, heralding a period of rapid growth in exports and in lot feeding.
- 4. The Australian resources boom and US economic woes has seen a rise of over 80% in the A\$/US\$ rate since 2001.
- 5. Brazil emerged from nowhere to overtake Australia as the world's largest beef exporter, displacing Australian frozen beef from many of the 'second tier' markets.
- 6. Australian cattle producers have endured widespread severe drought conditions for the past six years, raising questions about the role being played by climate change.
- 7. Finally, a La Nina climate pattern arrived in late 2007, bring record floods to parts of Queensland and northern NSW, but unusually it did not bring the expected widespread break to southern Australia.
- 8. Global grain prices rose rapidly, on the back of growth in demand in China and India, the diversion of grains for (government mandated) bio-fuel production and adverse weather impacts on grain harvests around the world.

Any one of these extraordinary events is a once in a lifetime event.

Near-term supply outlook

For Australian cattle industry, 2007 was a difficult year, with widespread losses to drought-affected producers, in lot feeding and in beef exporting, particularly to the US market.

The short term outlook depends in part on the drought. Hopes were high for a widespread breaking of the drought in autumn. However, another dry southern autumn and poor monsoon rains in the NT and western Queensland have sentences many cattle producers to another tough year.

Nationally, the cattle industry has handled these years of drought remarkably well, with the herd now larger than before the drought commenced in 2002, beef production at record levels, feedlot capacity up 25% and beef quality higher. However, this performance has come at a cost to beef producers in higher expenditure, low average incomes and higher debt. It has also been associated with a significant shift in the cattle herd to the north and a fall in southern herds.

Over 2008, beef production is expected to fall only 3%, with declines in the slaughter of grainfed cattle and breeding stock (cows and calves), but a lift in grassfed cattle availability and live cattle exports. Providing the drought recedes, the herd is expected to expand slowly over the next five years to approach 30 million head, allowing for a steady expansion in cattle turnoff and beef supplies.

The global grain price shock, Australian drought and high A\$ have created major losses in lot feeding, causing many feedlots to close or severely curtail activity. While the bumper summer sorghum harvest has brought limited relief to northern feedlots, grainfed cattle turnoff is expected to fall 20-30% in 2008. Some significant recovery is anticipated in spring, providing we have a good winter grain harvest, but it is likely to be some time before the sector fully recovers, particularly as US grainfed beef competition seems about to intensify in Korean and Japan.

Beef export challenges

Australia currently faces major challenges on the export front, particularly from the return of US competition and the high A\$. This is being only partially offset by strong beef demand from South East Asia, the Middle East, the EU and Russia and for live cattle from Indonesia. Common factors in this growth to 'second tier' beef markets has been strong local spending growth, lower local supplies and a sharp easing in competition fro South American beef.

With some overall easing in export demand expected, and a small fall in supplies, beef exports are forecast to fall 5% in 2008, with the fall confined largely to Japan (down 11%) and Korea (down 26%).

In contrast, live cattle exports remain buoyant, despite the high A\$, and prices are attractive relative to the store/slaughter trade. With record exports expected to Indonesia, assisted by high supplies coming out of the dry Northern Territory, live cattle shipments are expected to lift a further 8% in 2008, to 760,000 head. Live exports are projected to continue expanding to reach around 850,000 head by 2012.

Short term cattle price forecasts

The likely trend in cattle prices is difficult to predict at present, with increased US competition, high and rising A\$, low feedlot and processor margins and high global grain costs suggesting a fall, but high US beef prices, a boost in restocker, store and, to a lesser extent, feedlot demand and lower Australian supplies suggesting a rise.

In reality, price developments are likely to be mixed in the short term, with falls in the price of medium weight finished steers and Japan ox, a lift in the price of breeding stock (providing the drought recedes) and young cattle prices level or slightly higher.

Medium term issues

There are a number of major issues which suggest a bright medium term demand outlook for the Australian cattle and beef industries. The principal one is the strong growth in Asian economies, particularly the huge population centres of China and India. In the near-term, there is also likely to be limited global growth in beef supplies, and falls in some major exporting countries, as land is shifted from cattle into cropping.

This will eventually add to the growing problem of global food price inflation, by lifting beef prices further, including in the US and North Asia. The shift of crops into the production of biofuels will add significantly to this problem.

The Cattle Industry, Ready to Bounce Back cont.

The question is: where is the growth in beef supplies going to come from to meet the expected growth in China, India, Korea and Japan (as they recover from BSE), the EU (as their supply deficit grows), Russia and North America (population growth)?

This problem should be good news for demand for Australian cattle and beef and prices over the medium term.

In fact, Australia remains well positioned as the world's premier and efficient supplier of quality beef, having:

- a variety of tailored cattle and beef, covering almost all cattle breeds and feeding regimes;
- a reputation as a reliable and specialist global beef supplier;
- high and rising product quality backed by Meat Standards Australia and Eating Quality Assured (export) grading;
- top disease freedom status;
- safe beef and top product integrity, backed by QA at all levels of the supply chain, national cattle ID and National Vendor Declarations;
- a healthy and nutritious beef image, constantly reinforced by objective research and communication campaigns (Red Meat. Feel Good); and

 major and effective producer-funded research and marketing programs.

The main area in which Australia does not match its competitors is in the pursuit of sophisticated and stable supply relationships and in the associated use of price and supply risk management tools.

Conclusion

The Australian cattle industry has come through the last extraordinary decade remarkably well, but faces significant short term challenges, principally from the high A\$ and intensifying US competition, which seems likely to lower finished cattle prices.

However, the industry is well positioned to benefit from what is expected to be a bright medium term global beef outlook.







Indonesia - opportunities for Northern Territory Cattle Producers

NTCA Annual Conference 2008

Indonesia – our nearest neighbour and home to 215 million consumers – is currently riding the wave of high global commodity prices. Its GDP is growing at around 6.3% as it feeds China, India and Japan with coal, palm oil and natural gas. This is the fastest rate of economic growth for the Indonesian economy, the largest economy in South East Asia, in over a decade.

It was 19th century economist Ernst Engel who documented that as people earn more money, they spend a smaller percentage of their incomes on food, and, importantly for beef, switch from cheaper foods to more expensive foods such as animal proteins. The graph below depicts this phenomenon in markets around the globe.

This increase in economic wealth in Indonesia, combined with a population growth that has seen an extra 20 million mouths to feed since 2000, provides a platform for strong continued demand for beef in one of Australia's closest markets.

The influx of cash from commodity exports is resulting in investment into supermarkets and shopping malls across Jakarta. There are now 112 hypermarkets in Indonesia, including 40 outlets of French chain Carrefour, and Matahari, who built their first hypermarket in Indonesia in 2004, opening their 53rd this year. Obviously the large multinationals see the prospects for growth in Indonesia also.

Australia, with its commitment to freedom from exotic diseases such as foot and mouth disease (FMD), is the major supplier of beef to the Indonesian market. Likewise, Indonesia is one of Australia's most valued customers, accounting for 72% of all live cattle exports in 2007.

It is a remarkable testimony to the efficiency of the Indonesian feedlot sector that, despite an increase in cattle prices in 2007 and a 12% appreciation of the Australian dollar to the Rupiah, cattle exports grew to 521,000 head in 2007. Of this, 45% were loaded out of Darwin.

A testament to Darwin exporters is the fact that of all the cattle loaded onto the 187 short-haul cattle voyages in 2007, 99.9% walked off fit and well in their destination market place.

Australia's boxed beef exports also grew, with manufacturing beef destined for bakso (meat balls) the fastest growing segment. This expanding market provides an important alternative for manufacturing beef to the dominant US grinding beef market.

Given the growth potential in Indonesia, and Australia's premier position as a supplier of safe cattle and beef to the market, MLA commissioned research to look at impediments and opportunities for growing demand for beef.

If we can remove impediments to increased beef consumption as the economy continues to grow in Indonesia, Australian cattle producers stand to benefit. The research found that while beef's dominant role is currently as a luxury product for most Indonesians, there is an opportunity for beef to play an increasing role in diets, as Indonesia's middle and upper classes become more health conscious and increasingly focused on giving their children the best possible start in life.

The research uncovered four key barriers to this increased role.

The first is cost, with beef being more expensive than the typical alternative proteins of chicken and fish. Given the improving economic conditions, however, and the resultant increasing in purchasing more expensive proteins described above, we expect demand for beef in Indonesia to rise.

The other barriers identified were:

- a lack of trust in the freshness, hygiene and disease freedom of beef in traditional markets;
- a perception that beef, while luxurious, is fatty and bad for blood pressure and cholesterol; and
- the limited repertoire for beef meals beyond rendang and soup, and lack of knowledge about cuts and cooking methods due to beef's status as a 'special occasion' product.

To start to reduce the latter three impediments, MLA and LiveCorp, in partnership with Indonesian feedlotters, have instigated the following projects:

- Designing model stalls for wet markets
 These easy to replicate stalls will use simple improvements such as hard plastic cutting boards rather than wood for easier cleaning, elevated sloped trays for display of beef and better lighting. The goal here is to provide a model that can be replicated by stall owners and lead to an improvement in the levels of consumer trust in these markets as fresh disease-free suppliers of beef.
- Consumer-based awareness program on the nutritional benefits of beef for growing children
 - This program is aimed at highlighting the important role that beef can play in ensuring children have the nutrients required for development, and tapping into the increasing child-centric focus in Indonesia, where the success of the family is more and more being measured by the success of the children. The program also seeks to reduce the misconception that beef is unhealthy.
- Consumer education on different cuts of beef for different cooking styles and meal options

 We sim to provide confidence to Independ to traditional.
 - We aim to provide confidence to Indonesia's traditional meal preparers housewives and maids through in-store

A testament to Darwin exporters is the fact that of all the cattle loaded onto the 187 short-haul cattle voyages in 2007, 99.9% walked off fit and well in their destination market place.

Indonesia - Opportunities for Northern Territory Cattle Producers cont.

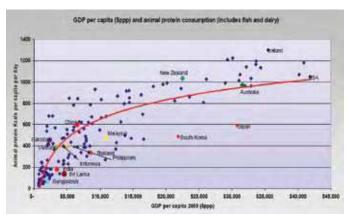
demonstrations of the versatile range of dishes that beef creates and how quickly and easily these can be prepared. While the research demonstrates the merit in investing in projects to remove barriers to increased demand for beef, cost remains a major barrier.

It is important to note that the increasing economic benefits being enjoyed by Indonesia are not shared by all sectors of the community. The increase in basic food and fuel costs (the price of fuel, rice and cooking oil have doubled over the past few years) resulting from the commodity export boom have seen an additional four million people classified as officially poor. This means there are now 39 million people living on less than US\$6.80/month, and 100 million living on less than US\$2/day.

This increased price pressure on most foods has caused a public outcry, including protests against the price of beef by meat sellers in Indonesia. Such pressure at the start of the election cycle in Indonesia puts pressure on the government to relax its food safety and quarantine standards in order to try and find cheap suppliers of food.

The Australian industry will continue to defend the market advantage we have at moment. This market advantage is the result of significant investment by industry and Government in keeping the Australian herd free from exotic diseases such as FMD. This freedom from disease is not only of benefit to Australia, but also to Indonesia and this fact will continue to be promoted.

The economic environment in Indonesia, and Australia's long association, strong relationships and reputation as a supplier of fresh, safe and nutritious beef and disease-free high quality cattle, all point to a strong continued growth in demand for cattle for producers in the Northern Territory.



Mr Scott Hansen MLA

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Phone: 1800 733 810

Email: executiveofficer@connellanairwaystrust.org.au Or write to PO Box 749 Williamstown SA 5351





One Company, Unlimited Solutions

Strengthening our Domestic Market

NTCA Annual Conference 2008

Demand is a critically important driver of prosperity in every industry. Strong demand drives the top line for industries and for the enterprises within them. It doesn't matter how efficient, how technologically adaptive, how productive an industry is, all that counts for nought if demand is weak and falling.

We've seen an extraordinary period for the beef industry, and extraordinary demand has been a vital contributor of that. But will that demand continue? And what can we do to help ensure it does?

We can't take demand for granted. It doesn't just happen. In the more sophisticated societies where choice is abundant (and where we supply most of our beef), demand is driven as much by feelings, by desires, by confidence and familiarity, by relationships, and by salesmanship as it is by basic needs.

Just as we must never stop trying to improve the quality and efficiency of the beef we produce, so too we must never ever stop telling our customers and our consumers what a great product Australian beef is and what great value it delivers.

Australia has benefited significantly by the absence of the US from North Asian markets over recent years, winning new customers and new consumers to Australian beef.

In Australia, consumers have increased their expenditure on beef by \$2.5 billion over the last seven years. And that spending benefits everyone in the industry including retailers, processors and producers, and whether you supply the domestic market directly or not. Every sector of the industry is interconnected and strong demand in any market should benefit all.

The drivers that won us this increase in expenditure remain the same drivers that will sustain it. And those drivers don't just apply to MLA's programs; they apply to every enterprise in the food industry.

Value for Money - a mental equation of perceived benefits (rational and emotional) divided by price. Improving value for money doesn't have to mean lower prices. We want to see high prices and we'll only achieve that if consumers perceive high benefits.

Enjoyment, because we are food, and we eat what we enjoy.

The Meat Standards Australia program has given us a fantastic tool on improving the quality of our beef, and the growth of feedlotting has helped us not only maintain eating quality through the drought, but actually improve it. We're extending the MSA research program into our key markets of USA and Japan – to better understand quality dimensions from their perspectives.

But quality on its own is not enough. In key overseas markets, we're promoting the taste and 'deliciousness' of Australian beef using endorsements from opinion leaders and undertaking widespread sampling programs. In Australia, we're challenging mums' perceptions that kids love chicken best, with our Kids Love Beef TV campaign running in capital cities.

Nutrition - We're a staple in the diet, and we want to stay there. That will only happen if meal decision makers know of the important nutritional role red meat plays.

In Korea, shopping centre promotions involving kids are proving very effective in positioning Australian beef as healthy and important for growing bodies. In Australia, Sam Neill tells the story of how red meat has played and continues to play a central role in the development of mankind.

Convenience - new products that are easy to prepare, and even more important, improving retail standards so that all beef is an easy choice for tonight's meal.



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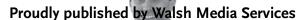
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Strengthening our Domestic Market cont.

Our Red Meat Networking Club is an example. This program which takes groups of butchers into other markets and other stores is giving butchers the confidence to improve their quality, to try new products, to improve their service and to make often very large investments refurbishing their stores.

Integrity - ensuring that community trust is high, through safety, labelling, animal welfare, environment and industry ethics.

MLA is working with other sectors of agriculture, with government and with educators to form a new organisation, the Primary Industries Education Foundation. This organisation will collate and promote credible and fact-based information and resources for inclusion in school curricula.

We're taking a higher profile at the Royal Shows, not trying to teach people how to cook, but informing them how their beef is produced.

And we have our own emotive story to tell - of how beef producers love their land, love their cattle and are the cultural heart of Australia. Regular feature stories in magazines, TV shows and books can maintain the high levels of trust and regard the mainstream community already has for our farmers.

In our overseas markets, we're educating customers how Australian beef is produced, and promoting our safety and traceability systems.

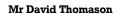
Our most important need right now is to have sound data on which to support our environmental and animal welfare performance. Sound science is our only long term credible defence against misguided or mischievous attacks.

But nor can we put our head in the sand and not change practices which we reasonably can't defend, because the community does have the right to set standards within which we operate. But those standards must be well informed.

The Future

Consumer demand in Australia has strengthened considerably over the last seven years. Even though many household budgets may be tightening, those factors of Value for Money, Quality, Nutrition, Convenience and Integrity that generated this growth will remain fundamental to maintaining the gains we've made, if not growing demand even further.

Regardless of what challenges lie ahead, we must never ever stop telling consumers how good our beef is and how they should continue to be very proud of the people who produce it.







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Northern Territory Cattlemen



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Applied Pastoral Information Technology Project

Auvergne Station

The Applied Pastoral Information Technology project was a joint project between the Australian Government National Landcare Program (NLP), the Northern Territory Cattlemen's Association, Consolidated Pastoral Company, Livestock Exchange and MB Consulting that wrapped up as the of the end of June 2008.

The project was undertaken at Auvergne Station in the northern VRD and aimed to develop and demonstrate systems for improved information management suitable for extensive grazing properties. Good Information management systems can assist in improving herd performance and assist in managing the balance between animal numbers and land condition.

The aim was to piggy back on the National Livestock Identification System (NLIS) using individual animal ID tags as the basis to record and analyse information related to herd performance. Recording and analysis was done using Aleis race and wand tag readers, TruTest scale heads and weigh beams and the Stock IT program developed by Livestock Exchange running on a Panasonic Toughbook computer. The software allows for analysis of individual animal performance to be done crush-side, to identify and cull cows that are not raising a calf for example. Analysis can also be done at any stage by generating reports to assess herd performance at the paddock or property scale.

The project also utilised the tools and support available through the Grazing Land Management (GLM EdgeNetwork) package to calculate and adjust pasture utilisation rates to match those recommended for the various land systems across the trial paddocks. Utilisation rates were estimated from animal numbers and classes as at first round 2007 and using the GRASP model outputs of pasture growth within 5km of water.

Bringing the analysis of herd performance together with natural resource management performance has been the key outcome of the project.

The project has also underlined the key importance of training and support for staff to successfully implement any recording program. Communicating with staff the value of their contribution to making recording systems work is absolutely vital. It is also important to recognise the commitment needed to make all this happen and to reward this commitment when it is given by staff.

Recording systems require some infrastructure modifications to work, especially around the head bail and crush. Modifications will also be needed to be made where calves and weaners are processed. Good setups for recording weights will also need to be put in if not already in place. It is also important to ensure that you get good quality equipment and that technical support is available to you at all times.



Awaiting caption information



Awaiting caption information









Good Information management systems can assist in improving herd performance and assist in managing the balance between animal numbers and land condition.



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Louise Orwin - Merchandise/Admin - 8932 4688



NATURAL RESOURCES, ENVIRONMENT AND THE ARTS

Key contacts for Pastoral Land Managers

Darwin Office

Busntires N I	8922 0844
Heritage	8924 4143
Natural Resource Management Board (NT) Inc.	8999 4847
Pastoral Land Board	8999 4667
Rangelands Management	8999 4575
Spatial data and Mapping	8999 3603
Vegetation and Land Management	
Advice	8999 3631
Water Management	8999 4455
Water Resource Assessment	8999 3615
Weeds	8999 4567

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- locations of fires can be downloaded to your own mapping programs

Applied Pastoral Information Technology Project cont.

Significant benefits from herd and natural resource management performance recording include:

- 1. The ability to underpin the assertion that we are grazing country sustainably with actual data.
- 2. Increased confidence that the business is running as few non-performers as possible.
- 3. Increased ability to monitor performance and analyse problems.
- 4. Increased ability to report and budget accurately. The project has also highlighted the significant investment in time and money that such a large scale project requires and the need to maintain a close watch on costs associated with achieving these benefits to ensure that profitability is improved as a result.

Please contact Matt Bolam if you have any queries or questions that you might like answered.

MB Consulting

Phone: 0408 920088 or Email: matbolam@bigpond.net.au
Alternatively you can visit the Northern Territory Cattlemen's
Association website for detailed reports and a gallery of photos.
Website: www.ntca.org.au/training/apitp.html

Awaiting caption information to go in here.



Top End Branch Committee 2008



Chairman: Tony Searle



Deputy Chairman:Ian McBean

Chairman:

Tony Searle

Deputy Chairman:

Ian McBean

Secretary:

Tricia O'Hehir

Committee:

Philip Howie, Ian McBean, Patricia White, Markus Rathsman

Alternate:

David Walker

Top End Branch NTCA - Chairmans Report

During the past year we have had a good rollup of members to our branch meetings as well as constructive input by members. Pleased to report that we have 3 new members and 2 new associate members.

The seasonal conditions over the Top End was average to good, with cattle prices holding up well to date given the strong Australian dollar.

Major issues that were at the forefront of discussions during the year were:

- **Pastoral Lease Valuations** still on going. Final notices for the Top End not delivered at this stage.
- Local Government this issue has taken up a considerable amount of everybody's time and will be ongoing. There is a need for reform but not in the way in which the Government is implementing these reforms.
 - Main Questions asked by members on this issue were: What is going to happen when the councils go broke? How are we going to get representation on these councils? With the recent Government announcement that the Top End Shires are going to go back to what they were has just raised more questions and concerns for all NTCA members.
- Douglas Daly Moratorium on Land Clearing Industry has worked tirelessly on this, working with government to achieve a positive outcome but government decided not to heed the hardships suffered by the farmers/producers and the scientific evidence that small scale farming and grazing could be carried out sustainably in the Douglas Daly area. Therefore another two year moratorium on land clearing is in place. As a result this is having a severe impact on the grazing operations in the area but producers will not give up on this.

- Live Export South East Asia live export strong, with the
 association continually promoting NT cattle. Indonesia is
 dominating trade 5000,000hd plus from Australia with
 270,000hd out of Darwin. Live export for the foreseeable
 future continues to look strong.
- Animal Welfare is an issue that we must stay aware of. There
 are very active groups and bodies that will target industry as
 well as exporters on any form of perceived animal cruelty. If
 they can't win the live export battle they will then target on
 farm practices.
- NLP Funded Mimosa Program this is in the final year of funding with a new application for funding being lodged in February'08, if successful it will carry over for further 3 years.
- Roads
- Native Title
- Wild Dog Control
- Long Distance Road Transport Code of Practice
- Communication Infrastructure in Regional & Remote Areas

Members can contact NTCA Office for further information regarding NTCA issues.

I would like to take this opportunity to thank NTCA members for their support throughout the year and the support received with regard to the Fighting Fund. Also to Stuart and Tricia for there dedicated work throughout the year.

A special thanks to Ian McBean for all his efforts associated with the Douglas Daly Region and his tireless support of the NTCA.

Trusting that the season ahead will be a productive and prosperous one for you all.

A.N. Searle

Top End Chairman

Katherine Branch Committee 2008



Chairman:Rohan Sullivan



Deputy Chairman: Allan Andrews

Chairman:

Rohan Sullivan

Deputy Chairman:

Allan Andrews

Secretary:

Georgia Underwood

Committee:

Jak Andrews, Brett Kraft, Gary Riggs

Alternate:

Charlie Holzwart

Katherine Branch NTCA - Chairmans Report

Fellow Katherine Branch members, welcome to the 2008 AGM.

The old Chinese proverb, "May you live in interesting times" could be used as either a blessing or a curse. Regardless of ones outlook on life, there is no doubt that times are indeed interesting. A change of federal government, rising interest rates, a strong dollar, unrest in our main market and the territory government hell bent on imposing a socialist experiment on its rural population all make for interesting times for our industry.

The wet season appears to be doing the right thing by most producers in the region so far. There are some in the southern VRD who have missed out and the Barkly and Alice Springs Districts are still dry. Disciples of the Madden Julian Oscillation will be aware of another opportunity for monsoonal influence to develop in mid to late March if the current one fails to deliver. At least there has been some rain in the eastern states.

The live export market has remained strong despite occasional flat spots. It is surprising in some respects given the strength of the Australian Dollar which has appreciated against the Indonesian Rupiah by 18% in the last 12 months. The recent unrest among butchers and wet market stallholders in Jakarta is a reflection of the impact high cattle prices are having at the Indonesian end. Another cloud on the horizon is the recent renewed attacks by WSPA and Animals Australia on live exports and long distance transport of animals. These should serve as a reminder that we cannot rest on our laurels and that we should be looking for ways

Our association continues to be in a sound position both in terms of membership and financially. to improve our performance in all areas and prepared to defend ourselves at any time.

The political landscape changed dramatically at the end of 2007 with the defeat of the Coalition in the federal election. We enjoyed excellent relations with federal coalition ministers thanks to the local CLP members Nigel Scullion and Dave Tollner. It remains to be seen whether the local ALP members Warren Snowdon and Trish Crossin will be as effective. Also, while on the subject of politics, most informed opinion is there will be an election held in the territory before the end of the year. One can only hope that the electorate returns some balance to the makeup of the next legislative assembly.

The NT Government introduced its new local government legislation to parliament at the last sittings and seems determined to press ahead having neutralised the Top End/Litchfield Shire as an issue. It has been extremely frustrating to have watched the process roll inexorably onwards despite our best efforts. If we are able to influence the government legislation to limit or remove the ability of the shire councils to increase rates at will then it will have been a worthwhile effort. However there is no guarantee until the legislation is actually passed and nothing can bind future governments. I say this because local government will be a millstone around our necks, forever!

Our association continues to be in a sound position both in terms of membership and financially. At the most recent executive meeting we endorsed 2 new members, both from the Katherine Region. It is heartening to see our members actively involved in the various committees, landcare groups etc. The value of our association was again highlighted during the latest round of pastoral lease valuations and rent negotiations. After the second round of appeals there at last appears to be some sort of consistency in Unimproved Beast Area Values within

It would be remiss of me not to mention the Sustainable Farming Families Pilot **Project run in Katherine which finished** in November 2007. This program deals with the everyday health issues that affect farming families and ultimately their businesses. It is a great wake up call to anyone who is unaware or feeling a bit smug about their health and risk factors for various conditions.

districts, however there are still unresolved issues for some members. Overall, my assessment is that the valuation process was completely stuffed up and in the resultant uproar the government compromised the independence of the Valuer Generals's office leaving the whole process with no credibility. The important issue now is to make sure that the next round of valuations in 2009/10 is carried out in a more professional manner with more objectivity and a lot less snake oil.

At a branch level, the 2007 AGM and Conference in Katherine was a highlight for the year as was the renaming of the Katherine Trucking Yards after Peter Flanagan. Once again, I would like to acknowledge the sponsorship of the plaque by LNT and the support of DPIFM in bringing members of Peters' family to Katherine for the ceremony. Thanks also to John Armstrong, KRS manager Jack Wheeler and Tom Stockwell for their assistance with planning and on the day.

The management of the yards has now been taken over by Landmark. A race and drafting setup has been constructed at the rear of the yards by staff from KRS and a schedule of charges is now in place for yard users.

This time last year I made mention of the lack of progress on the Western Creek Road. Little has changed thanks to the EPA although contracts have now been issued for the Birdum Creek crossing. Once again I would like to thank local DPI staff particularly Trevor Troy and Phil Harris for attending our meetings throughout the year and making the effort to work with the industry and make the best use of available resources with the maintenance grading program.

It would be remiss of me not to mention the Sustainable Farming Families Pilot Project run in Katherine which finished in November 2007. This program deals with the everyday health issues that affect farming families and ultimately their businesses. It is a great wake up call to anyone who is unaware or feeling a bit smug about their health and risk factors for various conditions. The progress made by some participants over a 12 month period in addressing issues such as weight, blood pressure etc was impressive to say the least. I would thoroughly recommend participation to anyone. I must acknowledge the efforts of the local coordinator Sara Potter who does a fantastic job. There is some funding is available to run another program in Katherine in the coming year, but another \$30000 is needed.

I would like to acknowledge the other members of the branch committee, Deputy Chair Allan Andrews, Secretary Georgia Underwood, Branch Alternate Morgan Lorimer, and Committee members Jak Andrews, Keith Holzwart, Paul Herrod and Brett Krafft. Finally, thankyou to all branch members for your support throughout the year.

Rohan Sullivan

Chairman, Katherine Branch 27/02/08

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Tennant Creek Branch Committee 2008



Chairman: George Scott



Deputy Chairman: Ernie Holt

Chairman

George Scott

Deputy Chairman:

Ernie Holt

Secretary:

Ian McLean

Committee:

Ken Ford, Henry Burke, Bruce Werford

Alternate:

Geoff Murrell

Tennant Creek Branch NTCA - Chairmans Report

This year we have been dealing with headline issues such as Climate Change, Conservation, Territory and Local Government. These issues have been dealt with on your behalf, but the tasks are still in front of us. The industry cannot afford to take a reactive role in any of these issues – and must remain informed and proactive in the debates in each of these arenas.

Climate Change: Whilst we have suffered from an adverse season recently and that's not to be unexpected given the preceding favourable seasons – I think it is widely agreed the frequency and intensity of adverse events is altering, to what degree Climate Change can be blamed is debatable – but the response to this issue is still one that needs to be considered and the response to this issue is still one that needs to be considered and managed proactively by the organisation. This is best done by the organisation being prepared with drought management strategies, providing pathways for negotiation and to remain at the table in discussions when solutions are being sought.

Conservation: A topic that has increased in public attention and knowledge dramatically in the time I have been in this chair. This industry is being called on more and more to manage the resources it works with – in particular in response to the prevailing seasonal conditions (eg. flexibility in stocking rates and management practices which lead to Best Management Practices). A good example of this is the outcomes (favourable and adverse) of the Pigeon Hole and Rockhampton Downs trails.

Territory Governance: There have been two main fronts of debate in this arena. These have been the issues of leasehold rents and the relation to unimproved capital values and the emerging possibility of an additional level of local governance.

Both of these matters have been vigorously debated and fiercely represented by both constituent members and NTCA Officers at all levels. Whilst these matters are not concluded – there has been a slightly reduced rate of change and some consultation with both industry and the broader community.

In Conclusion:

I would like to thank all members from the Tennant Creek branch for their support over my term as chairman. In handing the chair to George Scott I hold great confidence that he will take the industries issues and concerns forward and debate vigorously on behalf of the Tennant Creek branch. I would also like to thank the NTCA president – Mr Roy Chisholm and the Executive Director Mr Stuart Kenny for the enthusiasm they displayed in the execution of their roles on behalf the Northern Territory Cattlemen's Association.

Henry Burke

Chairman, NTCA Barkly Branch

This industry is being called on more and more to manage the resources it works with – in particular in response to the prevailing seasonal conditions (eg. flexibility in stocking rates and management practices which lead to Best Management Practices).



Alice Springs Branch NTCA – Chairmans Report

Deputy Chairman:

Andrew Miller

The last year has been another busy one across
Central Australian Stations. Unfortunately there was
no general rain across the region at all for yet another
summer. There were a few isolated storms falling over
some areas, providing some welcome relief but far
from drought breaking.

Chairman: Ben Hayes

Rain through parts of Eastern Australia generated good demand on our cattle, which was fortunate as stations in the region further destocked due to the dry conditions. There were also a lot of central Australian cattle going north to supply the live export market. We are fortunate to be able to sell to markets throughout Australia, depending on season and demand.

The distance to transport that turnoff to markets is part of running a station in Central Australia, however the rising cost of that transport is impacting on the industry more and more. Trucking companies avoiding major beef roads, or charging higher rates to compensate for the additional damage caused by those roads, is adding thousands of dollars to the cost of sending each load of cattle off the place. The price of petrol may be well outside the control of the Northern Territory Government but the condition of major arterial roads in the NT (used by tourists, mining companies, indigenous communities and pastoral stations) is completely within their control.

This year sees changes in the association with Dick Cadzow standing down as chair, after many years good service, Ben Hayes took over as Branch Chair and Andy Miller elected as Deputy Chair. We also welcome Luke Bowen as Executive Director of the association and look forward to working with him and increasing his knowledge of pastoralism in Central Australia. We also bid farewell to Stuart and thank him for all he did for the region in his time with the Association.

Looking forward the future is positive for the industry and the region, as reflected by the investment in stations that have changed hands in the region recently.

The resilience of the region, the industry and the people will help us come through this drought stronger than before, hopefully sooner rather than later.

Alice Springs Branch Committee

Looking forward the future is positive for the industry and the region, as reflected by the investment in stations that have changed hands in the region recently.

Progressing the Grazing Land Management Movement

Since it started in January 2006, 9 Grazing Land Management (GLM) workshops have been delivered in the NT to 124 participants. This equates to a land mass of over 124,690 km² under pastoral production being directly managed by GLM graduates.

All participants indicated they had acquired or enhanced their understanding of grazing management as a result of their participation. Pastoralists highlighted that the workshop provided a rare and valuable opportunity to share their experience and knowledge.

The workshops were coordinated by the Katherine and Alice Springs Grazing Land Management Officers (GLMO) who also provided follow up support to participants as they worked toward implementing the tools and principles they had learnt. This arrangement was the result of a partnership between the NTCA and DPIFM.

The two organisations secured funding through the National Landcare Program (NLP). The project funded through this arrangement, 'Progressing the Grazing Land Management Movement', succeeded the 'Grazing Land Management Officers' project which ran from January 2006 to January 2008.

Since the commencement of the initial project, 25% of Central Australian producers have taken part in a GLM workshop.

In the Katherine region, a GLM follow up activity was held which provided training to graduates in the use of a software program called Stocktake. This program is used to make improved land management decisions by analysing the information provided from forage budgeting and land condition monitoring.

Over the last few months, participant's impressions and applications of GLM have been captured through interviews. These have proved valuable in developing the future direction of extension services for GLM graduates, and conducting an evaluation of the GLM program.

A series of case studies and a brochure will also be produced to provide information about the sustainable land management activities of pastoral businesses in the NT. These will help to inform the wider public and demonstrate to other land managers the benefits of being involved in the GLM program. Over the life of the project, concluded in August 2008, national and international recognition has been gained.

Separate projects for the Katherine/Barkly and Central Australia regions have recently been developed and approved for funding. These projects, funded through the Australian Government 'Caring for our Country' program, see the NTCA and the DPIFM continuing to work in partnership. Allowing the work instigated in the earlier projects to continue, whilst addressing the unique needs that have emerged in each region.

These projects allow for a number of new initiatives:

- developing a GLM workshop for the Barkly region,
- producing GLM reference material and web based tools,
- incorporating GLM principles into other programs,
- facilitating the sharing of pastoralists knowledge and experience, both inter and intra state, through events and study tours.

These activities will be carried out in addition to maintaining the core function of the GLMO position, i.e. delivering GLM workshops and providing follow up support; both integral for the optimisation of production and land condition in the NT.

All participants indicated they had acquired or enhanced their understanding of grazing management as a result of their participation.



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New Book Features 500 Barkly Tablelands Plants and Grasses

The first of its kind for the Barkly region, the Field Guide to Plants of the Barkly Region Northern Territory, was launched at the 2008 conference in Darwin by the Federal Minister for Agriculture, Fisheries and Forestry, the Hon. Tony Burke MP and QLD DPI&F botonist Jenny Milson. The book contains over 500 species of plants found across the barkly and is aiming to increase the knowledge of plants of all who work or visit the region. In particular pastoralists will benefit from the information relating to the grazing value of many of the species included. The book is being sold through the Barkly Landcare Conservation Association with all profits going towards future conservation work in the region.

Authors Jenny Purdie, Chris Materne and Andy Bubb all lived and worked in Tennant Creek for the Department of Primary Industry, Fisheries and Mines. Jenny was the Regional Director for 5 years, while Chris and Andy worked for many years in Pastoral Production. They all now reside in Alice Springs.

Being acutely aware of the need for such a publication they were successful in applying for funding through the National Landcare Programme in conjunction with the Barkly Landcare and Conservation Association.

Chair of the BLCA, Henry Burke said "This book will help to enrich the experience of all who work in and visit the Barkly region through providing them with a greater understanding of the plants that exist in this unique environment."

Jenny says they wanted to collate an easy and simple guide to plants in the Barkly, and after three years they have done just that.

"There's about 375 plants features with photos, descriptions, notes, the meanings of the scientific names, distribution maps, and then there's about another 125 species mentioned, one's that are closely related, so there are about 500 species altogether."

She says it's written for pastoralists because it's important for them to know what plants their cattle are eating.

"There's nutrition information, weeds information, poisonous plants information, but there's also a lot of plants that I'm sure tourists and people travelling through the region will be interested to know the names of."



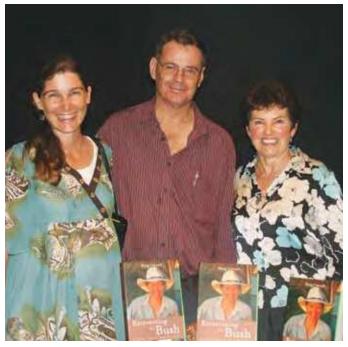








Caption to come?



Book Launch: Author Marg Carroll Reinventing the Bush featuring inspiring stories of Young Australians.