



AGRICULTURAL APPOINTMENTS

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2022 Salary & Trend Report



Effects of COVID-19
on Australian Agribusiness

Australian Agriculture
Salary Snapshot

Trends That Are
Shaping The Talent Pool

Structural Changes to the
Workplace after COVID 19

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Hiring New People? In a Candidate Deficient Market, Change Your Hiring Strategy from a “Ready Made” Mindset



Dr Ray Johnson
and Brett Price

Introduction

The world is still reeling from the enormous blow and successive shockwaves of the COVID-19 pandemic, which have rippled throughout the world and required us to make changes in everything we do – everything we’ve taken for granted – in the space of 12 to 18 months. Our way of life, our freedoms, our relationships and social responsibilities, and our work arenas have undergone massive change and disruption.

The world economy retracted in 2020/21, but already the prediction is that this will dramatically change in 2022 as countries around the world come out of their respective lockdowns and travel restrictions are lifted (or, at least, loosened). In particular, the five critical South-East Asian economies (Indonesia, Malaysia, Vietnam, Thailand, and the Philippines) are predicted to grow at a rate of 6.3% and China at a rate of 5%.

Australian agriculture has clearly weathered the pandemic very well, with continued strong growth. The gross value of Australia’s agricultural production is forecast to reach a record \$73.0 billion in 2021–22 – if that estimate is realised, it would be the first time that gross agricultural value has surpassed \$70 billion.

In line with this strong performance in the agriculture sector, there has been a surge in demand for talent. Our analysis of online advertising of job opportunities has shown a significant increase in advertised vacancies since the beginning of the pandemic, with the number of job advertisements currently sitting at four times what they were in 2012.

However, there are worrying signs on the horizon. There has been a sharp decline in candidate availability, with many potential candidates simply not interested in changing jobs or starting a new career amid the lingering disruption caused by the pandemic. This has greatly exacerbated the ongoing skills shortage in Australian agriculture, which will be one of the biggest challenges facing the sector as it struggles to realise its enormous potential.

This report looks at these issues and considers some of the major structural changes to the workplace that have been instituted off the back of the global COVID-19 pandemic. The substantial growth predicted for Australian agriculture will be dependent on employers in the industry fully understanding these changes and adapting their talent acquisition programs accordingly. Those businesses that fail to adapt in the post-pandemic phase will suffer significant talent shortages, ultimately determining who struggles and who thrives as we move forward into the short-to medium-term.

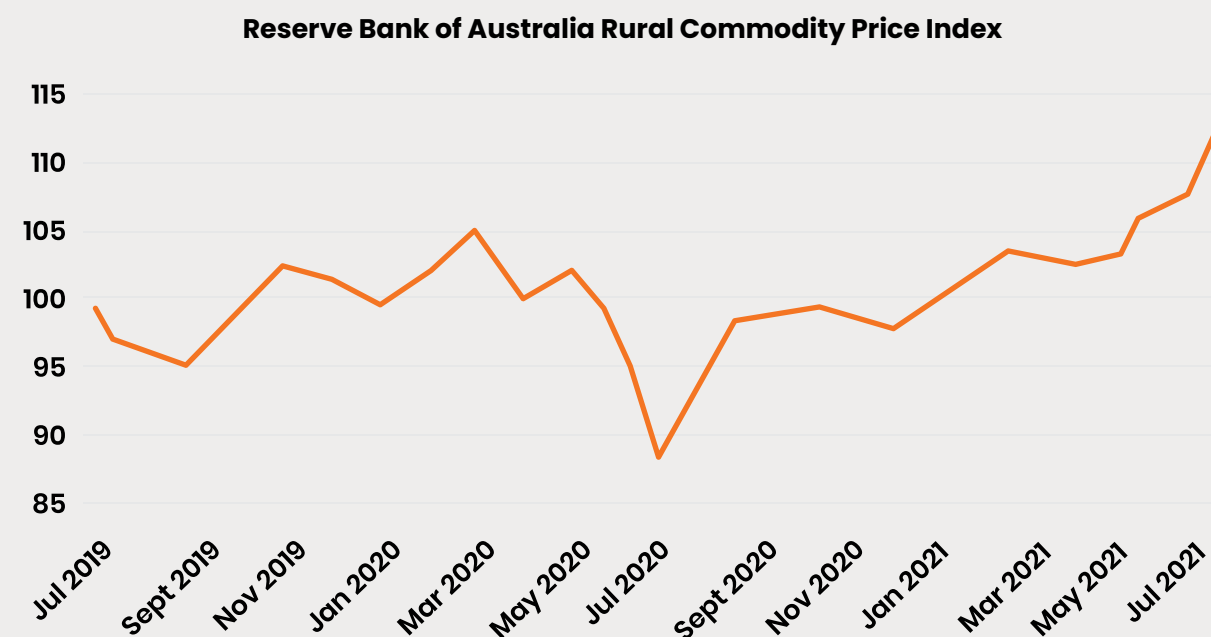
Effects of COVID-19 on Australian Agribusiness

Market Factors

Initially, Australian agribusiness was adversely affected by the onset of the COVID-19 pandemic, and those industry sectors exposed to decreased trade were particularly susceptible. Our analysis suggests that one of the worst-affected sectors was the seafood and aquaculture market. For example, producers of premium specialty fish products, such as Murray Cod and Rock Lobster – nearly 100% of which are sold into the Chinese market – have been hard hit by trade restrictions.

However, while March sales were devastated by the reverberations caused by COVID-19, the market rebounded quickly thanks to swift action from the Australian Government to ensure that commercial logistical links were restored and enhanced.

Importantly, since the initial impact in early 2020 our agriculture exports have generally performed well, despite seafood, wine and fibres suffering the more serious effects of pandemic restrictions. Good seasonal conditions and high prices have helped Australian agricultural, fisheries. Forestry (AFF) exports have continued to perform well. During the COVID-19 pandemic, and rural commodity prices rose substantially during the 2020-21 financial year despite pandemic-related restrictions (Figure 1).



The RBA's rural commodity price index tracks the export prices of selected Australian agricultural commodities, including crops, milk power, beef, sheep, meat and wool. Data sources: Reserve Bank of Australia Index of Commodity Prices (Index: 2019/200=100) and IMF World Economic Outlook July 2021 Update

Figure 1. Reserve Bank of Australia Rural Commodity Index to July 2021 (Impact of COVID-19: August 2021 update Q2 2021, Department of Agriculture, Water and Environment)

There are projections for strong economic recovery across Australia's primary agricultural export markets, driven by the reopening of the economy (albeit a careful and slightly wary reopening) on the back of successful vaccination programs that have enabled the number of community vaccinations to reach the critical checkpoints in the government's recovery plans. This is very positive news for premium food exporters.

The five key South-East Asian economies (Indonesia, Malaysia, Vietnam, Thailand, and the Philippines) will grow at +6.3% in 2022, and China's growth is expected to be similarly strong at around 5% in 2022. While global political disagreements and manoeuvring have served to significantly reduce Australian agricultural exports to China at this time, China continues to play an important role for Australian producers – both as customers and as drivers of global demand and prices.

Job Demand and Talent Availability

One of the critical indicators of talent search in the agribusiness sector is the number of SEEK job postings. Figure 2, below, shows the number of SEEK job advertisements from July 2013 through to July 2021, encompassing the period before and after the COVID-19 outbreak.

The immediate effect of the pandemic was readily apparent, with SEEK ads in the Farming sector suffering a 24% reduction in the two months from April 2020 to June 2020 compared to the same period in 2019. This resulted in a strong "levelling off" in employment, in contrast to the continual growth experienced over the decade from 2010 to 2020. By sector, the wine and viticulture sector recorded the largest single reduction in SEEK job ads of 63%, indicating that this sector was one of the most severely impacted by the COVID-19 pandemic, together with Seafood & Aquaculture.

However, following this transient decline in job advertisements, the Farming sector has shown a significant and consistent rebound, demonstrating historic levels of persistent growth. The number of job advertisements posted as at July 2021 is now four times the number of job ads in July 2013. Incredibly, since the beginning of the pandemic, the number of advertised vacancies within the Farming sector has effectively doubled.



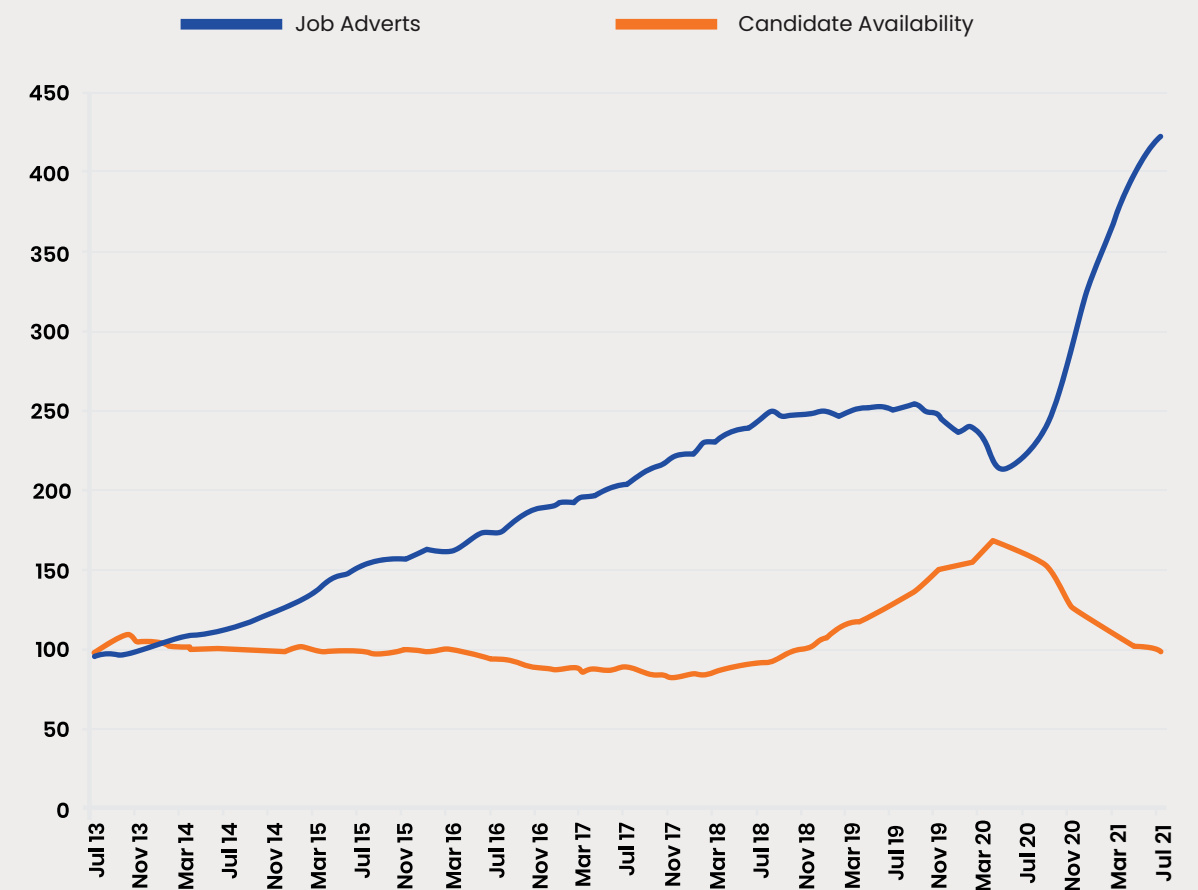


Figure 2. Average advertised relative salary levels in the SEEK Farming jobs category from 2012 to September 2021 (Index is 100=2012) (SEEK Salary Report, 2021)

However, all categories within the SEEK Farming sector are currently experiencing a high demand for talent acquisition and low candidate availability, at all levels.

	Candidate Supply (vs 5 year avg)	Hirer Demand (vs 5 year avg)
Total	Low	High
Agronomy & Farm	Low	High
Conservation, Parks & Wildlife	Low	High
Farm Labour	Low	High
Farm Management	Low	High
Fishing & Aquaculture	Low	High
Horticulture	Low	High
Other	Low	High
Veterinary Services & Animal Welfare	Low	High
Winery & Viticulture	Low	High

Table 1. Overview of hirer demand and candidate supply across the different categories of the Seek Farming sector.

Salary Snapshot

While the average salary in the agricultural industry has continued to improve over the last ten years and, in recent years, it has continued its growth at a slow rate (Figure 3). Since 2012, the SEEK average advertised salary level has risen by approximately 12% as of September 2021, equating to an average salary increase of just 1.3% per annum. This rate of salary increase is about half the average inflation rate of around 2% per annum. In real terms, this indicates that agricultural and farming salaries in Australia have not increased at all over the last decade, when adjusted for inflation – and may, in fact, be stagnating or even going backward.

The agriculture and farming sectors are not alone in experiencing little to no real salary growth between 2012 and the end of 2019 – this has been a feature across the entire Australian employment sector (Australian Parliament Library, 2019).

While there is certainly evidence that the COVID-19 pandemic significantly reduced salary levels down to a level not seen since 2016, there appears to be a weak recovery currently underway. Given the strong demand for talented people as the foundation for the continued growth of the agribusiness sector, it's surprising that salary growth hasn't been stronger as it remains one of the key competitive tools available to attract talent into the industry.

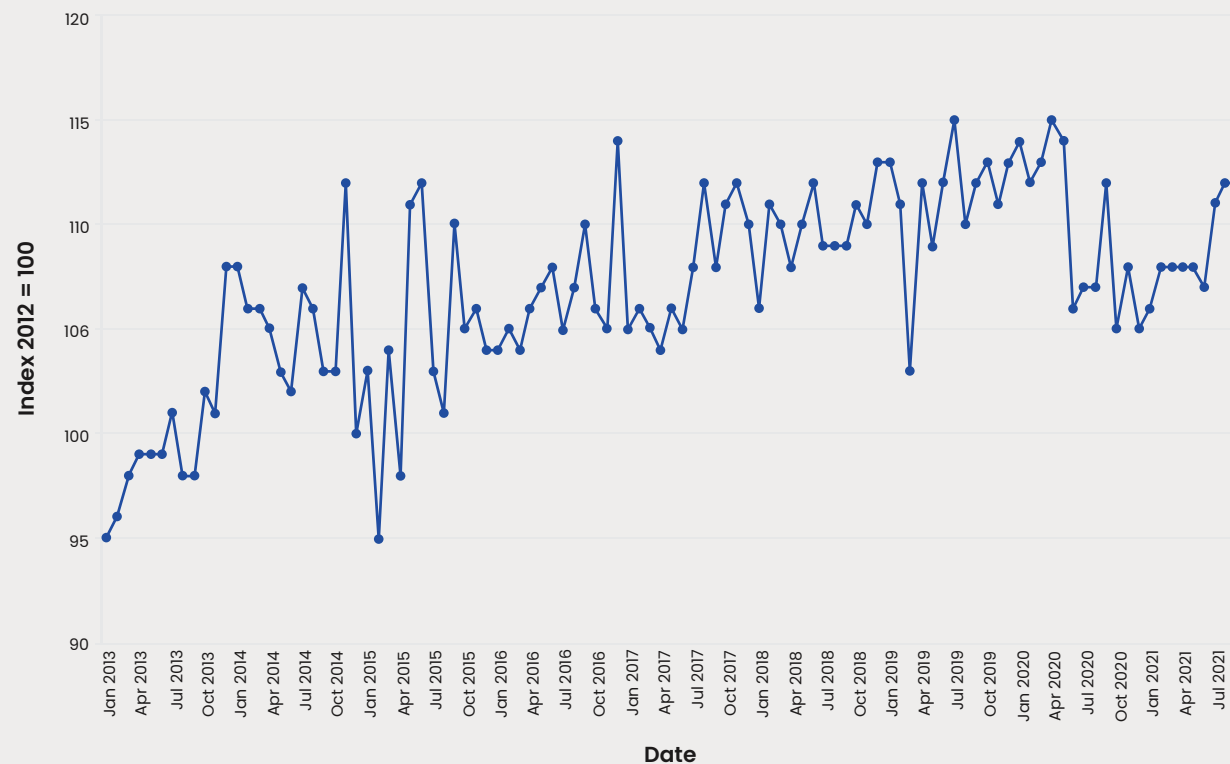


Figure 3. Average advertised relative salary levels in the SEEK Farming jobs category from 2012 to September 2021 (Index is 100=2012) (SEEK Salary Report, 2021)



Trends That are Shaping The Talent Pool

There appear to be four key trends presently working to re-shape the agribusiness talent pool, causing shifts in demographics that will have potentially long-lasting effects on the Australian agribusiness talent pool. Our analysis suggests that three of these trends are negatively impacting attempts to address the current skills shortages being felt across all Australian agriculture sectors:

- ▶ Continuous departure of large numbers of Baby Boomers from the available workforce
- ▶ Loss of agricultural science graduates to other professions;
- ▶ The sector's inability to attract female agricultural science graduates into the agricultural sector, or convince women who have entered the sector to stay and pursue a long-term career in agribusiness.

The remaining, potentially-positive trend, lies with the return of immigration as our society emerges from its COVID-19 bubble and we anticipate the return of migrant workers, who are likely to drive productivity and, hopefully, help to address the candidate deficit.

Demographic Changes – Baby Boomers

The most considerable generational shift in 70 years is currently in full swing in Australia, with Baby Boomers increasingly retiring and, in many cases, holding on beyond the traditional retirement timeline. Over the last decade, Gen Y has staged a dramatic demographic takeover, claiming the nation's two largest population groups in the 2016 census, thanks in part to a surge in migrants –and putting an end to the combined 70-year majority reign of the Baby Boomers and Generation X.

Born roughly between 1980 and the mid-1990s, Gen Y are the children and grandchildren of Baby Boomers, and they are the best-educated and most materially endowed generation to date (McCrindle, 2019). By 2025, Gen Y will make up about 34% of the workforce, while the percentage of Baby Boomers will drop from around 25% to less than 10%.

Over the past ten years, the boom in Asian migrant workers has significantly boosted the size of the 30–34 years' age bracket, hastening its rise to become the largest in the nation. Analysis of the Bureau of Statistics' newly-released 2016 census data shows that in the preceding five years, the age group holding the largest share of the population shifted from the 40–44 years' age bracket down to the 30–34 years' group, closely followed by their generational peers in the 25–29 years' cohort.

As of 2019 there are more Australians born after 1980 than before, with members of Gen Y (born 1980–1994, also known as 'Millennials'), Gen Z (born 1995–2009), and Gen Alpha (born after 2010) now constituting more than half of the population. Gen Y and Gen Z now comprise more than half of the workforce, outnumbering Gen X and the Baby Boomers for the first time, and we are seeing them begin to dominate as workers, consumers, and new household owners – and this makes them the key groups for the agricultural sector to engage with.

Gen Y are rewriting the rules of employment (McCrindle, 2019). They are a multi-tasking, multi-channelling group that want organisations to inspire and motivate them. They seek out businesses that positively contribute to society, foster innovative thinking, and develop their employees' skills. They seek out employers who can provide them with work-life balance, an inclusive employment culture, and a varied professional role.

The working habits of Gen Y are markedly different to those of the Baby Boomers. As it currently stands, members of Gen Y average more than four careers in their lifetime, stay an average of 2 years in a role, work for 17 employers in their lifetime, have a voluntary turnover rate in excess of 15%, and one in three works casually or part-time. These younger demographic groups are primarily based in the cities and, increasingly, do not entertain thoughts of working in regional areas. These factors mean it will be harder for agriculture to attract and retain younger skilled people to crucial roles.

Job Demand and Talent Availability

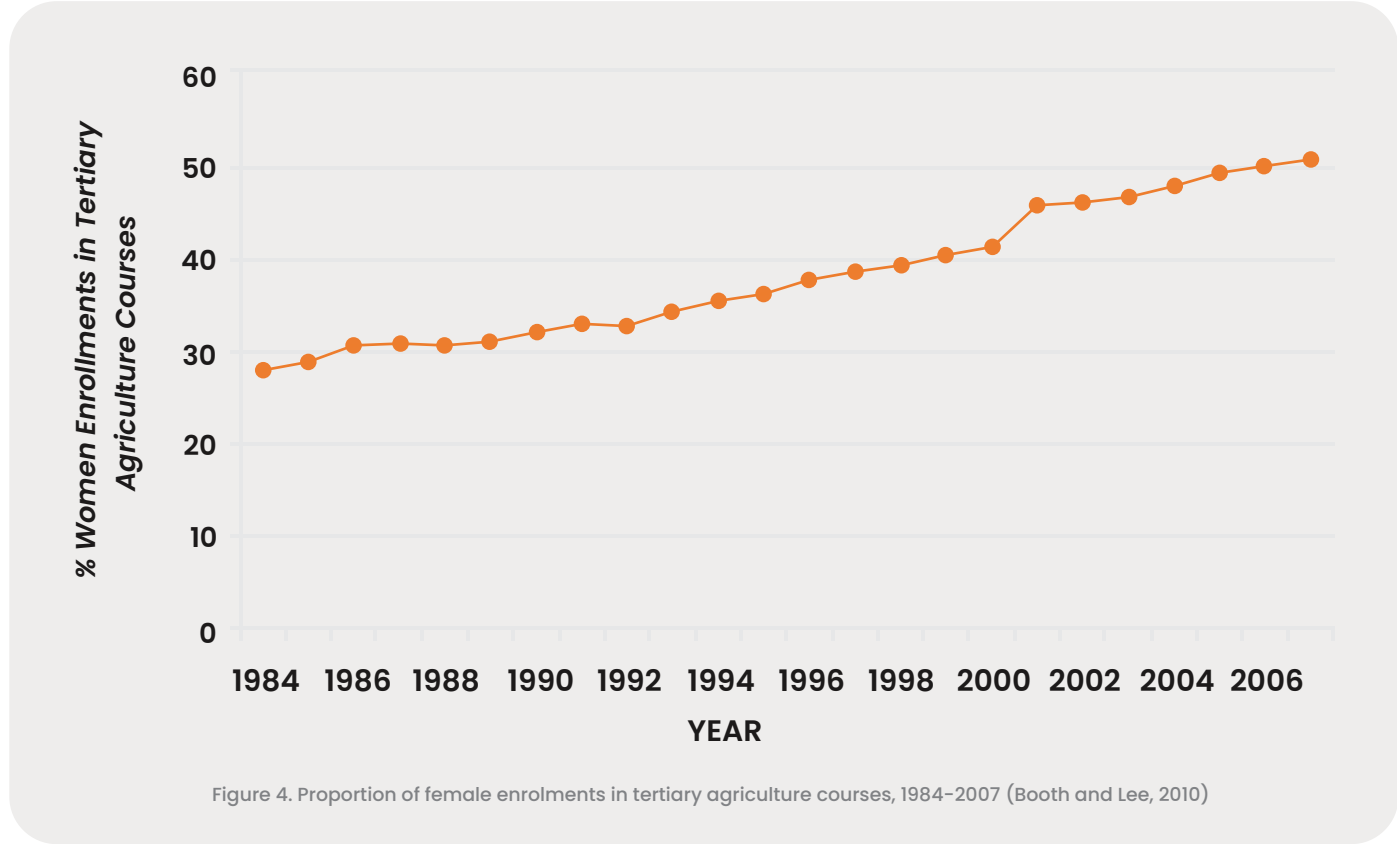
Results of a graduate pathway survey, conducted at one-, three-, and five-years following graduation, yielded some surprising statistics regarding the loss of agricultural science graduates to other professions (Coates and Edwards, 2008). The study found that only 15–20% of agricultural science graduates chose to pursue a career in an agricultural industry, while a further 15% of agricultural science graduates side-stepped an agricultural role in favour of entering professions within the Government, Education, and Health & Community Services sector.



The data generated by these analyses indicate a substantial loss of agricultural science graduates to other professions, something not seen to the same extent in other graduate courses such as engineering (Coates and Edwards, 2008).

The sector is failing to entice female agriculture graduates to pursue a career in agriculture

Over the last 25 to 30 years, there has been a dramatic change in the gender balance of the students enrolling in rural and veterinary courses at all Australian universities and agricultural colleges, with women now making up the majority of students in such training courses (Figure 4).



Overall, almost 12,000 students were studying a Bachelor’s degree in agriculture, environment, and related studies in 2014. While other higher education programs like engineering are still struggling to enrol women in STEM specialties, women are responding favourably in the high-skilled agricultural professions, as evidenced by the roughly equal gender balance at this higher qualification level. In the non-degree TAFE courses, the proportion of women reduces as the qualification level decreases. (Science in Australia Gender Equity (SAGE), 2020), as shown in Figure 5.

However, in the twenty years from 1998 to 2018, the proportion of women employed in the Agriculture, Forestry, and Fishing industry sector has remained at 30.1% (<https://www.wgea.gov.au/data/fact-sheets/gender-segregation-in-australias-workforce>), making it one of the most significantly male-dominated industry sectors in Australia. Other male-dominated sectors include Wholesale Trade, Manufacturing, Electricity, Gas, Water, and Waste Services, Transport, Postal and Warehousing, Mining, and Construction.

Gender representation by student completions and academic level
Agriculture & Environment, 2014

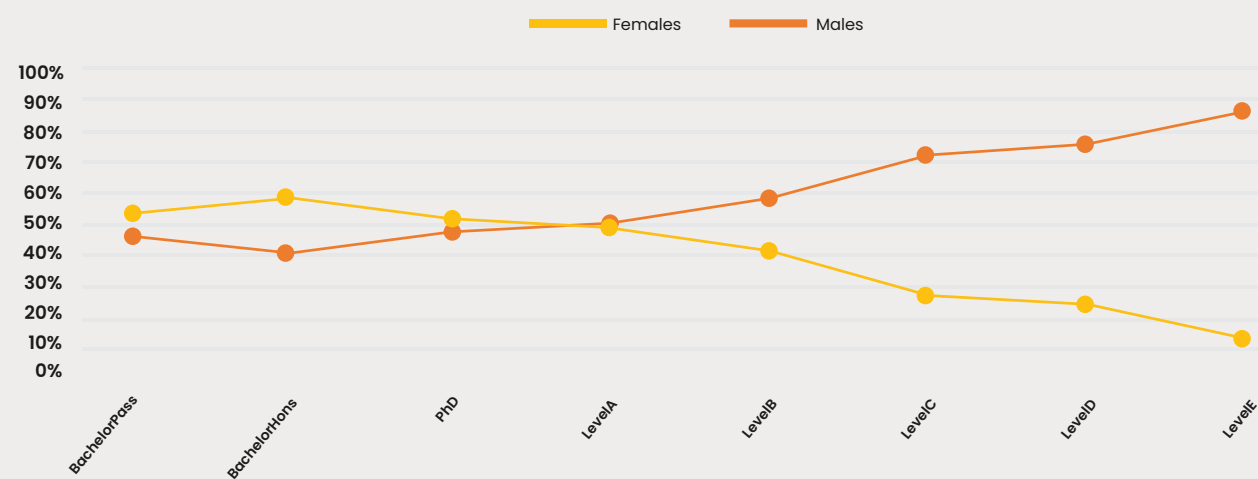


Figure 5. Proportion of female enrolments in tertiary agriculture courses, 1984-2007 (Booth and Lee, 2010)

Given the proportion of women now graduating from rural training courses in Australia, it is clear that the failure to utilise this significant talent pool is exacerbating the skills shortages in Australian agriculture and it is an issue that needs to be addressed. Intelligence gained from Agricultural Appointments' data reveals that, across hundreds of roles and more than 10,000 applicants in 2019, around 85% were male and 15% were female. This indicates that there is a significant gender skew in the applications for roles across the agri-food supply chain – a trend that does not align with the gender-neutral education programs for agriculture that have been in place since the mid-1980s. Professor Margaret Alston, an acknowledged expert in gender issues, has recently argued that women go missing early in their careers (Trend Report 2020, Agricultural Appointments). Many can be found raising families in the cities and working outside of agriculture. She highlighted issues restricting women from entering the agriculture industry, including remuneration, location, and flexibility of working conditions. Wise employers will work out ways to attract an increasing number of women into the workforce, to redress the imbalance between genders.

New immigrants driving productivity

Australia's broader migration program has been revolutionized over a generation, without anyone really noticing. There has been a massive increase in Australia's annual permanent migration intake from 85,000 in 1996 to 208,000 in 2017/18. Where, in the past, our migration intake was predominantly from English-speaking countries such as the UK, New Zealand, and South Africa, non-English speaking countries such as India and China emergence of as the most prominent sources by far of migrants (Bankwest Curtin Economics Centre, 2019).

In a recent recruitment exercise for a role with a significant agricultural science organisation, we sourced and presented around 65 candidates, 75% of whom were new immigrants to Australia and only 25% were Australian-born. Of these new immigrants, 85% had postgraduate qualifications – the majority at doctorate level – whereas around 50% of the Australian-born candidates had doctoral qualifications.

We are also seeing an increasing trend towards the appointment of new immigrants with good agronomic skills to specific farm services in the agricultural sector, which is excellent news given the significant skills shortages in this sector.

There is ample evidence to show that new immigrants are a vital driver of productivity in the Australian economy, including the agricultural sector. While the farming industry has been predominantly focusing on-farm production, coupled with a heavy emphasis on seasonal workers, our experts here at Agricultural Appointments believe there is increasing circumstantial evidence to suggest that highly-educated immigrants are adding significant value to the more technical areas of agribusiness and life sciences.

Data suggests that contemporary immigrants coming to Australia are almost always of working age and in possession of higher formal qualifications than their Australian-born counterparts. In terms of degree-level tertiary qualifications, 48% of immigrants from non-English-speaking countries have a tertiary degree compared to 36% of immigrants from English-speaking countries and 33% of Australian-born individuals (Bankwest Curtin Economics Centre). Notably, nearly 16% of individuals born outside the English-speaking countries (such as China, India, and the Philippines) have a postgraduate degree, compared to 6% of Australian-born individuals.

From 2006 to 2016, the number of Australian-born individuals holding a tertiary degree increased by 30%, compared to a whopping 77% increase in the overseas-born population. The data also show that contemporary immigrants are committed to continuing their education, with 35% of recent immigrants having pursued further studies after arriving in the Australia. A quarter of individuals who already possessed a postgraduate degree when they arrived in the country completed another postgraduate degree after their arrival.

In a review of the impact of new immigrants on Australian agriculture, Collins et al (2016) made the following conclusions:

- Immigrant farmers, producers, and workers are vital to improving productivity in Australian agriculture, as they re-energize capital and labour productivity and assist the sector to overcome the problem of farmers' seasonal and permanent labour shortages.
- Temporary immigrant workers are increasingly important sources of Australia's seasonal agricultural workforce, particularly Working Holiday Makers, who provide a mobile seasonal labour force to assist in maximising the harvest yield.
- Immigrant farmers/growers contributed substantially to establishing the modern horticultural industries in Australia and have been highly successful at introducing new crops.
- Immigrants with experience and skills entering farming can apply their knowledge and skills to growing specific crops and achieving more productive and sustainable land management practices. At the same time, immigrant farmers often have extensive co-ethnic networks, if not in the community they live in, then in other parts of Australia or other countries.

While only a small proportion of immigrants were employed in the Agriculture, Forestry, and Fishing sector in 2016, the Professional, Scientific, and Technical Services industry employed the second largest share of immigrants across two groups. the share of workers in this industry was 15% for points-based migrants and 10% for employer-sponsored migrants. Less than 2% of the Professional, Scientific, and Technical Services industry workforce in 2016 were Australian-born (Bankwest Curtin Economics Centre, 2019).

The Professional, Scientific, and Technical Services industry is a crucial sector for agriculture and agribusiness, and other sectors such as life sciences. But these data indicate that new immigrants are tending to gravitate towards the scientific sectors, due to their higher education qualifications. In fact, when recruiting for these types of roles it has been our experience that most applicants are new immigrants and it's becoming increasingly rare for Australian-born individuals to apply for these roles.



Structural Changes to the Workplace After COVID-19

The global COVID crisis will result in significant structural changes to the workplace, and employers need to be aware of these changes and adapt their business quickly.

The McKinsey Global Institute recently published a detailed analysis of work trends in the aftermath of the pandemic ("The Future of Work After COVID-19", February 2021), in which they considered that the physical dimension of work – that is, the frequency of human interaction – would be a key determinant. Travel, restaurants and hotels, retail and hospitality, computer-based office work, and production and warehousing will be most severely impacted, with the greatest ramifications for agriculture being in the production and warehousing arena. A clear example of these impacts can be seen in Victoria's billion-dollar Meat Processing sector, which has recently had at least six facilities hit by disruptions and temporary shutdowns due to workers contracting COVID-19 (Weekly Times, October 6th, 2021).

Other structural changes identified by the McKinsey Global Institute's analysis included:

- ▶ There has been a significant increase in the amount of ongoing remote work, with current estimates suggesting that 20-25% of workers are continuing to work from home – however, this working arrangement will be most frequently adopted in the area of computer-based office work. This level of remote work is around 4-5 times higher than before the pandemic.
- ▶ E-Commerce and the "delivery economy" will continue its rapid growth, having already increased at 4 to 5 times the rate of pre-pandemic growth over the course of the pandemic. This strong rate of growth is predicted to continue well into the future, and businesses will need to adapt their digital infrastructure to be able to respond to these changes effectively.
- ▶ There will likely be significant increases in robotics and automation in areas such as manufacturing, warehousing, and customer interaction hubs.
- ▶ Occupation transitions are predicted to increase by as much as 25-30%. There will be significant numbers of lower-wage workers without formal university degrees or further education, training and/or qualifications, who have left industry sectors where more frequent human interaction is required. With appropriate training, these workers may be potential candidates to shift into the farm labour sector of agricultural production.

These changes represent both challenges and opportunities for Australian agriculture. A concerted and coordinated effort from the Agricultural, Forestry and Fishing sector will be required to successfully respond and adjust to the necessary changes, rebuild the dwindling workforce, and move the sector forward. Agricultural Appointments stands ready to connect employers with the right candidate for their vacant role, and connect workers to genuine employment opportunities, in our efforts to help build (or re-build) your business in the current market.

Hiring New People? In a Candidate Deficient Market, Change Your Hiring Strategy from a “Ready Made” Mindset

These days, businesses that are looking to hire skilled agricultural personnel often encounter a scarcity of qualified talent. However, it's a different story for job seekers in many agribusiness sectors, where an abundance of job openings is allowing superior candidates to pick and choose between the top roles and top employers.

In many agribusiness sectors, the days of posting an advertisement on the employment opportunity noticeboard and selecting a shortlist of candidates from (potentially) hundreds of applicants, from which you can select the applicant with the best fit for the role and for your business, are long gone. Advertising for some vacancies may not yield a single application from any suitable candidates at all. The challenge significantly increases if you seek to attract skilled or semi-skilled personnel to regional and remote areas. If there is a choice of jobs, many candidates will elect to take opportunities where infrastructure such as schools, tertiary education, and healthcare facilities are more prevalent and readily accessible.

There is an opportunity cost in lost revenue or reduced productivity associated with prolonged periods in which a role remains vacant. To avoid these losses and hidden costs, businesses that are hiring in a tough market may need to revise any hiring strategies they have used previously when operating in a market in which there is a plentiful supply of candidates.

If candidates are not meeting your expectations, you may need to re-evaluate the skills and experience you are seeking. Rather than waiting for the perfect candidate, you should instead look for people who could do the job with a bit of training and practice. The ability to perform a job consists of “soft skills” and “hard skills.” ‘Soft skills’ are a collection of personal attributes – qualities that are either innate or difficult to teach, such as initiative, confidence, positive attitude, enthusiasm, perseverance, resilience, professionalism, passion, sense of humour, analytical ability, interpersonal and communication skills. ‘Hard skills’ are a specific skillset or knowledge base required to carry out the technical aspects of a job – for example, specialist knowledge of products or best practices, or the physical capability to undertake a particular task or process. Importantly, hard skills can be taught.

When it isn't possible to find a candidate with the required hard skills, be open to considering candidates who have the soft skills and technical foundation needed for the role and who, with some training and experience, have the potential to be a good fit for your organisation. In a market with a severely depleted talent pool, hiring candidates with a generalised skillset who are enthusiastic, intelligent, and eager to learn, and providing them with training and mentorship, makes good business sense.



Tips For Hiring in a Candidate-Deficient Market

▲ Ensure that your company has a strong employee value proposition, and that this proposition is clearly communicated to prospective employees. This proposal could include support for learning new skills, an emphasis on work/life balance, flexible hours, the ability to work from home, and a focus on health and well-being.

▲ Be proactive, not reactive. In a market where demand for specific skills exceeds supply, be mindful that the top candidates are likely to be gainfully employed and unlikely to respond to job advertisements (so-called passive candidates). If you wish to hire them, you must find ways to identify and communicate with them. If you don't have the necessary network to do so, hire a consultant who does.

▲ Don't elongate the recruitment process by hanging out for the perfect candidate. If you have done your due diligence in seeking out candidates and have identified someone who fulfills, say, 80% of your position requirements don't hesitate – hire them! A drawn-out recruitment process with associated delays and poor communication may be taken by the candidate as being indicative of the future employment experience, and acting as a deterrent for future employment experience, and acting as a deterrent for candidates, who will either lose interest or accept alternative opportunities.

▲ Don't haggle over money. Be prepared to pay the market rate, commensurate with skills and experience.

▲ If candidates aren't meeting the requirements as described in your position description, rethink the criteria. It may be that you can hire a less experienced person while providing the necessary training and support to bring a candidate up to speed.

▲ When candidates lack relevant industry experience, endeavour to identify potentially-suitable candidates with similar skillsets in other industries and leverage off their transferrable skills.

▲ The pandemic has taught us that with current and advancing technology and modern means of communication, many jobs can be effectively performed remotely – at least for a proportion of the time. Considering candidates with the relevant skills and giving them the option to work (at least, partially) remotely may deliver more candidates who can fulfill the position requirements. Workplace flexibility and increased autonomy are powerful tools to attract talent in the modern world.

Companies at the more progressive end of the spectrum have realised that the current talent shortage is a problem that is unlikely to be fixed any time soon. Instead, they recognise the need for long-term planning to address it.

Skills audits can be a valuable tool to identify where a company may be exposed to risk from the potential loss of key personnel (whether due to resignation, retirement, or death) and to gauge the likelihood of sourcing such skills from the market. Businesses can minimise risk, once identified, by developing graduate programs or training and creating succession plans to minimise the need to go to market.

In 2021, a shortage of skilled personnel is commonly encountered across many sectors of the food and fibre supply chains. This shortage is further exacerbated as new skills are called for to meet the technological demands in agriculture, such as precision farming, robotics, mechatronics, IoT, and so on. Organisations that employ such skills should be mindful of the availability of these skills from the market and develop strategies to minimise the risk of being caught short.





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