



Post-harvest Review of 2024/25 Chickpea Transport



**Queensland
Government**



QTLC

QUEENSLAND TRANSPORT
AND LOGISTICS COUNCIL

QTLC delivered this report in partnership with Queensland Department of Primary Industries.

Introduction

In late 2024, in response to a projected and unprecedented crop of chickpeas for export to India, and industry's view that there might not be sufficient road and rail transport capacity to transport the crop to Ports over the period October 2024 to March 2025, QTLC initiated a workshop to discuss the issues and possible solutions.

The workshop duly occurred on 18 August 2024 and a report of proceedings "Queensland 2024/25 Chickpea Transportation: issues and solutions" was distributed in September 2024. The list of attendees is at Annex A.

The pressing need for a workshop was influenced by five factors:

1. Due to local drought, the Indian Government announced a temporary suspension of the usual trade tariff on chickpeas. The lucrative value of chickpeas compared to grain crops (>\$1,000/ton v \$350/ton), and chickpeas' shorter planting to harvest cycle, meant that Queensland farmers planted significant crops.
2. Queensland growers have a strong history of chickpea production, particularly before the introduction of Indian tariffs. This established familiarity, combined with the favourable economic conditions brought about by the temporary suspension of tariffs, created a pressing need to act swiftly and reassert Queensland's position in the global chickpea market and re-establish favourable economic relationships.
3. The tariff suspension was short-term (ending 31 March 2025) with the transport task set to take place during a window in which industry foresaw road, rail, port, sea and weather constraints. There were further concerns that there would be a lack of 20ft food grade containers.
4. The experience of the previous record chickpea export event in 2017, when there were few highly productive A doubles available to transport containerised chickpeas to Port, and additional trucks had to come from NSW, Vic and SA to get the job done. In 2017 rail played no part because the chickpea crop was exported in 20ft containers and transporting heavy 20 ft containers by rail was cost-prohibitive.
5. A pressing desire by all involved in the supply chain to drive further innovation, safety and productivity of the transport task.

The objective of this report is to summarise stakeholder discussions leading up to the chickpea export event, outline chickpea export results and stakeholders' view of the process and recommend measures to better co-ordinate responses to future events.

Results of Workshop

The consensus of the Workshop was that the chickpea freight task was ideally suited to rail, but that the time required to reposition extra locos, as well as long term impediments such as track axle limits and available grain paths indicated clearly that these issues could not be ameliorated to meet the short time frame of the 2024/25 freight task.

Hence the focus was on road transport, and recommendations were biased accordingly.

The workshop report included recommendations covering ports, rail, and road transport access, including payload concessions for A Doubles: those relevant to the Department of Transport and Main Roads (TMR) were communicated to the Director General of TMR in a letter dated 12 September 2024. TMR's responded in writing on 2 October 2024.

In its response TMR pointed out that freight operators and consolidators had indicated that there was adequate transport capacity in Queensland to transport the chickpea crop, with assistance from trucking operators in the southern states,

The implication was that there was no real need to provide payload concessions for A doubles to effectively improve transport capacity, given TMR's view that capacity wasn't a problem.

TMR was correct: there were sufficient transport resources to transport the chickpea crop to Ports.

However, other agricultural grain crops eg, wheat, barley, were unable to be transported to ports by road during the period chickpeas were being exported because available transport capacity had been consumed transporting chickpeas.

Monitoring of the Event

Driven by industry concern, the Department of Primary Industries (DPI) convened the Queensland Chickpea Harvest Transportation Taskforce group to coordinate and facilitate appropriate solutions to transport infrastructure and capacity limitations.

The group met regularly throughout the event to share information, facilitate solutions to optimise transport capacity and export paths, and communicate to government and industry.

Export Results

The chickpea export season which ran from October 2024 to March 2025 resulted in record export tonnages (see table below):

Mode/Port	Volume (t)	Share of Total
Total Exported	1,241,126	100%
Bulk (all ports)	1,030,515	83%
Containers (Bris)	210,611	17%
Rail (bulk only)	200,000 (1)	16%
Road (est.)	1,041,126	84% (inferred from total minus rail)

Notes:

(1); 50,000 tonnes to POB and 150,000 tonnes to the Ports of Gladstone and Mackay, ie 19% of bulk tonnes.

(2): Shipments by Port.

- Port of Brisbane – 756,660t in bulk, 210,611t in containers
- Port of Gladstone – 114,923t.
- Port of Mackay – 158,932t.

These figures confirm the dominance of road transport during the export window.

These outcomes and subsequent stakeholder feedback highlight the need for early and integrated planning across transport modes, particularly when responding to unexpected market access opportunities such as tariff suspensions.

Post-Event Survey - Themes

In March 2025 the QTLC and DPI initiated a survey of everyone who participated in the chickpea discussions leading up to the export event and the Taskforce, to find out what participants thought of the process and to ascertain some ‘takeouts’ or lessons for the future.

There were two distinct themes which emerged:

- Stakeholders had a positive view of the whole collaborative process, given it had not previously occurred. Industry appreciated the opportunity to discuss the issues with TMR and Queensland Rail (QR).
- Stakeholders gained a better understanding of road transport impediments and how the grain supply chain works.
- There was however a lack of understanding/clarity about some decisions made by TMR in relation to truck payload concessions.

Recommendations

Following the collaborative experience with Government and QR over the last 12 months, and with a large winter crop forecast, QTLC believes there is now a compelling case for a permanent forum to be set up for the agricultural (ag) sector, including cotton.

It would allow the opportunities and problems/issues in the ag sector to be discussed and resolved much more quickly than the current ad hoc approach. It would allow opportunities to:

- Maintain a long-term focus on Ag transport capacity issues. Without significant improvements, limited road and rail capacity will constrain agricultural exports. This issue has direct implications for achieving the Prosper 2050 vision.
- Improved understanding of road and rail infrastructure issues.
- Improved understanding of road transport impediments.
- The involvement of other relevant stakeholders eg, stevedores, other ag sectors.
- An opportunity to progress some road transport related efficiencies.
- An agricultural sector transport vision to be created and implemented.

Members would include TMR, DPI, QR, POB, NHVR, QTA and a number of ag sector representative bodies eg, Cotton Australia, Cotton Shippers Association, AgForce, stevedores, shippers and selected transport companies. It would have a formal Terms of Reference (TOR) and be chaired by a QTLC nominee.

The case for this formal body is not unique and is similar to the recommendation of the independent panel who reviewed freight policy in NSW, publishing specific comment on grain logistics in the final report handed down in June 2025 (see below example).

Example: NSW Initiative

A recent freight policy reform strategy issued by Transport for NSW “Delivering Freight Policy Reform in NSW” dated June 2025 reinforces the recommendations of this report.

The document states that “many of the relationships within the ‘logistics’ sector could be described as dysfunctional. For some supply chains, more co-operation by industry participants is needed to improve coordination and connectivity. There are two identified areas, grain and containers, where there is merit in industry initially being provided the opportunity to develop more collaborative approaches, with the aim of improving the performance of those logistics chains. The strategy proposes “that the NSW Government facilitate a stakeholder forum for the development of proposals to improve coordination, rail asset utilisation, and investment risk sharing for the grain task”.

Clearly NSW has a similar range of issues in the agricultural sector as Queensland.

Appendix 1. August 2024 Workshop and Taskforce Attendees by Organisation

- AgForce Queensland
- Grain Growers Limited
- Graincorp
- Grains Research and Development Corporation
- Seaway Logistics
- National Heavy Vehicle Regulator
- Port of Brisbane
- QTA
- Gladstone Ports Corporation
- Port of Bundaberg
- Louis Dreyfus Commodities
- JSM Bulk
- LGAQ
- Sizer & Cogill
- Queensland Department of Agriculture and Fisheries
- Queensland Department of Transport and Main Roads
- Queensland Rail
- Queensland Transport & Logistics Council
- SEQ Hauliers
- TasLog
- TNS Logistics
- Watco East West