



Sydney

Japan External Trade Organization

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Hello and welcome to this March 2013 edition of JETRO Sydney's English Newsletter. It has been a busy start to the year, and an even busier end to the Japanese financial year. As such we are featuring the Research Department's exhaustive Business Activity Survey in this edition, as well as some timely pieces on present and future economic development. Please read on for more interesting content, and find my own article "Finding the Floor: Brighter Prospects in the Japanese Business World", on page 3. Enjoy!



Highlights of Business Activity Survey 2012 of Australia-based Japanese Companies

By Seichiro Komiyama & Nada Tasic - Research



During the period from October to December 2012 JETRO conducted the Business Activities Survey of

Japanese-Affiliated Companies in Asia & Oceania. First commenced in 1987, this is the 26th year it has been conducted. This survey covers Respondents from 3819 Japanese companies. The full results of the survey can be found at this website:

http://www.jetro.go.jp/en/reports/survey/pdf/2013_01_01_biz.pdf

In Australia we had 200 responses from some 300 companies which are operating inside Australia, making a response rate of 62.1% of the original targeted group. The following presents the highlights of the survey results.

As Japanese Companies in Australia gain ground, over 70% of respondents forecasted a Business Profit for 2012. However, for the second year in a row, Economic Sentiment has worsened, with expectations also weak for 2013. The outlook ahead for the development of new projects and hope for expansion has fallen, whilst numbers of those keeping the status quo at current levels have increased. It appears that for management the greatest topic of concern is the rising labour costs.

The business profit expectation rate from Japanese Firms with Australian branches showed an

improvement to 73.2% (3.2% higher than last year).

Only 12.1% of businesses expected losses (down 0.1% from last year).

38.9% of businesses are expecting an "Improvement" in the 2013 profit forecast (an 8.2% fall from previous outlook), whilst 15.7% expected it to worsen (4.6% up on last year).

Oceania region have reported a strong increase, especially Bangladesh, Cambodia, India, Laos, and Indonesia, to 45%.

Regarding the future direction of project development in the coming year or two, 43% of firms responded with plans of "expansion", slightly down on last year. In a familiar trend, the last two years have seen a reduction in "expansion" figures, offset by an increase in

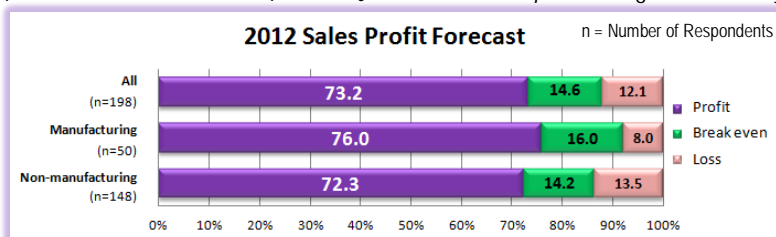
"Maintaining Status Quo" as well as some intentions to "transfer or withdrawal" from 2012.

In local market development more than half of the firms (84.4%) claimed cultivating the Australian domestic market further as a priority over other international markets.

As the domestic market in Australia is expanding, both manufacturing and non-manufacturing sectors are focusing on "Product Quality", "Increasing Value as a Point of Differentiation" and "Strengthening Brand Power".

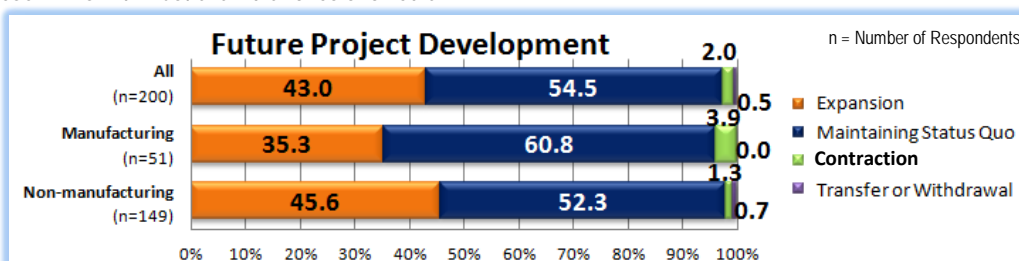
Labour and other costs featured prominently, with a high of 71.5% of respondents claiming "Employee's Wage Increases" as the main issue for Management. Also on the rise were issues of "cost curtailment before reaching the limit", "lower consumption" and "increase in supply costs".

Even in developing economies, over 80% of respondents from China, Indonesia, Vietnam and Myanmar are concerned about "Wage cost increases", as well as "threat from competitors" (on the cost side), "local staff abilities and knowledge" and "increase in supply costs". We thank those Japanese firms that participated in the survey.



The main reason attributed for the improved business profit forecast was "increase in turnover in the local market". Conversely, Manufacturing companies stated "reduction in exports" as the reason for their predicted decline, while non-manufacturing firms claimed "reduction of sales turnover in the local market".

The economic sentiment is revealed through the Differential Index (DI) of sales profit compared with the previous year, by deducting the percentage of those who state a 'worsening' from the percentage of those who predicted an improvement. In 2012 the DI was minus 0.1%, and 0.0% in 2011, and has hardly changed. Despite an increase of DI in 2010, it has decreased over to the previous two years, indicating a continuation of negative economic sentiment. Developing countries in the Asia-



By Manuel Panagiotopoulos



While the situation in the US economy has stabilized and the share market displays tremendous optimism, the EU moves sideways like a sand crab, but at least it's not moving backwards. The North Atlantic crisis seems to be past the worst. In contrast, the Asian region, which has had great expectations to shoulder, is showing some changes in economic drivers that business has to carefully analyse.

In a nutshell, the winds of change are blowing from China, whose somewhat faulty economic growth strategy is coming up against its limits. The demographics of the one child policy are placing China quickly into the aging population category and its investment-centred growth continues to fuel the debt laden shadow lending sector. The flight of capital is a sign of concern for future prospects. In addition, China's recent international relations with its neighbours create a non-economic factor that will affect economic relations and policies.

These changes provide challenge and opportunity in the same decision-making process. Two recent business seminars highlight clearly some of the new dynamics and the potential responses. They emphasise the necessary reallocation of attention towards the significant economic opportunities in the ASEAN countries, both for Australia and Japan.

JBIC CEO Hiroshi Watanabe was in Sydney recently and I was able to hold a seminar for him to present his carefully worked out analysis ("Opportunities in Asia for Australia and Japan"). While pointing out the emerging risks to China's ongoing growth, Watanabe also showed the tremendous opportunities to be found in the vibrant economies of Indonesia, Philippines, Vietnam, Myanmar and other Southeast Asian economies, which together provide a substantial market. Stable economic growth in this region has reached a level where it is self-sustaining. A combination of a rising and substantial middle class and the enormous requirements for infrastructure, energy, environmental technology, transportation and logistical networks provide the foundations for these opportunities.

Much to my satisfaction, Watanabe also mentioned the enhancement of Asian supply and value chains as a key opportunity. If you have seen my report for Austrade on East Asian Integration (www.austrade.gov.au/Supply-Chains-the-Key-to-Growth-in-East-Asia) then you know I am very keen on this type of analysis. Such a perspective came into focus at another recent event, co-organised by JETRO, called Partnering with Japan in the Asian Century. Presentations by Peter Davis, CEO of ANZ in Japan and Andrew Parker, Asia Deals Partner with PWC, applied the value-chain approach to various sectors, such as infrastructure, health-

care and resource development. While China was included, as it must be, all the papers also spoke of the enormous opportunities for Australia and Japan in the ASEAN markets. There are ample places within Asian value-chains for the numerous assets and capabilities owned by Australian and Japanese firms to work together in new complementary ways. When you notice the wind is changing, it's best to move early.

Event Report :

Sydney office,
March 14th, 2013

Japan-Queensland: New Partnership Opportunities

JETRO Sydney, the Japanese Chamber of Commerce and Industry (JCCI) Sydney, and the Queensland State Government co-hosted the *Queensland: New Partnership Opportunities* on Thursday, 14th March. The State of Queensland and Japan have enjoyed a well established and strong partnership for decades, particularly in the resources and agricultural sectors. This seminar aimed at expanding this relationship, by exploring potential collaborations in **Public private partnerships (PPPs)** and **Partnership in Innovation**.

Guest speakers included:

- **Mr Dave Stewart** – Executive Director, *Projects Queensland, Queensland Treasury and Trade*
- **Dr Craig Belcher** – Manager, *Business Development – Technology Commercialisation, UniQuest*
- **Dr Ian O'Hara** – Senior Research Fellow, *Centre for Tropical Crops and Bio-commodities, Queensland University of Technology*
- **Dr Mauricio Acuna** – Senior Research Fellow, *University of Sunshine Coast*
- **Dr Kazuhiro Nogita** – Director, *Nihon Superior Centre for the Manufacture of Electronic Materials, School of Mechanical & Mining Engineering, University of Queensland*

Below: Tak Adachi, Trade & Investment Commissioner – TIQ Japan

Projects Queensland is a new unit within the Queensland Government aimed at fostering investment partnerships that deliver positive infrastructure outcomes. Mr Stewart's presentation centered on the Queensland Government policy settings for PPP, and project opportunities in Queensland.

Dr Belcher, Dr O'Hara and Dr Acuna each presented on innovation sectors, with the focus of *innovation* as a key economic driver, driving a new platform for the next commercial partnership between Queensland and Japan. Dr Nogita also provided details on two case studies of successful Queensland-Japan technical partnerships between Australian and Japanese academic and industry partners.

This event showcased Queensland R&D capabilities and exciting new Queensland technologies and projects which are seeking international collaboration.

Further information:

<http://www.treasury.qld.gov.au/projects-queensland/>

Projects in QLD:

Above: Brisbane's 1 William Street Office Tower Development preview

Below: Abbott Point Port – UniQuest developing failure-resistant coupling



MD's Message – Takashi Tsuchiya



At the end of February this year, I enjoyed a brief, albeit business-based return to Tokyo. I am happy to report that the atmosphere around the place is now as upbeat as ever before. The positive mood stems from great expectations that Prime Minister Abe's policies, now known by the popular international moniker of "Abenomics", will usher in a new economic era for Japan.

"Abenomics" is based upon three main measures that the Japanese government will be concentrating a lot of effort on: (1) **Bold Quantitative Easing**; (2) **Agile Fiscal Stimulus** (via public spending on various kinds of projects); and (3) **Economic Growth Strategy** including reform and deregulation of current systems by Government.

These three measures are known in Japan as the Three Arrows (三本の矢), after the feudal *Moori* legend from Western Honshu, the moral of which is that three arrows bundled together are stronger than if they were separated.

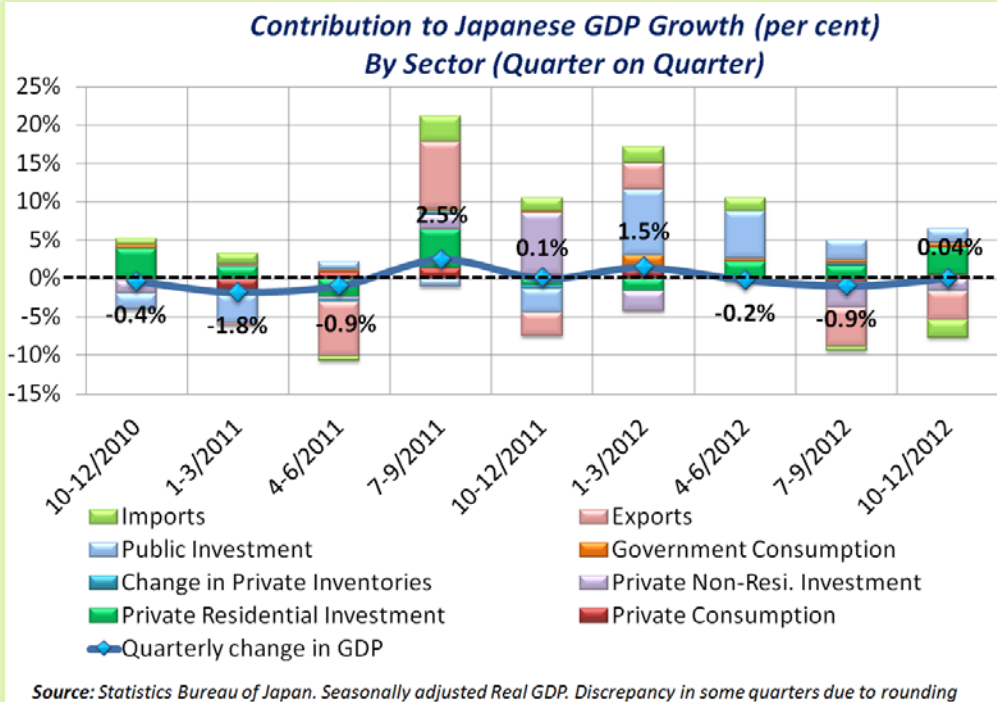
In actuality, the three measures have yet to be fully implemented. The new President of the Bank of Japan is, at the time of writing (early March), awaiting approval before the Japanese Diet. For now, government spending has only been endorsed de facto through the latest Supplementary Budget, and the main FY2013 budget is yet to pass through the Diet.

This expectation of the Abe Administration is embodied in the recent pleasing trends in stocks and currency. The Nikkei has risen from a low of around 9400 in November last year, when the Diet was dissolved, to 12,000 points early this March. The Yen, a long-time headache for Japanese exporters, has devalued itself from an exchange of ¥82/AU\$1 last November, to ¥97/AU\$1 by early this March.

The actual statistics co-incide with the upbeat atmosphere: Last Quarter of 2012 saw a register GDP growth at 0.04% over the previous quarter (see Graph at right). Though it may seem small, this figure brings to an end the previous two consecutive quarters of decline. This has been due to internal factors of stable consumer spending, and government spending for the reconstruction of tsunami and earthquake-stricken areas.

External factors are having an adverse effect on GDP growth, as exports have reduced and imports have increased. This may continue, however domestic industrial output is now also bottoming out, so the Japanese economy is finally finding the floor.

At the start of 2011, the Japanese economy had

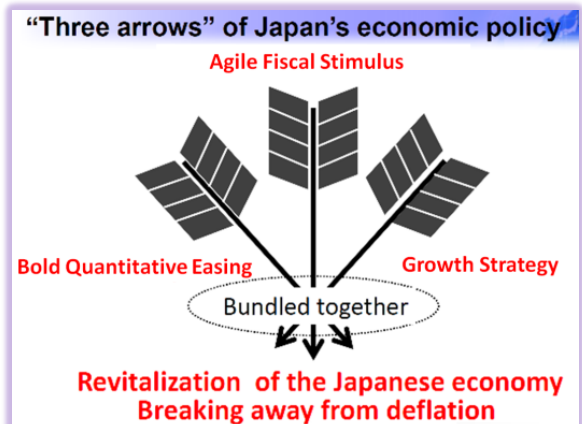


started its recovery from the 2008 global financial crisis. However, the March 11th tsunami and earthquake wreaked untold havoc at home, and the October floods in Thailand heavily disrupted Japanese supply chains and invested operations, too.

In 2012, economic recovery started again, however external factors of the ongoing European debt crisis, and Chinese growth stagnancy certainly did not help that year.

Now, in 2013, the USA economy is getting stronger, which is good news. Coupled with a devalued Yen, US-Japan trade, as well as Japanese trade with Greater Asia, can increase in our favour. Hopefully, further external factors will improve into 2013, and with them the internal effects that we all expect from Mr Abe's Three Arrows will bring renewed prospects

for the Japanese business world this year. So 2013 seems to have generally brighter prospects for the economy.



Case Study: **Hardcat Pty. Ltd.**

By Thomas O'Keefe, Business Development

Hardcat Pty Ltd is a South Melbourne-based software & services company that specialises in "Fixed Asset Management Security" using barcoding and RFID (Radio Frequency Identification) technology. What this



Dan Drum, Managing Director of Hardcat Pty. Ltd.

means is bullet-proofing their clients' digital information and security. *Hardcat* has a range of products that it has successfully introduced into the Australian market, and as of a few years ago, they have made great strides into the international and Asian markets, particularly Japan.

Dan Drum, Managing Director of *Hardcat*, spoke with us to share some details of his company's experience dealing with Japan, and how JETRO has helped along the way.

"JETRO has been an integral part of *Hardcat* entering the Japanese marketplace" Mr Drum states. In the first instance, back in 2008, it was at a business-matching meet that Mr Drum was introduced to a consultant in the field of exporting IT services. In turn, he was introduced to a Japanese software company by the name of *Kotarosoft Inc.* Put simply by Mr Drum: "If it wasn't for JETRO, none of this would have happened". Soon thereafter, Mr Drum was selected by JETRO Sydney to attend a trade mission in Japan, and spent four days

days exploring the associated RFID trade shows. Through this experience, it became clear that *Hardcat's* products and services would be unique in the Japanese market, with great potential if converted to Japanese. The budding partnership with *Kotarosoft* would be ideal for this, and in the years since *Kotarosoft* and *Hardcat* have enjoyed a fruitful partnership, with *Kotarosoft* has been translating some of *Hardcat's* products and case studies for the Japanese market.

As a matter of fact, the Japanese partnership has opened doors for *Hardcat* into the Taiwanese markets, too, with custom translations into Chinese. This opportunity came about as a very timely requirement from a Japanese client-company, which ran manufacturing operations in Taiwan, and wished to roll out *Hardcat* in all their Japanese



plants. In the last 12 months alone, several Japanese companies have subscribed to *Hardcat's* products and services, including *Harada Metal Industry*, *Matsuura Machinery Corp* and *Kyodo Holdings*.

As to the future, Mr Drum's own words more than suffice: "The projections for growth over the next 12 months are very positive. It is extremely important to have the right partner

in Japan and JETRO were instrumental in aligning *Hardcat* with the correct partner." JETRO's services have been taken full advantage of over the course, with access to market research and exposure facilitated by JETRO Sydney's Melbourne representative, Jennifer Bean, who has engaged Mr Drum to speak publicly in the recent past, and thereby unlocked even more information on Japan and viable client sales.

As yet, *Hardcat* has not set up a subsidiary of its own company inside Japan. However, plans are in the works right now. The partnership with *Kotarosoft* will likely remain a strong and mutually beneficial one, as it is



now, however it could well be boosted, in many ways, by *Hardcat* having its own incorporated Japanese entity. It does wonders for paperwork troubles and efficiency management over the long term, and could well allow the partnership to grow stronger through combined efforts of client-seeking within the Japanese and broader Asian markets. As Mr Drum rightly puts it, "Japan is the hub into the Asian market", and he fully intends to use his company's already established successes to expand through Japan, out into Asia. Products such as *Hardcat's* latest Forensic Evidence Tracking System, have gained strong interest from these markets.

In Japan, meetings with JETRO personnel have allowed Mr Drum to make contact with Japanese manufacturing companies from the disaster-affected areas of Tohoku, which he especially appreciates. Commercially, Mr Drum recognises that the crowded nature of the Japanese populace makes limited movement during major disasters a fact of life. However, there is a great market for useful Disaster Management technology, into which some *Hardcat's* efforts have lately been directed.

Mr Drum's perspective on this is a simple and realistic one: go to Tohoku affected areas and spend money and buy things, as opposed to mere charitable donations alone. JETRO shares this view, and will warmly welcome enquiries from any legitimate business that wishes to invest in or buy from the Tohoku region, as it will form a strong and lasting element of the entire recovery process.

Where We Were - This Past Quarter



Mr Tsuchiya and the speakers at the *Partnering with Japan in the Asian Century* seminar in Melbourne (see page 5 for full Event Report)

Above - From left: Mr Tsuchiya, Richard Grupetta (Team Leader - Trade Services: Austrade), John Bilmon (MD: PTW Architects), Andrew Davis (CEO: ANZ Japan), and Andrew Parker (Asian Deals Lead Partner: PwC).

With Mr Bruce Gosper, recently appointed CEO of Austrade (right) and Mr David Howard, General Manager: Inter-national Operations - North America, UK, Europe, Japan, Pacific (left)



In Sydney, hosting the *Japan-Queensland: New Partnership Opportunities* Seminar (see page 2 for full event report)

See their website: www.hardcat.com

Event Report :

Melbourne,
February 27th, 2013

Partnering with Japan in the Asian Century

On the second-last day of summer this year, JETRO partnered with Austrade, PwC and ANZ Bank to deliver a rousing seminar on the ways that Australian companies can partner with Japan in the 'Asian Century'. Off the back of the Australian Federal Government's release of the *Asian Century White Paper* late last year, this seminar was designed specifically to affirm that partnerships with Japanese entities is the best way for Australian companies to get into the Asian markets.

Highly esteemed guest speakers, hosted by Jason Hayes, Partner and Japan Desk Leader at PwC, included:

- **Mr Hidenobu Sobashima**,
Consul-General of Japan,
Melbourne
- **Mr Peter Davis**,
CEO,
ANZ Japan
- **Mr Richard Gruppetta**,
Team Leader,
Trade Services, Australian
Trade Commission
- **Mr Andrew Parker**,
Asia Deals Lead Partner,
PwC
- **Mr Takashi Tsuchiya**,
Managing Director, JETRO Sydney

Following the opening remarks and endorsement by Consul Sobashima-san, JETRO's own Managing Director Tsuchiya-san both spoke broadly on Japan's recent economic performance and indicators, as well as existing and proposed international trade agreements and their spread and impact.

Mr Davis provided some very valuable insight from the banker's perspective, including an introduction to the business models of Japanese trading houses, case studies of the houses and Japanese manufacturers, and an overview of mid-term plans by these players in the field. Opportunities for investment were highlighted in the resources, utilities, infrastructure and agribusiness sectors.

Mr Gruppetta enlightened the audience with further relevant statistics on Japanese and Australian economic settings, with a major focus



on the existing and expanding movements by Japanese firms into the greater Asian markets, in a range of sectors, from retail and food to rail and infrastructure.

Mr Parker's focus was on the recently renewed movements by Japanese firms, in the wake of changed governmental policies, and how Australian companies can best capitalise by partnering with the Japanese entities, with strong historical grounding in some key case studies – Bluescope and Nippon Steel joint venture, Jetstar Japan (Qantas and JAL), and healthcare sector opportunities.

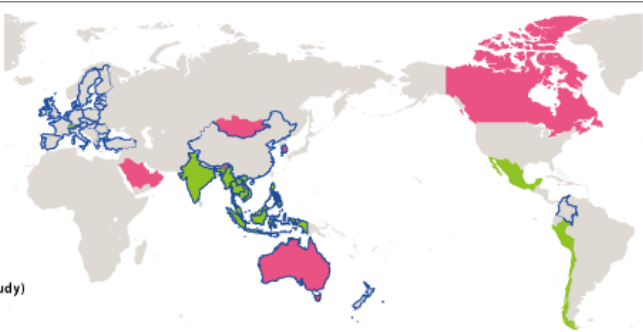
What stands as a powerful cornerstone of such advice as given in this lecture, is the well-established trade links between Australia and Japan, a common interest in the structural shifting of the Asian economies, and an established friendship that can see Australian firms utilise in-roads that have already been established by Japanese companies in Asia.

Attendees at the lecture responded very positively, commenting on the extensive experience and knowledge provided by the speakers, as well as the highly informative and useful nature of the information presented. Attendees came from a wide range of corporate backgrounds, including major banks, government departments, heavy industry, accountancy, universities, research consultancies and legal service firms.

For more information, please contact PwC: Fiona Richardson at Fiona.Richardson@au.pwc.com

EPA-FTA in Japan (November, 2012)

- **Concluded ▶ 13**
Singapore, Mexico, Malaysia, Chile, Thailand, Indonesia, Brunei, ASEAN, Philippines, Switzerland, Viet Nam, India, Peru
- **Negotiating ▶ 5**
(Include Countries unsigned)
Australia (Negotiating), GCC (Negotiation postponed), Korea (Negotiation suspended), Mongolia (Negotiating), Canada (Negotiating)
- **Pre-Negotiating (ex. Joint Study)**
Japan-China-ROK, RCEP, Colombia, EU, Turkey



Upcoming Event:

LIFE SCIENCES BRIEFING – JAPAN: KEY INSIGHTS FOR SUCCESS

Wednesday 27th March 2013

2:00pm (2:15pm start) to 4:15pm incl. networking
Clayton Utz Boardroom
Level 28, Riparian Plaza, 71 Eagle Street Brisbane,
QLD

Hosted by Clayton Utz and supported by the Consulate
General of Japan, Brisbane
and Trade and Investment Queensland

During the forum you will hear from:

- ❖ **Mr Takashi Tsuchiya**, Managing Director, Japan External Trade Organisation (JETRO)
- ❖ **Mr Katsumi Maruyama**, Managing Director V2V Pty Ltd
- ❖ **Professor Maree Smith**, Executive Director of the Centre for Preclinical Drug Development (TetraQ), The University of Queensland

We look forward to seeing you at this important event.

JETRO IBSC – Your Bridgehead into Japan

For any company, government or organisation looking to expand their business into and through Japan, JETRO should be your first stop.

Once you've contacted us (*the website is www.jetro.go.jp/australia*), you will have begun planning your leap across the Pacific Ocean.

Our 'bridgehead' consists of several government services, including **free office space** and access to all necessary experts for incorporation in Japan. The **JETRO Invest Japan Business Support Centre**, or IBSC, is where you want to be.

JETRO IBSC allows FREE use of office space and essential services for a maximum of 50 days (conditions do apply) – this will be more than enough time to sort all your affairs, and set up your Japan-base efficiently, quickly, officially, and legally.

JETRO IBSC is located in the
heart of business and
financial districts in these
major Japanese cities:

Tokyo* *Yokohama
Nagoya* *Osaka
Kobe* *Fukuoka



JETRO Tokyo

JETRO Osaka

Editor's Note – Thomas O'Keefe



In the three months since our last edition, I have taken some golden opportunities to visit the far corners of our wide, brown land.

Late last year, it was Adelaide and Melbourne, and in early 2013 the west was won with a trip to Perth.

Melbourne is a well-known and well-liked destination for all here at the JETRO Sydney office, and I jump at the chance to visit, and meet all the truly enterprising minds and businesses that flourish 'south of the border'. Adelaide is a small yet vibrant city, and the agriculture and viticulture in particular are second to none.

In Perth, I was greeted by a well-organised and enthusiastic party of Japanese and Western Australian business interests (pictured), all arranged by the WA State Government Department of State Development (DSD), and thank them for their whole-hearted efforts. I would also like to thank the Australia-Japan Society of WA, Consulate-General of Japan in Perth, Japanese Chamber of Commerce and Industry – Perth, the Japanese Association of WA, Department of Commerce and their Square Kilometre Array team, the Chamber of Commerce and Industry – WA, the Hyogo Prefectural Government Centre, Tourism Western Australia, the Pilbara Development Commission, and Murdoch University's Renewable Energy department and professors. All the talk surrounding WA right now is iron and resources, however I would hate to think that too many of us have forgotten about Australia's greatest resource – which is *resourcefulness* itself. Historically there has been a latent and oft unsung talent for innovation, often borne of the scarcity of certain basic resources. A mother-lode of one or a few tangible resources should never, ever supersede the importance of having the ability to make something truly great out of those tangible resources. The history in this regard is peppered with bright bursts of highly useful creativity, and you would be surprised just how many everyday-use things were developed here, and have become fundamental in the modern world (take wifi, refrigeration or penicillin, for starters).

When we talk of building roads and highways, advancing and investing domestically and overseas, we should recognise the most ingenious of designs, and honestly hold full intention to take action immediately when poss-

ible. I am one for making a change when it is needed, and for finding the courage to do it now. No matter the fate of the global economy, those among us who can adapt and work productively will never be without a place or cause.



Below, from left: Richard Talbot (Consulate-General in Perth), Keizo Sakurai (outgoing President of JCCI-Perth), Stuart Crockett (Director of DSD), Jean Stewart and Ged Boylan (AJS-WA), Thomas O'Keefe (JETRO Sydney), Akira Yoshida (Hyogo Prefectural Office), Etsuko Kobayashi (Consulate-General), Amy O'Sullivan and Anthea Petersen (DSD).

Farewell Mr Inasawa

March marks the end of the Japanese financial year, however it marks the end of another era here at the JETRO Sydney office. Mr Sadaka Inasawa, Director of the Business Development department, will be leaving us after four years of service at the JETRO Sydney office. In that time, he has travelled extensively around Australia and the Oceania region. He says it has been an extremely interesting and educational journey, and is very glad he had the opportunity. Mr Inasawa is now returning to Japan. All of us, his colleagues here on Martin Place, can agree that Mr Inasawa has been a quiet, but critical asset to the office. After having gotten to know him over the last 13 months here myself, I can say that he will be truly missed, and we all hope he does well in his new, post-JETRO Sydney life.

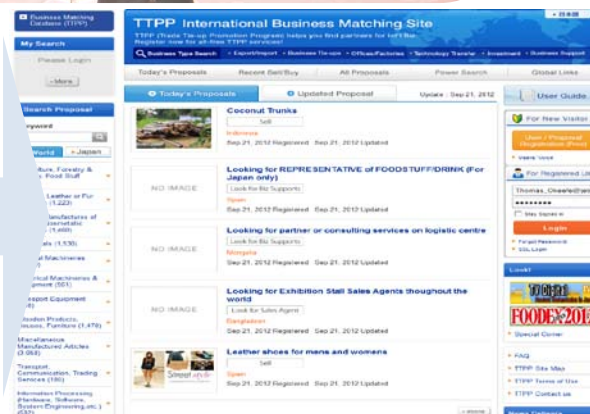
稲澤さん、さようなら!

Mr Sadaka Inasawa, outgoing BD Director (centre), farewelling the BD team



JETRO's TPPP is a business partnering database that anyone can use, "Free, Anywhere, Anytime." Companies and individuals in more than 170 countries search and browse through literally tens of thousands of business proposals. Through TPPP, reach out to potential business partners in Japan and internationally by registering your company information and posting your own proposals.

Find TPPP on the JETRO website at www.jetro.go.jp/tpppoas/index.html



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