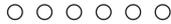




# ADM's Top 20 SMEs 2019

By Katherine Ziesing | Canberra | 7 January 2020

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Once again, ADM's annual Top 20 SMEs has some staggering headline figures and surprises for the Defence community.

To clarify, rankings are based purely on turnover earned during the calendar year of 2019 in Australia and/or NZ. To qualify as an SME, ADM relies on the definition used by the Australian Bureau of Statistics; a business must have 200 or less full-time equivalent staff members. An ANZ SME must meet that mark plus be owned and operated in Australia/NZ, independent of a foreign-owned parent company.

It's worth pointing out here that the entire turnover for the Top 20 is \$912 million; Top 40's Top 5 turnover alone is \$4.82 billion.

As always, there is much volatility in the Top 20 SMEs. St Hilliers nudged up to the top spot this year, taking out the ANZ SME crown as well as rank 20 in the wider list.

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**TABLE 2 – TOP 20 SMEs**

TOP 20 SME 2019	RANK, COMPANY	2019 TURNOVER (\$MILLIONS)	2018 TURNOVER (\$MILLIONS)	2018 RANK
1	St Hilliers Property	\$135,416,514	\$105,293,098	2
2	NIOA	\$81,830,000		
3	Safran	\$80,000,000	\$72,000,000	
4	CAE Australia	\$72,000,000	\$48,000,000	
5	Leonardo Australia	\$70,000,000	\$45,000,000	
6	RUAG Australia	\$52,000,000	\$54,000,000	7
7	Cubic Defence Australia and Cubic Defence NZ	\$44,770,368	\$81,577,576	4
8	Norship	\$43,000,000	\$40,036,489	
9	Collins Aerospace Australia	\$36,000,000	\$35,000,000	11
9	SME Gateway	\$36,000,000		
11	XTEK	\$35,500,000		
12	Daronmont Technologies	\$35,100,000	\$26,200,000	14
13	Air Affairs Australia	\$35,000,000	\$30,400,000	13
14	Rohde & Schwarz Australia	\$34,400,000	\$33,000,000	12
15	Shamrock Civil Engineering	\$30,057,000	\$21,800,000	15
16	Chemring Australia	\$26,000,000	\$38,000,000	10
17	Kinexus	\$22,170,000	\$19,600,000	16
18	Birdon	\$16,327,000	\$17,000,000	18
19	Customs Agency Services	\$13,750,000	\$11,250,000	22
20	Craig International Ballistics	\$13,275,000	\$17,400,000	17

“A challenge for all growing businesses is to never lose sight of what has brought the opportunities in the first place,” St Hilliers’ General Manager Brant Wood said to *ADM*. “At St Hilliers we recognise, even while growing, we need to maintain our personable and tailored approach to service our valued clients along the entire project.

“St Hilliers are continuing to gain knowledge around the best methods of submission, delivery and handover within the Defence framework. St Hilliers aim to utilise the valuable lessons we have learnt through our current and past projects to further enhance our offering to Defence.”

Of the responses this year, 19 companies qualified as ANZ SMEs (see Table 3).

sense to simply continue with t...

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**TABLE 3 – TOP ANZ SMES LIST**

TOP 20 ANZ 2019 RANK	COMPANY	2019 TURNOVER (\$MILLIONS)	2018 TURNOVER (\$MILLIONS)	2018 RANK
1	St Hilliers Property	\$135,416,514	\$105,293,098	2
2	NIOA	\$81,830,000		
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6	Daronmont Technologies	\$35,100,000	\$26,200,000	6
7	Air Affairs Australia	\$35,000,000	\$30,400,000	5
8	Shamrock Civil Engineering	\$30,057,000	\$21,800,000	7
9	Kinexus	\$22,170,000	\$19,600,000	8
10	Birdon	\$16,327,000	\$17,000,000	10
11	Customs Agency Services	\$13,750,000	\$11,250,000	
12	Craig International Ballistics	\$13,267,000	\$17,400,000	9
13	EPE	\$13,000,000	\$8,810,812	13
14	R.G.M. Maintenance	\$10,340,000	\$8,430,000	14
15	Bisalloy Steels	\$10,000,000	\$10,000,000	
16	Eylex	\$8,700,000	\$15,800,000	11
17	EM Solutions	\$4,700,000	\$7,065,000	15
17	Aero PM	\$4,700,000		
19	Penten	\$3,700,000		

“The Government’s Defence Industry Policy setting has provided the right environment for Australian companies like NIOA to invest with confidence and pursue export opportunities,” NIOA’s CEO Robert Nioa said to *ADM*. “Over the coming 12-months NIOA will commence construction of the artillery shell forging plant at Maryborough under our Joint Venture with Rheinmetall Waffe Munitions, expand operations at Benalla under a direct tenancy with the Commonwealth, open an office in Melbourne, deliver warshot and training munitions for the Land 400 Phase 2 Boxer family of vehicles and 81mm mortar, and continue to deliver against a series of small arms contracts for our Defence and Law Enforcement clients in Australia and NZ. NIOA has been shortlisted for the Land 159 Lethality Systems Project, so we will commence 2020 responding to a restricted tender with our strategic partners.”

There has been much rumbling from the SME community this year when it comes to access into Defence’s mega programs like the various phases of Land 400 (Rheinmetall Defence Australia for Phase 2 and Phase 3 will be undertaking a risk mitigation activity this year between Rheinmetall and Hanwha), Future Frigates (Hunter class from BAE Systems) and Future Submarine (Attack class from Naval Group) – see P92 for more on this. There have also been complaints around the balance of work on the consultancy front, with work being split between the Major Service Providers (MSPs) and the Defence Support Services (DSS), arguably in favour of the four MSP teams. As with any rebalancing of spending priorities and practices, there is a settling in period while the system realigns.

“Whilst opinion varies as to the trend for SME engagement in Defence, during 2019 it has been encouraging for SME Gateway to note that membership of our community continues to grow,” Stuart Althaus, CEO at SME Gateway, said to *ADM*.

“We take this to be a firm and positive indicator that SMEs remain keen to be active in Australian Defence programs, and want to operate in an environment that acknowledges their credibility, credentials and value as a Fundamental Input to Capability and a national asset.”

“Our growth helps to strengthen our supply chain,” BAE Systems Australia CEO Gabby Costigan said to *ADM*. “Collaboration across industry and within our supply chain is at the heart of how we do business. Today, we rely on around 1,500 Australian companies in our supply chain and our spend with those businesses is around \$330 million per year.

“More than 950 Australian companies have already registered through the Industry Capability Network to supply into the Hunter program, with that number still rising. Together with our supply chain, we are collaborating to develop new, world-leading technologies that will



**Comment**

As always, the figures here are but a snapshot in time of what the Australian Defence Industry landscape looks like. In terms of R&D, exports and AIC figures, Tables 5 and 6 provide some context into what policy in action looks like. As Minister for Defence Industry Melissa Price confirms in her From the Source interview this month, both the CDIC and Defence Export Controls agencies are being reviewed to make sure they are fit for purpose in terms of timeliness and value for money for all parties.

Work on the updated Force Structure Review will be completed in early 2020 and hopefully, fingers crossed, this will lead to a publicly updated Integrated Investment Program (IIP). The IIP is updated within the department every six months but this is not made available to the ninth Fundamental Input to Capability; Industry. Hard to plan your capital and workforce investments when you have only vague guidance of what's in the pipeline.

On the surface, Industry is doing well. However, as mentioned previously, there are rumblings not far below the surface. The natural tension that exists between primes, SMEs, CASG/procurement bodies, the end users and the government of the day is a never-ending point of friction. Clear and timely communication around expectations, timelines and budgets goes a long way towards easing those friction points.

ADM will be doing online follow up coverage with more insights from the data, both from this year and longitudinally now with over 20 years of data to draw on. Keep an eye on the website for more details.

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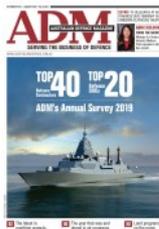
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