



Department of Primary Industries

GROWING THE PARTNERSHIP OF INDUSTRY AND GOVERNMENT

Agriculture Industry Action Plan

Issues paper



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More information

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Acknowledgments

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Industry snapshot¹

Agriculture contributed approximately \$14.5 billion, or 3.4 percent, to the NSW economy in the year ending June 2011.

NSW has around 41,600² farm-based businesses and 1,400 fishing businesses. Approximately 86,750 people are directly employed in the NSW agricultural industry with 1,600 in aquaculture.

Wheat is the most important crop commodity for NSW, contributing a significant amount to Gross Agricultural Product and to NSW and Australian exports.

Sheep and lamb, along with beef cattle, continue to be the most important agricultural livestock commodities for the NSW economy. Other high value agricultural commodities for NSW include chicken meat, apples, bananas and macadamia nuts.

Agriculture's share of total exports in NSW in the last two years has grown, assisted by improvement in seasonal conditions. In 2009-10 agriculture contributed 7.2 percent to NSW exports.

Agricultural Industry Action Plan

Background

The NSW Government has established industry-led taskforces to develop Industry Action Plans (IAP) to position key sectors of the NSW economy over the next decade. Agriculture was identified by the NSW Innovation and Productivity Council, based on the Access Economics (2010) - "The NSW economy in 2020 – A foresighting study" as one of the industries that would benefit from the development of an IAP. The Agricultural IAP Taskforce was established in April 2013 to develop the plan.

In this paper the Agricultural IAP Taskforce has identified key challenges facing the agriculture sector over the next 10 years. Through the consultation process the taskforce is seeking your advice on the key issues for your industry and the agricultural sector in general, and what can be done by industry and government to address these issues and facilitate growth in the sector.

Your feedback on the issues paper will lead to the development of the Agriculture IAP that will set out actions for industry and government to encourage industry growth for the decade to come. With your help, this issues paper will identify drivers for, and barriers to, growth, innovation and productivity in the NSW agricultural sector.

The Agriculture IAP will articulate clear, achievable and high impact initiatives for industry and government that will strongly support the government's 10 year strategic plan (NSW 2021). The Agriculture IAP will provide the framework for industry-government partnerships beyond the NSW 2021 horizon, ensuring that government and industry work together to best take advantage of opportunities and manage risks appropriately.

Vision for the industry

Agriculture in NSW will be profitable, productive and innovative; valued for its economic, environmental and social contribution to the state. It will be a world leader in the provision of high quality food and fibre products, through the use of innovative technologies and sustainable resource management. The agricultural sector in NSW will be resilient in face of change, and agile in the pursuit of opportunities. The future of the sector will be driven by industry; will attract

¹ Agriculture in NSW (July 2012) Statistical indicators 4/12 – NSW Parliamentary Research Service

² The contribution of Primary Industries to the NSW Economy – Key Data 2013

investment; will utilise and have strong links to research and development; and will provide an attractive career path for future generations.

Scope

For the purposes of this issues paper the Agriculture IAP Taskforce has defined the agriculture industry to be:

“Agriculture is the use of natural and man made resources for the production of food, fibre and other products. The sector includes the early stage processing of agricultural commodities and service providers to the sector”

The issues identified by the taskforce (presented below) and those further developed through the consultation process with industry, will create the framework for the future actions of industry and government.

The taskforce has determined that the Agriculture IAP will include aquaculture because of the similarity of issues and constraints, but it will not include other primary industries such as wild catch fishery or forestry.

Context

Competitive advantages of NSW agricultural sector

Agriculture, including aquaculture in NSW has strengths in its diversity of production systems, resource requirements and climatic conditions in which it can operate. This enables production of a wide range of high quality food and fibre products and means NSW has a dynamic and versatile agricultural industry that is well positioned to take advantage of the many opportunities that lay ahead.

NSW’s agricultural produce has a strong reputation with consumers and is unparalleled for safe and reliable foods. The reputation for being an innovative, resilient and responsive sector is well known. NSW is fortunate to have a strong research and development sector, balanced with world class educational institutions.

NSW has a strong domestic market and is well positioned to capitalise on the growth in global populations and consumer wealth. There are favourable consumer trends and attitudes for ethical production systems.

Key future challenges and opportunities

“The NSW economy in 2020 – A foresighting study” (Access Economics 2010) identified four mega-trends that are expected to have a considerable impact on the shape and performance of all sectors of the economy, including agriculture. These are:

- national and global policy actions to address climate change and water use
- demand and competition from emerging economies, especially China and India
- the widespread adoption of new information technologies
- demographic changes, especially a growing and aging population.

Over the next ten years and coming decades, ongoing globalisation, population and income growth will strongly drive demand for agricultural food and fibre products. A key challenge is to increase agricultural production to meet a range of consumer preferences and expectations, with greater constraints on resources..

Building on the challenges discussed above, the Agricultural IAP Taskforce has defined key areas of the NSW agricultural economy to consider through developing the IAP. These are shown on the following pages.

Issues

Productivity, profitability and innovation

- Industry is increasingly driving innovation on behalf of its stakeholders.
- There is a need for uptake of the latest research and development (R&D) by industry and stakeholders to drive productivity.
- The changing mix of public and private investment in research and development.
- Changing terms of trade in the context of increased costs of production, competition from overseas and volatility of international commodity markets.
- Improvements in management and adaptation to increased climate variability and its impacts of enterprise productivity, profitability and resource allocation.
- The need for improving business skills as agricultural enterprises intensifies, with greater exposure to production and marketing risks.
- Capitalising on export opportunities, such as the “food bowl to Asia” century.
- Access to telecommunications infrastructure and access to innovative technologies.
- Surety and security of adequate land, water and resources.

Workforce and skills

- Tailoring agricultural education and training to ensure appropriate skills for future industry development.
- Improved planning for labour force supply and demand to better manage the seasonality of labour.
- Attracting the next generation of farmers to redress the ageing profile of the farming sector; and the provision of the right skills needed.

Business and regulatory

- Maintaining a strong biosecurity track record given new and emerging biosecurity risks are inevitable as a result of increased climate variability and globalisation.
- International variations in regulations governing industry and workforce such as higher health and safety regulations, environmental regulations and duplicative regulatory regimes which will increase costs for Australian farmers.
- Anticipated increase in regulatory requirements over coming years, especially in relation to product identification, hygiene of production, packaging and storage of product for food safety reasons.
- Changes to the use of chemicals in agricultural production systems and the management of risks for the unintended or off-site impacts.
- Growing expectations from consumers for traceability and accountability of production systems.
- Support an open and competitive environment where funding and risk management tools are available.

Investment and ownership

- Finding the right balance of public and private investment for replacing ageing infrastructure; improve coordination of and investment in infrastructure.

- Striking the right balance regarding foreign investment and foreign ownership within the sector. This is a broad trend occurring across the international agricultural sector, and is driven largely by issues around acquiring adequate capital for business growth and for production and financial risk management.
- Driving greater economies of scale to maximise efficiency.
- Addressing barriers for investment and new entrants to the sector.
- Pressures associated with changing land use (eg. urban expansion, extractive industries) that threatens to reduce the land available for agriculture, and opportunities for co-existence.

Markets and export

- Management of the impact of global issues on local production, such as the fluctuations in the Australian dollar and trade agreements with our export markets.
- Supermarkets represent the largest domestic market segment for food products. Concerns that their reduced competition is increasingly allowing a small number of buyers to force lower prices; manipulating quality and supply from producers and processors.
- Improved coordination of efforts may be needed to capitalise on trade opportunity through greater insights and understanding of market needs, also the need to address inequitable market access.
- Globalisation can be seen as a positive as it provides opportunities for much needed investment in agriculture.

Connecting with community

- Generally there is a need to improve the levels of awareness and understanding of agriculture, its activity and value to the NSW economy including in relation to environmental stewardship, climate resilience and carbon mitigation.
- Industry has a need to be pro-active and improve its representation, connection and communication of key issues impacting on the industry to the non-rural community and Government.
- Gaps in capacity to address community concerns when there are instances of unfavourable reports about some agricultural practices – these have the potential to impact negatively on the agricultural industry by:
 - devaluing agriculture in the eyes of local consumers
 - discouraging potential new entrants to the sector
 - making access to capital more difficult
 - encouraging potential partners and buyers to look elsewhere
 - discouraging young people from entering the agricultural workforce
 - reducing the ability of NSW agricultural businesses to engage and compete internationally.
- Continual improvement of economic, environmental and social outcomes through the development of best practice guidelines and environmental management systems for the sector, industry or locality; to enhance industry sustainability to consumers.

- Changing consumer preferences and expectations – consumers are seeking more information on where and how agricultural products are produced (eg environmental sustainability, local, ethical, organic).

Key questions

The IAP Taskforce is seeking answers to these key questions for the agricultural (including aquaculture) sector in NSW to grow:

- What do you see are the key issues for the sector?
- How can innovation and productivity be improved in the sector?
- What can industry do differently to encourage the sector to grow?
- What can government do differently to encourage the sector to grow?
- How can your industry respond to enhance the competitiveness of the sector?
- How can governments (whether State, Commonwealth or local) act to enhance the competitiveness of the sector?
- What are the opportunities that the sector can exploit over the next decade?
- What are the enablers for industry to ensure the sector's growth?
- What are the enablers for government to ensure the sector's growth?
- What is stopping the sector in NSW from taking up these opportunities?
- What are some of the low cost solutions that industry can do in the short term?
- What are some of the low cost solutions that government can do in the short term?
- What actions or roles are you prepared to undertake to assist in positioning the sector in NSW for future growth?

Your contribution

Information about how to make a submission can be found through the NSW Government's Have your say website at www.haveyoursay.nsw.gov.au

Appendix 1: Industry profile

Agricultural production

The gross value of agricultural production in NSW increased in the year ending June 2011 to \$14.5 billion. NSW recorded the third highest gross value in agricultural production in Australia, after Victoria and Queensland. This amounted to an increase of 24 percent on the previous year.

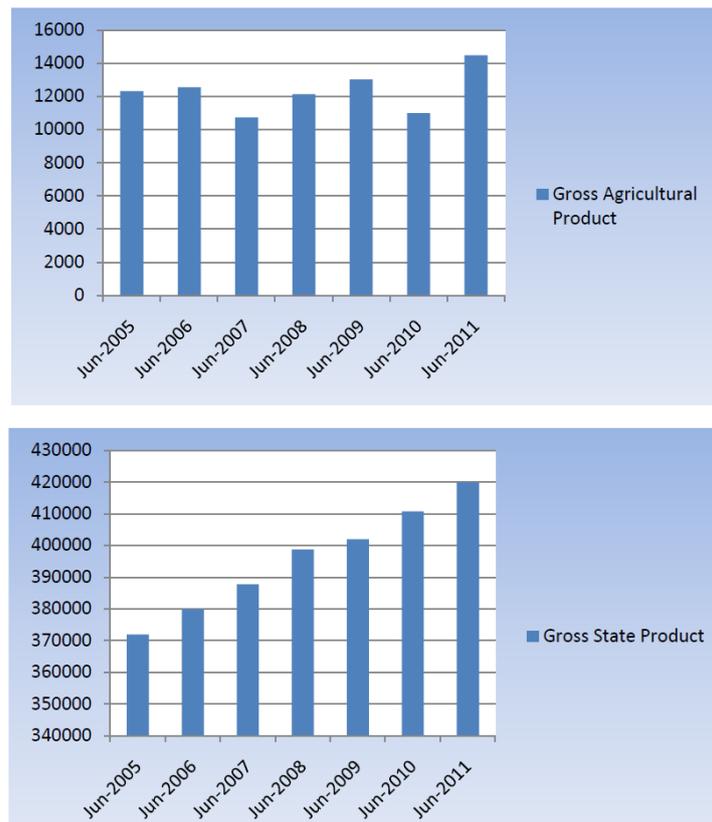
Despite remaining relatively stable between the 10 years 1992 and 2002, between the years 2002 and 2011 agricultural production in NSW, as a percentage of agricultural production in Australia, declined from 29 percent to approximately 22 percent.

Agriculture contributed approximately \$14.5 billion, or 3.4 percent, to the NSW economy in June 2011. Wheat is the most important crop commodity for NSW, contributing a significant amount to Gross Agricultural Product and to NSW and Australian exports. Largely as a result of the high Australian dollar and forecast lower world prices for some agricultural commodities, the value of NSW and Australian agricultural exports are expected to fall in 2012-13.

Table 1. Gross value of agricultural production, \$m³

Date	NSW	VIC	QLD	SA	WA	NT	ACT
Jun-2005	12312	11088	11935	5554	6911	461	32
Jun-2006	12563	11780	12581	6109	7937	426	34
Jun-2007	10734	10999	13064	5273	6546	478	30
Jun-2008	12137	14590	12159	7076	9242	583	32
Jun-2009	13025	13316	13488	6545	9651	559	30
Jun-2010	10999	14037	13267	6507	7410	604	23
Jun-2011	14486	16396	15281	8195	7076	756	25

³ Source: ABS, Australian National Accounts, State Accounts 2010-11, 5220.0 November 2011

Figure 1. NSW Gross Agricultural Product and NSW Gross State Product, chain volume measures, 2005-2011 (\$m)⁴**Table 2. Gross value of agricultural production in NSW and Australia, chain volume measures 2000-2011 (\$m)⁵**

Date	Agricultural production NSW	Agricultural production Australia	Agricultural production as % of national
Jun-2000	10719	40616	26.4
Jun-2001	12322	46483	26.5
Jun-2002	14252	53136	26.8
Jun-2003	11453	44348	25.8
Jun-2004	12452	51391	24.2
Jun-2005	12312	49540	24.9
Jun-2006	12563	52726	23.8
Jun-2007	10734	48461	22.1
Jun-2008	12137	57381	21.2
Jun-2009	13025	58230	22.4
Jun-2010	10999	54263	20.3
Jun-2011	14486	63775	22.7

⁴ Source: ABS, Australian National Accounts, State Accounts 2010-11, 5220.0 November 2011⁵ Source: ABS, Australian National Accounts, State Accounts 2010-11, 5220.0 November 2011

Agricultural income

Agricultural income in NSW was approximately \$4 billion in the year ending June 2011. This amounted to 28 percent of the total agricultural income in Australia, and was the largest amount of any year between 1990 and 2011.

Figure 2. Agricultural income, NSW 2005-2011 (\$m)⁶

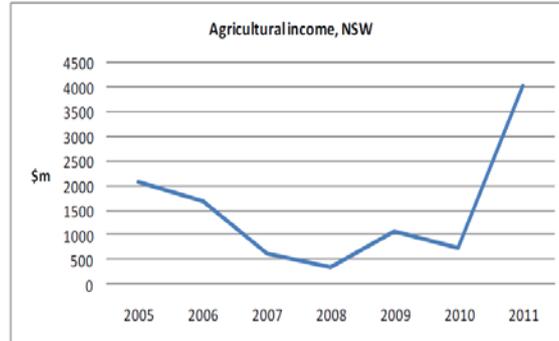
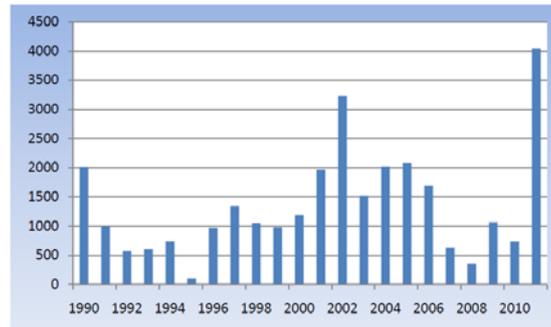


Figure 3. Agricultural income in NSW, current prices. 1990-2011 (\$m)⁷



Agricultural exports

The value of food exports from NSW in 2010-11 was approximately \$4.16 billion. The value of food exports in 2010–11 in Australia, and across all States, was adversely affected by a sharp appreciation in the Australia dollar against the currencies of most of Australia’s trading partners. Despite this, total Australian food exports increased to \$27.1 billion in 2010–11, \$2.6 billion higher than the previous year.

Table 3. Total value of food exports from all Australian States, current prices. 1999-2000 and 2010-2011 (\$m)⁸

Date	NSW	Vic	Qld	WA	SA	Tas	NT	NSW exports as a % of national
1999-2000	3692	4845	4680	3234	2370	384	156	19.1
2010-2011	4164	6404	6264	3799	4417	531	193	16.2

⁶ Source: ABS, Australian National Accounts, State Accounts 2010-11, 5220.0 November 2011

⁷ Source: ABS, Australian National Accounts, State Accounts 2010-11, 5220.0 November 2011

⁸ Source: Commonwealth Government Department of Agriculture, Fisheries and Forestry, Australian Food Statistics, 2000-2011

Agriculture's share of total exports in NSW in the last two years has grown, assisted by improvement in seasonal conditions. In 2009-10 agriculture contributed 7.2 percent to NSW exports. This compares with a 26.4 percent contribution by the mining sector and 35.6 percent by the services sector.

The value of Australian air freight exports of food and beverages was \$1.6 billion in 2010–11, \$29 million or 1.8 percent lower than in 2009–10.

Table 4. Export value of selected food commodities in NSW, current prices. 1999-2000 and 2010-2011 (\$m)⁹

Commodity	1999-2000	2010-2011	% change 1999-2000 to 2010-2011
Minimally transformed product			
Live animals (except fish)	11	16	45
Fish	27	12	-56
Vegetables	39	13	-67
Fruit and nuts	61	48	-21
Grains	783	986	26
Oilseeds	223	113	-49
Substantially transformed product			
Meat processing (excludes poultry)	1035	1053	2
Smallgoods	17	9	-47
Dairy products	110	127	15
Fruit and Vegetables	84	92	10
Oils and Fats	44	85	93
Flour mill and cereal food	486	460	-5
Bakery products	52	77	48
Wine	294	516	76
All food commodities	3692	4164	13

Employment

There was an overall upwards trend in total employment in NSW between November 2007 and 2012. In comparison, there were considerable fluctuations in the level of employment in Agriculture, Fisheries and Forestry in NSW between 2007 and 2012. The most significant decline occurred between November 2010 and November 2011 when employment in the sector declined by approximately 25 percent.

⁹ Source: Commonwealth Government Department of Agriculture, Fisheries and Forestry, Australian Food Statistics, 2000-2011

Table 5. Total employment in NSW and in Agriculture, Fisheries and Forestry in NSW. 2007 to 2012 (number)¹⁰

Date	Total employment in NSW	Employment in agriculture, fisheries and forestry in NSW	Employment in agriculture, fisheries and forestry in NSW as % of total employment in NSW
November 2007	3387000	89008	2.6
May 2008	3449000	97767	2.8
November 2008	3425000	84052	2.5
May 2009	3446600	92813	2.7
November 2009	3451000	98022	2.8
May 2010	3490100	106598	3.1
November 2010	3593200	109327	3.0
May 2011	3590600	92535	2.6
November 2011	3599300	82485	2.3
May 2012	3619300	86752	2.4

Ownership

In 2010, 2.7 percent of total holdings of agricultural land (1,535,536 hectares) in **NSW** were foreign owned. This compares to 11.3 percent of the total holdings of agricultural land in **Australia** being foreign owned in that same year.

Table 6. Agricultural land by level of foreign ownership, 2010 (ha)¹¹

	Total area of holding	Australian owned	Foreign owned >0% to <10%	Foreign owned >10% to <50%	Foreign owned >50%	Not known	Total foreign owned
NSW	56186791	54541462	13608	379301	1142457	109962	1535366
Australia	397991323	352807599	168526	21701375	22984181	329642	44854082

Table 7. Agricultural land by level of foreign ownership, 2010 (%)¹²

	Australian owned	Foreign owned >0% to <10%	Foreign owned >10% to <50%	Foreign owned >50%	Not known	Total foreign owned
NSW	97.1	0	0.7	2	0.2	2.7
Australia	88.6	0	5.5	5.8	0.1	11.3

¹⁰ Source: ABS Labour Force, Australia. Detailed – electronic delivery March 20102 report number 6291.0.55.001, April 2012

¹¹ Source: ABS, Agricultural land and water ownership, December 2010. Report number 7127.0

¹² Source: ABS, Agricultural land and water ownership, December 2010. Report number 7127.0

Approximately 1 percent of all agricultural businesses in NSW and Australia in 2010 were foreign owned. Of these, the majority were more than 50 percent foreign owned.

Table 8. Agricultural businesses by level of foreign ownership, 2010 (number)¹³

	Total agricultural businesses	Australian owned	Foreign owned >0% to <10%	Foreign owned >10% to <50%	Foreign owned >50%	Not known	Total foreign owned
NSW	43309	42699	30	103	313	164	446
Australia	135648	133623	139	330	824	732	1294

¹³ Source: ABS, Agricultural land and water ownership, December 2010. Report number 7127.0

Appendix 2: Industry Action Plan Q&A

What is an Industry Action Plan?

The primary function of an Industry Action Plan (IAP) is to build a partnership between industry and the NSW Government to enable industry to capitalise on opportunities and address challenges to the growth of that industry.

The IAP process does not commit the NSW Government to providing large amounts of funding to support industry development. Rather, the Government's role will be to:

- facilitate industry led development of the IAP
- commit to addressing identified drivers and barriers to growth
- to assist industry to identify the appropriate resources needed to re-align to the new industry priorities developed in the IAP.

Why are IAP's being developed?

The Government has established industry-led taskforces to develop Industry Action Plans to position key sectors of the NSW economy for strong growth, resilience, improved innovation and productivity, global competitiveness, and new investment opportunities over the next decade.

The development of the IAP's is an important element of *NSW 2021*, the Government's 10 year strategic plan. The decade to 2021 will present both opportunities and challenges for our cities, towns, businesses and communities.

For example, our position in an increasingly connected global economy, with fluid markets and consumer demand, advances in new technology and a growing and ageing population, are just some of the mega-drivers that we need to navigate.

The IAP will help NSW industries meet these challenges as well as capitalise on opportunities.

Why does the Agricultural sector need an IAP?

The selection of the Agriculture sector to develop an IAP by the Innovation and Productivity Council was based on information contained in a report by Access Economics ("The NSW economy in 2020 – a foresighting study" Aug 2010) and driven by a number of considerations such as:

- agriculture represents a significant contributor to the economy
- agriculture needs to be positioned to take advantage of opportunities that may be identified in the IAP and that are expected to grow rapidly over the period to 2020
- agriculture should maximise potential for export growth
- agriculture should support activities which have a substantial positive impact on the international competitiveness of other industry sectors in NSW.
- Agriculture needs to modernise and commercialise, adopting new technologies and clever solutions, whilst maintaining its focus on profitability

What are the key elements of an IAP?

An IAP will document the explicit actions that both Industry and Government will undertake to support industry growth and development. The IAP will include:

- a long-term vision for the industry
- analysis of the opportunities, challenges, risks and barriers facing the sector
- a regional economic and employment perspective

- implications for small and medium sized businesses in the industry
- policy actions and designs that will help the sector be competitive
- detail of industry and regional specific opportunities for growth and export
- proposed actions by both industry and government to promote growth of the sector to enable it to capitalise on the opportunities/address the challenges identified
- key performance indicators and targets.

What is the scope of the Agriculture IAP?

For the purposes of this discussion paper, the Agriculture IAP Taskforce has defined the agriculture industry to be:

“Agriculture is the use of natural and man made resources for the production of food, fibre and other products. The sector includes the early stage processing of agricultural commodities and service providers to the sector”

The taskforce has determined that the Agriculture IAP will include aquaculture because of the similarity of issues and constraints, but it will not include other primary industries such as wild catch fishery or forestry.

What is the role of the Industry Taskforce?

Development of the Agriculture IAP will be undertaken by a small (less than 10 members) focused industry-led taskforce. Some members of the taskforce will be drawn from the newly created Primary Industries Ministerial Advisory Council and that Council will be a key reference and support group for the taskforce.

In developing the IAP, the taskforce will undertake consultations with key stakeholders including major businesses (including processing, manufacturing etc), industry groups, education institutions, research organisations and Government agencies (at Commonwealth, State and Local levels, where appropriate).

The taskforce will employ consultative mechanisms that allow for a broad range of stakeholder input. Regional consultations will also be undertaken. An issues paper has been prepared to provide background to the taskforce.

The NSW Innovation and Productivity Council will oversee and contribute to the development of all IAPs to ensure consistency and to provide advice on innovation and productivity issues.

Government actions in the IAP will ultimately be presented to the Minister for Primary Industries and the Deputy Premier. The IAP recommendations will be subject to Cabinet consideration before a Government response is made. The taskforce is to include within the IAP advice on how recommendations should be implemented.

What are the terms of Reference for the IAP?

That the Industry Taskforce will submit an Industry Action Plan that:

- outlines a vision and 10 year development strategy for the industry, including 2 year and 5 year goals
- articulates ways to achieve the vision, including priority issues to be addressed (including, but not limited to, skills, regulations and regulatory barriers, innovation and productivity, research and development, infrastructure and policy reform)
- proposes ways to build stakeholder engagement and commitment in delivering long-term industry development needs

- identifies drivers for and barriers to growth and innovation in the industry (including those caused by Government practices, as well as identifying specific issues facing regional businesses and small to medium enterprises)
- identifies and validates the key domestic and global trends, opportunities and challenges for the industry's development (including for regional NSW and small business development)
- develops detailed recommendations and rationale for the strategies and actions proposed to be undertaken by industry, industry associations, educational and research institutions, and Government. Strategies and actions should encourage sector growth, enhance productivity and innovation, improve export performance and, where required, facilitate structural adjustment
- identifies key performance indicators, progress and outcome metrics, clear benchmarks and timeframes for major initiatives
- identifies roles and responsibilities for the delivery of the IAP's recommendations, and outlines mechanisms to oversee and report on the progress of its implementation.

The Industry Action Plans are being developed within a tight fiscal environment where there are budgetary pressures for both the Government and for industry. Therefore, the IAPs are not expected to commit industry or the NSW Government to the injection of large amounts of additional funding.

Who is on the taskforce?

The NSW Primary Industries Minister appointed the Agriculture IAP Taskforce in April, 2013. The taskforce brings together our leading agriculture thinkers from key beef and sheep, cropping and rural service sectors. It consists of:

- Lucinda Corrigan (Chair) – Beef producer
- Michael Murray – Cotton Australia
- Barry Walker OAM – Wool & Sheep Industry
- Peter Wright – Chairperson, RSPCA
- Chris Cummins – Breakout River Meats, Cowra
- Alister Bennett, Head of Product Management and Development, Rabobank
- Gerry Lawson, Director, Sunrice
- Ian Cartwright – Fisheries Review Panel
- David Goodfellow, Group General Manager, Elders Ltd.

What are the timelines for the Agriculture IAP?

Duration	Action	Date
Month 1-2	Development and Release of issues discussion paper	April / May / June 2013
Months 2-4	Seek industry/stakeholder input through interviews, stakeholder meetings and public consultation on issues paper	July / August
Month 5	Release of draft Industry Action Plan for final consultation	September / October
Months 6-9	Seek industry/stakeholder input through interviews, stakeholder meetings and public consultation on draft Industry Action Plan	November / December
Month 10	Submit final IAP to Government	January 2014
Month 11	Public release of final IAP	February
Month 12 -13	Release Government Response to taskforce recommendations, following Cabinet approval	March / April