

RDA WHEATBELT SUBMISSION TO THE GREEN PAPER ON AGRICULTURAL COMPETITIVENESS

Regional Development Australia (RDA) is a national initiative which seeks to grow and strengthen the regions of Australia. Made up of 55 committees, the network of RDA committees covers metropolitan, rural and remote regions across the country. RDA committees are strong advocates for their region and drivers of change and, as such, have a pivotal role in ensuring the long-term sustainability of regional Australia. RDA committees focus on the economic and social issues of importance to communities in their region.

RDA Wheatbelt is an incorporated not-for-profit community-based organisation and is one of the 55 committees that make up the national network of Regional Development Australia. Representing the interests of the Wheatbelt region of Western Australia, RDA Wheatbelt engages with 43 Local Government Authorities and other stakeholders across a geographical area of 154,862 square kilometres, extending out to the north, east and south east of the Perth metropolitan area.

This submission is made on behalf of RDA Wheatbelt and provides responses to several of the questions raised throughout the Green Paper.

Importance of the Agricultural Sector to the Wheatbelt

Australian Bureau of Statistics (ABS) census data from 2011 indicates that around 59,300 people were employed in agriculture in the Wheatbelt region. The Wheatbelt accounts for 5 per cent of total employment in Western Australia and 46 per cent of all people employed in the Western Australia agriculture, forestry and fishing sector.

The agriculture, forestry and fishing sector (12,024 people) was the largest sector in terms of employment in the Wheatbelt which represented 20 per cent of the region's workforce. Of this 91 per cent worked in agriculture, 6 per cent worked in support services for the agriculture, forestry and fishing sector, 1 per cent were employed in aquaculture and 1 per cent worked in fishing, hunting and trapping. In addition, an estimated 1014 people were employed in food product manufacturing (included in manufacturing sector employment figures).

Consistent with national trends showing a reduction in the number of people who work in agriculture, the Wheatbelt has witnessed a significant decline in employment figures in this sector since the 2006 census, dropping from 33.3 per cent, except in the horticulture sector which saw significant employment growth on the central coast¹.

¹ Wheatbelt Workforce Development Alliance, Wheatbelt workforce development plan 2013-2016, Department of Training and Workforce Development



In 2010–11 the gross value of agricultural production (GVAP) in the Wheatbelt region was \$2.7 billion, which was 50 per cent of the total gross value of agricultural production in Western Australia (\$5.4 billion) for 2010–11.

The Wheatbelt region has a diverse and important agricultural sector. In 2010–11, this region accounted for the total value of Western Australian asparagus and passionfruit production, approximately 93 per cent of oat production, 89 per cent of olive production, and 74 per cent of vegetables grown for seed.

The most important commodity in the region, based on the value of agricultural output, was wheat. In 2010–11, wheat contributed 31 per cent (\$846 million) to the total GVAP in the Wheatbelt region. Wool, and sheep and lambs, each accounted for 16 per cent (\$444 million and \$423 million, respectively) of the total gross agricultural production. Canola (\$220 million) and barley (\$206 million) each contributed approximately 8 per cent to the gross agricultural production of the region.

ABS data indicates that in 2010–11 there were 6,474 farms in the Wheatbelt region with an estimated value of agricultural operations of more than \$5,000 (Trestrail, Martin, Corrie & Frakes, 2013²). The region contains 52 per cent of all farm businesses in Western Australia. Mixed grains and livestock (2129 farms) were the most common, accounting for 33 per cent of all farms in the Wheatbelt region, and 85 per cent of all mixed grains and livestock farms in Western Australia.

Infrastructure

The criticality of technology and transport as key infrastructure to drive productivity and access to markets for agriculture in the Wheatbelt cannot be underestimated. Given the predominance of mixed grain and livestock farms in the Wheatbelt, investing in transport infrastructure is vital to the competitiveness of the agricultural sector in the region. An extensive national, State and local road and rail network currently serves the Wheatbelt region and plays an integral role in inter-regional and interstate freight, enabling access to both domestic and export markets.

The Wheatbelt is essentially the gateway between Perth and the north of WA and the east coast of Australia with more than 43,000km of roads, of which 11,370km, or less than 30 per cent, are sealed³. The most important road links include the Great Northern Highway, Great Eastern Highway, Great Southern Highway, Brand Highway, Indian Ocean Drive and the Albany Highway.

The rail network serving the Wheatbelt is vital to the regions grain industry, providing the means of moving the majority of grain to ports for export markets. The rail network consists of a combination of standard and narrow gauge lines. The standard gauge line forms part of the interstate mainline which links Western Australia to the Eastern States and transports the majority of general freight along that transport corridor. The 2,300 kilometre narrow gauge line forms the grain rail network that services the region and transports export commodities through to ports in Geraldton, Bunbury, Albany, Esperance and Fremantle. Because of this connectedness there is great potential for the development of inland ports or intermodal hubs to receive and distribute goods.

Western Australian grain growers delivered a record 15.85 million tonnes of grain⁴ through the state's primary grain handler, CBH (Cooperative Bulk Handling) in the 2013-2014 harvest, which equates to 90-95 per cent of the grain produced in the state⁵. The previous 2012-2013 harvest, CBH received 9.1 million tonnes of grain and moved 6.52 million of that total tonnage to port by rail up from an average of 6.05 million tonnes⁶. The rail network utilised by

² Trestrail C, Martin P, New R, Corrie K, Frakes I, 2013, Agriculture, Fisheries and Forestry in the Wheat Belt region of Western Australia 2013, ABARES About my region 13.42, Canberra, March.

³ Western Australia Planning Commission (2011), Wheatbelt Regional Profile (Draft).

⁴ 'CBH exports WA's biggest grain shipment', CBH media release, 10th February 2014

⁵ Stretch T, Carter C, Kingwell, R, January 2014, The cost of Australia's bulk grain export supply chains: An information paper

⁶ 'Creating and returning value to growers, 2013 CBH Annual Report



CBH is graded in tiers 1, 2 and 3 in declining order of most to least essential to the operations of the grain freight network. The ongoing concerns between CBH and Brookfield Rail, which leases the rail lines, have led to the closure of Tier 3 rail lines causing much of the rail grain freight to be redistributed via the dated road network.

Alongside this shift in freight patterns from rail to road, there are also major port infrastructure investments earmarked for the Bunbury Port. Global agribusiness Bunge has recently launched its bulk grain facility at Bunbury Port in a hope to establish itself as a competitor to CBH. The port is also set to expand following the recent approval of a \$500 million export facility for coal from Griffin Coal in Collie. The current road network is not fit-for-purpose to cater to the increased heavy vehicle road usage, with overtaking lanes and road quality the biggest concern. The bottlenecks in the road infrastructure impacted by the closure of Tier 3 rail and the expansion of the Bunbury Port need to be carefully considered when planning for future major infrastructure developments.

RDA Wheatbelt supports the Government's current investment into major road infrastructure such as the Great Northern Highway – Muchea to Wubin Upgrade Stage 2 which has been jointly funded with \$384.8 million from Federal and State Governments. Recent stakeholder forums to provide feedback to these planned Great Northern Highway upgrades echoed the policy recommendation that broad consultation is paramount to understanding local infrastructure needs. This ensures that new and innovative ideas have the opportunity to inform infrastructure planning and funding decisions.

Access to communications continues to be a challenge for farm businesses in the Wheatbelt. The agricultural industry is one of the most innovative industries in Australia, but access to leading edge research, information and technology is severely limited by the communications infrastructure. The Regional Mobile Communications Project (RMCP) has deployed new mobile communications infrastructure at 113 sites across the State, including 16 Wheatbelt locations. Whilst this has increased the coverage in the region, there are still a number of black spots where mobile reception is not available at all. Slow and unreliable internet speeds hinder the development and growth of agricultural businesses and put them at a significant disadvantage to their metro counterparts and foreign competitors. A large percentage of remote communities rely solely on the Interim Service Satellite (ISS) which has a fraction of the capacity of the high speed broadband.

RDA Wheatbelt supports the policy idea of enhancing communications to assist farmers and regional communities to use the communications infrastructure currently being deployed. RDA Wheatbelt has been an effective conduit of information working closely with the Wheatbelt Development Commission to relay information pertinent to the RMCP deployment and NBN rollout. RDA Wheatbelt was also integral to the switching on Digital TV, being awarded the contract to liaise and engage with all Wheatbelt communities to ensure that they were ready for the switchover. Despite having the highest and most broad number of challenges, the Wheatbelt successfully transitioned from analogue to digital TV on 25th June 2013.

Working with States and Territories

RDA Wheatbelt agrees with the Government's aim to utilise the Council of Australian Governments (COAG) and individual States and Territories to reduce regulation, remove duplication and make it easier to interact with all levels of government. As a Federal Government initiative, RDA Wheatbelt is committed to developing strong working relationships with our State Government equivalent, Wheatbelt Development Commission (WDC), and many other departments, organisations, agencies, businesses and communities.

On a regional level, RDA Wheatbelt and WDC collaboratively developed the Wheatbelt Strategic Framework in 2012 as a basis for influencing policy direction and implementing initiatives that will contribute to the sustainability of the region. This collaborative process reiterated the importance of cooperation amongst stakeholders and the holistic approach to sustainable development. The Wheatbelt Strategic Framework acknowledges that the delivery of all projects will only be achieved through key partnerships with a stakeholders and identifies the focus areas for each.



This sharing of information, knowledge and resources has reduced duplication between agencies and made it easier for Wheatbelt residents to interact with RDA Wheatbelt, WDC and Local Government Authorities (LGA).

Effective information flow regarding relevant regulation, policy and initiatives is key to engaging the farming community to address issues such as natural resource management, land use and concessional loans. This thorough and responsive consultation is needed for any infrastructure investment and development to ensure maximum return on investment for Federal, State, Local Governments and private stakeholders. When engaged in the process, farmers will generally understand and acknowledge with the Government's decision, which in turn assists them plan for the future. For the example listed in the Green Paper regarding the removal of excess work health and safety requirements, RDA Wheatbelt advocates that there should be equal emphasis on the reform of these requirements as to educating the agricultural industry about the need for them. Farm motorbike accidents continue to be a huge concern, even despite regulation and efforts made by organisations such as FarmSafe.

RDA Wheatbelt believes that more informed public debate needs to occur around the impact of the mining on the agricultural sector. The value of mining in the Wheatbelt has increased by 220 per cent in the five years leading up to 2011-12 with a Gross Regional Profit (GRP) of \$2.7 billion, compared to \$6.4 billion in agriculture that same year. RDA Wheatbelt acknowledges the Mining Act 1978 (WA)⁷ prevents land owners to claim royalties for mineral deposits but strongly advocates that adequate compensation is made to counter the ongoing impact including loss of income due to reduced arable land and the impact of natural resource base.

RDA Wheatbelt agrees with the Government's commitment to working with States and Territories to address concerns affecting the Wheatbelt such as wild dog control, a 'One-Stop Shop' for environmental approvals, delivering Farm Finance Concessional Loans and delivering Drought Concessional Loans and emergency water infrastructure. Clarity around where to access information and broad public promotion of collaborative initiatives to address these concerns are strongly supported by RDA Wheatbelt.

Competition and regulation

As noted in the Green Paper overview, the graph illustrating the severe decline of farmers' share of price in the century up until 2000, it is a common euphemism that farmers are the only professionals 'that buy at retail and sell at wholesale'. This is further compounded by uncontrollable environmental and economic factors that affect farmers' ability to influence over their price. And whilst the majority of the agricultural output of the Wheatbelt is largely attributed to cereal crops and livestock, the growing horticultural and aquacultural sectors are impacted by duopolistic tendencies the supermarket chains. This narrow scope at the end of the supply chain is also slowly filtering back up with wholesalers now being locked into partnerships and contracts, further diminishing a producers options for getting produce to market.

RDA Wheatbelt strongly supports the Federal Government's initiatives into ensuring that optimal levels of competition are achieved along the supply chain and that transparency is fundamental to any marketplace arrangement.

RDA Wheatbelt also supports the improved regulation pertinent to the efficiency of agricultural and veterinary chemicals regulation as well as country of origin labelling for food.

⁷ Mining Act 1978 (WA) s. 123 (Austl.)



Foreign investment

Australia has always relied on foreign investment to meet shortfalls in domestic savings⁸. Foreign investment in Australian agribusinesses and agricultural land has also benefited from this financial injection into capital, technology and broader global supply sources. Unfortunately, the debate around foreign business and land ownership is marred by misinformation and negative media resulting in three out of five Australians being against foreign ownership of land⁹. This pessimistic view of foreign investment may not be warranted but there does need to be certain parameters around local ownership, job creation and investment back into local communities. RDA Wheatbelt supports greater collaboration, transparent and accessible information relating to foreign ownership and a more informed public discussion about the challenges and opportunities available to agriculture in the Wheatbelt.

Education, skills and training, and labour

Family farms have been the traditional model of agricultural operation in the Wheatbelt. As economies of scale and advancements in technology continue to alter the human resource need on farm, smaller family farms in the Wheatbelt are being bought-out by next door neighbours and/or the traditional model is becoming more corporatised. Anecdotally, many parents involved in family farming are encouraging their children to consider alternative career pathways, creating negative impressions about agricultural careers and dissuading the continuation of family farming. Conversely, those young people interested in a career in agriculture whom don't have an opportunity through the generational family farm, are finding it increasingly difficult and disheartening to pursue their career aspirations.

This negative stigma associated with agricultural careers can be stemmed if agriculture was imbedded into the primary and secondary curriculum, if not as an entire subject stream but as a key focus area of learning. Whilst nutrition does not form part of the White Paper on Agricultural Competitiveness scope, it is a key component of agriculture and growing concern within the wider community, with childhood obesity at alarming rates. Agriculture has obvious links with subjects such as home economics, biology, chemistry, information technology and geography but could also be imbedded into subjects such as mathematics, languages, art and music.

As such, RDA Wheatbelt supports the Federal Government's commitments to the Agriculture in Education initiative and implores the support regional, rural and remote (RRR) students specifically, even beyond the measures outlined in the Green Paper. It is widely known and published the RRR students are significantly worse off than their metro counterparts in terms of cognitive outcomes¹⁰ and educational outcomes¹¹ which directly correlate to a child's development. Extrapolating this further, RRR students are then less likely to finish school and/or complete tertiary education, increasing their debt burden and diminishing their prospects of contributing to society. It could also be argued that RRR students are more likely to consider careers in agriculture or remain in rural Australia because they have a higher likelihood of exposure to this industry and community in their formative years.

RDA Wheatbelt is the provider of the Youth Connections program for the Wheatbelt region until 31st December 2014 and during the 5 year contract, has assisted in excess of 900 young people who are disengaged from education and not in paid employment. Further education and employment opportunities are limited and the Wheatbelt youth unemployment rate has increased by 16 percentage points in the last decade to 23.3 per cent, compared 10.4 per cent in WA overall and 12.6 per cent nationally¹². RDA Wheatbelt would strongly support Government initiatives to

⁸ Moir B, 2011, Rural Industries Research and Development Corporation, Department of Agriculture, Fisheries and Forestry (ABARES), 'Foreign investment and Australian agriculture'

⁹ Oliver, 2014, The Lowy Institute Poll 2014, Lowy Institute, Sydney

¹⁰ Edwards B & Baxter J, 2013, Australian Institute of Family Studies, Research Report No. 25, 'The tyrannies of distance and disadvantage: Factors related to children's development in regional and disadvantaged areas of Australia'

¹¹ Lamb S, Glover S & Walstab A, 2014, 'Educational disadvantage and regional and rural schools'

¹² Cassells R, Dockery M, Duncan A, Gao G, Leong K, Mavisakalyan A, 2014, Workforce and Skills. Western Australian labour markets in transition, Bankwest Curtin Economics Centre, Focus on Western Australia Series, Issue 14/3, August 2014



assist in addressing this alarming youth unemployment rate through the implementation of a work experience or employment program that offers opportunities to regional youth already exposed to agriculture and rural life. By enhancing employment pathways for young people into agriculture the Government will be addressing a considerable social issue in rural communities as well as countering the ageing demographics of the farming population.

Notwithstanding the support and encouragement of agriculture as an exciting and fulfilling career prospect, RDA Wheatbelt agrees with the sentiments expressed in the Green Paper relating to likelihood that the agricultural sector will need foreign labour to bolster its workforce. The cereal cropping seeding and harvest periods depend heavily on a seasonal workforce, many of whom are Skilled Temporary Work (457) visa holders. The growing horticultural industry within the Wheatbelt has also benefitted greatly from the Seasonal Worker Program. The stress that environmental and economic factors impose on already tense seasonal periods, is further compounded by the onerous application process and limited skill scope of the visa programs. RDA Wheatbelt strongly supports the streamlining and reduction of administrative burdens to ensure that these seasonal periods maximise yields and potential profit.

And whilst it is State-based issue, RDA Wheatbelt would like to acknowledge the negative impact that the introduction of the primary school tuition fee for 457 visa holders has on those families contributing to the Wheatbelt agricultural industry. For many families whom have relocated to the Wheatbelt to form a welcome part of our vibrant communities, the \$4,000 per annum, per student levy for families collectively earning over \$75,000 is major cost and disincentive to relocate to Australia. 457 visa holders are significant and much-needed contributors to the agricultural workforce and RDA Wheatbelt supports initiatives that enable them to continue to enjoy, live and work in our region.

Drought

As referenced in RDA Wheatbelt's submission to the Issues Paper, a long-term view of managing and mitigating the impact of drought in regional communities is paramount. The recommendations specified in the 'Review of the pilot of drought reform measures in Western Australia'¹³ advocate for well-deliberated farm business planning and training. These proactive measures also recommend that any planning or training to be undertaken is done so in the context of encouraging women's participation as an active and vital part of family farms as well as appropriate delivery methods, catering to diverse skills and knowledge.

Mental health continues to be a significant concern within the Wheatbelt agricultural industry and wider community. Centralised services and lack of telecommunications to be able to access remotely delivered services increases the barriers to access for Wheatbelt residents. RDA Wheatbelt strongly supports any by-partisan, targeted, collaborative initiatives that assist with managing and mitigating the long-term impacts of drought and the mental health challenges associated with severe weather events.

¹³ Keogh, M., Granger, R. and Middleton, S. 2011, Drought Pilot Review Panel: a review of the pilot of drought reform measures in Western Australia, Canberra, September.



Water and natural resource management

Whilst agriculture has had a long and successful history in the WA Wheatbelt, the development of land for farming has had some negative effects on the region's natural resources¹⁴. Traditional cropping and grazing management practices have subsequently contributed to the development of a number of soil health issues in the region¹⁵. According to the Wheatbelt NRM Soil Health Guide, the highest priority management issues for farmers is wind erosion, soil fertility, secondary salinity and soil acidity. Erodibility of soils can be reduced if more than 50 per cent of attached ground cover is maintained. Dryland salinity is a major cause of land degradation and remains a threat to 2.8-4.5 million hectares of highly productive, low-lying or valley soils in WA. Currently, 16 per cent of the Avon River Basin is at high-risk of dryland salinity and this is expected to increase to 21 per cent by 2050.

Over the past century, agriculture in the WA Wheatbelt has been recognised as highly innovative and responsive to the changing environments and best land management practices. To ensure that this region continues to be agriculturally productive and that the natural resources are improved, there needs to be a direct effort to promote further innovation in soil health. RDA Wheatbelt supports the Government's commitment to the National Landcare Program and recommends that farmers are a core focus and key stakeholder in all natural resource management endeavours. Support to implement and adopt innovative and sustainable farming practices such as the soil conservation incentive program (SCIP) outlined in the Wheatbelt NRM Soil Health Guide, would also be welcomed.

Research, development and extensions (RD&E)

Western Australia has an extensive and growing number of grower groups which form part of the Grains Research and Development Corporation (GRDC) funded Grower Group Alliance. These localised grower groups are able to respond to research needs relevant to their area and crop mix with financial streams ranging from government grants to self-funded payments. This swelling number of grower groups could be attributed to the lack of relevance of and perceived connection to the larger, national research and development corporations but conversely, could also duplicate research and divert funding away from collaborative and more comprehensive RD&E.

RDA Wheatbelt strongly supports the establishment of a new body or tasking existing bodies to coordinate cross-sector research, reducing duplication and maximise research, development and extension outcomes. This will enable the critical research and development to be fully extended into and applied through grower groups and in-turn drive productivity gains.

Biosecurity

Whilst cereal cropping and livestock continue to be the predominant sector within the Wheatbelt agricultural industry, there is growing diversification into other sectors, such as horticulture in the Central Midlands and Coastal subregion. Geographic isolation ensures a natural biosecurity system from other similar sectors across the country suffering challenges around fruit fly and other insects. As such, Wheatbelt horticulturalists use minimum pesticide on their produce resulting in near chemical-free fruit and vegetables, fetching premium prices in domestic and especially international markets, where quality is the highest purchase priority. RDA Wheatbelt strongly supports the Government's commitment to the coordination of a national fruit fly strategy to ensure the sustainability and viability of these diversified farming operations within our region.

These horticultural operations vary in size with most delivering in to Perth for domestic market. The Central Midlands and Coastal subregion is predicted to increase its horticultural production, especially in citrus, with two large producers yet to achieve peak yields. As the domestic market becomes saturated with local produce, there will

¹⁴ Wheatbelt NRM, 2013, Wheatbelt NRM Soil Health Guide, Wheatbelt Natural Resource Management, Northam, WA

¹⁵ Simons J, George R and Raper P, 2013, Report card on sustainable natural resource use in agriculture, Department of Agriculture and Food, Western Australia



be an oversupply and need explore other markets, such as exporting into highly populated countries such as China and India. As this avenue is only just beginning to be fully explored, there will be scope to support the varying horticultural operations as well those exporting the more established cereal cropping and livestock farmers looking for new markets.

As noted in the Green Paper, RDA Wheatbelt supports the provision of improved information and intelligence gathering tools. On the assumption that telecommunications infrastructure is available to farmers and regional communities, crowdsourcing initiatives to assist in gathering information such as the Fireballs in the Sky¹⁶ initiative by Curtin University and Inspiring Australia or community reporting systems such as the Adopt-A-Hydrant¹⁷ web application developed for the city of Boston, USA.

Accessing international markets

As the highly populated developing countries such as China and India seek new supply chains for their growing and changing demand for food, Australia is well-placed to continue to provide high quality bulk commodities as well as new niche agricultural products. Wheatbelt producers have long been consistent suppliers of bulk commodities such as cereal grains and oilseeds for export markets. The comparative advantage that Wheatbelt bulk commodity production offers has been valuable in the past two decades as Chinese domestic agricultural production has shifted from cereal and rice to cash crops. Smaller Chinese farmers are now satiating a large segment of the domestic fruit and vegetable supply providing an opportunity for Wheatbelt producers to meet the gap in supply of bulk commodities.

Whilst bulk commodities still remain the predominant agricultural product in the Wheatbelt, the diversification into areas such as horticulture, aquaculture and specialty grains offer opportunities in the higher-end, quality niche export markets not currently being met by domestic supply. Improved land management practices, innovative technology and greater communication along supply chains beyond the traditional markets have opened up opportunities for Wheatbelt producers. RDA Wheatbelt also acknowledges and commends the Federal Government's efforts in concluding the China-Australian Free Trade Agreement (ChAFTA) and the signing of the free trade agreements with the Republic of Korea (KATFA) and Japan (JAEPA). Aligning the export demand, domestic production and improved trade relations provides significant counter-seasonal and alternative supply opportunities for many Wheatbelt producers, whom would otherwise depend on the market price given in the domestic supply chains.

For smaller Wheatbelt producers aiming to leverage the opportunities available in export markets, it is currently limited by the lack of coordinated effort by the State and national government trade and agricultural departments. There is already a small percentage of Wheatbelt producers selling niche products such as freshwater crustaceans, specialty grains and horticultural products into export markets and most have established these connections individually and with great investment of time and financial resources. From an international perspective, Australia is seen to produce clean, quality food and values the relationship built with the supply chain. By promoting State-based or regional-based produce into an export market, the message of 'brand Australia' is diluted. RDA Wheatbelt supports collaborative international relations and a marketing effort to create and build upon 'brand Australia' so that Wheatbelt producers can easily and effectively market their produce into lucrative export markets.

To support the supply, marketing and branding of quality Australian produce into new and existing markets, it is imperative that comprehensive research is undertaken before any capital investment is committed. This research will enable producers to respond directly to market needs and plan accordingly. By enabling Australian producers to respond effectively to both domestic and export demand, the physical logistics and relationships along the supply

¹⁶ Fireballs in the Sky <http://www.fireballsinthesky.com.au/>

¹⁷ Adopt-A-Hydrant web application <http://www.atelier.net/en/trends/articles/boston-uses-crowdsourcing-keep-its-fire-hydrants-serviceable-420721>



chain will reduce inefficiencies and improve bottom line returns. As noted in the Green Paper, exporter readiness training would be vital to achieving this and RDA Wheatbelt encourages this coordinated and whole-of-supply-chain focus.

As also reiterated in the Green Paper, the Australian agricultural industry is able to supply not only premium, quality produce but also innovative research, education and technologies which has substantial export potential. Noting that Australia produces only 1 per cent of the total global value of agricultural production, yet, for example, Wheatbelt farmers are some of the most effective dryland farmers in the world, there is significant opportunity to export our vast skills base and expertise. This two-way learning could form part of high-level RD&E through science organisations such as CSIRO, ACIAR and RIRDC to knowledge transfer as part of holistic international aid and development.

