



Australian Government

Department of Agriculture,
Water and the Environment

Delivering Ag2030

April 2022



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Minister's foreword



The 2022–23 Budget delivers over \$600 million to a broad range of initiatives supporting trade, exports, biosecurity and regional communities across agriculture, fisheries and forestry. Measures announced as part of this year's budget builds on over \$300 million committed in the 2021–22 Mid-Year Economic and Fiscal Outlook and \$850 million committed in the 2021–22 Budget.

The Australian Government remains committed to supporting industry to reach its goal of \$100 billion by 2030. Government's role is to support industry by getting the framework and policy settings in place to allow industry to flourish.

The government has committed over \$6 billion in support across the 7 themes of *Delivering Ag2030*, which sets the foundations for industry to not only achieve its goal, but to help farmers build resilience and access new markets across the world.

The facts say it all – even with devastating drought, bushfires, floods, COVID-19, and global trade disruptions, the agriculture industry has grown 21% in 2020–21. Our primary industries are forecast to be worth a record \$86.8 billion in 2021–22, up from \$67.1 billion in 2019–20.

The government's *Delivering Ag2030* plan focuses on supporting this growth into the future across 7 themes – making exporting easier by streamlining our processes; continuing our record investment in, and strengthening of, our biosecurity systems with funding of more than \$600 million; delivering a well-functioning voluntary biodiversity market providing a new income stream for farmers; supporting a nationally focused digital innovation systems across the whole supply chain, delivering value for all Australian; identifying future water infrastructure needs; and ongoing investment in our most precious asset – our people.

Every year, the government is continuing to fund each of the *Delivering Ag2030* themes to create more prosperity and jobs in rural and regional Australia and contribute to the country's commitment to reduce emissions.

Agriculture, already one of Australia's greatest assets, reached new highs in 2021 and carries this momentum into 2022 and beyond. Our government will continue to work with the agriculture industry to see it thrive as a key pillar of our nation's economy and society into the future.



The Hon David Littleproud MP
Minister for Agriculture and Northern Australia

Agriculture Industry at a Glance



\$81.0b

forecast gross value of
farm production
in 2021–22

Top five:



\$14.7b

Cattle



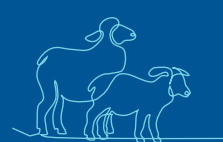
\$11.5b

Wheat



\$5.5b

Fruit & nuts



\$4.9b

Sheep



\$5.0b

Milk



\$5.8b

Fishery and forestry sector

Over 90%

of the daily food consumed in Australia
is made by Australian farmers



Australian farmers
produce enough food for

80 million people

Around 70%

of Australia's agricultural
produce is exported



Over 300k

people are employed in
the agriculture sector

229k

people are employed in
the food and beverage
manufacturing sectors



Introduction

Ag2030

The Australian Government is continuing to support the agriculture industry as it works towards reaching its goal of \$100 billion in production by 2030 (Ag2030).

We are already implementing measures to help industry to reach its Ag2030 goal at community, industry, and national levels. We have reformed policy settings and frameworks, directed substantial funding to new initiatives to better support industry, and listened to the needs of industry. We are committed to continue to put in place the right foundations for industry to thrive and examine areas where additional investments are needed.

The Australian agriculture industry

The agriculture industry is a strong contributor to the Australian economy. The gross value of agricultural production is forecast to be \$86.8 billion in 2021–22, comprised of \$81.0 billion farm and \$5.8 billion in fishery and forestry production. It was one of the only industries to grow in value despite the challenges of 2020 and 2021, including bushfires, drought, floods, COVID-19, and global trade disruptions.

The industry provides significant employment opportunities across regional and rural Australia both directly and indirectly. Over 300,000 people are employed in Australian agriculture and a further 229,000 employed in the food and beverage manufacturing sector.

The strength of our agriculture industry is based on strong demand both at home and abroad. Around 70% of Australia's agricultural produce is exported, providing a reliable source of food and fibre to our trading partners. Of the food consumed domestically, over 90% is produced in Australia, ensuring our food security.

The challenge

Despite consistent growth, reaching \$100 billion by 2030 remains a highly ambitious goal. For the farming sector to reach \$100 billion, the annual growth rate will need to continue to increase, which will only be possible if industry is successful in harnessing emerging opportunities and increasing productivity and efficiencies.

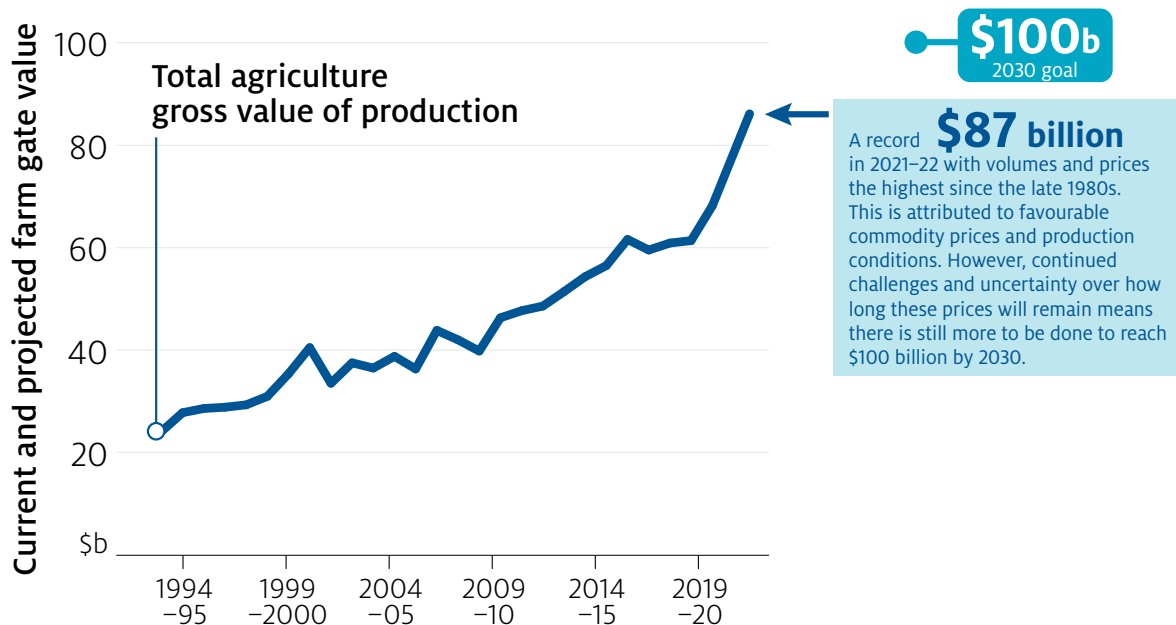
While growth is forecast for most of Australia's major export commodities, shifts in consumer preferences, increasing competition and changing trade relationships present challenges. Our agricultural exports both benefit from, and are vulnerable to, global market conditions and will be impacted by any reductions in world commodity prices. Agricultural exports will continue to be significantly impacted by global trade disruptions.

While agricultural exporters are proving adept at diversifying into new markets or taking advantage of changes in trade flows, capitalising on trade and export opportunities is fundamental to delivering the \$100 billion goal.

Markets, supply chains and our trade relationships are increasingly more complex. Australia will need to adapt quickly and continue to be proactive in our responses.

There are domestic challenges too. The strength of farmers' resilience against extreme conditions will continue to be tested as we are likely to experience more of the recent severe climate events, from drought to fires, and floods. To assure productivity and our excellent reputation for safe and quality foods, we need to maintain our essential pest and disease-free status in the face of rising global biosecurity threats, including in our region.

FIGURE 1 Ag2030: \$100 billion target a challenge



Source: ABARES.

Delivering Ag2030

While Ag2030 is an industry goal and industry will have a leading role in overcoming many of the challenges faced, the goal will not be achieved without the right foundations from government to help drive industry growth.

The government has committed over \$600 million to agriculture in Budget 2022–23 as part of its continued substantial investments in Australian agriculture across the 7 themes to support industry to reach its goal:

- ▶ **Trade and exports:** We are strengthening agricultural ties with major and emerging export markets, and we are making it easier to do business. This is delivering new trade and market access for producers, while also reducing red tape.
- ▶ **Biosecurity:** We are safeguarding Australia from exotic pests and diseases and maintaining Australia’s clean and green reputation, through the implementation of a range of measures to strengthen the biosecurity system. Good biosecurity is vital to protecting our agriculture, environment, health and regional communities and jobs, critical to our market access and to lower costs for our producers.
- ▶ **Stewardship:** We are ensuring Australian farmers are rewarded for their stewardship of land and water.
- ▶ **Supply chains:** We are backing fair, strong and resilient supply chains and putting in place the frameworks so everyone is treated fairly and pays their share.

- ▶ **Water and infrastructure:** We are supporting Australian farmers and rural and regional communities with infrastructure when and where it is needed.
- ▶ **Innovation and research:** We are providing the right conditions to modernise Australia’s agricultural innovation system, driving improvements in collaboration, commercialisation, and uptake to grow agricultural productivity and competitiveness.
- ▶ **Human capital:** We are making sure people and their communities, right across the agriculture industry and supply chain, have the support, infrastructure, and skills to do their jobs.

The government’s commitment to helping industry to reach its goal by 2030 means we need to continue to build the foundations for agriculture, and the broader Australian economy, to tackle challenges and capitalise on opportunities.

The future is looking positive, but success will require a sustained, collaborative effort across industry, government, and communities to make sure the foundations are strong, and industry has the best chance possible to achieve its goal.

Global Drivers and Trends



Premium supplier

Australian farmers enjoy price premiums due to our reputation as a producer of high-quality produce. We must ensure we maintain this reputation through our assurance and traceability systems and by taking into account changes in consumer preferences or international perceptions of our production systems.



Pest & disease status

Australia has an enviable pest and disease-free status, which allows us to access more markets and attract premium prices. We must maintain this status.



Free Trade Agreements

We have negotiated 15 Free Trade Agreements (FTAs) with 26 countries, giving Australian industry access to a wide range of markets. However, the trade advantages from the FTAs could be eroded as competitor countries achieve agreements with our partners.



Trade barriers

Trade barriers can prevent exporters from receiving premium prices. Globally, non-tariff measures have risen by 300% over 30 years, increasing costs to businesses. We need to continue our work to break down barriers and increase export opportunities.



World prices

Real prices of major Australian agricultural products have fallen dramatically since 1950. Although they have stabilised, they are unlikely to ever return to pre-1950 levels.



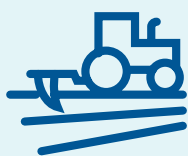
Climate

Australian farmers operate in one of the most variable environments in the world. Average rainfall across Australia's wheat/sheep zone has declined and become more variable, and extreme climate events are likely to become more frequent.

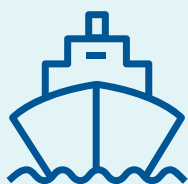
Theme 1

Trade and Exports

We are strengthening agricultural ties with major and emerging export markets, and we are making it easier to do business. This will deliver new trade and market access for producers, while also reducing red tape.



Australian farmers produce enough food to feed 80 million people



70% of the value of Australia's agricultural production is exported



Over 90% of food consumed in Australia is produced here

Getting our produce to the world

A continued focus on gaining, maintaining, diversifying, and expanding market access is essential to achieving the Ag2030 goal.

We are making transformative changes through a number of reform initiatives. These include the \$328.4 million Busting Congestion for Agricultural Exporters package, committed in 2020–21, followed by \$127.4 million to continue the transformation of our digital agricultural export systems. These initiatives will enable us to improve how we regulate trade to ensure Australian exporters remain competitive in the global marketplace.

We have already delivered targeted improvements, such as:

- ▶ a single digital export account where exporters can securely verify who they are, save time by reusing their details across export services and find status updates
- ▶ more secure access to meat product hygiene dashboards, supporting risk-based auditing and improving market access for establishments
- ▶ new cloud infrastructure to accelerate the delivery of digital services, while increasing the robustness, availability, security and performance of our services
- ▶ industry consultation to identify potential opportunities to reduce regulatory costs in the meat, live animal, seafood and plant export industries
- ▶ a meat export market access prioritisation framework, driving market expansion and access
- ▶ streamlining amendments to Approved Arrangements for meat establishments
- ▶ appointing a Seafood Export Facilitator to support exporters.

Reforms started under the Busting Congestion package will lead to annual government fees and charges being over \$20 million lower than without our investment from 2023–24 and generate between \$236 million and \$1.2 billion of other benefits to industry by 2030. These include decreasing the time it takes exporters to interact with our export systems as well as reducing losses from consignments that are distressed, returned or detained due to inaccurate information or inconsistencies in manually completed documents.

We announced an investment of \$72.7 million in December 2020 to help Australian agribusinesses expand and grow their export markets through the Agri-Business Expansion Initiative (ABEI). Building on initial successes in implementing ABEI, the MYEFO 2021 included an additional \$13.2 million, taking the total investment in ABEI to \$85.9 million.

Through ABEI we have placed short-term Agriculture Counsellors in 3 key markets: the United States, Saudi Arabia, and the Republic of Korea. Our network of overseas Agriculture Counsellors contributed to gaining market access that made an additional \$2.92 billion in export value during 2020–21.

These additional surge Counsellor deployments will play a significant role in supporting the agriculture sector's ambition to grow to \$100 billion by 2030. The new Agriculture Counsellor based in Washington DC is bolstering local engagement efforts and developing opportunities for premium agri-food products. A new Counsellor in Riyadh is helping to expand opportunities for exporters of meat and animal products to Saudi Arabia and the Gulf region. The new Counsellor posted in Seoul will play a lead role in opening opportunities for Australia's premium products such as seafood.

To date, \$19 million in grant funding has been awarded under the expanded Agricultural Trade and Market Access Cooperation (ATMAC) program. This means that all available funding for the 2020–21 and 2021–22 financial years has been allocated. We are working with Austrade to disseminate market intelligence to exporters, including through regular industry-government roundtables, a new digital intelligence portal and social media. Work on new and expanded market access is ongoing as we support agri-food producers and exporters to respond to and recover from trade disruptions in 2020 and 2021.

We have also appointed Australia's first Special Representative for Australian Agriculture, Ms Su McCluskey, to spearhead a more strategic program of international advocacy and representation under

the Global Agriculture Leadership Initiative. We have committed additional resources to advance national interests in the 3 international standard-setting bodies. Australia's sustainable agriculture credentials and our commitment to the rules-based order as a basis for trade, will be boosted through this initiative.

The digitisation of paper-based export services was also implemented during 2021. This means less processing time is required for exporters.

The government has invested \$1.043 billion in the International Freight Assistance Mechanism (IFAM) since April 2020, as a temporary measure to keep global airfreight links open through the pandemic. IFAM is funded to 30 June 2022, with an operational tail until 31 July 2022.

We delivered the reformed *Export Control Act 2020*. The reformed Act commenced in March 2021 and will improve the export control framework, making it easier for exporters to get their goods to market.

To protect the profitability and viability of the Australian timber product producers, we are investing \$0.9 million over 2 years in a series of studies to more effectively implement Australia's illegal logging laws. This helps protect the Australian market from being undercut by underpriced, illegally harvested timber products.

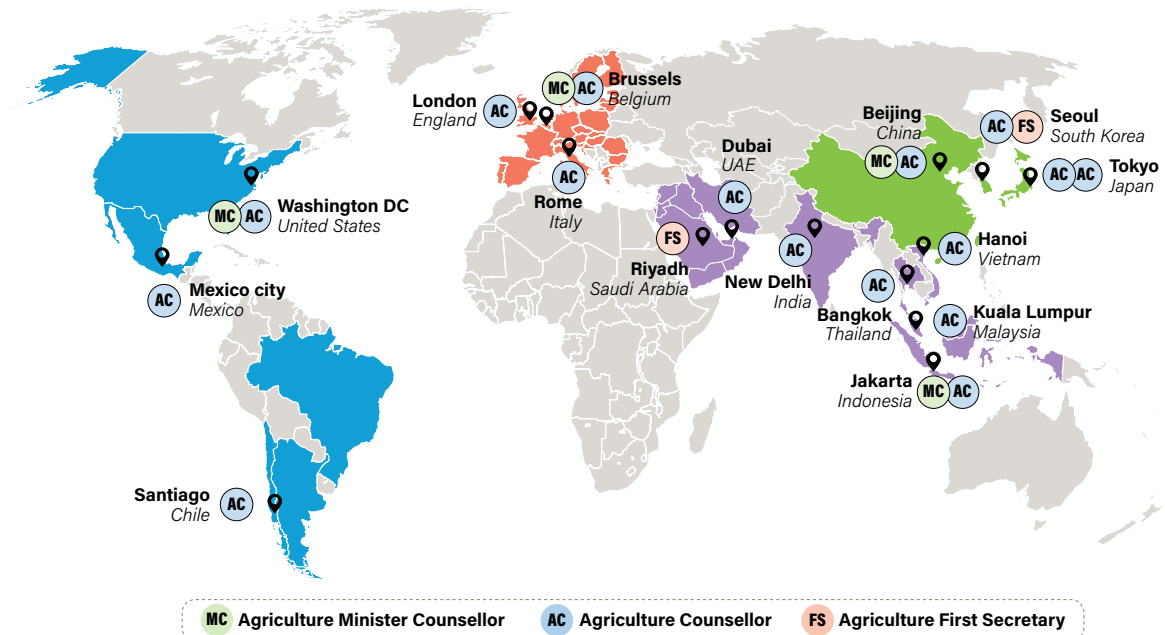
We are also expanding access to safe and approved agricultural and veterinary chemicals for Australian farmers to use responsibly and as needed, to boost farm productivity and strengthen responses to pests and diseases.

These initiatives are providing a foundation for industry to leverage our competitive advantages to unlock trade and export opportunities.

We have delivered 99 market access achievements for agriculture and food exports in the 2020–21 financial year, valued at \$2.92 billion, including:

- ▶ Approval of fumigation treatments for exports of canola, chickpeas, lentils, and wheat to Pakistan, facilitating the first Australian canola exports to Pakistan since 2017. Industry estimates the potential value of this export market to be \$200 million.
- ▶ Agreement for Australian seafood establishments seeking access to Taiwan to bypass lengthy and costly audit processes. Improved access is an important step in increasing our market share in Taiwan and diversifying our seafood export earnings.
- ▶ Gaining approval from Malaysia for a Queensland-based beef establishment to resume exports after losing access in 2018. Australia now has 17 establishments approved to export red meat to Malaysia, compared to New Zealand (11), the United States (1) and Japan (2). We continue to advocate on behalf of 8 additional red meat establishments awaiting approval.
- ▶ Agreement with India and Bangladesh on improved conditions for table grape and citrus exports, including in-transit cold treatment which is less damaging to the fruit than other treatments. Industry estimates put the potential value of this improvement at \$10.9 million over the next 2 seasons.
- ▶ Agreement with Taiwan on new arrangements to meet Taiwan's requirements for certification of Australian hay exports. Effective from 10 May 2021, export certificates for hay and straw issued and verified electronically, enable easier certification and acceptance practices and reduce the risk of trade disruptions. Australian straw and hay exports to Taiwan were valued at \$43.3 million in 2020.
- ▶ Agreement for irradiation as an accepted treatment option to manage fruit fly on exports of Australian strawberries, scallopinis, honeydew melons, rockmelons, and zucchinis to New Zealand. Horticulture exports to New Zealand were valued at \$228.0 million in 2020.
- ▶ Maintaining seafood access to Indonesia through advocating for acceptance of Australian health certificates. Trade from other countries, including New Zealand and the United States, has been paused for several months due to difficulties in meeting Indonesia's new health certificate requirements. Exports of Australian fisheries products to Indonesia were \$13.0 million in 2020.

Agriculture international representation – post locations and markets



The Agri-Business Expansion Initiative (ABEI) is on-track and investment to boost activity in this space is already delivering results.

- ▶ The share of agriculture exports to the top 5 markets fell from an average of 59% in the first halves of 2018–20 to 48% in the first half of 2021. This reflects exporters’ increasing recognition of the risks associated with relying on a limited range of markets, and the benefits associated with taking advantage of Australia’s technical access to a range of other trading partners.
- ▶ ABEI has supported our red meat exporters gaining additional access to Vietnam’s \$1.7 billion red meat market. A \$1.5 million Agricultural Trade and Market Access Cooperation grant is enabling Meat and Livestock Australia to capitalise on this outcome by funding a business development specialist for the Vietnamese market, as well as new business development specialists in Thailand and Saudi Arabia.
- ▶ Barley was an early commodity impacted by trade disruptions. Through the ABEI, Grains Australia secured an Agricultural Trade and Market Access Cooperation grant of over \$0.9 million in collaboration with major grain peak bodies. Saudi Arabia has emerged as a leading importer of Australian grains, including wheat and barley, and increasing access to the Saudi Arabia market will benefit from the recent deployment of a short-term Agriculture Counsellor funded through the ABEI over the next 12 months.

The government is delivering:

- ▶ \$328.4 million to bust congestion for agricultural exporters
- ▶ \$68.4 million to shore up Australia's agricultural traceability systems and increase access to premium overseas markets, including through establishing a National Agricultural Traceability Alliance between government and industry to foster national leadership, as well as a National Agricultural Traceability Hub to develop a roadmap for action and to fund research and industry proofs of concept
- ▶ \$72.7 million through the ABEI to support industry in expanding and diversifying their export markets
- ▶ \$15.0 million to step up Australia's leadership in international agriculture and food policy discussions
- ▶ the appointment of Australia's first Special Representative for Australian Agriculture to spearhead a more strategic program of international advocacy and representation under the Global Agriculture Leadership Initiative
- ▶ \$9.0 million to support expanded access to agricultural and veterinary chemicals
- ▶ support for Australian exporters and business with a stronger overseas presence, sharing market intelligence about the challenges and opportunities of overseas markets, increasing our contribution to global efforts to reform the World Trade Organization, and enhancing Australia's advocacy and cooperation with international partners
- ▶ work to progress the Simplified Trade System, to modernise and improve Australia's trade system, including reviewing regulatory processes and ICT systems that impact cross-border trade
- ▶ \$13.2 million for 2022–23 to extend the ABEI for one additional year, aligned with Austrade's ABEI. This includes:
 - » \$6.0 million more for Agricultural Trade and Market Access Cooperation grants
 - » the deployment of additional short-term Agriculture Counsellors
 - » boosting our capacity to deliver technical market access and diversification opportunities
 - » additional resourcing for market intelligence to provide industry with the information to pursue market opportunities
- ▶ \$8.5 million to expand the use of Australia's export legislation to non-traditional agricultural products, starting with cosmetics, to support expansion and diversification of Australian exports
- ▶ \$3 million over 3 years from 2021–22 to the Organisation for Economic Co-operation and Development (OECD) to support research on global agricultural trade and sustainable agriculture.

In Budget 2022–23, the government is committing:

- ▶ \$127.4 million for the Digital Services to Take Farmers to Markets initiative that will streamline trade processes, reducing the cost and time of exporting and make it easier for agricultural businesses to compete internationally
- ▶ \$7.7 million, as part of a multi-portfolio package of \$26.9 million, to establish a 'Tell Us Once' digital model for whole of government which delivers streamlined trade processes, reduces the cost and time of exporting and enables our agricultural businesses to become more internationally competitive
- ▶ \$11.7 million to expand the Trade Information Service to provide exporters with a single source of online information to facilitate access to international markets, including additional agricultural commodities.





Theme 2

Biosecurity

We are safeguarding Australia from exotic pests and diseases and maintaining Australia’s clean and green reputation, through the implementation of a range of measures to strengthen the biosecurity system. Good biosecurity is vital to protecting our agriculture, environment, health and regional communities and jobs, critical to our market access, and to lower costs for our producers. The *Commonwealth Biosecurity 2030* strategic roadmap sets out our forward agenda, including efforts toward a national biosecurity strategy and progress towards sustainable funding and investment.



On average 2.5 million containers, 19,000 commercial vessels and 115.3 million mail articles arrive in Australia each year



65,000 mail articles containing biosecurity risk material were intercepted in 2020–21



New 3D X-rays are more than 3 times as effective in identifying biosecurity risks as 2D X-rays

Protecting against rising global risks

A robust, effective biosecurity system is essential to keeping Australia safe from exotic pests and diseases, while allowing people and goods to flow across our border. Protecting our biosecurity status supports market access and avoids unnecessary costs for our producers. The government has increased annual investment in biosecurity and export services by \$492 million or 78% since 2014–15 to an expected total of over \$1.2 billion in 2021–22.

We are continuing our record investment in biosecurity – over \$590 million in new funding measures in the past 18 months. We have invested in innovative trials and projects, including new technology to enhance screening, detection, and analytical capabilities. We have funded new frontline resources to defend Australia against hitchhiker pests and emerging threats in our region, helping safeguard the agriculture industry from exotic pests and diseases.

Khapra beetle is being increasingly detected in consignments, including containers arriving in Australia, sometimes hitchhiking on the container rather than being associated with the goods. If established in Australia, khapra beetle could cost our grain industry \$15.5 billion over 20 years and remove access to key markets. Through the 2021–22 Budget, the government invested \$96.9 million over four years to manage the biosecurity risk posed by hitchhiker pests arriving in imported cargo, building on the \$14.5 million Khapra beetle – Enhanced Screening measure, announced in December 2020. Increased actions to manage Khapra beetle risks include:

- ▶ a ban on high-risk plant products via non-commercial pathways
- ▶ offshore treatment of sea containers packed in khapra beetle risk countries
- ▶ offshore treatment and revised phytosanitary certification for high-risk plant products via commercial pathways.

Our strengthened efforts have ensured Australia remains protected from threats like khapra beetle.

Keeping Australia safe from African swine fever and lumpy skin disease

African swine fever (ASF) is a serious and fatal pig disease that is a significant and evolving threat to Australia's agriculture industry and favourable biosecurity status. ASF has spread globally with the disease spreading to China in 2018, and then onto much of Asia, including our near-neighbours Indonesia, Timor-Leste, and Papua New Guinea. More recently, ASF has been detected in the Caribbean for the first time in almost 40 years, with outbreaks reported in the Dominican Republic and Haiti in July and September 2021.

ASF has never occurred in Australia. An outbreak would have significant impacts on pig health and production and our export trade. In the event of an outbreak in Australia, the export of pork or pork products would be immediately impacted, and eradication activities would begin. The cost of a small outbreak is estimated at up to \$877.0 million, while a large outbreak could cost \$2.0 billion over 5 years.

The government responded to the international spread of ASF through a \$66.6 million ASF Response Package in 2019 and a further \$58.6 million in the 2021–22 Budget. This investment has helped keep ASF out of Australia, and also strengthened our ability to prevent other pest and disease incursions.

Lumpy skin disease (LSD) is a viral disease of cattle and water buffalo that causes relatively low mortality. However, the disease can result in animal welfare issues and significant production losses. The disease is spread primarily by biting insects such as certain species of flies, mosquitoes and possibly ticks. Infection typically causes an acute disease with fever, depression, and characteristic skin nodules. There may also be a marked reduction in milk yield as well as abortion in pregnant animals.

The global distribution of LSD is increasing the risk to Australia. Since 2019, the disease has spread through China and Southeast Asia. In 2021 the disease was confirmed in Vietnam, Thailand and Malaysia. In March 2022 it was officially reported by Indonesia on the island of Sumatra and in Singapore.

If LSD were to occur in Australia, this would have significant consequences for our beef, water buffalo, and dairy cattle industries, along with substantial trade impacts if Australia was no longer recognised as being free from LSD. The cost of an LSD incursion would also see severe economic losses to Australia's meat processing sector.

Through a \$61.6 million investment, the government is boosting biosecurity in northern Australia, with a key priority to protect Australia from LSD, other emerging vector-borne animal diseases and ASF. This includes working with states and territories, industries and communities to enhance surveillance, improve diagnostic capability, build regional resilience including the delivery of critical biosecurity infrastructure and supporting technical preparedness and response capability to a potential outbreak.

A robust, agile and effective biosecurity system for Australia

In the face of biosecurity risks and border movements that are growing in number and complexity, our biosecurity system must be responsive to emerging operating needs. Global supply chain responses to COVID-19 have added to the challenge, with significant increases in cargo arrivals, while the reopening of our borders to international travel will see increasing passenger arrivals.

We are working on the biosecurity system reforms needed to meet existing and future challenges. The government has set out its forward strategy for biosecurity in the *Commonwealth Biosecurity 2030* roadmap. The first annual plan under the roadmap was recently released, outlining priority activities for 2022. The document also provides an overview of key work already delivered under the roadmap and provides an update on our progress addressing key systemic issues underlying recommendations made by

the Inspector-General of Biosecurity and the Australian National Audit Office since December 2017 to ensure lasting improvements are made and the biosecurity system remains fit for purpose.

We are continuing to work with state and territory governments, industry, and the community – including environmental interest groups – to develop a national biosecurity strategy, releasing a consultation draft in February 2022.

The over \$590 million investment in 2021–22 and 2022–23 is a significant down payment on the biosecurity system reforms needed to meet existing and future challenges. Consistent with the *Commonwealth Biosecurity 2030* strategic action to align our funding and investment model to emerging system needs, we are working toward ensuring our funding and investment strategies are fit-for-purpose and sustainable, and that biosecurity partners contribute equitably.

The Chief Environmental Biosecurity Officer has:

- ▶ released the National Priority List of Exotic Environmental Pests, Weeds and Diseases
- ▶ developed the National Environment and Community Biosecurity Research, Development and Extension Strategy 2021–26
- ▶ partnered on One Health initiatives to support the wildlife health system.

Since 2018, more than \$3.5 million has been leveraged from \$1.5 million investment through the Environmental Biosecurity Project Fund, along with awareness and capacity building to manage biosecurity risks that impact the environment. Collaboration has continued with research organisations to fund practical projects to manage invasive species such as carp, deer, feral pigs, and ants.

We want Australia's strong, globally recognised biosecurity system to continue to reduce the risks of exotic pests and diseases arriving in Australia and support rapid and effective responses if they do.

We are continuing to invest in frontline resources, including even more on-ground staff, and technical solutions. This includes 3D X-ray screening of international mail, goods, and passenger baggage to increase accuracy in the detection of biosecurity risks. 3D X-ray technology can now automatically detect fruit, vegetables, meat, seafood, and plant material. Three have been installed into mail centres, one in Melbourne and two in Sydney, with more being rolled out across the mail, traveller, and air-cargo pathways. 3D X-ray has proven 2–3 times more effective at detecting biosecurity risk material than other screening methods.

Throughout the COVID-19 pandemic, we have worked across government to support Australia's response, address border risks, and focus resources to deliver the services needed to enable increased movement of international cargo. In line with the national plan to reopen to travellers announced in July 2021, we have introduced new clearance processes and bolstered

airport biosecurity resources to enable the return of international travellers and support economic recovery –in particular for the agriculture sector through support of seasonal workers and the new Australian Agriculture Visa. This has been achieved on the back of collaborative arrangements with other federal and state government agencies, and industry.

We will continue to strengthen our partnerships with industry to mitigate biosecurity risks offshore and streamline the entry of goods into Australia, reducing the burden of regulatory processes. Under the government's deregulation agenda, we are designing and delivering 7 pilots to test the ability to manage end-to-end biosecurity risks across importer supply chains. Managing biosecurity risks offshore is more cost effective than dealing with an incursion or an established pest or weed. We are working with our near neighbours, including Papua New Guinea, Timor-Leste, and those in the Pacific, to build local capacity to detect and manage threats, generating mutual benefits. We are modernising our data and analytic capabilities and focusing on our own emergency preparedness and response planning.

We are also working in partnership with state and territory governments to ensure our biosecurity investments are complementary and to target specific risks. Focus areas include working with states and territories, as well as industry and community stakeholders, to improve horse traceability to reduce biosecurity risks, and support high quality exports, food safety and animal welfare outcomes.

Our direct investment in the Australian biosecurity system complements work underway across government towards digital transformation and simplifying trade.

Our ongoing commitment to biosecurity gives us confidence that we can continue to keep pest and disease threats out of Australia and respond to those that reach Australia swiftly and effectively.



The government is delivering:

- ▶ \$235.1 million to strengthen partnerships with importers, companies, producers, and the community that will build our ability to detect and manage threats offshore and increase capacity to respond to incursions
- ▶ \$96.9 million over 4 years from 2021–22 towards building a stronger biosecurity system to protect Australia from hitchhiker pests in sea containers and goods
- ▶ \$84.1 million for the frontline of our fight to prevent pests and diseases coming to Australia from overseas, including more on-the-ground resources to target known and emerging threats, such as African swine fever
- ▶ \$80.9 million to build a modern, effective biosecurity system underpinned by the right technology and analytical capabilities
- ▶ \$14.5 million surge funding for khapra beetle for strengthened biosecurity measures at the border, faster containerised cargo inspections and increased surveillance, and improved sample collection, diagnostic resources and equipment and treatment
- ▶ \$30.0 million to build resilience to manage fruit fly through delivery of critical infrastructure
- ▶ \$20.0 million for on-ground control of established pests and weeds, in collaboration with state and territory governments as part of the government's \$49.1 million Supporting Communities Manage Pest Animals and Weeds Program to reduce the prevalence, impact, spread, cost and overall burden of established pests and weeds on land managers, farmers, agriculture, native wildlife and the environment
- ▶ \$13.2 million to deliver a biosecurity self-service portal to allow industry book biosecurity inspections online and manage changes to these bookings, through the Simplified Trade System agenda
- ▶ \$12.0 million to progress important improvements to modernise biosecurity systems to allow faster and more targeted biosecurity clearance processes, through the Simplified Trade System agenda
- ▶ \$1.1 million to support the establishment of national horse traceability arrangements for all horses
- ▶ additional funding to contribute to improving the clearance of international passengers through the digital collection of biosecurity information
- ▶ working towards sustainable funding arrangements for biosecurity.

In Budget 2022–23, the government is committing:

- ▶ \$61.6 million to boost biosecurity in northern Australia, with a focus on safeguarding our northern border against lumpy skin disease and other emerging animal diseases
- ▶ \$10 million for Japanese encephalitis virus as part of a \$69 million multi-portfolio response, to support state and territory agriculture departments carry out surveillance and control
- ▶ \$20.1 million to support Australian agriculture through improved on-farm biosecurity and enhanced pest and disease traceability.





Theme 3

Stewardship

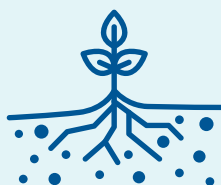
We are ensuring Australian farmers are rewarded for their stewardship of land and water.



Agricultural land managers are responsible for managing 58% of Australia's land mass



New stewardship market opportunities will pave the way for private sector investment and new income streams for farmers



Agricultural production could be increased by up to 58% through improved soil management

Encouraging stewardship of our land

Australia's agriculture industry depends on a biodiverse and well-managed natural resource base, and land managers play a key role in achieving environmental outcomes that benefit everyone. We recognise this and are providing industry with the tools to adapt to a changing climate and build a sustainable resource base for the future.

The Agriculture Biodiversity Stewardship package will help deliver the government's vision of a well-functioning voluntary biodiversity market with new income streams for farmers, based on lessons learnt during the Agriculture Biodiversity Stewardship Pilots. The package will:

- ▶ expand the Trading Platform – automated system for trading biodiversity benefits
- ▶ deliver more Natural Resource Management support – to assist farmers in their region to apply and register their projects
- ▶ improve information and methods for monitoring/assessment of biodiversity benefits.

This is not about locking up land but rather promotes native vegetation management in areas that are degraded or would benefit from erosion control or windbreaks, while agricultural production continues on productive land.

A National Stewardship Trading Platform, launched in mid-December 2021, will connect farmers with businesses looking to buy these biodiversity benefits, including those applying the Carbon+Biodiversity methodology.

We have consulted on legislation to underpin a national voluntary biodiversity stewardship market. The legislation would:

- ▶ provide a consistent and credible way to describe and measure biodiversity outcomes
- ▶ create a new form of tradeable property
- ▶ establish assurance and compliance systems that ensure market integrity.

Rewarding farmers for biodiversity improvements

The Enhancing Remnant Vegetation Pilot is an example of how farmers can be rewarded for biodiversity improvements. Farmers can receive payments for context-specific management activities that seek to protect and improve biodiversity on-farm, such as fencing, weed and pest control and replanting.

Eligible management activities will improve the condition of remnant vegetation, leading to biodiversity benefits as well as other potential benefits on farm. The trial will prioritise funding for projects with the most biodiversity benefit per dollar.

The pilot is being run in 6 Natural Resource Management regions in Queensland, New South Wales, Victoria, Tasmania, South Australia, and Western Australia. Applications for the pilot closed in October 2021.

The government is also building on the Agricultural Stewardship Package through consultations on legislation that would underpin a national voluntary biodiversity stewardship market. Consultations will continue on the proposed legislative framework which would deliver a range of benefits including opportunities for farmers to earn income by delivering biodiversity outcomes for the environment.

The legislation would ensure farmers can be recognised for delivering environmental services and would provide a means of earning a drought-proof income from less productive areas of farmland. The private sector would also gain access to an easy and cost-effective way to invest in credible on-farm biodiversity.

We are also improving the tax treatment of farmers' income from carbon and biodiversity markets. This is expected to reduce taxes paid by farmers by \$100 million over the forward estimates (treatment as on farm income).

Healthy soils are essential for healthy plant growth, food production and clean water and air. Australian soils cover close to 8 million square kilometres of land and are essential to agricultural productivity and production. Continued improvements in management of Australia's soils will continue to deliver productivity outcomes for agriculture and increase climatic resilience.

The Australian Government has committed \$214.9 million for a National Soil Package to implement practical measures to support the National Soil Strategy. Measures include:

- ▶ increasing the frequency and quality of soil testing
- ▶ improving access to soil data
- ▶ enabling farmers and land managers to make informed and evidence-based decisions for the next and future growing seasons.

In 2021–22, this has meant:

- ▶ the engagement of 32 Smart Farms Small Grants Soil Extension Activity competitive grants totaling \$18.0 million

- ▶ opening the \$54.4 million Pilot Soil Monitoring Program
- ▶ opening the \$20.0 million Soil Science Challenge to research organisations
- ▶ developing the \$15.0 million Australian National Soil Information System to capture soil data for public use
- ▶ partnering with Soil Science Australia to establish a soil science accreditation and a community of practice to bring together best practice soil knowledge and approaches for soil practitioners.

We will also deliver the \$67 million Food Waste for Healthy Soils Fund to divert up to 3.4 million tonnes of organic waste annually from landfill to productive use on agricultural soils. The fund supports Australia's goal to recover 80% of our organic waste materials by 2030.

Additionally, under the Emissions Reduction Fund (ERF) over 170 million tonnes of contracted abatement are linked to land and agriculture sector projects, with an estimated value of over \$2 billion. Across all ERF methods, \$2.2 billion has been committed to rural and regional areas. A new integrated farm method under the ERF, to be developed in 2022, will allow separate ERF land-based activities to be combined or stacked on the same land.

The government will continue to support the sector to reduce emissions while increasing productivity and profitability through our technology-led approach.

Through the \$5.0 billion Future Drought Fund, we will provide \$100.0 million each year to build drought preparedness and resilience, including investing in natural resource management activities. In addition to measures announced previously, the 2022–23 Budget

Australia's farmers understand market signals and can benefit from sustainability credentials that go beyond carbon.

The Northern Australia Pastoral Company (NAPCo) is one of Australia's largest beef producers. The company became the world's first to sell a premium carbon neutral beef product certified by Climate Active. Climate Active has seen a tripling of carbon neutral certifications in the last 2 years.

The Australian Government is putting in place systems to help more farmers realise these opportunities by investing in new technologies that further reduce barriers to entry for Australian farmers in voluntary environmental markets.

committed a further \$84.5 million over 4 years and \$10 million over 2 years from 2026–2027. This brings our total investment through the Fund to \$420 million. This includes \$23.0 million for the Future Drought Fund Drought Resilient Soils and Landscapes Program to promote land management practices – including good soil management – that support drought resilience.

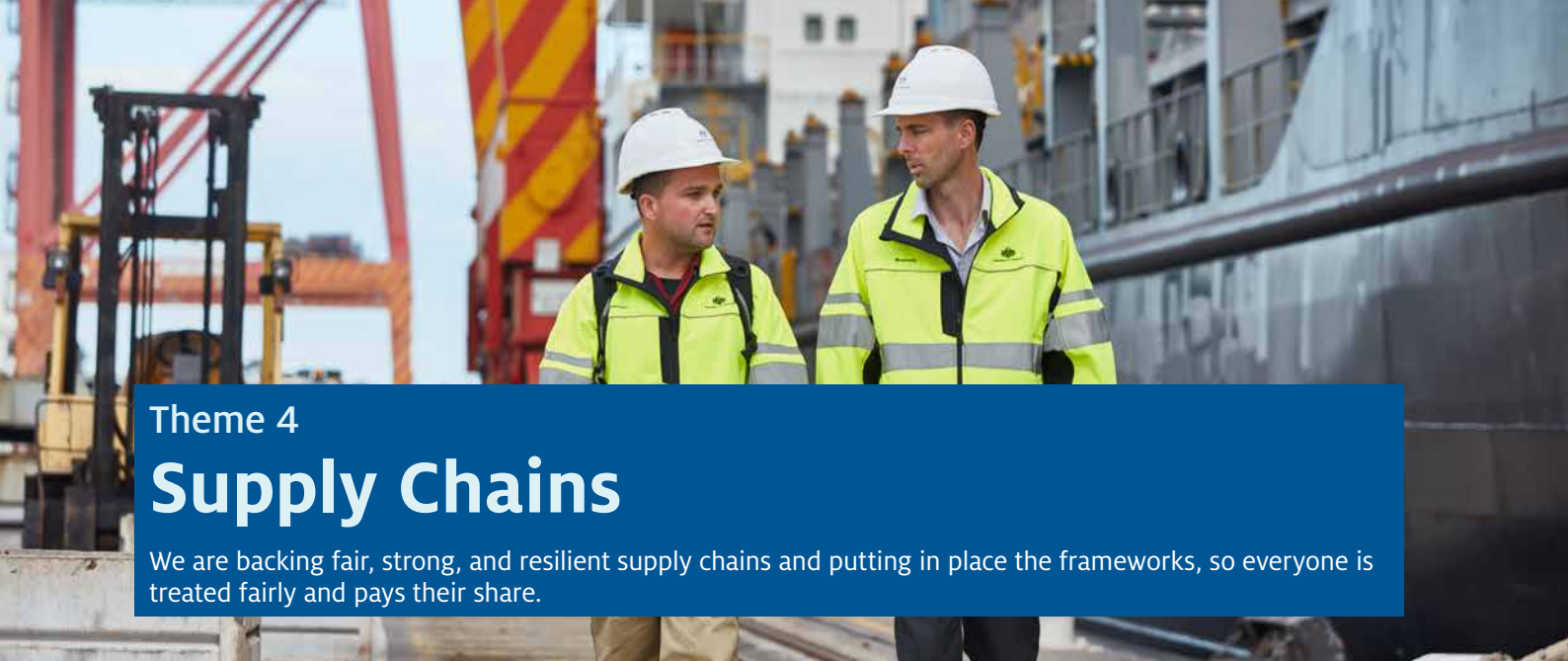
We continue to support Australian farm and regional businesses to prepare for, manage and recover from drought through an additional \$2 billion in concessional loan funding to be delivered through the Regional Investment Corporation (RIC).

The government is delivering:

- ▶ \$2.0 billion in additional funding for the Regional Investment Corporation (RIC) Drought Loan program, to help farmers prepare for, manage, and recover from drought, as part of the broader \$4.1 billion RIC program
- ▶ The Agriculture Biodiversity Stewardship package, with over \$66.1 million to expand support for agriculture stewardship and create market opportunities for farmers who improve biodiversity and soils, including:
 - » \$22.3 million to conduct scientifically robust on-ground trials to test methods to reward farmers for improving native vegetation through the Enhancing Remnant Vegetation Pilot
 - » \$5.4 million to implement the Australian Farm Biodiversity Certification Scheme, to provide a credible, independent assessment of how farmers are protecting biodiversity
 - » \$4.4 million for the development of a biodiversity trading platform
- ▶ \$214.9 million to implement the National Soil Strategy and associated measures, including:
 - » piloting the National Soil Monitoring and Incentives Pilot program
 - » \$67.0 million to deliver the Food Waste for Healthy Soils Fund
 - » \$20.0 million for a National Soil Science Challenge grants program to address gaps in soil knowledge, developing a new education accreditation in soil science
 - » \$18.0 million Smart Farms Small Grants: Soil Extension Activity grant round under the National Landcare Program
 - » additionally, the Soil Carbon Data Program (\$7.9 million) will support partnerships between scientists, industry and landholders to develop and validate improved measurement approaches
- ▶ The development of the Technology Investment Roadmap which will guide around \$21 billion of investment in low emissions technology and is expected to unlock a total of \$80.0 billion of private and public investment. Soil carbon is identified as a priority technology under the roadmap
- ▶ \$30.7 million from 2020–21 to 2025–26 to support the development and deployment of livestock feed technologies that reduce emissions and can increase productivity, including:
 - » \$6 million to support the development of feed supplements and forage feeds that reduce emissions and deliver productivity gains
 - » \$23 million to help develop and trial technologies to deliver methane inhibiting feed supplements to grazing livestock, which represent around 95% of the national herd
 - » \$1.7 million to scale-up production of the red seaweed *Asparagopsis*
- ▶ \$1.2 billion over 10 years to create a technology co-investment facility to support the development of priority technologies, including regional hydrogen hubs, carbon capture, use and storage technologies, very low-cost soil carbon measurement and new agricultural feed technologies
- ▶ \$50.0 million for a National Soil Carbon Innovation Challenge, to help reduce the cost of soil carbon measurement to under \$3 per hectare per year
- ▶ \$325.5 million over 4 years from the Future Drought Fund, including \$23.0 million for the Resilient Soils and Landscapes Program to promote land management practices – including good soil management – that support drought resilience. Further, a \$7.0 million investment to expand climate information capabilities to support farmers and farming communities understand how drought and other climate risks might impact them into the future
- ▶ \$13.2 million to establish a national voluntary biodiversity stewardship market in Australia, supporting new income streams for farmers who improve biodiversity outcomes on their land
- ▶ \$4.1 million to develop drought indicators as part of a drought early warning system.

In Budget 2022–23, the government is committing:

- ▶ \$86.2 million over five years, from 2021–22, to support the establishment of new plantations and secure our future wood supply in partnership with states and territories
- ▶ \$27.3 million to help deliver the government’s vision of a well-functioning voluntary biodiversity market
- ▶ \$4.4 million to improve illegal logging traceability.



Theme 4

Supply Chains

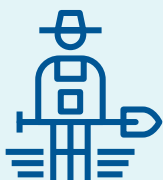
We are backing fair, strong, and resilient supply chains and putting in place the frameworks, so everyone is treated fairly and pays their share.



Australian agriculture accounts for 2.6% of national employment



Over 229,000 people are employed in the food and beverage manufacturing sectors alone



Agricultural employment growth has been spurred by Australia's participation in global value chains

Investing to strengthen supply chains

Robust and transparent domestic supply chains underpin a strong, effective Australian agriculture industry and are essential to achieving industry's 2030 goal.

We are committed to improving competition and fairness across supply chains. Codes of conduct have been established for the dairy, wheat, port, sugar, and horticulture industries, to address egregious behaviour and keep dealings clear and transparent.

The government has continued to work with industry to combat market imbalances across domestic fresh food supply chains, directing the Australian Competition and Consumer Commission (ACCC) to undertake an inquiry into the harmful imbalance of bargaining power between farmers, intermediaries, and retailers.

The government is driving several initiatives in response to the ACCC's inquiry recommendations, including strengthening unfair contract terms protections for small businesses and examining the inclusion of a prohibition on unfair trading practices in Australian Consumer Law. The government has also held 14 workshops with over 200 participants in perishable agricultural good industries to explore price and market transparency issues and co-design solutions. Proposals developed through these workshops will be eligible for \$5.0 million in grant funding in 2022.

Ensuring fair and transparent conduct throughout the supply chains

At the beginning of 2020, the government implemented clear and enforceable rules about the conduct of business relationships between dairy farmers and processors, through the mandatory Dairy Industry Code. These changes help rebalance bargaining power and improve transparency in transactions.

Since the code's initial operation, there have been positive developments including increased competition among processors of raw milk prices, and increased transparency, as farmers were able to access price information.

The first review of the Dairy Industry Code has been completed. The review found the Dairy Industry Code is providing a crucial framework for the dairy industry and is operating as intended. While stakeholders were highly supportive of the Code, areas for improvement were identified. The Australian Government has agreed to implement the three recommendations proposed in the report.

Supply chain resilience underpins production

In the 2021–22 Budget, we committed \$5.4 million to improve market transparency for more fair agricultural supply chains, in response to recommendations of the December 2020 ACCC Perishable Agricultural Goods Inquiry.

We will address findings of the Productivity Commission's Review into Vulnerable Supply Chains. The review examined risks to the functioning of the Australian economy and Australians' wellbeing from disruptions to global supply chains, including:

- ▶ intermediate goods such as fertiliser
- ▶ agrochemicals and seeds
- ▶ manufactured goods and other inputs.

The final report was publicly released on 13 August 2021, and included a framework for identifying supply chains that are vulnerable to disruption and was applied to Australian imports and exports. The report also identifies strategies to manage supply chain risks and the circumstances under which government might intervene.

We are working with the Office of Supply Chain Resilience (OSCR) to monitor supply chain vulnerabilities. OSCR is working with whole-of-government partners, industry, and academia to improve Australia's access to essential goods, including for the agriculture industry.

We will also continue to progress the Modern Manufacturing Strategy, including building scale in our onshore processing and packaging capability and encouraging the adoption of smart technologies:

- ▶ in Round 2 of the Manufacturing Modernisation Fund, around two thirds of delivered funding was aligned

either solely or in part to the Food and Beverage National Manufacturing Priority (\$35.4 million of executed funding)

- ▶ in Round 1 of the Modern Manufacturing Initiative's Translation and Integration streams, \$33 million of announced funding was for projects aligned to the Food and Beverage National Manufacturing Priority, or around 16% of the total funding announced
- ▶ in Round 1 of the Supply Chain Resilience Initiative, \$25.3 million of announced funding was for Agricultural Chemicals, or around 76% of announced funding.

In January 2022, the government invested \$29.4 million to support the scaling-up of the manufacture of significant quantities of Technical Grade Granular Urea (TGU), a critical component of diesel exhaust fluid (AdBlue).

In partnership with state and territory governments, we are providing \$15.1 million for a new Construction Softwood Transport Assistance Program to assist bushfire-affected softwood reach timber mills with additional processing capacity.

We will also strengthen protection against the risk of devastating pests and diseases to ensure robust domestic supply chain production.

The government's \$5 billion investment in freight and regional roads will also strengthen domestic agricultural supply chains, with additional funding for upgrades to the Great Western Highway in New South Wales, the Bruce Highway in Queensland and METRONET in Western Australia.

The government is delivering:

- ▶ \$5.4 million to improve market transparency by taking action on the ACCC Perishable Agricultural Goods Inquiry
- ▶ the implementation of the \$1.5 billion Modern Manufacturing Strategy, with the Food and Beverage Road Map released in March 2021 and
 - » investing \$107.2 million in the Supply Chain Resilience Initiative to address vulnerabilities in critical supply chains as part of the Modern Manufacturing Strategy
- ▶ improvements to supply chain competition and fairness through codes of conduct for dairy, wheat port, sugar and horticulture
- ▶ adoption of a whole-of-government framework for identifying and mitigating critical supply chain risks
- ▶ strengthening unfair contract term protections in Australian Consumer Law, including making unfair contract terms unlawful, and expanding the definition of small business to increase eligibility
- ▶ \$15.1 million through the Construction Softwood Transport Assistance Program to assist bushfire-affected softwood reach timber mills with processing capacity.

In Budget 2022–23, the government is committing:

- ▶ \$328.3 million over 5 years to further support the Modern Manufacturing Strategy and National Manufacturing Priorities (NMPs) and address critical supply chain vulnerabilities including:
 - » \$250.0 million over 2 years from 2022–23 to extend the Modern Manufacturing Initiative to support businesses in NMP sectors to deliver high-impact projects
 - » \$53.9 million over 4 years from 2021–22 to extend the Manufacturing Modernisation Fund to support technology adoption in NMPs
 - » \$6.9 million over 2 years from 2021–22 to develop Manufacturing Investment Plans to guide government and industry investment in NMPs.

Theme 5

Water and Infrastructure

We are supporting Australian farmers and rural and regional communities with infrastructure when and where it is needed.



The Murray–Darling Basin accounts for two thirds of agricultural water use in Australia



By 2030, the 1,700 kilometre Inland Rail project will support 2.32 million tonnes of freight between Melbourne and Brisbane



Irrigated crops make up 30% of the value of Australia's agricultural production

Increasing infrastructure's reach for all

Investment in regional infrastructure and transport, digital connectivity and water security projects creates and supports local jobs and rural and regional communities and improves the efficiency of the agriculture industry.

The delivery of the National Water Grid Fund is helping to identify and build new water infrastructure, contributing to regional Australia's long-term economic growth and development.

Farmers who install on-farm water infrastructure also benefit from the extension to the On-farm Emergency Water Infrastructure Rebate Scheme to 2022–23. This \$100.0 million scheme is reducing farmer's infrastructure costs and helping them respond to, and prepare for, natural disasters and severe weather events, not just drought.

We are also building on the successful Murray–Darling Communities Investment Package by making \$140 million available to keep communities and jobs at the heart of achieving a sustainable and certain future for the Murray–Darling Basin. Central to this is a new \$97 million Healthy Rivers – Healthy Communities grant program. The program is a truly triple-bottom line program that offers grants of between \$100,000 and \$5 million in the Murray–Darling Basin to build stronger and more vibrant regional economies and communities, improve the health of rivers and wetlands, and enhance environmental outcomes through targeted infrastructure investment.

The government's next 5-year plan for progressing economic development in Northern Australia, *Our Future, Our North: 2021–2026 – Targeted Growth*, was released in November 2021. The government will invest in transformational and enabling projects through a whole-of-government approach in partnership with state and territory governments.

The government has committed \$9.3 million to develop Master Plans to accelerate Regions of Growth. Master Plans will set out the strategic direction for efficient economic development. They will deliver a 20-year blueprint for the economic development of a region, anchoring resources and investment from across all levels of government to maximise the long-term public benefit of regional planning and development.

The \$7 billion Northern Australia Infrastructure Facility is critical in helping to deliver outcomes through master planning.

The government is also supporting economic and community growth through the \$111.9 million Northern Australia Development Program and the Business and Community Growth Program, and the \$68.5 million Connecting Northern Australia initiative to improve voice and digital connectivity.

The government is committing \$35 million to expand the Horticultural Netting Program to Tasmania, New South Wales and the Northern Territory along with additional funding to Victoria, Queensland and Western Australia. This builds on the original \$25.9 million provided in the 2019–20 MYEFO process to over 190 growers who co-invested in the installation of protective crop netting over horticultural commodities in South Australia, Queensland and Western Australia. Protective netting is an effective on-farm infrastructure investment that prevents damage to crops from extreme weather events and pest predation, reduces water usage costs through limiting evaporative losses

and increases Australian agricultural resilience and growth. The program expansion will assist growers and local economies as they recover from drought and the pandemic and support adaptation to Australia's changing climate. The program will operate until 30 June 2024 or until all the funds are committed.

As technology progresses, so do the ways that regional communities and farmers communicate and manage their businesses. To improve regional communication, the government has committed \$90 million for 81 'place-based' telecommunications infrastructure projects across regional Australia, to ensure our infrastructure keeps pace with technology. We continue to provide additional investment through the Regional Connectivity Package to support recovery and growth in priority investment regions. We are also continuing to invest in the National Broadband Network to improve rural and regional Australia's access.

New storage improves water access for iconic wine region

In 2020, the McLaren Vale Treated Water Storage Project established the McLaren Vale Water Storage Facility at Seaford Heights in South Australia. Jointly funded by the Australian Government (\$2.50 million) and industry partners (\$4.90 million), the facility stores water from the Christies Beach Wastewater Treatment Plant and helps to meet irrigation demand for wine grapes produced in the iconic McLaren Vale wine region. Construction included a new 600 megalitre water storage dam and a supply connection to the existing Quarry Road pump station. The recycled water will augment groundwater drawn from aquifers across the region.

The project has boosted water security and economic resilience for local industry and the broader region. It can supply up to 750 megalitres of treated water for irrigation and enable vineyard expansion by up to 500 hectares. This will increase premium grape production by up to 3,750 tonnes, worth \$5.50 million in grape production for McLaren Vale, making the premium wine production worth around \$33.75 million annually. The improvements have also reduced wastewater discharge into the Gulf Saint Vincent, improving water quality and sustainability. The project supports around 170 ongoing new winery and vineyard farm jobs in the McLaren Vale, Willunga and Sellicks regions.

Keeping water and goods moving

As part of this investment, we are making sure we have the right infrastructure in place to support agricultural communities and efficient production. The infrastructure projects will support an estimated 30,000 jobs across Australia, including rural and regional Australia. Across government we have introduced a range of measures that support regional Australia's sustainability, resilience, and job creation.

We are ensuring Australia's water resources are managed well, now and in the future and are working with the Murray–Darling Basin Authority to help manage the water in the Murray–Darling Basin.

In response to the ACCC report on Murray–Darling Basin water markets, the government provided \$3.5 million in 2021–22 for an independent panel to consider the ACCC's advice and develop a roadmap for water market reform. A principal adviser, Daryl Quinlivan AO, has been appointed and has provided his initial advice. The government is working with Basin states and other stakeholders to develop the roadmap and implement

4 early actions to improve the governance, structure, and operation of Murray–Darling Basin water markets.

Since the establishment of the National Water Grid Authority in late 2019, the Australian Government has already committed over \$1.5 billion to over 30 water infrastructure projects, with 8 of these already complete. These 8 completed projects have seen:

- ▶ an increase in irrigable land and new areas serviced
- ▶ new water infrastructure jobs supported by the projects during construction
- ▶ an increase in ongoing water allocation
- ▶ new ongoing direct and indirect jobs following the completion of the projects.

We have a shared interest in current and new infrastructure projects and proposals. This includes investing in road and rail across every Australian state and territory to improve the movement of people and goods and delivering initiatives under the National Freight and Supply Chain Strategy.

The government is also supporting the continued delivery of Inland Rail by 2025, which will boost future access into domestic and international markets for many farmers and farming communities and help capture broader commercial and employment opportunities.

The government is investing in the Digital Economy Strategy, to support Australia to be a leading digital economy and ensure businesses across all sectors can lift productivity and global competitiveness. This is complemented by funding for infrastructure projects to provide people and businesses in regional Australia access to improved broadband services and data, delivering fast, affordable, and reliable connectivity.

The government is delivering:

- ▶ \$1.5 billion to continue efforts to achieve a sustainable and certain future for the Murray–Darling Basin
- ▶ our digital economy, including opportunities for regional Australia and agricultural businesses, by providing \$1.2 billion for the Digital Economy Strategy
- ▶ an additional \$28.6 million to deliver initiatives as part of the National Freight and Supply Chain Strategy delivering on its commitment of \$380.0 million to the Mobile Black Spot Program with Round 6 expected to open shortly, providing \$189.6 million to support the next 5-year plan for northern Australia
- ▶ \$348.0 million to support regional Australia’s sustainability, resilience and job creation including investment in community infrastructure to support the delivery of reliable, affordable, and innovative digital services
- ▶ the extension of the \$100.0 million On-farm Emergency Water Infrastructure Rebate Scheme to 30 June 2022
- ▶ \$90.5 million in new water infrastructure project commitments under the \$3.5 billion in water infrastructure through the National Water Grid Fund
- ▶ over \$5.0 billion in freight and regional roads across every state and territory
- ▶ \$3.5 million to develop a phased, practical, and cost-effective roadmap for water market reform
- ▶ \$35.0 million to expand the Horticultural Netting Program nationally to support producers protect their crops from extreme weather, pests, and water loss. This brings the total funding committed to horticulture netting nationally to \$60.9 million.

In Budget 2022–23, the government is committing:

- ▶ \$97 million Healthy Rivers – Healthy Communities grant program
- ▶ \$2.6 million for a 12-month independent, systematic, technical assessment of infrastructure in the southern Murray-darling Basin to inform future decisions about the infrastructure to improve water security and to help to mitigate the impacts of floods and droughts
- ▶ \$2.1 million in support of water market reform
- ▶ Enhancing the Inspector General of Water Compliance’s ability to engage and inform communities about Basin water resource management providing an essential link between compliance actions and on-ground eyes and ears
- ▶ Extending the popular On-farm Emergency Water Infrastructure Rebate Scheme for another year to ensure existing funding allocations are available to support farmers right across Australia.





Theme 6

Innovation and Research

We are providing the right conditions to modernise Australia’s agricultural innovation system, which will drive improvements in collaboration, commercialisation, and uptake to grow agricultural productivity and competitiveness.



Each dollar of public investment in agricultural research development and extension is estimated to have generated \$12 benefit for Australian farmers within 10 years



Around \$800 million is invested through the RDCs each year - over \$300 million from government and around \$500 million from industry levies



Fully implementing digital agriculture could lift the gross value of production by \$20.3 billion annually

Evolving industry through innovation

Australia’s agriculture industry has a strong tradition of developing and adopting innovative solutions to new challenges. Investment in, and adoption of, innovation drives down input costs, increases outputs, and is critical to achieving the industry’s ambitious goal by 2030. This is why we committed to the National Agricultural Innovation Agenda.

Under the agenda, we are supporting Agricultural Innovation Australia (AIA) by investing \$2.8 million to drive a cross-industry approach to innovation, in collaboration with the 15 Rural Research and Development Corporations (RDCs).

As part of the government’s Future Drought Fund investment of \$121.06 million in the Drought Resilience Research and Adoption Program, we have established 8 Drought Resilience Adoption and Innovation Hubs across Australia. The regional hubs are providing ‘shop fronts’ and connecting farmers, industry, agribusiness, and communities with drought resilience expertise, and contributing to the development and adoption of innovative practices.

Building on the direct \$79 million investment into the Hubs from the Future Drought Fund, the government is investing an additional \$21.7 million to expand the focus of the 8 hubs across the country to catalyse agricultural innovation, drive commercialisation and create jobs. This includes expanding the hubs’ scope into fisheries and aquaculture.

grow^{AG} has also been launched to help connect research and development outcomes to Australians and the world and drive commercialisation opportunities.

Each year, producers invest more than \$500 million in research and development levies to support research and development activities. Building on this, the government invests over \$300 million annually in additional matched funding to further improve the profitability, productivity, competitiveness, and long-term sustainability of Australia’s primary industries. At the forestry industry’s request, we are also increasing our matched levy funding for forestry research and development.

In addition, a \$150 million investment from CSIRO, government, and industry into 3 new research missions will be used to tackle drought, the food export market and to grow the protein market. The research missions aim to:

- ▶ reduce the impacts of drought by 30%
- ▶ increase the value of agrifood exports by \$10 billion
- ▶ produce an additional \$10 billion of high-quality protein products by 2030.

Digital Foundations for Agriculture Strategy

Digital technologies will be the foundation of the next major wave of agricultural productivity. The Australian Farm Institute estimates that full adoption of digital tools by the agriculture sector could boost productivity by around \$20.3 billion each year. Digital agriculture will deliver growth and employment opportunities across the sector and into the heart of our regional economies.

The strategy sets out a nationally-focused, whole-of-sector approach that is focussed on uptake and the whole supply-chain – delivering value for all Australians. There are 5 key areas of focus where collective action is needed – leadership, skills, data and governance, opportunities and value proposition, and connectivity and infrastructure.

To support the strategy, we are investing \$30 million to establish a National Centre for Digital Agriculture that will provide national leadership, coordination and

The Australian Government is also undertaking a feasibility study into an Australia-wide National Institute for Forest Products Innovation (NIFPI). We are also providing an additional \$3.1 million over 2 years to extend the life of the 3 existing regional NIFPI centres in Gippsland, Launceston, and Mount Gambier. This will secure and expand the good work of the NIFPI centres in these key forestry regions.

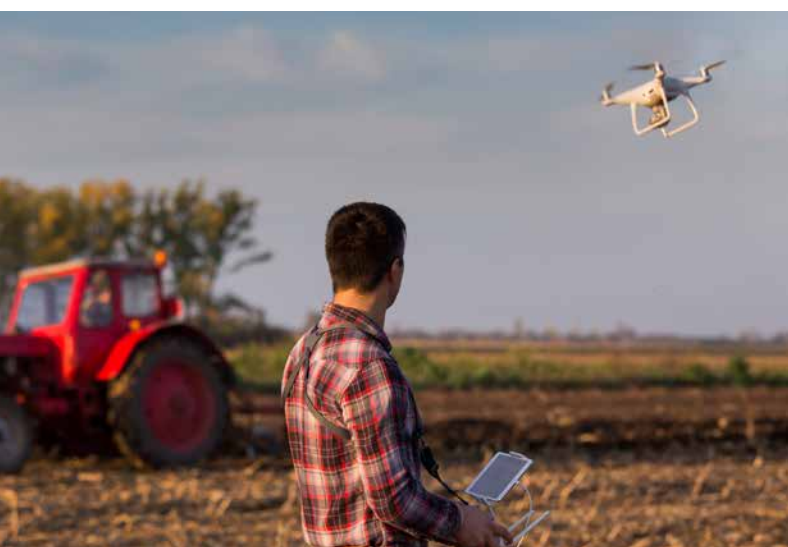
facilitation of work to address the key barriers to the uptake of technology across the farm, fish and forestry sector. The initiative will also see new funding provided to the existing Innovation Hubs, including dedicated digital officers to support uptake.

The government is partnering with the National Farmers' Federation by providing \$400,000 to expand the Australian Farm Data Code. The Code aims to provide transparency in the way service providers collect and use farm data. The Code also allows service providers to utilise a common language when working with farmers and their data. The work to expand the Code will help farmers understand how their data is used, shared and managed. It will include aligning the Code with the government's Consumer Data Right and raising awareness of the Code to producers and service providers.

Platform for innovation and research

grow^{AG} is an online platform that showcases innovative agricultural research, technologies, and commercialisation opportunities in one central location. The platform was launched in April 2021 and is the result of an ongoing collaboration between government and Australia's 15 Rural Research and Development Corporations. Since its launch in April 2021, the platform has hosted over 2,500 research projects and more than 86 commercial opportunities for investors. One such opportunity was to commercialise novel biological controls for insect pests developed by the NSW Department of Primary Industries in partnership with the Cotton Research and Development Corporation.

grow^{AG} allows easy access to research projects across different commodities. This increased visibility will accelerate commercialisation, leverage global expertise, and enhance transparency for levy payers and the community. grow^{AG} will also improve collaboration and reduce duplication, so investments are targeted to activities that will maximise productivity and ensure the long-term prosperity of the Australian agriculture industry.



New technology helping Australia stay competitive

We are positioning Australian agriculture to easily adopt innovation and technologies, delivering value to industry and community, and commercial returns to the innovation community.

As part of the National Agricultural Innovation Agenda, we have released a National Agricultural Innovation Policy Statement to focus investment on national challenges and outline how we are creating a world-leading agricultural innovation system. This includes 4 new National Agricultural Innovation Priorities – exports, climate, biosecurity and digital agriculture. Our investment of \$2.8 million in Agricultural Innovation Australia will see investment strategies developed for these priorities.

Under the government's Deregulation Agenda, we are providing \$20.1 million to Commonwealth fisheries for data integration, monitoring and artificial intelligence, to reduce regulatory burden, increase productivity, and improve environmental outcomes.

The government is also investing in new technologies identified in the Technology Investment Roadmap and Low Emissions Technology Statements to reduce emissions in the land sector.

We are extending the recently developed patent box regime to agriculture. The new measure reduces taxes on profits from locally developed patents on agricultural chemicals and veterinary medicines used in agriculture as well as new agricultural plant varieties (down to an effective tax rate of 17% from the typical corporate tax rate of 30%).

The government is delivering:

- ▶ a National Agricultural Innovation Policy Statement, with an initial \$2.8 million to develop investment strategies, furthering the National Agricultural Innovation Agenda
- ▶ \$66.0 million to establish 8 Drought Resilience Adoption and Innovation (Innovation Hubs) that play a key role in connecting farmers with regional agricultural experts, innovation and new practices, and more than \$20.9 million for their adoption officers, hub projects and enabling activities
 - » \$21.7 million in additional funding for Innovation Hubs, expanding their role beyond drought resilience adoption, to support broader innovation outcomes
- ▶ \$34.2 million for innovation grants to support development, extension, adoption, and early-stage commercialisation activities to build drought resilience
- ▶ \$2.7 million over 4 years from 2021–22 is being invested to establish a robust monitoring and evaluation framework for the National Agricultural Innovation Agenda
- ▶ \$0.6 million for the development of the Australian Agrifood Data Exchange platform to improve the sharing of data across the agriculture and food supply chain
- ▶ \$0.4 million to co-fund expansion of the Australian Farm Data Code and assist users to gain confidence in using this important source of information to improve the productivity, profitability, and sustainability of their enterprises
- ▶ \$40.1 million for the Forestry Recovery Development Fund Program to assist privately-owned wood processing facilities to recover and rebuild using innovation and product diversification
- ▶ \$11.9 million to support innovation in the forestry sector, including extending the existing 9 Regional Forestry Hubs and creating 2 new hubs
- ▶ \$20.1 million towards fisheries deregulation through technological innovation to boost productivity and competitiveness
- ▶ increasing transparency, removing duplication and driving commercialisation by establishing key performance indicators for RDCs and best practice guides for RDC stakeholder consultation and commercialisation
- ▶ \$10.2 million for measures to support research and development for our forest and wood products industries
- ▶ \$7.1 million over 4 years and then \$2.3 million ongoing to match forest growers increased research and development levies
- ▶ \$3.1 million over 2 years to extend the regional National Institute for Forest Products Innovation (NIFPI) Centres in Launceston, Mount Gambier, and Gippsland
- ▶ \$0.9 million for studies that build the knowledge base needed to optimise the implementation of Australia's illegal logging laws and assess their impacts around protecting the Australian market from illegally logged timber
- ▶ \$400,000 in partnership with the NFF to expand the Australian Farm Data Code.

In Budget 2022–23, the government is committing:

- ▶ \$30 million to establish the National Centre for Digital Agriculture and funding for the 8 existing Regional Innovation Hubs
- ▶ \$23.4 million to extend the patent box regime to agriculture.

Theme 7

Human Capital

We are making sure people and their communities, right across the agriculture industry and supply chain, have the support, infrastructure, and skills to do their jobs.



300,000 people are employed across agriculture sectors



By 2030, 1 in 3 new jobs created in the agriculture industry will be technology related



82% of the agriculture workforce live in rural and regional areas

Ensuring skilled labour access for industry

The success of the agriculture industry relies on the strength, resilience and wellbeing of its human workforce and the communities that support them.

In August 2021, the government announced the development of the Australian Agriculture Visa to address workforce shortages in the agriculture sector. It is a managed (sponsored) visa program developed in partnership with industry and will be available to skilled, semi-skilled and low-skilled workers across a broad range of agricultural industries, including horticulture, dairy, wool, grains, fisheries (including aquaculture) and forestry. It will provide access to critical workers needed for the growth of Australia's primary industries to reach \$100 billion in value by 2030.

This is the biggest structural reform to the agricultural workforce in Australia's history and will allow the next generation of migrants to assist grow our broad range of agricultural sectors. Vietnam was welcomed as the first country to sign a Memorandum of Understanding (MoU) with the Australian Government to participate in the Australian Agriculture Visa program.

The visa will supplement the Pacific Australia Labour Mobility (PALM) scheme, which will remain the mainstay for meeting workforce shortages in the primary industries sector.

On 23 November 2021, the government announced the next stage of reforms to the Pacific labour programs – the Seasonal Worker Programme (SWP) and the Pacific Labour Scheme (PLS). The SWP and PLS will be consolidated and operated under a single, improved PALM scheme and be managed by the Department of Foreign Affairs and Trade. The improved PALM scheme will feature new program and visa settings, while providing stronger worker protections and delivering streamlined processes and administrative efficiencies. The government restarted the Pacific Labour Mobility schemes in September 2020.

The restart and streamlining of the Pacific labour mobility programs has supported over 18,200 arrivals (at March 2022) bringing the total number workers currently in Australia under the program to 22,415 (at March 2022).

The government implemented a range of measures to support Australia's farmers during COVID-19 to access the agricultural workers needed. This included the introduction of the Agriculture Workers' Code which helped facilitate the continued movement of essential agricultural workers across borders despite COVID-19 restrictions and changed visa arrangements to permit backpackers and seasonal workers in Australia to continue working in agriculture. We also introduced AgMove, which has supported more than 8000 AgMove agreements, assisting people move to rural and regional areas for short-term agricultural work between 1 November 2020 and 15 March 2022. In the 2022–23 Budget, the AgMove Program was extended until 31 December 2022.

As part of the 2022–23 Budget, the government announced changes to visas that will support the Australian agricultural industry. This includes a one-off cap increase to the number of places available to Working Holiday Makers (WHM) from countries with which Australia has a Work and Holiday visa arrangement. As a result, around 11,000 additional WHM visas will be available for prospective backpackers. This change complements previously announced changes to incentivise WHMs to bring forward their arrival in Australia through refunding the Visa Application Charge between 19 January and 19 April 2022 and the announcement that, from 21 February 2022, all fully vaccinated visa holders can travel to Australia without a travel exemption. The Government has also more than doubled regional visas to 25,000 places under the 2022–23 permanent Migration Program to support growth in regional Australia.

We are supporting farmers and farm businesses through the Rural Financial Counselling Service, with more than 13,000 farmers across Australia helped since 2016.

The government also boosted education and training and encouraged more hiring of, and uptake of jobs by, young Australians. In 2021, we funded 50,000 places across 400 short courses in priority fields including agriculture. We have increased university funding from \$18 billion in 2020 to over \$20 billion by 2024 under the Job-ready Graduates reforms to higher education.

The reforms have already reduced student contributions for agricultural courses by 59% and seen a 5% increase in enrolments for 2021 compared to 2020.

This complements the JobTrainer Fund, which provides free training in areas of needed skills.

To further encourage young people to enter the workforce, we also amended Youth Allowance and ABSTUDY eligibility to include people working in agriculture in regional Australia.

Agricultural shows and field days are significant social and economic contributors to hundreds of Australian communities. COVID-19 has had a significant impact on this industry, with over 700 events cancelled since 2020 and many continuing to cancel in 2022. As part of 2022–23 Budget, the government is funding \$18.2 million to support agricultural shows and field days.

Labour assistance helps during challenging year

Over 18,200 Pacific and Timorese workers have arrived in Australia since the Pacific labour mobility programs were restarted in September 2020, bringing the total number of workers currently in Australia under the program to 22,415. Most of these Pacific Islanders and Timorese are working in agriculture, including mangoes, citrus, berries, apples, carrots, cauliflower, almonds, and meat processing. The number of Pacific and Timorese workers ready to take up jobs in regional Australia has also more than doubled with a work-ready pool of 52,000 workers following recruitment drives across Pacific countries and Timor-Leste.

We have also helped facilitate over 16,300 redeployments of Pacific and Timorese workers already in Australia (with their agreement). Stories of how Pacific Australia labour mobility is benefiting employers and workers are available at palmsscheme.gov.au/stories.



Building the agriculture workforce of the future

In December 2019, the government established the independent National Agricultural Labour Advisory Committee to develop a National Agricultural Workforce Strategy. The Committee's *'National Agricultural Workforce Strategy: Learning to excel'* was released in March 2021, alongside the *'Australian Government Roadmap to attract, retain, upskill and modernise the agricultural workforce'* which outlines the government's vision for the agriculture industry.

The government has provided significant support, around \$30 million in the 2021–22 Budget, to help the agricultural sector secure, skill and build its workforce, including through initiatives that directly respond to the recommendations of the National Agricultural Workforce Strategy. We have also been supporting the agricultural workforce by expanding Harvest Trail Services, announcing reforms to Australia's labour mobility programs and implementing measures, such as AgMove, to respond to immediate COVID-19 related workforce shortages. Our formal response to the National Agricultural Workforce Strategy was released in December 2021 and was informed by targeted consultations with state and territory governments and industry. The response aligns to the priority themes outlined in the Roadmap and it highlights the extensive work already underway to respond to the National Agricultural Workforce Strategy's recommendations.

Across government, we are delivering measures to support rural communities recover from the challenges of 2020, including increasing funding for the Rural Financial Counselling Service, extending the Regional Small Business Support Program and waiving Business Income Reconciliation Debts accrued under the Farm Household Allowance.

Through the Regional Investment Corporation, we are supporting the next generation of farmers – including share farmers and lease holders – with \$75.0 million in loans through the AgriStarter Loan product. We are also delivering Plantation Development Concessional Loans to encourage new plantation developments and the replanting of bushfire-damaged plantations with \$37.5 million in funding for 2021–22.

The government is also expanding access to mental and primary health care services for regional Australians, who make up the bulk of the agricultural workforce. Digital health services will be expanded to ensure easier access and we will support the delivery of primary care and a skilled health workforce in rural and remote Australia.

The government's deregulation agenda will continue to make it easier for businesses to get people into jobs and interact with government.



The government is delivering:

- ▶ \$75.0 million for the Regional Investment Corporation (RIC) AgriStarter Loan program to support the next generation of farmers looking to purchase, establish or develop their first farm business, and support farming succession arrangements
- ▶ \$37.5 million in loan funding for Plantation Development Concessional Loans product delivered by the RIC on 6 December 2021, to encourage new plantation developments and the replanting of bushfire-damaged plantations
- ▶ establishing the Australian Agriculture Visa to address workforce shortages in the agriculture sector
 - » providing \$87.2 million over 4 years from 2021–22 (and \$23.4 million per year ongoing from 2025–26) to implement and administer the Australian Agriculture Visa
- ▶ \$25.2 million in new funding for AgATTRACT, to shift perceptions of modern agriculture and recognise its diverse career opportunities, including:
 - » piloting AgCAREERSTART to give school leavers a way to experience working in agriculture – the government has announced the \$5.1 million pilot program will be delivered by the National Farmers' Federation and the first placements started in March 2022
 - » providing more opportunities for upskilling and career progression with AgUP grants – the grant program opened on 23 November 2021 and closed on 20 January 2022
 - » providing \$4.2 million to facilitate a targeted update of the Australian and New Zealand Standard Classification of Occupations (ANZSCO) to better reflect modern agricultural occupations – the targeted update was released on 23 November 2021
- ▶ \$21.2 million in 2021 to support the delivery of more than 2,300 short courses in agriculture, environmental and related studies to upskill our workforce
- ▶ \$15.4 million provided in the 2020–21 Budget for AgMove relocation assistance which resulted in more than 8,000 AgMove agreements to support people to temporarily relocate for short-term agricultural work between 1 November 2020 and 15 March 2022. AgMove has been extended to 31 December 2022 with an additional \$6.6 million to support more eligible job seekers who relocate for agricultural work
- ▶ \$4.6 million to AgFAIR to improve workforce management and planning, and to create attractive, fair, and safe working conditions, including \$3.2 million that has been provided to Growcom to fast-track horticulture businesses through the Fair Farms program
- ▶ \$2.6 million to expand the Career Revive program to support more medium to large regional businesses attract and retain women returning to work after a career break
- ▶ support for a fair and attractive workforce by helping small businesses meet modern award obligations through Employment Contract Tools and the Employer Advisory Service
- ▶ amendment of the Migration Act 1958 to strengthen protections for workers against exploitation
- ▶ enhancement of primary care, health workforce and mental health services, including digital mental health services, to support small business owners and regional Australians
- ▶ support for primary producers and small businesses affected by disasters, under Disaster Recovery Funding Arrangements
- ▶ waiving farm business income reconciliation debts incurred by the Farm Household Allowance up to 2019–20
- ▶ extension of the instant asset write-off to June 2023 to allow farmers to immediately deduct the full cost of eligible depreciable assets
- ▶ reforming Australia's Pacific labour mobility programs to introduce a more streamlined approach – the Pacific Australia Labour Mobility scheme (PALM Scheme)
- ▶ providing almost \$100 million to support the growth and long-term sustainability of the agricultural shows and field days industry
- ▶ extending existing loan funding for the RIC for a further 3 years to ensure it can continue to provide concessional loans to farmers and agricultural small businesses. Extending eligibility for Agristarter Loans which will make them available to farmers leasing or share farming land from 1 April 2022, supporting these farmers to purchase land or develop their businesses.

In Budget 2022–23, the government is committing:

- ▶ \$94.5 million for activities to improve the drought readiness and resilience of Australian farmers and communities from the Future Drought Fund
- ▶ \$15.4 million to deliver a second round of the oversubscribed and in-demand Agricultural Show Development Grants Program
- ▶ sponsoring large agriculture trade events through a \$12 million investment that promotes goods and services to national, emerging and export-focused agricultural production sectors in Australia, including \$6 million for Beef Australia
- ▶ \$2.8 million to deliver a third round of the Supporting Agricultural Shows and Field Days program, providing support for events that cancelled in 2021 or 2022 due to COVID-19 related issues.



Future Steps

The Australian Government is continuing to make significant investments to set the right foundations across the 7 Ag2030 themes to support industry – now and into the future – to have the best environment possible to reach the industry’s Ag2030 goal.

Additional measures outlined in this booklet build on those announced over the past 2 financial years. Our focus remains on delivering on our commitments so that agriculture remains a profitable, productive, and innovative industry that drives growth and job creation in rural and regional Australia.

Delivering Ag2030 will be updated annually to reflect future initiatives.

To stay up to date visit awe.gov.au/ag2030.

