



# 2030 Roadmap

2019 Report Card



National  
Farmers  
Federation

Leading  
Australian  
Agriculture

# In an increasingly complex environment, the single certainty faced by Australian Agriculture is that ‘business as usual’ is no longer an option, and nor should it be.

Launched in October 2018, the *2030 Roadmap* seeks to drive a targeted conversation about how Australian agriculture could stimulate innovative and sustainable growth.

While the vision is ambitious, to exceed \$100 billion in farm gate output by 2030, there is no doubt that the Roadmap has captured the hearts and minds of Australia’s farm sector, driving the strategic and collaborative approach required to succeed.

The Federal Government has also thrown its support behind the Roadmap – committing to the development of a complementary national plan for agriculture, fisheries and forestry.

One year on, the agriculture industry has laid the foundations to achieve the Roadmap priorities, but has also faced the headwinds of severe drought and flood, resulting in a forecast modest decline in agricultural production to \$59 billion in 2019-20.

Despite these seasonal challenges, the industry’s fundamentals remain strong and the National Farmers’ Federation (NFF) remains committed to its 2030 vision for Australian agriculture.

The purpose of this Report Card is to celebrate our successes and more importantly, highlight areas that require greater focus from industry or policymakers.

We’ve done this by summarising the outcomes of the past year and gauging whether we’re on track to meet the aspirations of the Roadmap.

The progress scale included is a reflection of activity undertaken throughout the year by industry and government, with a quantitative approach to follow as the impacts become measurable.

Attempting to consolidate the activities of an industry as immense and diverse as Australian agriculture into a short document is bound to result in oversimplification. Trying to draw conclusions about our trajectory 12 months into a 12-year plan is equally fraught.

What we present in this Report Card simply aims to maintain focus on the issues that are critical to our industry’s future.



**Fiona Simson**  
President, National Farmers’ Federation



## Pillar 1. Customers and the Value Chain

ASPIRATION	2030 METRIC	OUTCOMES
<p><b>1.1</b> The agricultural value chain has deep engagement with its customers, based on trust and transparency.</p>	<p>Agriculture is ranked Australia's most trusted industry.</p>	<ul style="list-style-type: none"> <li>Rural RDCs partner on the <i>Community Trust in Rural Industries</i> program to better understand and respond to community concerns.</li> <li>The NFF launches a wide ranging initiative to better connect agriculture with the community.</li> <li>Department of Agriculture progresses the <i>National Traceability Review and Framework Development</i> project to support future system enhancements.</li> </ul>
2019 PROGRESS* >		8
<p><b>1.2</b> Our value chain provides a competitive connection to global markets, and delivers clear market signals to guide paddock-to-plate investment.</p>	<p>Australia's freight cost per tonne-kilometre is competitive with major agricultural exporting nations.</p>	<ul style="list-style-type: none"> <li><i>National Freight and Supply Chain Strategy</i> receives funding commitment from Commonwealth Government.</li> <li>New <i>National Class 1 Agricultural Vehicle Exemption Notice</i> reduces red tape for farmers.</li> <li><i>Heavy Vehicle National Law</i> review commences to inform move to risk-based transport regulation.</li> </ul>
2019 PROGRESS* >		7
<p><b>1.3</b> Australia has world-leading market access, and the capacity to maximise the economic benefits.</p>	<p>A 50% reduction in agriculture exports experiencing non-tariff barriers each year. An average tariff faced by agricultural exports of 5%.</p>	<ul style="list-style-type: none"> <li>Strong ongoing industry-government partnership, but more work required to achieve positive trade outcomes, including elimination of non-tariff barriers.</li> <li>Commonwealth Government commits to introduce the <i>Biosecurity Imports Levy</i> to fund system improvements, however implementation is delayed.</li> </ul>
2019 PROGRESS* >		6



## Pillar 2. Growing Sustainably

ASPIRATION	2030 METRIC	OUTCOMES
<p><b>2.1</b> Farmers continue to embrace sustainable farming methods as part of a coordinated national framework that drives productivity and profitability, while recognising and rewarding environmental stewardship.</p>	<p>The net benefit for ecosystem services is equal to 5% of farm revenue.</p>	<ul style="list-style-type: none"> <li>Industry progresses individual commodity sustainability frameworks, with a stocktake planned from late 2020.</li> <li>Commonwealth Government announces \$30m funding for the <i>Agricultural Stewardship Pilot Program</i>.</li> </ul>
2019 PROGRESS* >		8
<p><b>2.2</b> Australian agriculture has cemented a competitive advantage and productivity gains by embracing a carbon neutral approach.</p>	<p>Australian agriculture is trending towards carbon neutrality by 2030.</p>	<ul style="list-style-type: none"> <li>The NFF joins the Australian Climate Roundtable to progress just, effective and efficient climate policy.</li> <li>Climate change policy remains fraught, however Governments are expected to agree <i>Climate Change Adaptation Strategy</i> for agriculture.</li> </ul>
2019 PROGRESS* >	4	
<p><b>2.3</b> Smart water policy has improved the health of our waterways, made our farms more productive, and made our regional communities more resilient.</p>	<p>A 20% increase in water use efficiency for irrigated agriculture by 2030.</p>	<ul style="list-style-type: none"> <li>Governments remain committed to sensible implementation of the <i>Murray Darling Basin Plan</i>, but swifter implementation of Productivity Commission recommendations required.</li> <li>Continued focus on Northern Australia development via the <i>Northern Australia Water Resource Assessment</i>.</li> </ul>
2019 PROGRESS* >	5	

\*2019 Progress: Indicative progress against expectations for this 12-month reporting period.  
1-3: Below expectation. 4-7: As expected. 8-10: Above expectations

ASPIRATION	2030 METRIC	OUTCOMES
<p><b>2.4</b> We have stemmed the loss of productive farm land, improved the health of our landscapes, and brokered lasting co-existence arrangements with other landholders.</p>	Maintain Australia's total farmed area at 2018 levels	<ul style="list-style-type: none"> <li>The NFF will deliver the Commonwealth funded \$4m <i>Sustainability Certification Project</i> to analyse, and further develop, existing industry sustainability models.</li> </ul>
<p><b>2.5</b> Australia has halved food waste, and significantly reduced the number of Australians facing food insecurity - thanks in part to a proactive partnership with the agricultural value chain.</p>	Halve on-farm food waste by 2030	<ul style="list-style-type: none"> <li>Numerous initiatives established to capitalise on Australia's food waste opportunities, however most in early stages of development.</li> <li>A national food security strategy is required to reduce the number of Australian's seeking food relief, which has increased by 22%.</li> </ul>

### Pillar 3. Unlocking Innovation

ASPIRATION	2030 METRIC	OUTCOMES
<p><b>3.1</b> Public and private R&amp;D efforts work seamlessly to translate world-class research into tools and services which give Australian agriculture a competitive edge.</p>	Australia becomes a Top 20 nation for innovation efficiency.	<ul style="list-style-type: none"> <li>Rural RDCs consider new collaborative approaches to complex cross-sectoral challenges.</li> <li>Commonwealth Government launches process to modernise the Rural RDC system.</li> <li>Commonwealth Government commits to agvet chemical and gene technology regulatory reforms to support access to safe technologies.</li> </ul>
<p><b>3.2</b> The agricultural value chain is highly digitised, with the benefits of new technology shared fairly among participants.</p>	Every Australian farm has access to infrastructure and skills to connect to the Internet of Things.	<ul style="list-style-type: none"> <li>Commonwealth Government commits \$220 million new funding to improve regional digital connectivity.</li> <li>Rural RDCs continue to co-invest in tools and frameworks to guide digital innovation, however national leadership is needed to reach full potential.</li> </ul>
<p><b>3.3</b> The agricultural value chain has reduced its reliance on fossil fuels, in favour of biofuels and renewable sources of electricity that are affordable and reliable.</p>	Australia's farm energy sources are 50% renewable by 2030.	<ul style="list-style-type: none"> <li>Australia continues to face a future without a national energy policy.</li> <li>Farm waste utilisation policies must be developed and implemented, including via the <i>National Food Waste Steering Committee</i>.</li> <li>The Clean Energy Finance Corporation releases <i>Transforming Australian Agriculture with Clean Energy Guide</i>.</li> </ul>

### Pillar 4. Capable People, Vibrant Communities

ASPIRATION	2030 METRIC	OUTCOMES
<p><b>4.1</b> There is a clear career pathway to attract workers and develop their skills, with tailored streams for new entrants through to seasoned professionals.</p>	Double the number of tertiary and vocational agriculture graduates by 2030.	<ul style="list-style-type: none"> <li>Commonwealth Government commits to enhanced vocational training sector, reforms yet to be implemented.</li> </ul>

ASPIRATION	2030 METRIC	OUTCOMES
<p><b>4.2</b> We have robust and sustainable mechanisms to access labour from Australia and around the world.</p>	Increase the available work force by 25%.	<ul style="list-style-type: none"> <li>Significant changes to working visa and migration programs implemented, however specific labour solution for agriculture still outstanding.</li> <li>Launch of <i>Growcom Fair Farms</i> to ensure fair treatment of horticulture industry workers.</li> <li>Strong industry support of the <i>Migrant Worker Taskforce</i> recommendations.</li> <li>Commonwealth Government commits to developing a National Agricultural Workforce Strategy.</li> </ul>
2019 PROGRESS >		7
<p><b>4.3</b> A career in Australian agriculture is an accessible aspiration for all.</p>	Achieve gender parity in the agricultural workforce, and double the number of women in management roles.	<ul style="list-style-type: none"> <li>Industry led agricultural diversity 'audit' planned from 2020.</li> <li>Successful diversity initiatives aimed at gender parity flourish, however more action required to promote inclusion of other underrepresented communities.</li> </ul>
2019 PROGRESS >		7
<p><b>4.4</b> We live in strong regional communities that are home to: world class education and health facilities; culture and entertainment; and a diverse economy.</p>	A mean score of 5 for every Physical Capital sub-measure in the Regional Wellbeing Survey.	<ul style="list-style-type: none"> <li>Commonwealth Government continues to implement the <i>Regional Deals</i> program.</li> <li>Significant activity by government to examine regional service delivery and development opportunities, however a strategic and long term approach is needed.</li> </ul>
2019 PROGRESS >	4	
<p><b>4.5</b> Australian farms have embraced a culture of safety, dramatically reducing workplace injuries and eliminating on-farm fatalities. A coordinated effort has improved the physical and mental health of industry participants.</p>	Zero farm fatalities. Close the gap between the psychological wellbeing of farmers and the broader community.	<ul style="list-style-type: none"> <li>Commonwealth Government announces \$3.5 million funding to improve farm safety initiatives.</li> <li>Recommendations from the ACCC <i>Quad bike Safety Standards Review</i> to be implemented.</li> <li>Agriculture lacks an effective and coordinated approach to mental health and wellbeing.</li> </ul>
2019 PROGRESS >		6

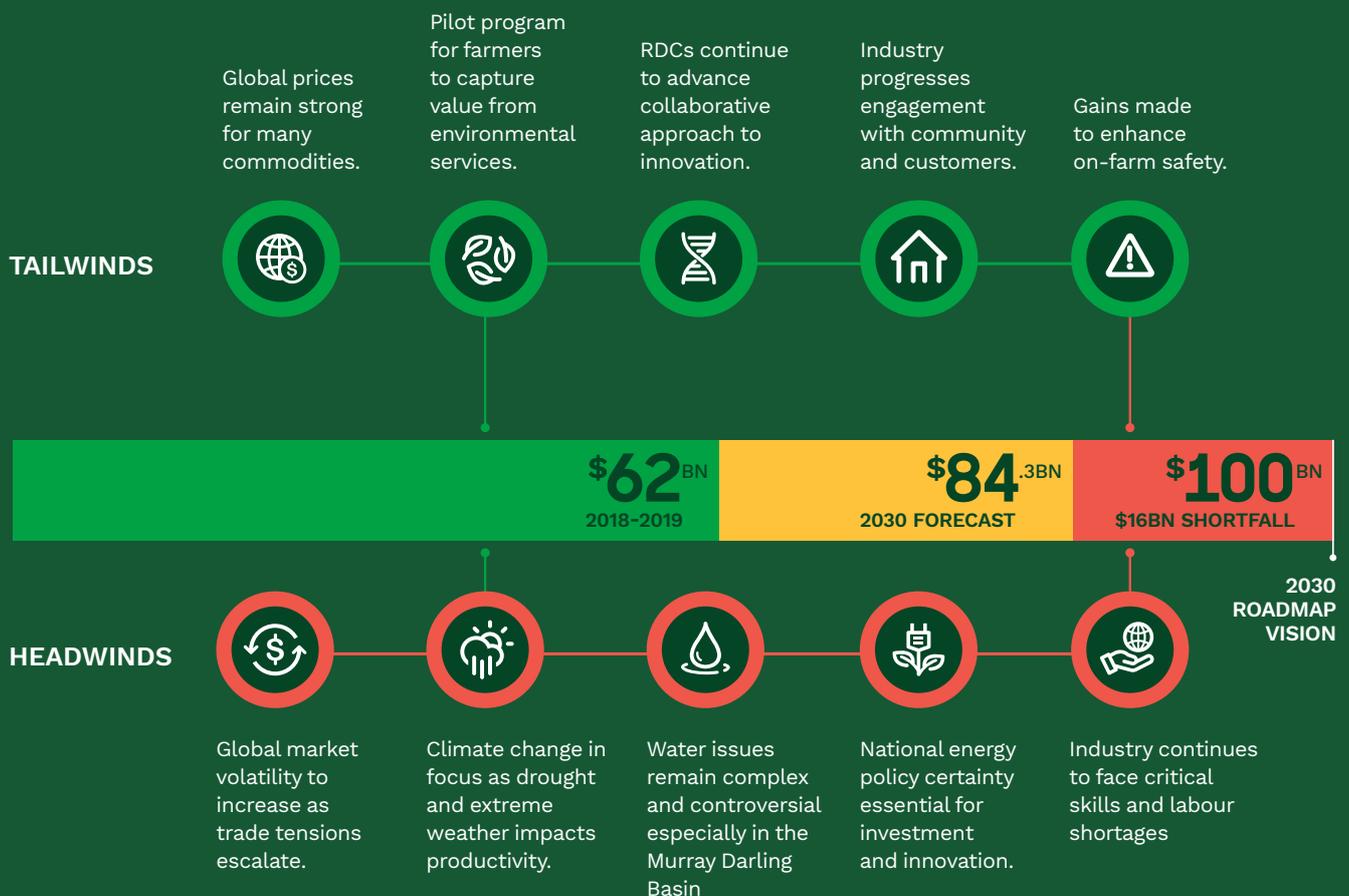
## Pillar 5. Capital and Risk Management

ASPIRATION	2030 METRIC	OUTCOMES
<p><b>5.1</b> Farm businesses have embraced new governance models -helping them better plan for the future, manage risk, and increase profit.</p>	90% of family farms have documented business plans, including succession plans.	<ul style="list-style-type: none"> <li>Greater industry activity to promote awareness of producer peer review boards.</li> <li>Improved opportunity for collaboration between grower groups.</li> <li>Need for national investment in rural business support services.</li> </ul>
2019 PROGRESS >	3	
<p><b>5.2</b> Investors are lining up to inject capital into Australia's agricultural businesses, based on demonstrated returns and a supportive policy environment.</p>	Year on year increase in equity investment in Australian farm businesses.	<ul style="list-style-type: none"> <li>Natural capital pilot project considers diverse opportunities for farm business income streams.</li> <li>Clarity needed on capital requirements to ensure shortfall is understood and resolved.</li> </ul>
2019 PROGRESS >	5	
<p><b>5.3</b> Innovative tools to reduce the inherent risks of farming are used by every Australian farm business -supported by consistent and well administered government risk management policies.</p>	90% of Australia's farmers employing multiple financial tools to manage risk.	<ul style="list-style-type: none"> <li>The NFF develops a National Drought Policy for government and industry adoption.</li> <li>AFI releases <i>Australian agriculture: an increasingly risky business</i>.</li> <li>NSW Government commits \$2m to facilitate additional research into the viability of insurance and other farm risk management tools.</li> </ul>
2019 PROGRESS >	5	

# Where to next?

Current forecasting suggests that Australian agriculture is on target to reach \$84.3 billion by 2030, leaving a gap of approximately \$16 billion to achieve the Roadmap vision.

Filling this gap requires continued progress where we are already advancing well, whilst ensuring our efforts are bolstered in areas yet to gain traction. Innovation, trade, intensification and income diversification will form the foundation for change.



## Government’s plan to enable agriculture, fisheries and forestry reach \$100bn by 2030.

The NFF commends the Federal Government announcement in July 2019 to develop a national plan which will enable the agriculture, fisheries and forestry industries to reach a \$100 billion by 2030.

Meeting this target requires strong policy and program support across all portfolios, including infrastructure, environment, trade, labour, education and innovation, and must commit all levels of government to key actions.

A coordinated national strategy is an effective way to ensure all levels of government work efficiently and seamlessly with industry towards a common goal.