

Queensland's agriculture strategy

A 2040 vision to double agricultural production





Department of Agriculture, Fisheries and Forestry

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A 2040 vision to double agricultural production

Premier's foreword



Agriculture is one of the four pillars of the Queensland economy identified by this government as fundamental to getting our great state back on track.

Along with resources, tourism and construction, agriculture underpins tens of thousands of jobs and contributes billions of dollars to Queensland's economy.

Most importantly, agriculture is the very lifeblood of many rural and regional communities across the state. To rebuild Queensland, we must rebuild agriculture.

For too long, agriculture has been undervalued. It is now time to not only recognise the great value the industry brings to our economy, but to release its potential to contribute much more. We made a commitment to double agricultural production by 2040 and, since taking office, this government has wasted no time in tackling this challenge.

We created a stand-alone Department of Agriculture, Fisheries and Forestry. We are revitalising essential frontline services, getting rid of unnecessary regulation and delivering real outcomes for the industry.

Queensland's agriculture strategy is part of our vision for this state's economic growth. The target is ambitious but clear—to double Queensland's agricultural production by 2040. To achieve this vision, I wholeheartedly endorse the four key pathways to growth:

1. securing and increasing resource availability
2. driving productivity growth across the supply chain
3. securing and increasing market access
4. minimising the costs of production.

The release of this strategy is our commitment to develop and implement the policies and initiatives that encourage economic development, support continued investment in research and development, and create strong partnerships with industry stakeholders.

The challenge for government and industry is to implement policies and programs that support the growth and prosperity of emerging opportunities.

In compiling this strategy, the Department of Agriculture, Fisheries and Forestry has sought input from industry stakeholders, including local councils and individuals.

I am extremely excited and confident about the future of Queensland's agriculture industry. By working together, we will rebuild agriculture, maintaining the sustainability of the sector and securing its role as a key pillar of the Queensland economy.

The Honourable Campbell Newman MP
Premier

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Minister's introduction



The Queensland Government's 2040 vision for agriculture, fisheries and forestry is for an efficient, innovative, resilient and profitable sector.

Queensland's agriculture commodities have a forecast estimated value of \$13.7 billion (gross value of production) in 2012–13, which includes both farm-gate value and first-stage processing.

Queensland overseas agricultural exports are worth \$8.9 billion per annum, comprising 16 per cent of the state's overseas commodity exports.

An estimated 323 800 Queenslanders are employed across the whole food supply chain. This means that one in seven Queenslanders are either partially or entirely supported by the food sector.

It is clear that our agriculture industries make a significant contribution and are integral to the long-term prosperity of Queensland. To grow Queensland we must rebuild agriculture as a pillar of our economy.

The sector is currently facing a number of major challenges, including continuing global economic uncertainty, an historically high Australian dollar and declining terms of trade. Our producers are also dealing with increasing production costs, the adverse effects of natural disasters, declining rates of productivity gains, competition for natural resources, continuing biosecurity risks and increasing climate variability.

However, the period to 2040 presents an unprecedented opportunity for growth. An increasing global population and burgeoning Asian middle class will drive an increased global demand for food, fibre and other higher value products. With a reputation for safe, clean, quality produce, Queensland is ideally positioned to take full advantage of this opportunity.

It is time for our state to embrace this opportunity, and the challenge it presents, in a practical and strategic manner. While many talk about such opportunities, Queensland is taking action and we will become a major high-quality food producer of choice for increasingly affluent consumers in Asia.

By releasing *Queensland's agriculture strategy*, I am outlining a vision and framework for growth based on four key pathways:

1. securing and increasing resource availability
2. driving productivity growth across the supply chain
3. securing and increasing market access
4. minimising the costs of production.

These pathways are the key foundations required for sustainable and ongoing growth of the sector in terms of increasing production and value.

Since taking office, the Queensland Government has been committed to rebuilding Queensland agriculture. We have already undertaken significant work within this framework to grow the sector and ensure long-term prosperity, including:

- undertaking Queensland's most comprehensive agricultural land audit, providing an unprecedented and up-to-date stocktake of Queensland's agricultural land resources to inform land-use planning decisions
- lifting productivity by significantly increasing our investments in key commodities such as sugar, beef, grains and tropical pulses, which have considerable future growth potential in Asia
- reinvigorating agricultural colleges through the Longreach Pastoral College and Emerald Agricultural College, and implementing a workforce development plan to holistically address the skilled workforce needs of our modern and progressive agriculture sector
- developing a research, development and extension plan to lift productivity across the supply chain by setting targets for transformational research, capacity, industry development, sustainability and improved international linkages
- undertaking reforms to the *Vegetation Management Act 1999* to enable clearing for high-value agricultural activities, and committing to including agriculture in statutory regional plans and local government planning schemes in order to enhance agricultural industries
- improving Queensland's biosecurity preparedness through implementation of new systems to more effectively manage pest and disease threats and the preparation of significantly enhanced biosecurity legislation
- revitalising frontline services to deliver on-ground solutions and outcomes for our producers in key areas such as wild dog management, tick control, crop protection and horticulture extension
- shifting Queensland's regulatory systems to a more streamlined, client-focused model that encourages innovation, business resilience and growth, while removing unnecessary and costly red tape.

I am committed to growing this pillar of the Queensland economy in partnership with industry, researchers and stakeholders by undertaking the incremental and transformational steps required to drive innovation and productivity across the sector.

I am committed to working with industry by providing the leadership that is vital to effectively capitalise on opportunities and overcome significant challenges.

I will work with my Cabinet colleagues to ensure the Queensland Government delivers on the initiatives outlined in this strategy and our commitment to double Queensland's agricultural production by 2040.

Queensland's agriculture strategy sits beside the *Queensland forest and timber industry plan* and the *fisheries direction statement* that will support these industries (Appendix).

Working together we can rebuild agriculture as a pillar of the economy and deliver an efficient, innovative, resilient and profitable sector that thrives in the long term.

The Honourable Dr John McVeigh MP
Minister for Agriculture, Fisheries and Forestry

Summary

Agriculture is a pillar of the Queensland economy—it creates jobs, generates over \$13.7 billion per annum for the Queensland economy and is the lifeblood of many rural and regional communities across the state.

The Queensland Government understands the importance of agriculture and is committed to getting the industry back on track. To rebuild Queensland we must rebuild agriculture.

Our 2040 vision

Our 2040 vision for Queensland’s agriculture, fisheries and forestry industries is for an efficient, innovative, resilient and profitable sector that thrives in the long term.

This means creating a sector that:

- achieves maximum productivity with optimised inputs and minimised waste
- embraces solutions that value-add and meet new requirements and market demands
- withstands and recovers quickly from difficult conditions
- yields profits and financial rewards for its producers and the economy.

In support of this vision, the Queensland Government has set a clear, ambitious target to double Queensland’s agricultural production by 2040.

Pathways to growth

While the sector is currently facing a number of major challenges, the period to 2040 presents an unprecedented opportunity for growth. An increasing global population will drive an increasing global demand for food, fibre and other higher value products. Queensland is ideally positioned to take full advantage of this opportunity.

The Queensland Government will work with industry, researchers and stakeholders to focus efforts and resources on addressing four key pathways:

1. securing and increasing resource availability
2. driving productivity growth across the supply chain
3. securing and increasing market access
4. minimising the costs of production.

These pathways will be underpinned by a commitment from the Minister for Agriculture, Fisheries and Forestry to be the enabling point of leadership, working across government and with industry to drive initiatives and help the sector grow.

1. Resource availability

Growth of agricultural production will require additional and optimised use of critical resources including land, water, labour and capital investment. The challenge is that, in many cases, these resources are declining and the cumulative impacts of overlapping constraints could limit further growth.

The Queensland Government will develop strategies that aim to improve access to, and the reliability of, water supplies, ensuring coexistence of industries through planning frameworks while providing certainty for producers in strategic agricultural areas and improving agriculture skills and career pathways. Key underpinning initiatives include:

- releasing the *Queensland Agricultural Land Audit*
- ensuring agriculture is represented as a state interest in statutory regional plans
- delivering secure and defined water entitlements for agriculture.

2. Productivity

To double Queensland's agricultural production, productivity growth must lift above the 30-year long-term average. The key to productivity growth will be the development and adoption of innovation across the supply chain, including:

- implementing preparedness and response mechanisms
- continuing the Queensland Alliance for Agriculture and Food Innovation
- investing in key growth commodities such as tropical pulses, beef, grains and sugar.

The Queensland Government will implement a research, development and extension plan that sets clear targets for transformation through research and improved workforce capability, increases the uptake of best practice and ensures Queensland becomes the most prepared state in Australia to respond to threats such as foot-and-mouth disease.



3. Markets

Market access and demand will be key determinants of future growth. Securing current markets and accessing new export markets will be vital to the sector's ongoing performance.

The Queensland Government will:

- streamline regulation while protecting our biosecurity status and food safety standards
- realign the Global Markets Initiative to enhance trade development services for food and agribusiness clients
- promote Queensland agribusiness as an attractive proposition to foreign and private investors.

4. Production costs

Profitability and viability have been affected by the cost of inputs, regulatory compliance and logistics of supplying markets. The challenge is to minimise the cost of production while ensuring reliable access to inputs.

Despite inherent challenges in the current system, the Queensland Government will:

- develop electricity and water strategies that help ensure reliable and cost-effective systems
- address supply-chain inefficiencies by preserving rail access and developing suitable transport infrastructure and logistics pathways such as ports and roads.

The way forward

Unlocking the sector's full growth potential is the responsibility of government, industry, researchers and stakeholders. Working together to refocus policies and programs to support the growth and prosperity of the sector will be critical to maximise growth and profitability.

The Queensland Government will work in partnership with industry to develop industry action plans that will address impediments and highlight opportunities for growth.

The Queensland Government will also develop a 'State of Queensland agriculture report' to establish baseline information for all of Queensland's major agriculture industries, providing vital information that industry has requested.

Working together, we will rebuild agriculture and get industry back on track. We will have an agriculture industry that thrives in the long term.

The importance of agriculture

Agriculture industries are integral to the Queensland economy. The sector is the backbone and social fabric of many rural and regional communities.

Geographically, Queensland is Australia's second-largest state, covering more than 173 million hectares. Almost 144 million hectares (83 per cent) of the land in Queensland is used for agriculture. Queensland has the largest area of agricultural land of any Australian state and the highest proportion of land area dedicated to agriculture.¹

Queensland's agriculture commodities have a forecast estimated value of \$13.7 billion (gross value of production) in 2012–13.² This includes \$11.1 billion at the farm gate (Table 1) and \$2.6 billion from first-stage processing (e.g. abattoirs, dairies and milling) (Table 2).

Queensland's overseas agricultural exports are worth \$8.9 billion per annum, comprising 16 per cent of the state's overseas commodity exports.³

Queensland produces around 47 per cent of Australia's total cattle and calves, which is worth well over \$3 billion per annum. Queensland also produces over 60 per cent of Australia's sorghum.⁴

Queensland is Australia's hub for tropical knowledge and expertise, producing approximately 94 per cent of Australia's sugar cane, 90 per cent of bananas, 89 per cent of limes, 55 per cent of mangoes and almost all of the country's pineapples and lychees.⁵

Queensland has the largest amount of certified organic production land in Australia, with almost 2.3 million hectares that includes large tracts of organic grazing land in Queensland's channel country.

Queensland has the highest value of farm-gate organic agricultural production in Australia at 32 per cent or \$140 million, including almost 70 per cent or \$52 million of Australia's growing organic beef industry.⁶

1 Department of Agriculture, Fisheries and Forestry 2013, *Queensland Agricultural Land Audit*, Department of Agriculture, Fisheries and Forestry, Brisbane.

2 Department of Agriculture, Fisheries and Forestry 2013, *Queensland AgTrends 2013: forecasts and trends in Queensland agricultural, fisheries and forestry production*, Department of Agriculture, Fisheries and Forestry, Brisbane.

3 Australian Bureau of Statistics 2012, 'Queensland overseas exports, standard international trade classification, ABS rural exports, Queensland 2011–12', unpublished data, Australian Bureau of Statistics, Canberra.

4 Australian Bureau of Statistics 2012, *1301.0 Year book Australia*, Australian Bureau of Statistics, Canberra.

5 As above

6 Monk, A, Mascitelli, B, Lobo, A, Chen, J & Bez, N 2012, *Australian organic market report 2012*, BFA Ltd, Brisbane.

An estimated 323 800 Queenslanders are employed across the whole food supply chain. This means that one in seven Queenslanders are either partially or entirely supported by the food sector.⁷

It is estimated that approximately 88 per cent of jobs in agriculture and 53 per cent of jobs in food processing industries are regionally based.⁸ These jobs and the economic contribution they provide are the backbone of many rural and regional communities in Queensland.

⁷ Australian Bureau of Statistics 2012, *6291.0.55.003 Labour force, Australia*, detailed quarterly, November 2012, Eo6, Australian Bureau of Statistics, Canberra.

⁸ Australian Bureau of Statistics 2011, *2011 Census of population and housing, working population profile, Wo9 industry of employment by sex*, Australian Bureau of Statistics, Canberra. 'Regionally based' means outside the Brisbane Statistical Division.



Table 1: Queensland's agriculture commodities—estimates and forecast gross value of production 2012–13 (farm gate)

Commodity (\$m)		Total (\$m)	
Livestock disposals		3 978	
Cattle and calves	3 247	Poultry	438
Pigs	204	Sheep and lambs	47
Other livestock	30	Kangaroos	12
Livestock products		470	
Milk (all purposes)	226	Eggs	138
Wool	106		
Fruit		1 334	
Bananas	500	Other fruit and nuts	200
Avocados	140	Strawberries	125
Mandarins	64	Pineapples	83
Mangoes	70	Macadamias	52
Table grapes	50	Apples	50
Vegetables		1 119	
Tomatoes	243	Other vegetables	223
Capsicums, chillies	139	Beans	74
Mushrooms	64	Potatoes	54
Lettuce	54	Sweet potatoes	52
Zucchini, button squash	42	Watermelons	36
Sweet corn	36	Melons	32
Onions	25	Carrots	24
Pumpkin	21		
Lifestyle horticulture		1 143	
Nurseries	867	Cut flowers	151
Turf	125		
Other field crops		1 970	
Sugar cane	1 140	Cotton (raw)	633
Sunflowers	10	Pulses	187
Cereal grains		1 099	
Wheat	554	Grain sorghum	305
Other cereal grains	162	Maize	34
Barley	44		
Total agriculture (farm gate)		11 112	

Source: Department of Agriculture, Fisheries and Forestry 2013, *Queensland AgTrends 2013: forecasts and trends in Queensland agricultural, fisheries and forestry production*, Department of Agriculture, Fisheries and Forestry, Brisbane.

Table 2: First-round processing value-added—estimates and forecast gross value of production 2012–13

Commodity	\$m
Meat processing	1 526
Sugar processing	646
Fruit and vegetable processing	211
Milk and cream processing	119
Flour mill and feed processing	89
Cotton ginning	72
Total first-round processing	2 664

Source: Department of Agriculture, Fisheries and Forestry 2013, *Queensland AgTrends 2013: forecasts and trends in Queensland agricultural, fisheries and forestry production*, Department of Agriculture, Fisheries and Forestry, Brisbane.

Table 3: Volume of production index for Queensland’s major agricultural commodities

Volume index	1996–97	1998–99	2000–01	2002–03	2004–05	2006–07	2008–09	2010–11	2011–12	2012–13
Grain sorghum	100	106	115	93	116	89	176	134	139	159
Major cereal grains	100	98	72	50	74	51	117	74	79	108
Sugar cane	100	98	71	94	97	91	82	77	77	83
Cotton lint	100	146	129	50	151	42	93	148	243	185
Major fruit and vegetables	100	102	132	119	134	145	138	164	167	153
Crops	100	105	92	82	105	85	103	104	118	117
Cattle calves and live exports	100	125	140	136	135	140	134	132	131	129
Poultry	100	108	111	123	138	147	158	170	174	174
Major livestock disposals	100	122	134	132	132	137	132	131	130	132
Milk (all purposes)	100	104	95	90	78	67	64	61	59	56
Eggs	100	133	173	135	191	260	266	495	504	562
Total agriculture	100	111	107	98	109	100	107	109	117	116

Source: Department of Agriculture, Fisheries and Forestry 2013, *Queensland AgTrends 2012–13: forecasts and trends in Queensland agricultural, fisheries and forestry production*, Department of Agriculture, Fisheries and Forestry, Brisbane.

In terms of the volume of production for Queensland’s major commodities, Table 3 shows a volume of production index that describes the movement in production over a period of time relative to a base period (from 1996–97 to 2012–13).

Table 3 shows that in 2012–13, the production index for agriculture is forecast to be 116. This indicates that Queensland’s agricultural production in 2012–13 is forecast to be 16 per cent higher (on average) than in the base year of 1996–97.

The year 1996–97 was chosen as the base year because it is considered to be a year when average production levels were recorded for most of Queensland’s major agricultural commodities.

In 2012–13, Queensland’s agricultural industries utilised an estimated \$4.4 billion of inputs from a range of industries to produce their outputs.⁹ These industries include transport, fuel, fertiliser and storage industries, which support rural and regional economies through the provision of jobs and injection of money back into the community.

Queensland’s agricultural industries support and underpin an array of secondary industries across the food supply chain. These industries include transport and logistics enterprises, refrigerated storage facilities, first-stage and second-stage food and beverage manufacturing, wholesale and retail distributors, and food services industries.

Queensland businesses of all sizes process and value-add to our base commodities across the food supply chain. Through a combination of technology, skills and knowledge, they produce products that meet market expectations and uphold our high food safety and quality standards.

In total, it is estimated that these secondary industries contribute over \$24.3 billion to the Queensland economy.¹⁰ They add significant value to Queensland’s base produce and support rural and regional economies.

⁹ Department of Agriculture, Fisheries and Forestry 2013, *Queensland AgTrends 2013: forecasts and trends in Queensland agricultural, fisheries and forestry production*, Department of Agriculture, Fisheries and Forestry, Brisbane.

¹⁰ As above

Data

Data for all the commodities contained in this strategy was sourced from *Queensland Agtrends* and the Australian Bureau of Statistics. *Queensland Agtrends* is developed and released by the Department of Agriculture, Fisheries and Forestry on an annual basis in October, with the forecasts revised the following April. These forecasts represent the current gross value of production at the farm gate plus the value-added estimate for first-stage processing, which for the entire sector in 2012–13 is \$14.7 billion. The forecasts are current, can be used for operational purposes and are readily understood by key stakeholders.

The Australian Bureau of Statistics data is from the *Australian national accounts: state accounts* (catalogue no. 5220). This publication contains state and territory estimates of gross state product and its components in current price and volume terms, which for Queensland represents a figure of \$12.5 billion. These statistics generally lag up to two years behind the current period. However, they are the preferred points of reference for yearly comparative analysis of the contribution of agriculture, forestry and fisheries to gross state product. The current *Queensland Agtrends* forecasts are updated once the Australian Bureau of Statistics data becomes available.

Specific fisheries and forestry commodity data is provided in the Appendix.

The journey so far

The Queensland Government has already undertaken significant work to grow agriculture in line with increasing resource availability, driving productivity, securing market access and reducing increases in production costs:

- **Market development**—Strong trade ties have been developed with our northern neighbours to tap into the burgeoning Asian food markets. To support the Queensland beef industry and help rebuild trade relations with our key northern neighbour, a joint mission with the Northern Territory Government travelled to Jakarta to meet with top-level Indonesian government ministers, including the Minister for Agriculture, Vice-Trade Minister and Minister for State-Owned Enterprises.
- **Sorghum research**—Through the Queensland Alliance for Agriculture and Food Innovation partnership, \$4 million of funding from the Bill and Melinda Gates Foundation was used to research drought-resistant sorghum varieties suitable for the dry tropics. This is seen as a significant opportunity for Queensland to again lead the world in arid-zone farming.
- **Sugarcane research**—Additional funding of \$4.6 million was provided to BSES to help boost yields in one of Queensland’s most important rural and regional industries.
- **Barley research**—Barley breeding capabilities have been retained in Queensland—and our research refocused into varieties suitable for northern Australia—supporting a clear target to boost yields and profits for Queensland grain growers.
- **Natural disaster relief**—A support package worth up to \$11.2 million was delivered to provide land rent relief for farmers in drought-declared areas, transport concessions, emergency grazing in national parks, freight subsidies for the movement of fodder and water, and assistance to purchase and install emergency water infrastructure for animal welfare needs. The Queensland Government will continue to work with the Commonwealth for natural disaster assistance under the joint Commonwealth–State Natural Disaster Relief and Recovery Arrangements.
- **Agricultural colleges**—The Emerald Agricultural and Longreach Pastoral Colleges have been restructured and local management boards and new college directors have been appointed, to ensure the colleges provide the practical agricultural training that industry needs.
- **Northern Beef Research Alliance**—We worked with The University of Queensland and CSIRO to solve some of the key questions affecting northern production, such as reproduction efficiency, optimisation of growth pathways and low-stress animal husbandry procedures. This includes the northern state-of-the-art cattle research facility, Spyglass, where we are working with industry, universities, research organisations and Meat & Livestock Australia to boost productivity through higher calving rates and weaning weights.

- **Bovine Johne's disease**—We responded to the Rockhampton outbreak to maintain Queensland's 'protected zone' status that ensures access to key export markets.
- **Wild dog baits**—We cut red tape and reduced costs of 1080 baiting by removing the requirements for baits to meet 'human consumption' grade.
- **North Queensland Irrigated Agriculture Strategy**—In partnership with the Office of Northern Australia and CSIRO, \$10 million has been invested in researching the potential for intensive, irrigated cropping and livestock production along the alluvial floodplains of the Flinders and Gilbert rivers. The potential of more water allocations has been recognised by individual and corporate agricultural businesses, which have already taken up all the water available in the current water resource plan.
- **Vegetation management**—Vegetation management has been overhauled to cut red tape and let farmers get on with the job of managing their farms.
- **Transport efficiencies**—Better access to markets and processors has been provided through common sense changes to road transport regulations, more opportunities on rail for cattle and grain, and rail upgrades including passing loops on the Toowoomba range.
- **Forestry and fisheries industries**—Alongside our efforts to develop and implement the *Queensland agriculture strategy*, we convened a working group chaired by Timber Queensland to develop a plan to drive innovation, resilience and profitability in the Queensland forest and timber industry. We have also begun development of a *fisheries direction statement* that will focus on streamlining fisheries management.

Our 2040 vision

Our 2040 vision for Queensland's agriculture, fisheries and forestry industries is for an efficient, innovative, resilient and profitable sector that thrives in the long term.

This means a sector that:

- achieves maximum productivity with optimised inputs and waste
- embraces solutions that value-add and meet new requirements and market demands
- withstands and recovers quickly from difficult conditions
- yields profits and financial rewards for its producers and the economy.

In support of this vision, the Queensland Government has set a clear, ambitious target to double Queensland's agricultural production by 2040.

Achieving this target will require a coordinated effort from government and industry to address the four key pathways to growth. Success will be reflected in an:

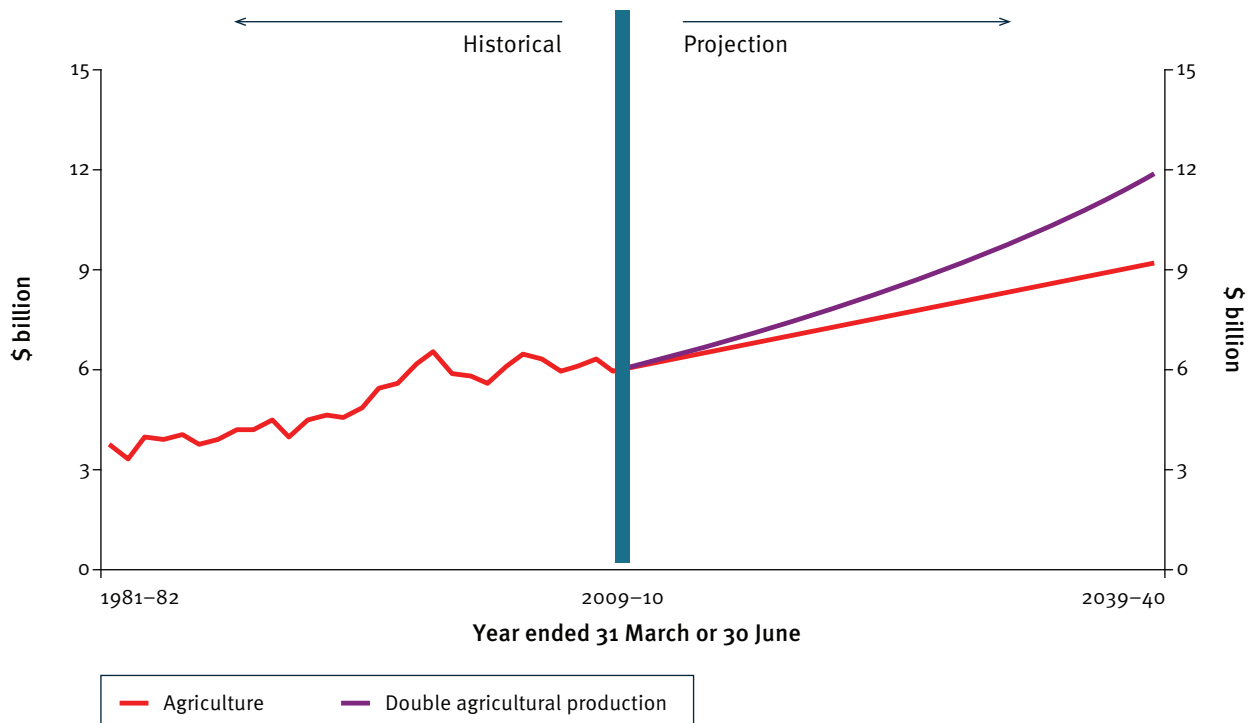
- increase in the value of production for Queensland produce
- increase in the export value of Queensland agricultural commodities
- increase in the sector's contribution to Queensland's overall gross state product.

Achieving this target will not be easy. The past 30 years has shown that the sector has experienced cycles of good and bad seasons. Queensland producers have dealt with years of drought, devastating floods and cyclones, and the impacts of pests and diseases.

However, meeting the target to double Queensland's agricultural production by 2040 (Figure 1) will only occur if we increase the level of productivity of the sector across the supply chain above the 30-year long-term trend.

Over the period to 2040, Queensland's agricultural industries will be increasingly export-focused. These industries will supply new and expanded markets with quality products while remaining globally competitive.

Figure 1: Queensland volume of agriculture output (1981–82 dollars)



Major data sources: Australian Bureau of Statistics—cat. no. 7503.0 Value of agricultural commodities produced, Australia (various years); 71210.0 Agricultural commodities, Australia (various years); Projections and forecasts by author.

Note: Figure 1 shows estimates of physical volumes of production in Queensland’s agricultural sector. It weights changes in quantities of commodities over time by their prices in the previous base period. The figure also presents agricultural output in a way that removes inflationary price measures over time. Using constant 1981–82 prices as a base, the figure illustrates a summary index of all commodities together. As such, it emphasises the challenge of doubling Queensland agricultural production by 2040, which had an estimated value of \$13.7 billion in 2012–13. The projections made above have been estimated by the Department of Agriculture, Fisheries and Forestry.

The sector will evolve and adapt, becoming more resilient and responsive to market signals to take advantage of opportunities. This will stimulate demand through the promotion of our quality products and attract new investment.

Innovation across the supply chain will occur to ensure our industries remain competitive and effectively access markets. Vertical integration in business models and increased capital investment, including private sector and foreign investment, will be important for future growth.

Niche markets will provide opportunities to attain the highest value for certain products, with significant scope to value-add and diversify enterprises along the supply chain.

Consumer and retail demand for organics will increase as people become more conscious of their health and the environment. Australia's organic industry (currently worth \$1.27 billion) is expected to grow up to 15 per cent a year, exceeding global trends and consistently ranking among the top of Australia's growth industries.¹¹

Queensland will have more efficient, innovative and resilient supply chains that adapt and respond to fluctuations in supply, cost pressures, natural hazards and competition. This will be supported by a freight network, infrastructure and service hubs that deliver innovative and integrated solutions to optimise capacity and maximise utilisation of supply chains.

The responsibility for managing, maintaining and/or developing efficient transport of product to market will be increasingly shared across infrastructure owners, regulators, transport operators and freight customers. Strategic investment in enabling infrastructure, supportive planning frameworks and a conducive economic environment will encourage growth and ensure long-term access for the sector.

Through coordinated approaches such as the National Primary Industries Research, Development and Extension Framework, Queensland can realise the full potential of its industry strengths, driven by innovation and delivering continued productivity increases.

Collaborative partnerships will undertake practical research, development and extension that deliver tangible local outcomes. Queensland will remain a world leader in subtropical and tropical research and in beef, horticulture, sugar and grains development, while also developing new strengths.

Queensland will be at the forefront of technology and practices that capitalise on opportunities to diversify into new pathways for growth. Bio-based products, including biofuels and pharmaceuticals/nutraceuticals using feedstock from Queensland, will become an increasing area of focus.

Agriculture will coexist with other pillars of the economy through appropriate planning and collaboration partnerships that deliver balanced outcomes. This will further strengthen rural and regional economic development in Queensland.

Queensland's industries will be prepared, resilient and responsive to challenges such as droughts and floods, water availability, pests and diseases, and evolving markets. The right knowledge, tools and support will be crucial to increasing profitability and productivity.

Biosecurity incidents are likely to become more frequent as the movement of products and people around the world increases, climates and environments change, free trade agreements become more common and market requirements intensify.

¹¹ Monk, A, Mascitelli, B, Lobo, A, Chen, J & Bez, N 2012, *Australian organic market report 2012*, BFA Ltd, Brisbane.

Increased global trade will call for a stronger biosecurity framework based on robust science, diagnostic capability and innovative tools to protect our enviable biosecurity status. Establishing and maintaining market access for our products will be essential for export growth.

Queensland's agribusinesses will harness a highly skilled workforce and innovative technology and practices, and share knowledge through extension. These businesses will be increasingly productive, with optimised systems and practices as the foundation for long-term prosperity, while ensuring the efficient use and protection of natural resources.

Regulation will be streamlined and client-focused, with an emphasis on shared responsibility with industry. This will create a dynamic landscape for business growth, facilitating industry development and investment through mechanisms such as land-use planning and biosecurity management.

Queensland's agriculture, fisheries and forestry industries will be efficient, innovative, resilient and profitable. Queenslanders will have closer links to the food and fibre we produce, and an increased understanding of the important contribution these industries make to the state's economy and society.



Pathways to growth

There are a range of factors that will influence and affect the sector's ability to grow. Some of these key factors—such as Australia's exchange rate, ongoing global economic uncertainty, decreasing terms of trade and increasing climatic variability—are beyond the control or influence of the Queensland Government.

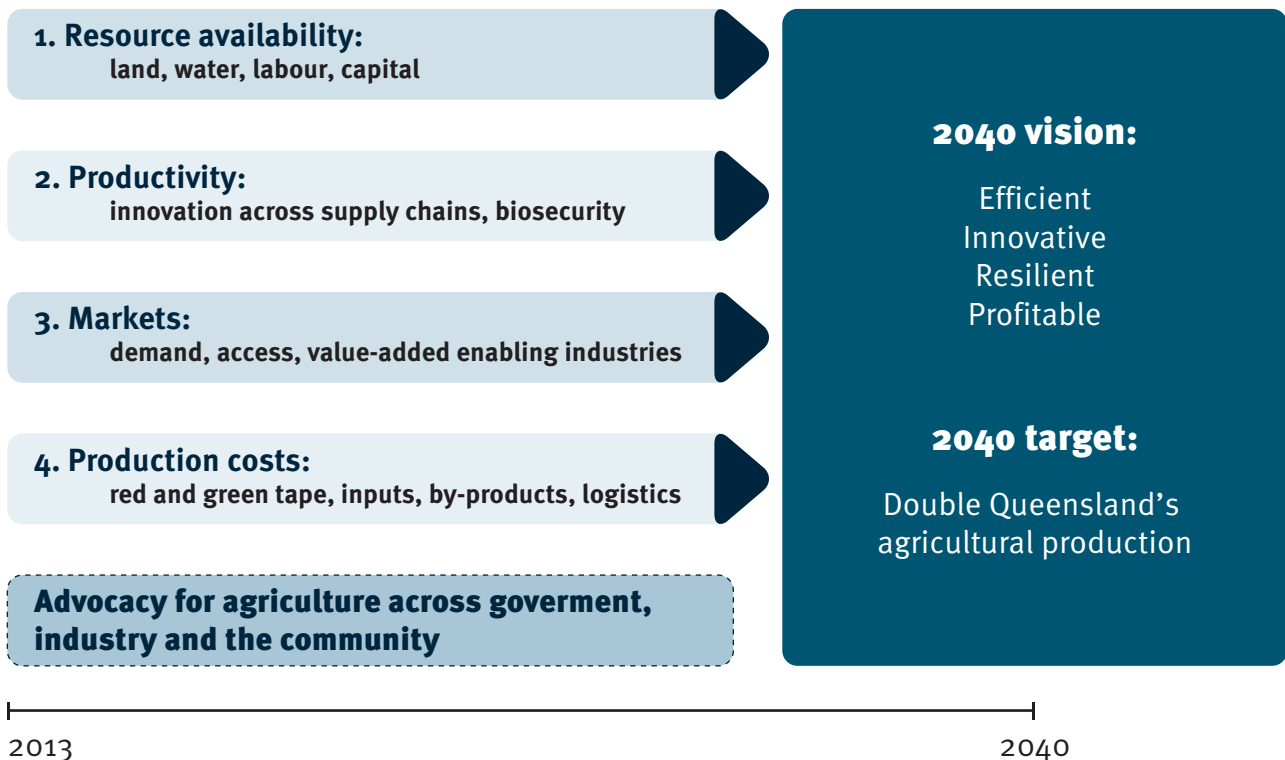
However, the government will work in partnership with industry to utilise available resources to establish the business conditions essential for facilitating growth.

We will focus efforts and resources on addressing the four key production pathways:

1. resource availability—securing and increasing resource availability
2. productivity—driving productivity growth across the supply chain
3. markets—securing and increasing market access
4. production costs—minimising the costs of production.

These pathways will be underpinned by a commitment from the Minister for Agriculture, Fisheries and Forestry to be the enabling point of leadership, working across government and with industry to drive initiatives that will help the sector grow.

Figure 2: Pathways to double agricultural production



1. Resource availability

Growth of agricultural production will require additional and optimised use of critical resources including land, water, labour and capital investment. The challenge for the sector is that, in many cases, these resources are declining and the cumulative impacts of overlapping constraints could limit further growth.

The natural resource base is under pressure from a number of factors, including an expanding resource sector, growing population, inefficient or degrading practices, and increasing climate variability.

Skills shortages across all industries, an ageing rural population and increasing competition have combined to reduce the workforce for agriculture, fisheries and forestry industries over time. Declining profitability has also seen a continued reduction in public and private investment. Overcoming these challenges will require increased flexibility and innovation across the whole supply chain.

Opportunities exist to increase access to reliable water, where economically viable and sustainable, and focus on efficiency improvements along the water supply chain. Effective water markets will be increasingly important for prioritising water for the most productive long-term use.

The identification, protection and facilitated development of strategic agricultural areas will be increasingly important, driving growth through the optimisation of resource use, infrastructure and supply chains. Existing and future planning frameworks will need to prioritise agricultural assets and encourage coexistence to enable agriculture to be flexible and resilient to changes in climate, market conditions and biosecurity threats.

As major resource and construction projects slow down in the future, the sector will need to attract skilled workers and school leavers. We must continue to attract and retain Queenslanders who are passionate about agricultural careers, and provide them with increased opportunities to gain the necessary business and technical skills to meet modern industry demands.

Capital investment is largely a product of market conditions. Further investment, both foreign and private, will be encouraged in part by initiatives that increase the profitability and investment potential of the sector. These will include reducing and streamlining regulation and promoting our industries' strengths and potential to private and foreign investors.

To secure and increase resource availability, the Queensland Government will:

- liaise with local service providers to develop and implement regional water supply strategies to address short-term and long-term water needs and supply risks for agriculture
- ensure the existing agricultural sector is supported with secure and defined water entitlements to underpin irrigation projects, provide opportunities for expansion of agricultural enterprises through water trading markets that may offer water supplies on a permanent or temporary basis, and release unallocated water where sustainable
- ensure ongoing management of surface water and groundwater resources to protect and maintain water quality and supply for agricultural use, without compromising existing downstream water users' rights, commercial and recreational fisheries, and environmental, tourism and cultural values
- develop strategies to extend water supply through local innovative, cost-effective water-use efficiency, recycling and re-use solutions (including opportunistic re-use of produced water from resource extraction)
- prepare and capitalise on large strategic investments in critical resources from external sources, which will increase connectivity in rural areas and support technological development in farming and business practices
- represent agriculture as a state interest in statutory regional plans and local government planning schemes (For example, the statutory regional plans for the Darling Downs and Central Queensland will identify strategic and highly productive agricultural land where agriculture will be determined to be the priority land use. Within these priority agricultural areas, resource activities will only be able to occur where a set of coexistence criteria can be adopted by the resource sector. These areas will be mapped as part of the regional planning process and be given effect through legislation.)
- ensure the inclusion of local government planning provisions aimed at protecting agricultural land and enabling/facilitating agricultural development, including agricultural-based secondary industries

“Increasing access to a skilled workforce by improving career pathways is a key objective of Growcom’s Production Horticulture Workforce Development Plan, which raises awareness of the wide variety of careers in the production horticulture supply chain and repositioning production horticulture as a career of choice in a high-tech, world-class industry.”

Growcom

- work with research agencies and industry to identify new opportunities for agricultural areas (including the North Queensland Irrigated Agriculture Strategy) and release unallocated water in Baffle Creek, the Flinders and Gilbert river catchments, and the General Reserve for the Great Artesian Basin to support new agricultural development
- investigate options for increasing availability of water for agricultural uses, such as raising the Burdekin Falls Dam
- improve agriculture skills and career pathways by developing workforce plans, and use the Agriculture, Fisheries and Forestry Skills Industry Advisory Group to provide leadership and direction for future strategies
- implement the government's response to the Land Access Independent Panel review, which will ensure landholders' rights are balanced with those of resource companies in relation to private land access and compensation
- improve the security and certainty of land tenure to support increased agricultural investment opportunities.



2. Productivity

Productivity growth will continue to be important to the strength of the agriculture sector. Recent analysis indicates a trend of slowing productivity growth.¹² To double Queensland's agricultural production and ensure we remain a globally competitive supplier of food and fibre, we must lift productivity growth above the current 30-year long-term average.

The key to productivity growth will be the development and adoption of innovation across the supply chain. Industry is already reaping the rewards of implementing best-practice management, including business decision-making tools. Public and private commercialisation strategies have been proven to support productivity, increase biosecurity management practices and increase sustainable production.

The Queensland Government will continue to strengthen biosecurity systems to protect current production from known pests and diseases, and ensure industry preparedness to minimise the risk of future incursions.

Continued investment in research, development and extension will lead to the development of better genetics, production systems and business decision-making tools, ensuring our producers can adapt to changing environmental factors. This will enhance the ability of industries to manage risk and ensure their ongoing resilience, particularly with regard to climate and biosecurity threats.

Producing more with lower inputs and value-adding through better use of agricultural by-products will maximise revenue from production and further add to productivity increases. Advances in biotechnology will be a critical driver in the development of new agricultural industries.

Brokering research, development and extension partnerships that pool resources and draw on more diverse funding will achieve the best returns on investment.

Government, researchers and industry must work together to harness collective knowledge, experience, ideas and infrastructure to ensure industry innovation and business improvement.

Effective extension is paramount for the adoption of research and development outputs. It will be imperative to share responsibility with industry to maximise uptake and ensure change occurs. A modern, well-trained and efficient workforce will be critical for the adoption of innovation.

¹² Sheng, Y, Mullen, JD & Zhao, S 2011, *A turning point in agricultural productivity: consideration of the causes*, ABARES research report 11.4 for the Grains Research and Development Corporation, Canberra.

Continued investment in research and extension is vital in order to keep the grazing and grains industry profitable. Initiatives such as the Grazing BMP will continue to lead the industry into the future by assisting producers with analysis and best management options for their operations.

AgForce

To drive productivity growth across the supply chain, the Queensland Government will:

- implement a research, development and extension plan that sets clear targets for transformational research, capability, industry development, sustainability and improved international linkages (the plan will address the recommendations of the Queensland Chief Scientist’s audit of the Department of Agriculture, Fisheries and Forestry science, and is informed by the National Primary Industries Research, Development and Extension Framework)
- increase the uptake of best practice, including measures such as conservation cropping techniques, irrigation efficiency, machinery adaption and sustainable grazing land use
- improve preparedness and response mechanisms to enhance resilience to natural disasters and biosecurity threats, including becoming the most prepared state in Australia for incursions such as foot-and-mouth disease
- increase funding for sugar research, development and extension to increase the productivity of Queensland’s sugarcane industry, improve farm practices and address pest and disease issues
- focus on research projects through the Northern Beef Research Alliance that aim to improve the productivity and profitability of Queensland’s beef industry
- enhance science and technology capability, including partnerships with universities and industry, to provide practical research that boosts productivity
- continue the Queensland Alliance for Agriculture and Food Innovation—a partnership with The University of Queensland that aims to increase innovation within the agriculture and food sector



- invest in industries that have potential for growth, such as tropical pulses, through investment with the Queensland University of Technology into research that will help increase the production and export of chickpeas, mungbeans and other pulses
- provide assistance and facilitation for value-add operations to establish, expand and relocate to Queensland through inward investment activities and programs
- deliver an updated Queensland climate adaptation strategy that recognises the importance of climate impacts on the agriculture sector, and explores cost-effective ways to build resilience to climate risks and foster adaptation opportunities
- support capability-building and productivity improvement in industry in collaboration with Enterprise Connect's food network
- work with regional bodies, funding providers and landholders to leverage resources to expand and increase uptake of best-management practice
- collaborate with producer groups, industry and scientists from around the world to develop solutions and opportunities for Queensland's field crops and pasture industries, including winter cereals such as wheat, barley, oats, canary and triticale
- provide growers and industry stakeholders with immediate access to cutting-edge research and industry information through best-practice principles and guidelines, and industry and extension staff (to investigate and resolve issues)
- work with producers, local governments and communities to continue the fight against weeds such as prickly acacia and bellyache bush, which have significant impacts on primary industries, natural ecosystems and human and animal health, and are estimated to cost Queensland \$600 million annually
- hold a feral animal summit with key government departments, local governments, producers and other organisations to develop future approaches to feral animal management, including wild dogs
- provide additional frontline officers to deliver on-ground solutions and outcomes for our producers in key production areas across Queensland
- continue to improve biosecurity systems, surveillance and detection to protect agriculture production and the environment, utilising state-of-the-art, purpose-built facilities that maximise efficiencies in line with the Commission of Audit.¹³

¹³ Queensland Commission of Audit 2013, *Queensland Commission of Audit: final report—February 2013*, Queensland Government.

Case study: Agricultural research and development partnerships

The Department of Agriculture, Fisheries and Forestry is collaborating with leading research organisations to rebuild our state's practical and applied scientific and technology capability, including partnering with Queensland universities to provide practical research that boosts agriculture.

One such arrangement is with The University of Queensland (UQ). Together with the Queensland Government, UQ has developed the Queensland Alliance for Agriculture and Food Innovation (QAAFI), which has brought together a diverse critical mass of resources to tackle some of the biggest challenges for growing Queensland agriculture. QAAFI has leveraged the Queensland Government funding for agricultural research threefold and has increased scientific capacity through early career scientists.

3. Markets

Market access and demand will be key determinants of future agricultural success in Queensland. Securing current markets and accessing new export markets will be vital to the sector's ongoing performance.

Market access can be challenging and global competition is fierce. The sector faces many competitive challenges, including a high Australia dollar, globally high production costs, limited supply capability, market access barriers, high tariffs, shelf life for perishable products, supply chain logistics and a highly variable climate.

Overcoming these challenges will require flexible regulation, innovative service delivery and novel approaches to increase market access and demand outside of free trade agreements, through consumer-targeted research and development across the entire supply chain. This will inform the development of new and improved products with increased health benefits, extended shelf life and innovative packaging that meet food safety requirements and customer demands.

Queensland's strong biosecurity systems protect the quality and safety of our products. We will continue to be at the forefront of biosecurity to ensure continued market access.



Strong environmental management not only provides market branding opportunities, but can also provide additional income through voluntary conservation programs and environmental and carbon offsets.

The Queensland Government will build awareness among potential investors of the many opportunities this state offers. This includes investment-ready companies through to greenfield developments in emerging areas such as complementary medicines.

To secure market access and increase market success, the Queensland Government will:

- streamline the regulatory environment while protecting and enhancing Queensland's enviable biosecurity status and high-level food safety and animal welfare standards
- implement policies that support financial payments for environmental services, such as offsets that can help diversify producer activities and increase resilience
- realign the Global Markets Initiative within Trade and Investment Queensland to ensure the program has greater emphasis on trade outcomes, opens new markets and is broadly applicable to a range of agricultural sectors
- enhance trade development services for food and agribusiness clients, including the coordination of inbound and outbound missions, market research, business matching and network facilitation
- help Queensland companies capitalise on our international reputation as a supplier of high-quality food and ingredients by promoting Queensland agribusiness as an attractive proposition to international investors
- work with industry partners to identify new market opportunities and the capability to process/refine raw produce to a stage suitable for use in established medical treatments and emerging areas such as complementary medicines
- facilitate the development and location of agriculture-based secondary industries, including research into farming practices that reduce adverse environmental impacts in Great Barrier Reef catchments
- promote healthy eating to help all Queenslanders meet the recommendations of the Australian dietary guidelines¹⁴
- support health promotion campaigns and consumer education strategies to drive demand for healthy foods, particularly Queensland-grown fresh fruit and vegetables.

¹⁴ National Health and Medical Research Council 2013, *Australian dietary guidelines*, Department of Health and Ageing, Canberra.

4. Production costs

Queensland producers continue to battle with increasing production costs on a daily basis. The rising cost of inputs, regulatory compliance and logistics of supplying markets impact upon the profitability and viability of Queensland's producers.

The challenge for the sector is to reduce the reliance on high-cost inputs while continuing to ensure vital access. Overcoming this challenge will require flexible, innovative solutions across the supply chain to increase efficiencies and maximise outputs.

Adopting practices identified by the latest research and development must remain a focus for industry. Research and development can result in increased yields, reduced input requirements or improved resilience to climatic conditions and pests and diseases. Research will also drive the use of by-products of production for heat and electricity generation to help reduce production costs.

Across the supply chain, water and electricity will remain critical inputs. Ensuring access to reliable, cost-effective water and energy systems will be vital to ensure production cost increases are minimised.

The reduction of regulatory red and green tape is a priority. Excessive or unnecessary regulation constrains growth by removing flexibility and adding costs to production. The Queensland Government intends to develop an environment that is both client-focused and conducive to business growth by removing unnecessary bureaucratic impediments.

Improving enabling infrastructure such as roads, rail, airports and port facilities will provide industry with more flexible and resilient supply chains. This will provide opportunities to invest in innovative, integrated solutions to optimise freight systems capacity, and maximise utilisation of supply chains to get products to market as efficiently as possible.

We are pleased that Queensland's agriculture strategy document takes an interdepartmental approach with input from other relevant departments, as producers are best assisted with a coordinated whole-of-government approach to fostering the development of our industry.

Queensland Farmers' Federation

To minimise the costs of production, the Queensland Government will:

- develop 30-year strategies for both the electricity and water supply sectors to help ensure reliable and cost-effective systems
- provide a robust water trading framework across the state, where possible, that supports effective water markets and provides an avenue for sustainable growth in irrigated agriculture
- undertake a rigorous review of all aspects of Queensland's electricity sector and develop new ideas on how to manage process while maintaining a reliable network
- support the investigation into the potential viability and sustainability of local management of SunWater's channel irrigation schemes
- support integrated planning and investment decisions relating to airports with an economic development directions statement for Queensland airports
- reduce red tape, including streamlining the regulatory burden around workplace health and safety, and reducing the burden on landholders by streamlining the development approval processes
- develop heavy vehicle access options for the agriculture sector, for vehicles such as harvesters and other farm equipment
- continue to preserve rail access for agricultural commodities in response to industry freight demands
- invest up to \$50 million in additional rail passing loops across the Toowoomba range—an example of strategic investment in enabling transport infrastructure that will increase the number of train paths directly available to the industry and reduce the number of heavy vehicles on our road system
- continue to be responsive in supporting and promoting the agricultural industry and its supply chain—such as an increase of 48 cattle train services available to the industry through the Livestock Transport Services Contract, providing improved access to rail services and providing road piloting services at no cost to assist drought-affected cattle producers from the states' north-west (with better access to regional saleyards and processing plants)
- develop and implement a Queensland ports strategy to support the most efficient and strategic use of ports to grow a four pillar economy, while ensuring high standards in environmental management.
- work with industry to identify and develop supply-chain opportunities to enhance the efficiency, timing and economies of scale of agricultural commodity movement, including more efficient loading/unloading facilities, backloading opportunities, improved storage facilities and cooperative arrangements to share available freight system capacity
- develop customer-focused service delivery systems that enable access to 24/7 online transactions and information, supported by mobile offices that service rural and regional communities and respond to communities affected by natural disasters.

Leadership

Delivering on the vision of an efficient, innovative, resilient and profitable sector will require a strong enabling point of leadership that will work across government and industry to deliver outcomes that help the sector grow.

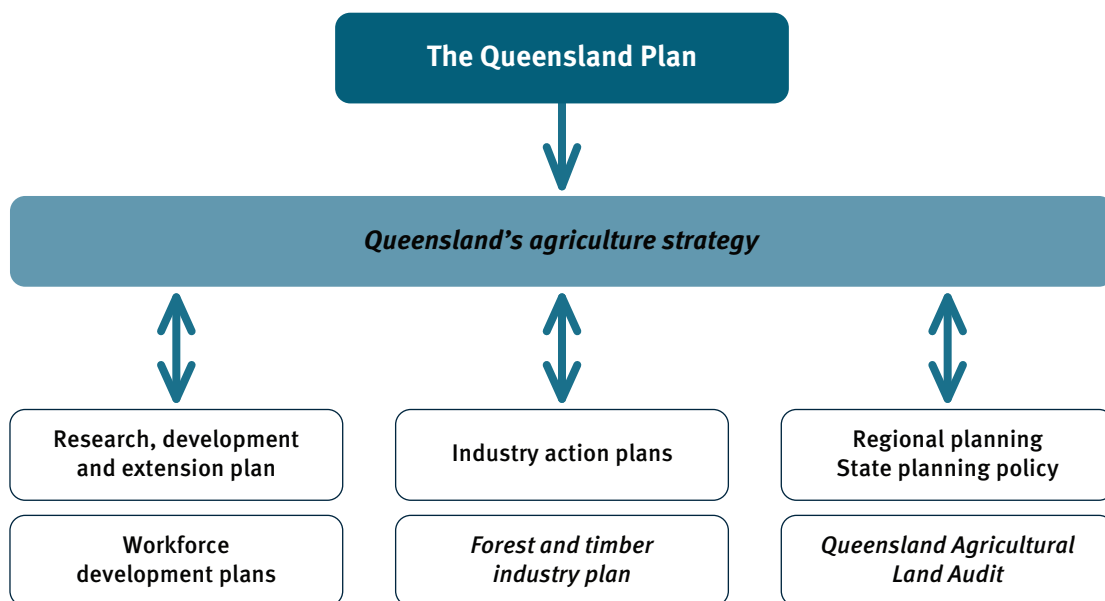
The Minister for Agriculture, Fisheries and Forestry will work with industry to provide this point of leadership. This involves actively advocating for the sector across government, including disaster reconstruction activities. Active leadership will ensure the sector's needs are appropriately considered and reflected in future policy and investment decisions, including 'The Queensland Plan' that will be a 30-year vision for this great state.

The Minister will work with his department and across government to ensure that:

- there is a real focus on customer and client services, and that government is responsive to client needs
- doing business with government is easy and government processes are simplified and streamlined
- enabling infrastructure investment supports efficient and resilient supply chains, helps minimise costs for producers and enhances profitability
- Queensland agriculture is promoted as an attractive investment proposition to both private and foreign investors
- export-ready producers are assisted to take advantage of new export opportunities and markets, particularly across Asia.

The Minister will continue to work in partnership with industry to identify the incremental and strategic steps that will drive productivity, improve resilience and increase profitability for producers.

Figure 3: Agriculture supporting 'The Queensland Plan'



The way forward

The release of *Queensland's agriculture strategy* marks the beginning of a journey, with initiatives already underway that directly contribute to the key pathways to growth. The challenge is to continue to refocus and adjust policies and programs to support the growth and prosperity of the sector as conditions change and impediments or opportunities emerge.

Unlocking the sector's full growth potential is the responsibility of government, industry, researchers and communities. Working together in collaboration will be critical to maximising growth and profitability.

To underpin *Queensland's agriculture strategy*, the Queensland Government will develop industry action plans, which will be developed in partnership with industry as required. The *Queensland forest and timber industry plan* is the first to be prepared by industry in consultation with the Queensland Government, followed closely by a *fisheries direction statement* currently in development that will focus on a new approach to fisheries management (Appendix).

The action plans will identify initiatives that government and industry can work on in collaboration to progress industry development, which will vary from one industry to another. The action plans will seek to address impediments and highlight opportunities for growth, including detailed market and supply chain analysis, while continuing to explore options for driving productivity and profitability.

Continuing to highlight and reinforce the importance of agriculture to Queensland will be critical for future growth and investment in the sector. As such, the Queensland Government will develop a 'State of Queensland agriculture report'.

The report will establish baseline information for the sector and report on progress towards the target to double Queensland's agricultural production by 2040.

The report will include a range of key Queensland industry-specific metrics, such as industry profitability and indebtedness. It will outline the state of the natural resource base in Queensland, which is vital to the sector, and will include a summary of actions undertaken by the Queensland Government to support progress towards this goal.

As we move towards 2040, agriculture will remain an integral part of the Queensland economy. They will continue to be the social fabric of rural and regional communities. Rebuilding Queensland means we must rebuild agriculture.

Queensland can only thrive in the long term if our agriculture industries are efficient, innovative, resilient and profitable. The Queensland Government is committed to achieving this vision.

Appendix

Fisheries

Queensland manages some of the world's most sustainable fisheries worth approximately \$434 million, producing approximately 50 per cent of Australia's prawns, crabs and scallops and 25 per cent of Australia's finfish (excluding tuna and salmonoids).¹⁵ The commercial, aquaculture and recreational sectors are worth \$260 million, \$101 million and \$73 million respectively.

The Queensland Government has delivered initiatives aimed at improving the sustainability of commercial fisheries through the buyback of inshore net fishing licences, moving to complete the commercial Fisheries (East Coast Trawl) Management Plan 1999 review, and investing in improved regional monitoring to ensure ongoing sustainable management of our fisheries.

To underpin *Queensland's agriculture strategy* and drive growth under the four pathways framework, the Queensland Government will:

- promote and implement the *Great Sandy regional marine aquaculture plan* to encourage and facilitate sustainable aquaculture development
- continue the buyback of commercial Queensland net fishing licences, which will help improve the economic viability, productivity and sustainability of the industry
- maintain Queensland's environmental stewardship credentials for state-managed fisheries, including a continuation of best-management programs to protect the Great Barrier Reef
- develop a *fisheries direction statement* that focuses on streamlining fisheries management to maintain a viable commercial industry and enjoyable recreational fishing opportunities. The plan will reflect the government's approach to minimise regulation and maximise flexibility for business decision-making, exemplified through actions such as assisting beam trawl operators affected by disastrous flooding in the Burnett River by trialling operations outside permitted fishing areas.

¹⁵ Australian Bureau of Statistics 2012, *1301.0 Year book Australia*, Australian Bureau of Statistics, Canberra.

Forestry

Queensland's timber resource includes around 240 000 hectares of privately managed plantation estate (predominately softwood) and a significant area of state-owned and privately owned native hardwood and cypress native forest.¹⁶ The forestry and logging industry is worth approximately \$150 million.

The Queensland Government has delivered initiatives aimed at increasing the productivity of the timber and forest industry by working in partnership with industry on the *Queensland forest and timber industry plan*, undertaking initiatives to resolve tenure arrangements for forest reserves and state-owned native hardwood forests, and increase access for beekeepers.

To underpin *Queensland's agriculture strategy* and drive growth under the four pathways framework, the Queensland Government will:

- produce a Queensland Government response to the *Queensland forest and timber industry plan*, which was developed by a working group chaired by Timber Queensland last year. The Queensland Government will work to implement actions to drive innovation, resilience and profitability in the Queensland forest and timber industry
- develop and communicate Queensland Government policy to provide balanced and responsible access to state-owned forests across Queensland (including any reinstated state forests) for commercial timber production and other uses
- deliver long-term resource certainty for cypress sawmillers reliant on state-owned native forests through commercial sales contracts, which will encourage ongoing investment in that sector and drive efficiencies and innovation in the use of cypress timber
- maintain Queensland's environmental stewardship credentials for state-owned native forest timber production.

¹⁶ Forest and Timber Industry Plan Working Group 2012, *Queensland forest and timber industry plan*, Timber Queensland.

