

THE COTTON COLLECTIVE | AUGUST 2023

What's on Australia's agricultural horizon?

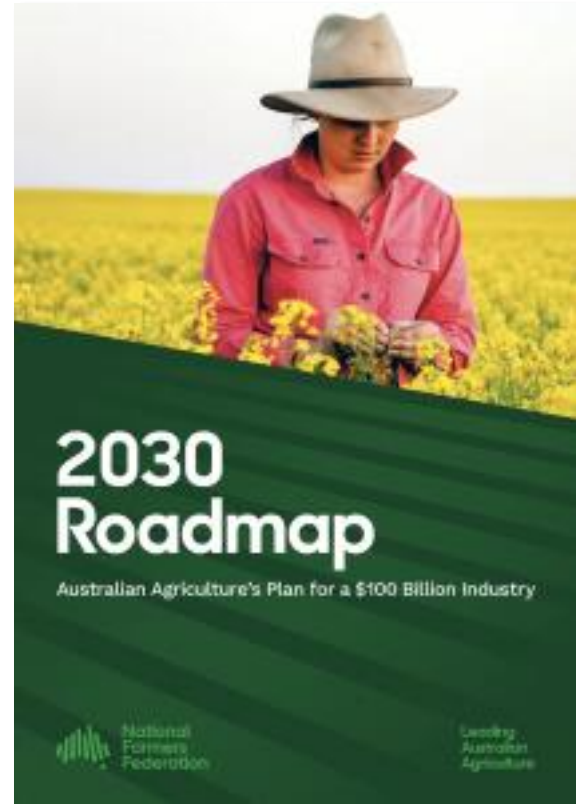


Our Members



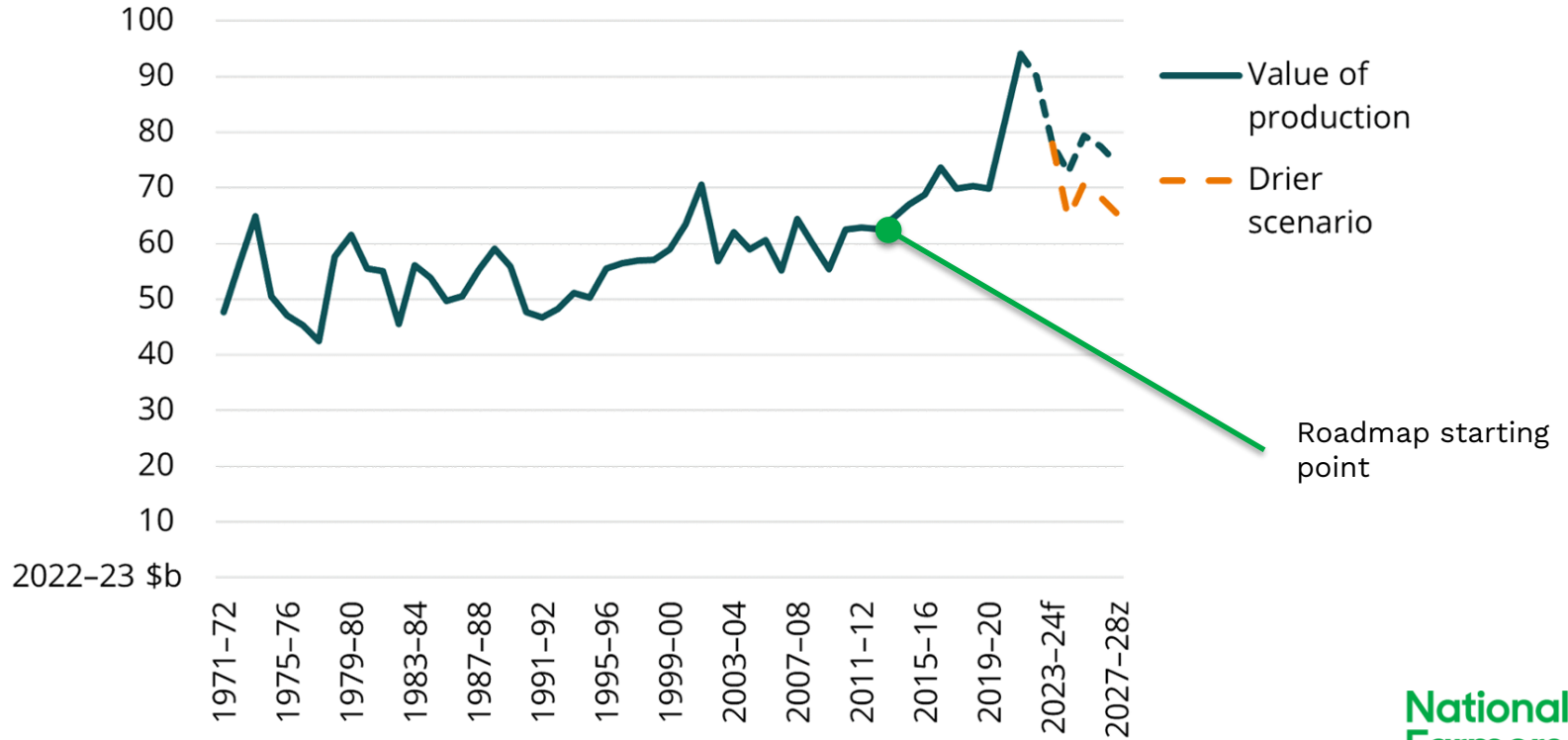
Our 2030 Roadmap

- Puts a plan behind our vision to grow the farm sector to \$100 billion by 2030
- Product of detailed national consultation over 2017 – 2018.
- Has bipartisan support of both major parties Federally
- Now forms the basis of the Federal Government's Ag2030 Agenda.
- NFF provides annual report card on industry's progress



**National
Farmers
Federation**

Tracking – farm gate value of Aust Ag



2022-23 \$b



Source: ABARES 2023

National
Farmers
Federation

Tailwinds to \$100bn



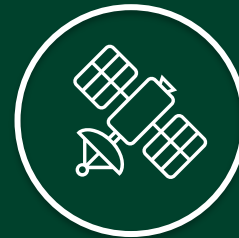
La Nina



**Commodity
Prices**



**Land
Values**



**Digital
Connectivity**



**Environmental
Markets**



Headwinds to \$100bn



Labour Shortages



Input Prices / Supply



Biosecurity



Trade Uncertainty



Environmental Regulation



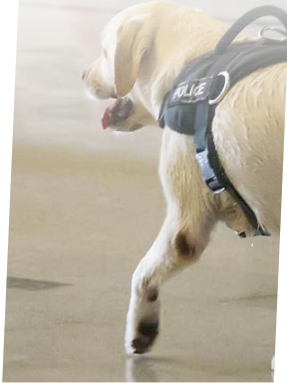
Our Immediate Policy Agenda



NFF 2023 priorities

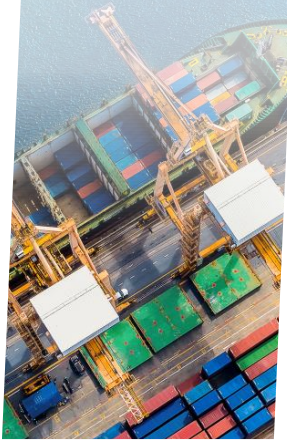
Biosecurity

- Securing sustainable funding to keep pests and diseases out of Australia.



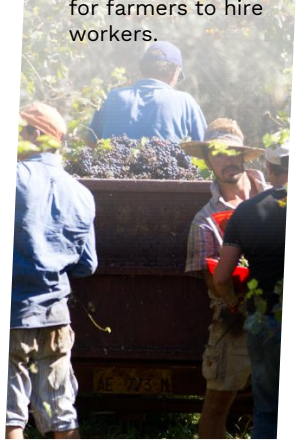
Trade

- Better access to the EU via the EU FTA.
- Supporting improved relations with China.



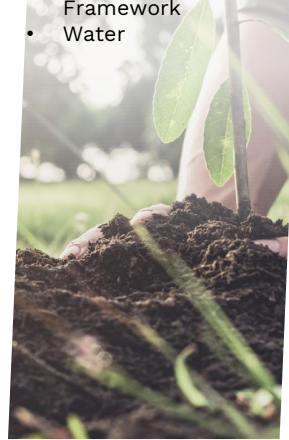
Workforce

- Increasing worker availability.
- Ensuring IR changes don't make it harder for farmers to hire workers.



Sustainability

- Climate change
- EPBC Act
- Australian Agriculture Sustainability Framework
- Water



Animal Welfare

- Supporting science-led animal welfare regulation.
- Working with the live export industry to oppose the live sheep phase-out.



Competition

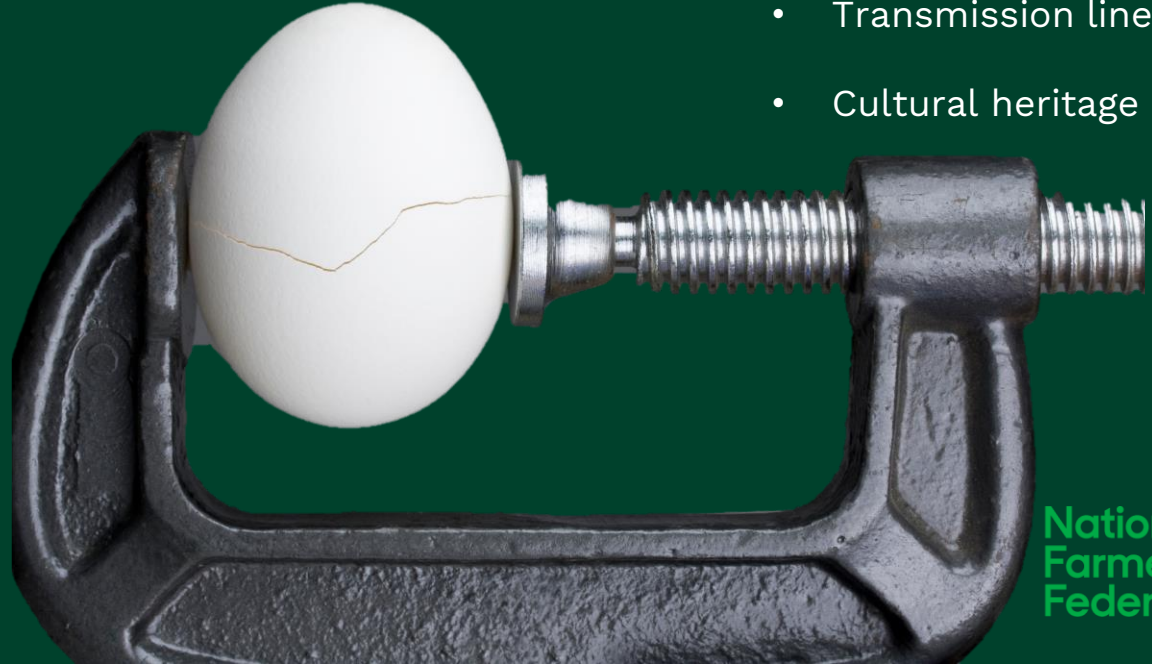
- Addressing supply chain concentration to ensure farmers receive a fair price – pre and post farm gate



Farmers are feeling the policy pressure

Here are just some of the policy headwinds we're managing...

- Live sheep phase-out
- Potential water buybacks
- Worker shortages
- Climate reporting
- EU deforestation laws
- IR changes
- Superannuation changes
- Environmental law reform
- Biosecurity levy
- Transmission lines
- Cultural heritage laws



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Looking further to the horizon...



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What is Agriculture's place in Australia...?

Farming food and fibre on 427m Ha or 55% of Aust land mass (not including timber production)

Farmers account for about 24% of water extractions (2,809 gigalitres in 2020-21)

Farmers account for 12% of Australia's total exports = \$40B... (cotton \$2B – wheat \$15B, beef \$10B)

Ag accounts for about 2.4% of value added (GDP)

2.5% of employment in 2021-22



What is AustAg's place in the world...?

Aust is the 6th largest country on the planet – 5% of the land mass.

Australia is a small global producer, ranking 23rd in the world or 1% of global production value (3% of wheat, 4% of beef, 3% of cotton)

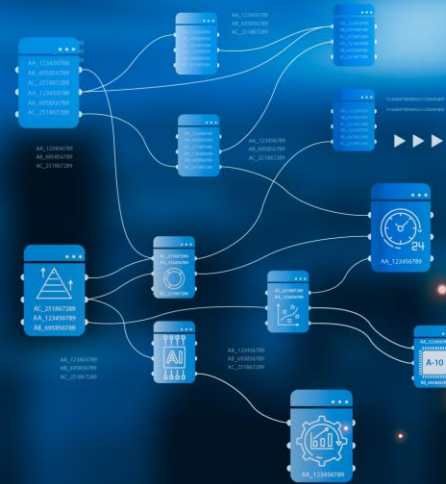
We are the 12th largest exporter with 3% of total agricultural trade

Agriculture as a % of GDP... (2.4% in Aust)

5% in the US,	1% in Ireland,
7% in Canada,	2% in Spain
29% in Brazil,	1% in the Netherlands
6% in NZ	1.5% in France



Provenance & traceability



A grid of eight icons representing different smart home and IoT devices:

- FAN: A fan icon.
- TV: A television icon.
- SECURITY: A shield icon.
- NETWORK: A Wi-Fi signal icon.
- CCTV: A camera icon.
- LIGHT: A lightbulb icon.
- TEMP: A thermometer icon.
- LOCK: A padlock icon.



Managing climate change, risk and developing environmental services

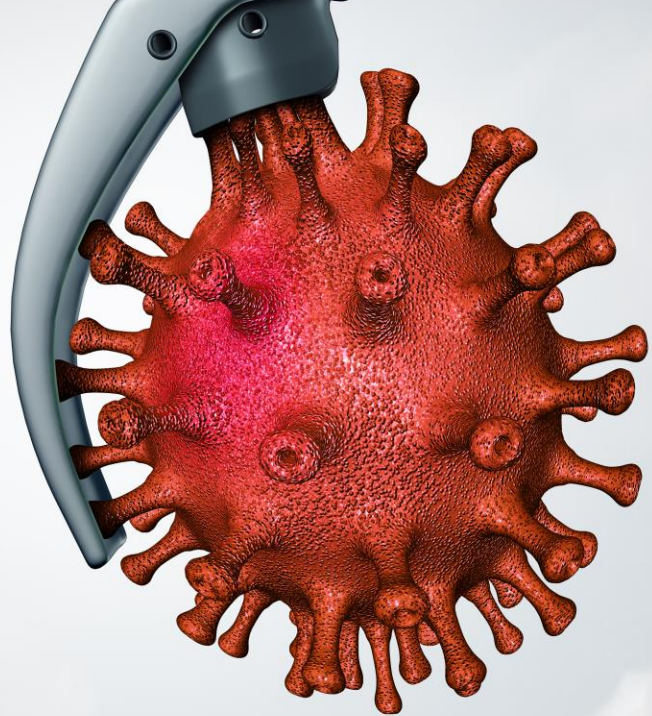




Automation and ubiquitous connectivity



More fragile biosecurity





I ❤️ CANADIAN TRUCKERS
I AM A DUTCH WOMEN
I WILL NOT SIT DOWN
I WILL NOT SHUT UP
I WILL NOT COMPLY

A precarious global policy environment



KAAG
SE WETEN LOOS

VEDERLAND
ONBESCHOOFD
EN CRIMI...
Land

REGERING
UOOK NOG
NEDERLANDSE
NEDERLANDSE

Thank you

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