



Australian Government
Department of Agriculture,
Fisheries and Forestry

Lifting productivity in agriculture, fisheries and forestry: issues paper



Lifting productivity in agriculture, fisheries and forestry: issues paper

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Department of Agriculture, Fisheries and Forestry

GPO Box 858 Canberra ACT 2601

Telephone 1800 900 090

Web agriculture.gov.au

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Acknowledgement of Country

We acknowledge the continuous connection of First Nations Traditional Owners and Custodians to the lands, seas and waters of Australia. We recognise their care for and cultivation of Country. We pay respect to Elders past and present, and recognise their knowledge and contribution to the productivity, innovation and sustainability of Australia's agriculture, fisheries and forestry industries.

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1 Purpose & Context

Economic reform and improving productivity are the top economic priorities for this term of government. The government's agenda is focussed on:

- deregulation without compromising standards
- faster approvals
- technology and innovation led growth and skills development
- competition.

The government is convening a high-level Economic Reform Roundtable on 19 to 21 August 2025, led by the Treasurer and the Prime Minister. The event will bring together a small group of senior leaders from across government, business, unions and civil society to shape the direction of long-term economic reform.

The Economic Reform Roundtable will focus on 3 priorities areas:

- lifting productivity growth
- strengthening economic resilience
- ensuring budget sustainability.

The Minister for Agriculture, Fisheries and Forestry will be hosting an Agricultural Productivity Roundtable on 12 August 2025, in advance of the Economic Reform Roundtable. Prior to the roundtable the Department of Agriculture, Fisheries and Forestry has brought together a range of potential initiatives in this issues paper.

The department will review and consider all feedback provided on this issues paper. Your feedback will help identify topics for targeted discussions at the 12 August roundtable convened by the Minister for Agriculture, Fisheries and Forestry which will result in a series of agreed priority initiatives to feed into the Treasurer's Economic Reform Roundtable.

The list of initiatives in this paper covers several broad areas. In prioritising the initiatives, consideration will be given to those that best contribute to the Economic Reform Roundtable's criteria and can be delivered within the scope of the department's activities. Considering the need to narrow the set of initiatives, early areas of prioritisation are likely to rest around:

- smarter, fit-for-purpose regulations (section 2)
- digitalisation of regulatory processes (section 2)
- strengthening regulatory performance in agriculture and veterinary (agvet) chemicals and fisheries (section 2)
- supporting value and productivity growth from research, development and extension (RD&E) (section 3)
- managerial skill, resilience & wellbeing (section 3).

That said, economic reforms to drive productivity growth and strengthen economic resilience are a priority across this term of government, and not just for the roundtable. Feedback on the initiatives presented will also help to prioritise engagement in the reform agendas of other areas of

government along with informing the ongoing reform and modernisation of the department's own work and its engagement with the work of other departments.

We invite industry and stakeholders to contribute feedback on the issues raised in this paper, noting the issues identified are not exhaustive, and you do not need to comment on all issues. We also welcome views on any other relevant issues not covered in this issues paper that we should consider. Please refer to section 4 for details on how to contribute.

The deadline to contribute feedback on the issues raised in this paper is **10 am AEST Monday 28 July 2025**.

1.1 Current opportunity

Although Australian agricultural productivity has delivered long-term gains, recent trends show a clear slowdown in productivity growth with implications for competitiveness, climate resilience and rural livelihoods (see Figure 1). Renewed reform efforts provide an avenue to not only remove impediments to productivity growth, but also to unlock new sources of innovation, efficiency and value creation across the agriculture, fisheries and forestry sectors.

A forward-looking submission to the Economic Reform Roundtable on agricultural productivity – not just to define the problem, but to identify potential reforms and levers to benefit Australian consumers and portfolio industries is an important opportunity to highlight issues related to productivity.

The Economic Reform Roundtable outcomes will shape the direction for long-term national economic reform that improves productivity, resilience and budget sustainability.

Ahead of the Economic Reform Roundtable, Ministers and departments have been asked to work with their stakeholders to identify and prioritise ideas into the reform process.

Ideas brought forward must be:

- Put forward in the national interest, not through the prism of sectoral or vested interests.
- Budget neutral at a minimum but preferably budget positive overall, taking into account necessary trade-offs.
- Specific and practical rather than abstract or unrealistic.

1.1.1 Links to other initiatives

The productivity agenda aligns with broader department priorities, including the National Food Security Strategy (currently under development) to enhance resilience across Australia's food system along with the [Take Farmers to Market](#) and the [Simplified Targeting and Enhanced Processing System](#) initiatives. It also connects with the Bioenergy Roadmap which outlines how efficient use of biomass and organic waste can support a low emissions bioenergy sector, strengthen energy security and drive regional growth. The government is also undertaking a Strategic Examination of Research and Development (SERD), to identify opportunities to drive investment in Research and development (R&D) to unlock growth and productivity across the economy. The Independent Panel is due to report later this year.

1.2 Agriculture, fisheries and forestry productivity

Productivity growth is an important part of the sector's growth story. It is about producing more with less, maximising outputs and minimising inputs.

Box 1 What is productivity & why does it matter?

What is productivity?

Productivity is a key measure of economic performance that captures the efficiency of production – how much output is produced from the inputs used.

Why does productivity matter?

Stronger productivity growth supports national income growth, boosts export earnings, contributes to regional development and helps keep food affordable and accessible to all Australians.

Productivity growth also helps to address several key challenges faced by agriculture, fisheries and forestry sectors, including:

- Farm profit – more productive farms use fewer inputs and generate more outputs. This helps deliver higher profits.
- Competitiveness – highly productive farm businesses can compete in markets where output prices are lower and input prices are higher and still remain profitable.
- Dealing with declining terms of trade – agriculture has faced rising costs for inputs and declining real output prices. Productivity growth is the most reliable long-term strategy to deal with this.
- Industry progress and job creation – higher productivity and profitability enable and attract investment, helping drive industry growth and job creation.
- Resilience – productivity growth creates a profit buffer so that farmers can tolerate fluctuations in price and climate (e.g. drought) and are well-prepared to avoid and/or manage climate and biosecurity threats.

While agricultural productivity growth has historically been strong, it has lost momentum over the past 2 decades. Productivity growth slowed from 2000 onwards, averaging just 0.7% per year compared to 2.2% in the decades prior (see Figure 1).

Productivity growth has also been variable across agricultural sectors. Productivity growth is much stronger for cropping farms than for livestock farms (see Figure 2). Within agricultural industries, evidence suggests that productivity performance is becoming 'multi-speed', meaning there is significant differentiation in productivity growth across various parts of the industry. 'Multi-speed' productivity performance is observable within the dairy industry, with differentiation across regions in close geographical proximity with similar climate and physical production constraints.

Within agriculture, there is emerging evidence of a growing gap between best performance and what individual farms are able to achieve. Best performance represents the ‘productivity frontier’ – the maximum possible output a farm or industry can achieve with the available resources and technology. The agriculture sector continues to push the productivity frontier in terms of what is possible, but the gap with industry-wide average productivity is growing. There also exists a significant share of the farming population that sits well below even average productivity levels.

In wild harvest fisheries, productivity in each fishery is a key driver of economic returns for industry and community (assessed by the measure ‘net economic returns’). In recent years it has become increasingly challenging to maintain economic performance as input costs have risen and output prices have remained steady. Additionally, wild caught fish stocks are under biological pressure, some because of increasing ocean temperatures but also due to a range of less well understood ecological processes. Like farming, productivity performance in fisheries can be variable at the aggregate level and vessel level does vary across a fishery.

There is a lot we do not know about the productivity performance of several agriculture, fisheries and forestry industries. Large gaps exist in data collection which mean that the productivity performance for industries like pork, poultry, feedlots, horticulture, aquaculture, industrial crops (such as cotton and sugar) and forestry are unknown.

At an aggregate level, the Australian Bureau of Statistics (ABS) estimates indicate that productivity performance for the combined agriculture, fisheries and forestry sectors has been strong – estimated at 2.5% per year for the period 1989–90 to 2023–24. This estimate is significantly higher than the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) estimate of broadacre productivity over the same period. However, there is insufficient data to allow understanding of the reasons for the different estimates.

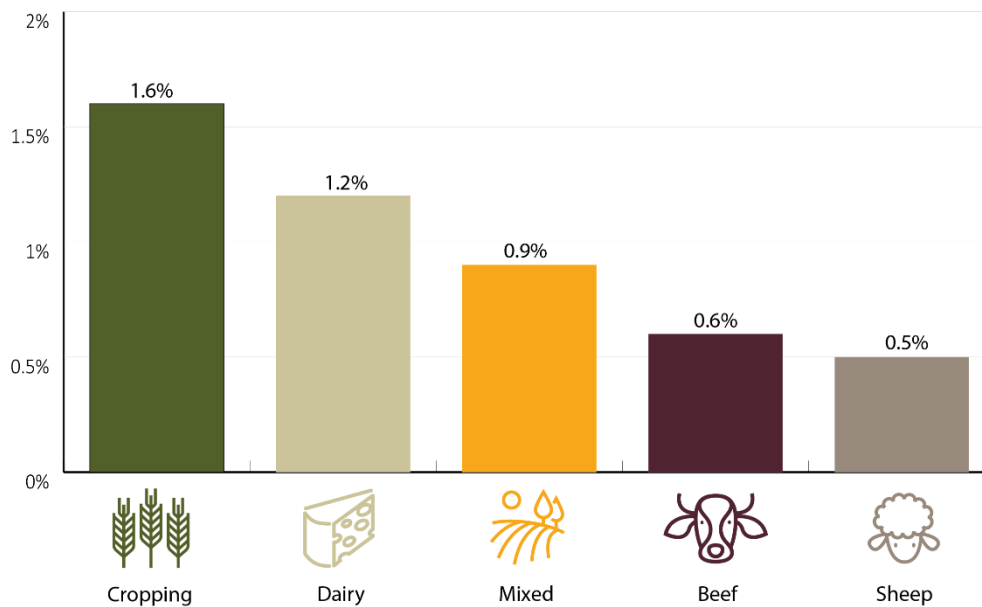
Across all sectors, measurement of sustainable productivity growth is also in its infancy.

Combined, these insights and features suggest that opportunities exist to lift sector productivity and the way it is measured and monitored.

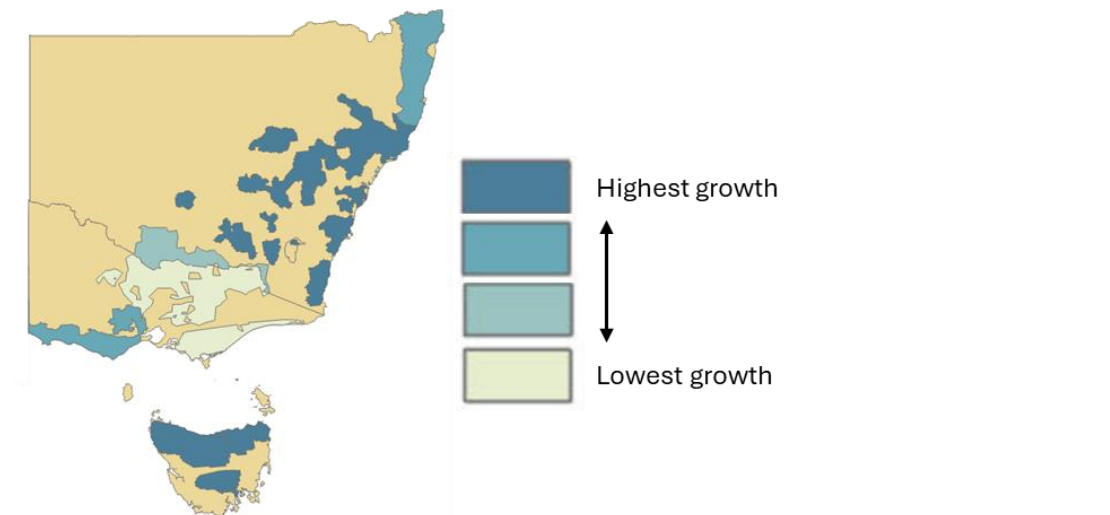
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Figure 1 Broadacre productivity slowdown, 1977–78 to 2023–24

Source: ABARES

Figure 2 Average productivity growth by industry, 1977–78 to 2023–24

Source: ABARES

Figure 3 Average dairy productivity growth by region during slowdown period, East Coast, 2011–12 to 2022–23

Source: ABARES

1.3 The role of the department in the supply chain

The department, in combination with its portfolio agencies, contributes not only to the productivity of primary industries but also to the performance of several sectors across the supply chain. The department's work supports the efficiency, risk management and value creation in both domestic and international markets.

The department plays a central role in maintaining the resilience and integrity of Australia's supply chains by regulating imports and exports, including through strong biosecurity systems that safeguard against pests, diseases and other threats that can disrupt production and trade.

Through leading Australia's engagement on agricultural traceability systems, the department is responsible for certifying that agricultural exports meet the requirements of the importing-country's government. Wine Australia, a portfolio agency, does this for exports of wine amongst other regulatory functions. Australia's agricultural traceability systems span government regulation and industry arrangements that enable end-to-end tracking and tracing of agricultural commodities and products. Over recent years, interest has grown in strengthening Australia's traceability systems – especially through digital tools and interoperable platforms – to support access to high value markets and meet evolving customer and market expectations around sustainability, provenance and food safety. Challenges include regulatory inefficiencies, rising fraud in global trade, consumer scrutiny of environmental and ethical claims, along with securing the necessary investment to continue innovations in these systems.

The department has a key role negotiating technical market access with international trading partners to reduce barriers and open new opportunities for Australian producers. This includes advocating for science-based standards, managing export protocols relating to food safety and biosecurity, and working with trading partners to resolve technical trade issues that can otherwise restrict access or impose costly delays.

Responsibility for governance and oversight of management and registration of agvet chemicals sits with the department, with regulatory supervision and approvals provided by an independent statutory authority, the Australian Pesticides and Veterinary Medicines Authority (APVMA). A well-functioning agvet chemicals regulatory system supports productivity by ensuring safe and effective agvet chemical products are available to industry and users while protecting the health and safety of people, animals and the environment, and maintaining access to international markets.

The Australian Fisheries Management Authority (AFMA) and the department work closely together to ensure the sustainable management of Australia's Commonwealth managed fish stocks. AFMA is also an independent statutory authority. In addition to ecological benefits, strong fisheries governance helps maintain access to international seafood markets, which increasingly demand evidence of sustainability and compliance with trade and environmental standards.

Australia's animal and plant health status is critical to Australia's international reputation as a 'clean' market, giving Australia a competitive advantage in our trading markets. Our biosecurity controls play a crucial role in maintaining our plant and animal health status. Additionally, on-farm management for biosecurity protection is likely to play an increasingly significant role.

The department also plays a stewardship role in Australia's agri-food system using its convening powers to foster cross-sector collaboration, promote market transparency, support producers, and ensure contestability in policy-making, even where no direct legislative or regulatory authority exists.

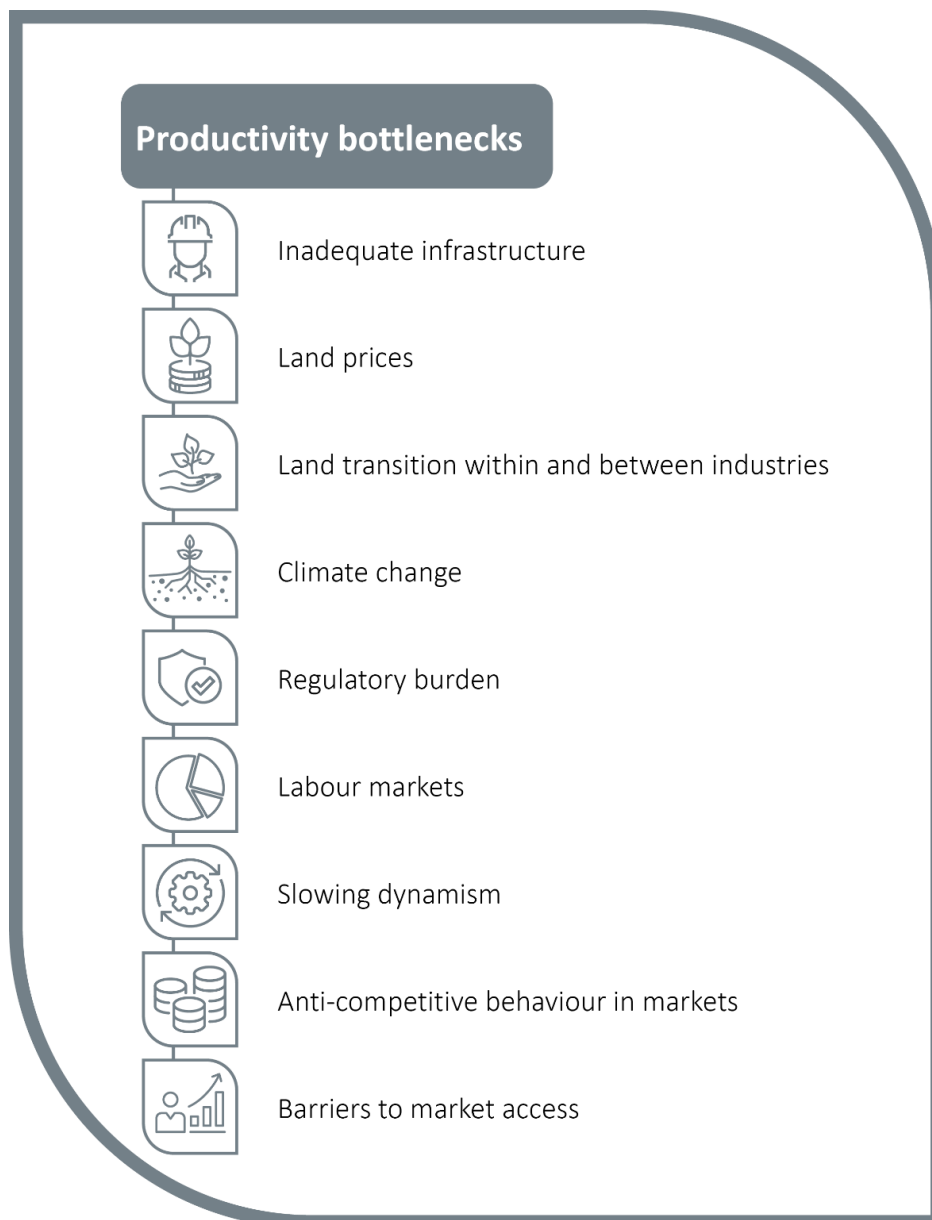
1.4 Drivers of productivity

There are many well researched and widely documented ways to [improve farm productivity](#). Some of these drivers generate quick productivity growth, others take many years to play out. These drivers include [achieving economies of scale](#), [R&D investment](#), [farm resilience](#), [technology adoption](#), [microeconomic reform](#), and [climate](#). A number of these drivers are applicable across the broader suite of food and fibre production activities. A challenge in lifting productivity across all agriculture, fisheries and forestry sectors, and those which the department regulates, is that past microeconomic reform has already delivered a number of gains, which makes the next wave of productivity improvements likely harder to achieve and more incremental. Policy makers and industry will need to think outside the box to unlock new and innovative sources of productivity growth.



1.5 Productivity bottlenecks

While some factors drive up productivity growth, there are also ‘bottlenecks’ in the system that restrict growth. Reducing or removing these restrictions in the system can help productivity growth to flow. Some of these bottlenecks include [high land prices](#), [slowing dynamism](#), [climate change](#), [inadequate infrastructure](#), regulatory burdens, inconsistency between jurisdictions, and [land transition within and between industries](#).



Opportunities to enable productivity drivers to both lift productivity performance and remove bottlenecks are discussed in the following sections under 2 broad groupings:

- Fit-for-purpose regulation for food and fibre producers, trade and biosecurity.
- Options to drive food and fibre production productivity.

2 Fit-for-purpose regulation for food and fibre producers, trade and biosecurity

A strong, trusted and future-ready regulatory framework for food and fibre production, trade and biosecurity is central to Australia's productivity growth. Domestically, smart and robust regulatory systems reduce the risk of costly disruptions, while internationally, our regulatory credibility supports market access, Australia's global reputation and industry profitability. In some cases, overseas market access requires regulatory systems – particularly when importing governments require formal government-to-government assurance that exporters meet their conditions. Additionally, Australia's regulations protect human health, the environment, animal welfare and consumer rights—essential pillars of a safe and sustainable food system.

Staying aligned with an increasingly complex global environment, including increasing risks and evolving global standards on sustainability, traceability and biosecurity, reduces trade friction, encourages innovation and enables producers to operate more efficiently. Digital tools like e-certification and interoperable traceability systems further cut compliance costs, streamline operations and increase transparency. Advocating for science-based and transparent trade rules, including the mutual recognition of standards and reduction of non-tariff barriers, is essential to counter rising protectionism and secure productivity-enhancing access to global markets.

Theme 1 – Smarter, fit-for-purpose regulations

Improving productivity involves reducing red tape. This means reviewing and refining domestic regulatory requirements, including regulatory systems managed and delivered by the department to ensure they are fit for purpose and not unnecessarily burdensome. This includes excessive regulation at all levels of government – federal, state, territory and local. Producers have also raised concerns about a proliferation of commercial and industry-level regulations that increase compliance costs. There are a range of areas where there may be potential to streamline measures, eliminate duplication and outdated steps, increase utilisation of international assessments, reduce time, compliance costs and uncertainty for producers and exporters. Examples include the 'fit and proper person' test, refining export goods determination processes, export documentation and certification processes, state, territory and local regulations, livestock identification and traceability and organic and sustainability certification. Improvements to some of these areas, however, may require initial investments to realise the benefits on offer.

Simplifying regulation does not equate to lowering standards. It means applying them in a way that is risk-proportionate, transparent and responsive to the realities of modern agricultural businesses. Smarter, more targeted regulation can free up resources for innovation, reduce bottlenecks in supply chains and ultimately improve the sector's competitiveness and resilience.

Potential initiatives include:

- Review and refine domestic regulatory requirements including those administered by the department to ensure that they are adaptive, proportionate and balance risk mitigation with innovation and growth – including reforms to the ‘fit and proper person’ test and goods determination scheme.
- Ensure fit-for-purpose rules are in place that aim at lowering the risk that Australian imports don’t meet domestic production standards (e.g. contain the product of illegal, unregulated or unreported fishing, illegal logging or modern slavery).

Theme 2 - Digitalisation of regulatory processes

Modernising regulatory systems through digital technology offers significant productivity benefits. Tools such as electronic certification, smart labels and improved eLabels, online permits and integrated traceability platforms improve accuracy, enable faster decisions and provide the transparency modern markets demand without compromising standards. Interoperable systems – where data flows securely between producers, regulators, importers and exporters – help to reduce duplication and delays and can lower business costs. However, they also often require additional upfront investment. Emerging technologies like artificial intelligence can further streamline regulation by flagging risks, predicting delays, helping users navigate regulatory information, or automating document checks. Smart investment in these systems, designed with user experience in mind, helps ensure that regulation supports productivity rather than hinders it.

Potential initiatives include:

- Accelerate the rollout in the department of digital and interoperable systems – including e-certification, smart labels and improved eLabels, traceability platforms and artificial intelligence driven tools – to reduce compliance burdens and improve regulatory performance.

Theme 3 – Building regulatory capability and support

Lifting productivity is not just about improving regulations and providing modern tools to engage with them, it’s also about making regulatory systems user-friendly, predictable and supported by skilled people. When food and fibre producers, importers and exporters understand what is required, have access to clear guidance and an efficient way to engage with regulatory agencies, including the department, compliance improves. Enabling effective compliance means building capability at every level – whether it is simplifying application processes, ensuring timely and consistent decisions, or embedding a more service-oriented approach within regulatory agencies. The department has a key role to play in strengthening this system-wide capability, particularly in areas like export certification, biosecurity compliance and digital traceability. It is modernising its digital systems and partnering with industry to keep pace with a more complex biosecurity and trade environment – shaped by growing tourism, cargo movements, evolving trading partner requirements and rising global protectionist pressures. Sustained focus and commitment will be essential.

Potential initiatives include:

- Strengthen system-wide capability to implement regulation effectively, through clearer guidance, faster responses and better support for compliance, and to provide support around market access issues.

Theme 4 – Increasing market access

Securing, improving and maintaining market access is a key driver of productivity in Australian food and fibre sectors. When Australian exporters can reliably sell into high-value markets, it can incentivise investment, innovation and efficiency on-farm and along the supply chain. However, food and fibre markets remain some of the most highly protected markets globally. Market access is increasingly being shaped by complex and evolving regulatory requirements (including non-tariff barriers such as sustainability, traceability and biosecurity standards). Australia's efforts to support credible science-based regulations which are appropriate to different ecosystems, seek greater harmonisation of standards and maintain strong relationships with trading partners help position our producers to compete on quality, not red tape.

Potential initiatives include:

- A continuous determination and commitment to the negotiation of further improvements in market access and alignment of standards that ensure Australia's unique production systems and environmental conditions are appropriately recognised by our international trading partners.

Theme 5 – Strengthening regulatory performance in agvet chemicals and fisheries

Improving the performance of regulatory systems for agvet chemicals and fisheries can unlock significant productivity gains. In agvet chemicals and fisheries, fragmented and inconsistent rules across Australian jurisdictions highlight the need for better coordination and, where appropriate, nationally consistent regulation to reduce inefficiencies and support innovation. Clearer approval processes for agvet chemicals, along with targeted incentives (see RD&E section further below), for emerging technologies such as biological and mRNA-based products will encourage uptake and enhance on-farm productivity. In the fisheries sector, to be risk proportionate, regulations need to adapt to the reduction of fishing access caused by a growth in marine parks and renewable energy zones and the impacts of climate change. Changes to regulation should reduce unnecessary red tape, support productive individual fishing operations and recognise marine food's role in food security.

Potential initiatives include:

- Implement a nationally consistent legislative framework for control-of-use of agvet chemicals with roles and responsibilities clearly articulated to regulated entities and the Australian public.
- Promote and enable enhanced data sharing between jurisdictions and agencies, and within sectors, to improve adverse experience reporting in agvet chemicals to ensure effective reporting and oversight.
- Strengthen intergovernmental coordination through regulation of agvet chemical use.
- Simplify and better coordinate agvet chemical regulation by reducing compliance burdens, introducing streamlined pathways for low risk products, aligning with trusted international approvals, and improving transparency and coordination across agencies.
- Accelerate regulatory pathways for biologicals and mRNA products.
- In fisheries, promote and enable enhanced marine data sharing between sectors, jurisdictions and agencies (for example to redesign stock assessment methods to collect and

integrate new data at reduced costs for a smaller fishing industry and to improve risk monitoring).

- Recalibrate the whole-of-government approach to better reflect and integrate the reduced risk of a smaller fishing footprint into policy and management frameworks, including through removing duplication and inconsistency in fisheries and environmental regulations.

3 Options to drive food and fibre production productivity

Lifting the productivity growth of food and fibre production will involve a range of actions by both government and industry to deliver benefits. Government and industry investment into Australia's internationally recognised rural RD&E system will remain critical to lifting productivity growth, with the role for agricultural extension likely growing in tandem with adaptation pressures, the transition to a net zero economy and changes in technology mix gather pace. Investments in this area from Rural Research and Development Corporations and others have helped make our industries sustainable relative to our international competitors. These investments have also contributed to farm returns, with every \$1 spent on agricultural RD&E yielding an almost \$8 return over a 10-year period (Chancellor, W & Boulton, C, 2024). However, the rising challenges across several fronts, including changes to the climate that have taken 0.2% per year from productivity growth, points to a growing pressure on the RD&E system.

Building on and leveraging from this strong base will help the agricultural industry adapt to future challenges. RD&E investment in agriculture, fisheries and forestry will continue to help the sectors adopt new technologies and practices and innovate, and drive scale efficiencies. The opportunity to better collect, collate and use data to help bridge information gaps is critical and if filled, could provide the evidence base for ongoing policy development that drives productivity growth.

Theme 1 – Supporting value and productivity growth from RD&E investment

The RD&E system already provides considerable benefits to food and fibre producers, helping to contribute to a growing productivity frontier and the sector's relatively strong productivity performance. There are a rising number of common challenges across all food and fibre production activities including shifting climate, industry and market dynamics. With long lead times from investment to benefit realisation, constant calibration and consideration of government and industry R&D spend is warranted to support the system to deliver benefits at the same level, or more in the future. Shifting dynamics around extension provision and need, particularly in response to the net zero transition, are likely to also heighten the importance of extension to the realisation of the potential benefits from the RD&E system. Similarly, growing demand for housing and pressures to decarbonisation the built environment mean getting the most from the resource base from fibre production requires RD&E linked to downstream sectors to help build momentum for modern manufacturing processes.

Potential initiatives include:

- Explore opportunities to support alignment of RD&E activities to deliver on shared challenges across all food and fibre production.
- Assess options to re-spark agricultural extension and practice change (which has almost halved in real terms over the last 14 years).

- Develop new collaboration partnerships across government and universities to reinvigorate long-term agricultural research discoveries.
- Ensure appropriate support or incentives for commercialisation of food and fibre research, to ensure tangible benefits are realised sooner.
- Identify ways to better develop and incentivise adoption of new and sustainable inputs in agvet chemicals including public-private partnerships to scale innovation and commercialisation, enhanced data sharing between research institutions, regulators and producers, targeted incentives for biotech startups and upskilling.

Theme 2 - Measuring what matters

To drive productivity growth, we first need to know what it is. There is very limited visibility on productivity growth for some major food and fibre industries including horticulture, poultry, pork, aquaculture, forestry, and cotton. Comparisons between ABARES and ABS statistics imply that significant productivity growth may be occurring in some of these unmeasured industries. Estimating productivity in the unmeasured industries may be possible but will require significant effort and investment. Similarly, there is limited knowledge around sustainable productivity growth. Properly measuring productivity growth is essential to understand which producers and industries have the greatest potential for improving productivity and sustainability.

Potential initiatives include:

- Fill critical measurement and data gaps in specified sectors to ensure we can accurately measure what matters.
- Accelerate the development of 'sustainable productivity' growth measurement — to inform policy and the community on maximising agricultural production while minimising environmental harm.

Theme 3 - Investment

Investment is critical to boosting productivity by expanding the capital base – enabling producers to access better infrastructure, advanced technologies – including manufacturing technologies – and improved production systems. This includes both domestic and foreign investment – particularly in areas where local capital may be constrained. Foreign investment, for example, can bring in international technologies, global expertise and stronger links to international markets. However, a balanced approach to foreign investment is essential. Foreign investment settings should protect national interests and foster transparency and community confidence, including in relation to farmland and key agricultural supply chain assets. Australian food and fibre stakeholders are generally supportive of foreign investment in sector businesses however have emphasised the need for a transparent and well-regulated foreign investment policy framework that ensures both the national interest and sector productivity are protected. There may also be scope to consider other investment and land, forestry and marine use rules that may be discouraging productive investment in the sector. For forestry, investment certainty to support plantations and support to modern manufacturing is critical to drive better use of timber estate and enable economy-wide productivity gains and emissions reductions.

Potential initiatives include:

- Review of policy and regulatory settings governing foreign investment applied to Australian agricultural land and agribusinesses, including investment thresholds, scope for exemption certificates, assessment criteria, and risk mitigation and management.
- Explore changes to the superannuation performance test benchmarks applied to unlisted agricultural assets.
- Reconsider restrictions on pastoral leases and other land use restrictions.
- Consider productivity and resilience enhancing investments across transport modes (e.g. uplift after natural disaster rebuilds).
- Further understand barriers to and incentives for investment in domestic value-adding activities, such as advanced timber manufacturing.

Theme 4 - Competition

Improving competition through evidence-based, efficient competition policy and regulation, across the food and fibre supply chain is critical to lifting productivity. When markets function fairly and transparently farmers can access better prices for their products and pay less for key inputs. In many parts of the agriculture supply chain – including processing, transport and retail – market concentration and information asymmetries can limit competitive pressures and reduce incentives for innovation. Addressing these challenges may require targeted reforms and initiatives aimed at enhancing price and contract transparency, better access to market data and supporting fair and efficient commercial practices. Recent reforms, such as making the Food and Grocery Code of Conduct mandatory, represent an important step toward improving fairness and accountability in supplier-retailer relationships. It will be important to assess the impact of these changes as context for any further interventions for particular industries or agriculture as a whole. However, gaps remain in market transparency and the ability to respond to emerging competition issues, so there may be value in establishing a dedicated agricultural market monitoring and inquiry function to identify distortions and bottlenecks. The department plays a lead role in promoting market transparency, supporting producer capability and ensuring contestability in regulatory and export processes. It works with other agencies such as Treasury and ACCC to identify barriers in freight, digital platforms, input markets and trading practices, and is guided by the Intergovernmental Agreement on National Competition Policy to drive strategic outcomes in areas such as national standards, occupational licensing, adoption of international standards, and protections for the right to repair agricultural equipment.

Potential initiatives include:

- Create a food and fibre supply chain monitoring and inquiry function to explore competition issues supported by enhanced and transparent reporting of key market information.
- Provide support to producers to understand their rights when negotiating with buyers, especially for perishable goods.
- Implement performance requirements identified in the National Competition Policy, such as harmonisation and improvement to national standards, occupational licensing, adoption of international standards, and protections for right to repair.
- Explore opportunities to strengthen national competition law and enforcement so that it provides stronger protections against anticompetitive behaviour across the economy, particularly small to medium agricultural enterprises.

- Ensure greater competition across and within modes of transport.
- Improve price and market transparency.

Theme 5 - Managerial skill, resilience & wellbeing

There are a number of programs that aim to directly influence and support primary producers' managerial skill, resilience to climate and other events and wellbeing. These programs help deliver on-farm public goods associated with the environment, control of pests and weeds and provide operational space for otherwise productive businesses to reorganise their operations in response to drought or other hardship events.

However, shifting climate pressures, changing markets, rising biosecurity pressures and emerging natural capital opportunities may mean that programs could be targeted to deliver on both existing objectives and help lift productivity performance in the face of a shifting production environment.

Potential initiatives include:

- Use levers across Future Drought Fund (FDF), Drought Policy, climate adaptation and biosecurity preparedness to protect productivity growth by promoting practice change, links to circular economy initiatives and synergies with the renewable energy sector.
- Deliver reforms to the Regional Investment Corporation in response to the 2024 review targeting future product development, supporting intergenerational change and closer links to the Rural Financial Counselling Service and other service providers, supported by improved monitoring, evaluation and reporting.
- Examine the role of the Natural Heritage Trust (NHT) in delivering on-farm public goods, regional landscape outcomes, and driving step changes in productivity at the system level.
- Explore opportunities to extend agriculture-based resilience measures and programs to the seafood production industry.

Theme 6 - Labour

Labour availability and capability are central to lifting productivity across Australia's agricultural sector. The government has lifted worker conditions and wages for agricultural workers through changes to awards and the Pacific Australia Labour Mobility scheme. It is investing in farm safety to reduce injury and death in the sector. Access to a reliable and appropriately skilled workforce enables producers to make timely decisions, adopt new technologies and scale operations efficiently. In recent years, many agricultural producers have reported labour shortages – especially during seasonal peaks in sector such as meat processing and horticulture – which can constrain output, reduce product quality and increase waste.

Improving skills, training pathways and workforce mobility can help workers operate more effectively, particularly as farm and forestry businesses adopt more data-driven and technologically advanced systems. As technology becomes more advanced, high tech agricultural roles can increasingly be undertaken in metropolitan areas and regional cities which may incentivise city-based workers to take up jobs in agriculture.

Seasonal workforce initiatives also play a vital role in meeting workforce needs, particularly in horticulture and other labour-intensive sectors. The PALM scheme and Working Holiday Maker

Programs are used extensively by agriculture to fill short term harvest roles and longer term low and semi-skilled roles. Other visa programs are available but can be expensive and complex to access. Improvements to overseas worker programs which enable smaller producer access and incentivise and streamline return relationships between migrant workers and employers may unlock productivity from this important labour source.

Poor workforce data in the sector is another longstanding issue which hampers effective policy and industry responses to projected shortages.

While workforce policy is primarily led by the Department of Employment and Workplace Relations (DEWR), the department supports these programs and works closely with industry to ensure labour settings are responsive to the sector's evolving needs.

Potential initiatives include:

- Improve labour mobility, seasonal workforce programs, workforce development for agriculture, on farm accommodation and regional infrastructure.
- Increase regulatory consistency on labour mobility for agricultural professionals.
- Explore opportunities to fill data gaps to improve industry planning, policy development and understanding of skill gaps.
- Increase availability and flexibility of training options.
- Improvements to workplace safety and increased support for wellbeing.
- Consider options which specifically address the need for skilled crew on commercial fishing vessels.

4 Contribute your feedback

We invite industry, business and the community to contribute feedback on the issues raised in this paper and contribute suggestions for discussion points at the upcoming roundtable.

To provide feedback, please use the link below which addresses the issues raised in the previous sections of this paper.

[Link to feedback tool](#)

There will be a section for you to provide additional feedback beyond the topics raised in this paper if you have further feedback to share.

Please note that feedback in the tool is limited to 200 words for free-text responses. Submissions will not be accepted via email or through other mechanisms. Input via the feedback tool is due by **10 am AEST Monday 28 July 2025**. The department will consider all responses provided through the feedback tool.

For information about this issues paper and how to provide feedback please email agproductivity@aff.gov.au.

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Australian Government
Department of Agriculture,
Fisheries and Forestry

Lifting productivity in agriculture, fisheries and forestry: issues paper – stakeholder feedback



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Department of Agriculture, Fisheries and Forestry

GPO Box 858 Canberra ACT 2601

Telephone 1800 900 090

Web agriculture.gov.au

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Acknowledgement of Country

We acknowledge the continuous connection of First Nations Traditional Owners and Custodians to the lands, seas and waters of Australia. We recognise their care for and cultivation of Country. We pay respect to Elders past and present, and recognise their knowledge and contribution to the productivity, innovation and sustainability of Australia's agriculture, fisheries and forestry industries.

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1. Purpose & Context

The Australian Government is convening a high-level Economic Reform Roundtable on 19–21 August 2025, led by the Treasurer and the Prime Minister. This event will bring together a small group of senior leaders from across government, business, unions and civil society to shape the direction of long-term economic reform.

The Economic Reform Roundtable will focus on three priorities areas:

- Lifting productivity
- Strengthening economic resilience
- Ensuring budget sustainability.

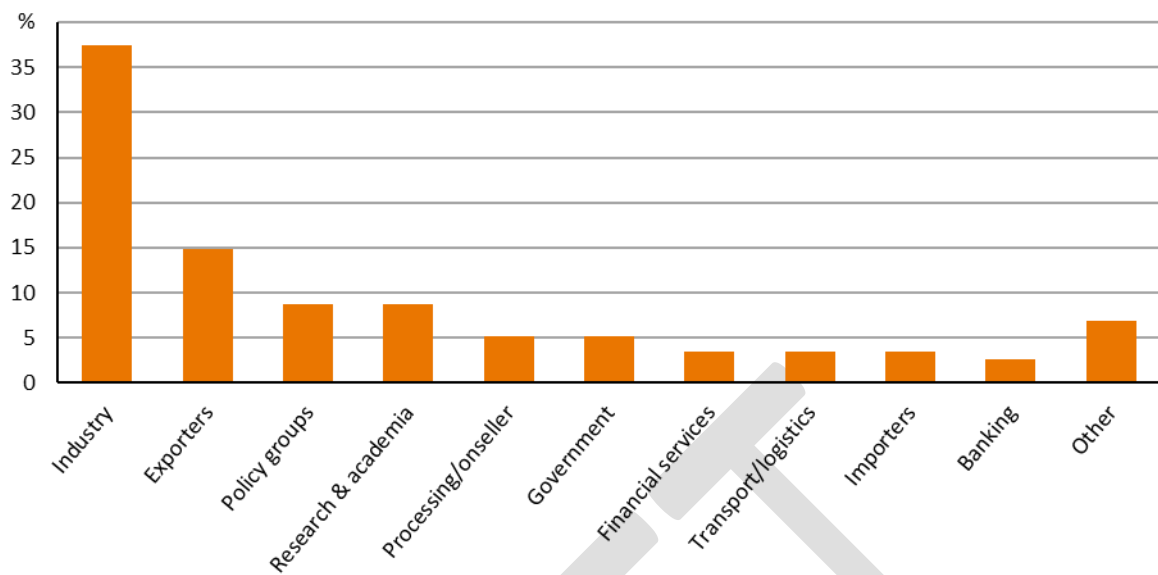
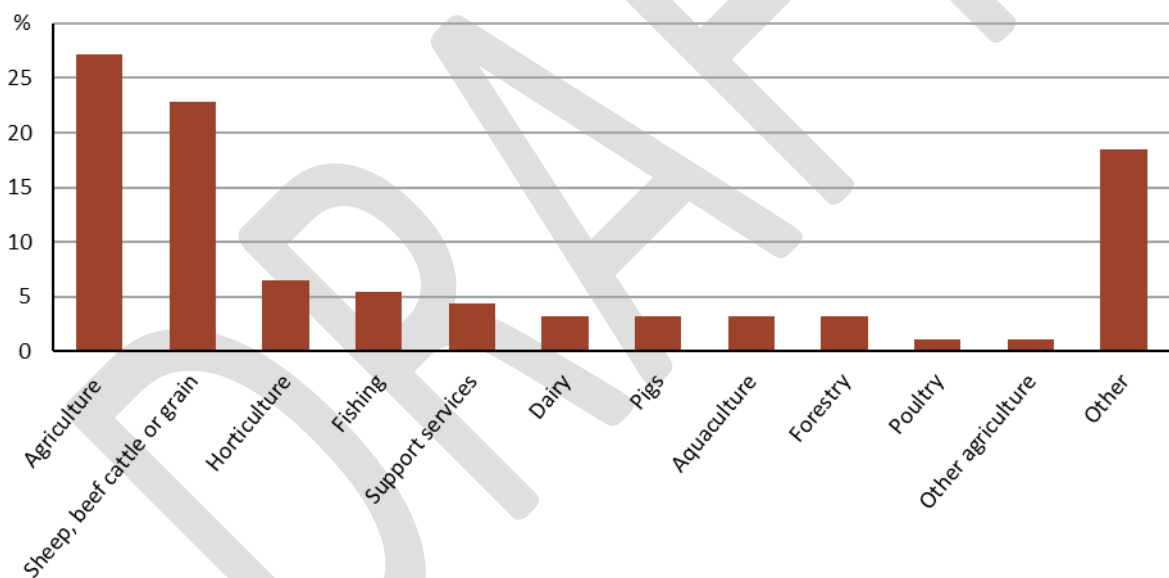
In advance of the Economic Reform Roundtable, the Minister for Agriculture, Fisheries and Forestry will be hosting an Agricultural Productivity Roundtable on 12 August 2025.

As an input to this roundtable, the Department invited industry and stakeholders to contribute feedback on the issues raised in an issues paper. Feedback was provided through an online tool to help target an agreed priority of reforms to feed into the Treasurer's Economic Reform Roundtable.

This paper provides a summary of the feedback provided by stakeholders, including responses to a set of questions provided in a feedback tool as well as written responses.

1.1 Response rates and industry coverage

A request for feedback was sent to a targeted group of stakeholders. A total of 145 responses were received through the online feedback tool, with 32% of responses from individuals and 68% from industry organisation. A majority of all responses (complete and incomplete) represented industry (78%), with the remaining responses including a range of individuals or organisations with an interest in agriculture, fisheries and forestry (see Figure 1). Responses were also spread across a variety of industries within agriculture, fisheries and forestry (see Figure 2).

Figure 1 Which of the following sectors best represent you?**Figure 2 Which industry is most relevant to you?**

2. Key themes & insights

2.1 Insights from structured feedback tool

Stakeholder feedback was provided under two key themes: fit for purpose regulation for food and fibre producers, trade and biosecurity; and options to drive food and fibre production and productivity. The Research and Development Corporations (RDCs) raised a number of themes, including the need for robust infrastructure, effective regulation and a skilled workforce to enable productivity gains. Individual stakeholders also raised a large number of issues that sit outside these themes - these are summarised in Appendix A.

Feedback relating to regulation strongly focused on improving process and systems, particularly those relating to a more enabling environment such as reducing duplication, faster approvals and simplifying processes.

There were a wide range of views on options to drive food and fibre production and productivity, with several common responses identified.

The most strongly supported responses are listed below. Detailed results from the feedback tool are provided in Section 3.

Regulation

1. Reducing duplication across regulators
2. More streamlined regulatory and compliance processes
3. Supporting faster and more transparent approvals
4. Investment in modern platforms and digital systems

Driving food and fibre productivity

1. Strategic investment in emerging sectors and regional infrastructure
2. Support alignment of RD&E across shared challenges
3. Support to develop farm business management skills
4. Need for integrated approaches along the entire supply chain

2.2 Insights from free-text comments and written submissions

The feedback tool included a few free-text fields where respondents could provide additional information not already captured. A small number of stakeholders provided written feedback outside of the feedback tool.

A summary of key themes and issues identified in these comments is provided below. More detail is available in Section 4.

Need for more integrated approaches

Focusing on the supply chain as a whole

Stakeholders across agriculture, fisheries, forestry, dairy, cotton, grain, food processing, logistics, and trade sectors emphasised the need to treat the supply chain as a unified, interconnected system. Enhancing productivity, resilience, and competitiveness requires coordinated action across all stages—from input supply and production to processing, logistics, regulation, and market access.

Need for more holistic thinking across issues/organisations

Across agriculture, fisheries, forestry, food processing, horticulture, and trade sectors, stakeholders consistently call for a shift from fragmented, siloed governance to integrated, systems-wide approaches that reflect the complexity of modern challenges.

Need for an enabling environment

Smarter regulation

There were a range of responses around smarter regulation, including the need for cross-jurisdictional alignment, improving efficiency and timeliness of approvals, and enabling innovation and technology.

Market access

Stakeholders across agriculture, aquaculture, fisheries, forestry, red meat, wool, wine, grain, and trade facilitation sectors consistently emphasise the need for a coordinated, forward-looking policy and regulatory environment that enables Australian industries to access, compete, and thrive in global markets.

Mobilising resources

Unlocking investment and finance to encourage innovation and commercialisation by cross-sector collaboration, public-private partnerships and incentives for climate-resilient technologies. This topic also included a number of responses around labour availability, access to training and building capacity through workforce development and education.

Need for better infrastructure

Better physical and service networks

Feedback responses underscored the urgent need for coordinated investment in physical and service infrastructure to unlock productivity and resilience across Australia's agriculture, fisheries, and forestry sectors.

Better tools for on-farm and the supply chain

Feedback responses highlighted the critical need for investment in digital tools and technologies to enhance productivity, efficiency, and resilience across farms and supply chains.

Knowledge production, integration and dissemination

Addressing knowledge gaps

Feedback responses highlight significant data and research deficiencies across Australia's agriculture, fisheries, and forestry sectors. These include: productivity data underprovision; limited visibility and granularity; and data collection and sharing.

Extension, scaling and adoptions

There is a strong call to revive and modernise extension networks to be more collaborative, locally relevant and utilising digital technologies.

3. Feedback tool results

Responses to a set of structured questions are provided below. Respondents were asked if they thought various options would be helpful. These were categorised as:

Strongly supported	more than 90% of respondents answering 'yes'
Well supported	70-90% of respondents answering 'yes'
Supported	50-70% of respondents answering 'yes'

Some questions were only relevant to a small number of stakeholders (for example, fisheries related questions). Responses to these areas are discussed separately below.

3.1 Fit for purpose regulation for food and fibre producers, trade and biosecurity

A strong, trusted and future-ready regulatory framework for food and fibre production, trade and biosecurity is central to Australia's productivity growth. Domestically, smart and robust regulatory systems reduce the risk of costly disruptions, while internationally, our regulatory credibility supports market access, Australia's global reputation and industry profitability. In some cases, overseas market access requires regulatory systems – particularly when importing governments require formal government-to-government assurance that exporters meet their conditions. Additionally, Australia's regulations protect human health, the environment, animal welfare and consumer rights—essential pillars of a safe and sustainable food system.

Changes to trade and biosecurity regulation to reduce costs or delays

1.	Simplifying regulation and compliance processes	Well supported
2.	Reducing duplication	Well supported
3.	Supporting faster approvals	Well supported
4.	Easier to use digital systems	Well supported
5.	Improving communication of requirements	Supported

Tools or systems to help meet regulatory requirements more easily

1.	More streamlined regulatory processes	Strongly supported
2.	Enhanced communication between regulators and industry	Strongly supported
3.	Access to staff who understand your business including market access	Strongly supported
4.	Interoperable systems that reduce double handling	Strongly supported
5.	Streamlined compliance or reporting requirements	Strongly supported
6.	Better coordination between government agencies	Strongly supported
7.	Faster and more transparent turnaround times	Strongly supported
8.	Harmonising and/or standardising information and data between industry and government	Strongly supported
9.	Clearer plain English guidance	Well supported
10.	Electronic certification, credentials and AI-assisted document lodgement platforms	Well supported
11.	Regulatory system matched with environmental risk	Well supported
12.	Online help or knowledge bases	Well supported
13.	Ability to trace product during export and import processes	Supported
14.	Mobile apps or user-friendly digital interfaces	Supported

International rules or standards creating productivity challenges for businesses

1.	Differing biosecurity or traceability rules across markets	Well supported
2.	Non-tariff barriers or inconsistent import conditions	Well supported
3.	Sustainability or emissions requirements	Well supported
4.	International rules that are lower than Australian standards for imported products	Supported

3.2 Options to drive food and fibre production and productivity

Lifting the productivity growth of food and fibre production will involve a range of actions by both government and industry to deliver benefits. Government and industry investment into Australia's internationally recognised rural RD&E system will remain critical to lifting productivity growth, with the role for agricultural extension likely growing in tandem with adaptation pressures, the transition to a net zero economy and changes in technology mix gather pace. Investments in this area from Rural Research and Development Corporations and others have helped make our industries sustainable relative to our international competitors.

Would the following deliver useful gains from RD&E investments?

1.	Finding opportunities to support alignment of RD&E activities to deliver on shared challenges across all food and fibre production	Well supported
2.	Assess options to re-spark agricultural extension and practice change	Well supported
3.	Explore opportunities to boost private sector investment in RD&E	Supported
4.	Develop new collaboration partnerships across government and universities to reinvigorate long-term agricultural research	Supported

Are changes to existing policies/programs required to improve farm managerial skills, resilience and wellbeing and help drive productivity?

1.	Biosecurity preparedness	Well supported
2.	Future Drought Fund	Supported

Would any of the following be useful to help build farm managerial skills?

1.	Support to develop farm business management skills	Well supported
2.	Support for climate and market risk decision-making	Well supported
3.	Support to better utilise technology	Supported
4.	Resources and training to support mental wellbeing for farms and farm workers	Supported

Would any of the following changes to investment settings be useful to support productivity growth and innovation in Australian agriculture?

1.	Support strategic investment in emerging sectors and regional infrastructure	Well supported
2.	Improve visibility of investment opportunities (e.g. agritech, infrastructure, value adding)	Well supported
3.	Strengthen investor confidence through improving transparency, timeframes and regulatory certainty for investment approvals	Well supported

Would the following initiatives help food and fibre businesses better access the labour they need to stay productive, especially during peak seasons?

1.	Explore industry/skill specific immigration settings	Well supported
2.	Better coordination in seasonal worker programs to match employer needs	Well supported
3.	Support with housing and infrastructure for workers	Well supported
4.	Improved training or accreditation systems tailored to farm work	Supported

Would improvements to the following parts of the agricultural supply chain improve productivity or reduce costs?

1.	Infrastructure investment	Strongly supported
2.	Fostering alternative market channels or logistic providers	Well supported
3.	Reviewing areas where buyers or suppliers have high market power	Supported
4.	Better market information (e.g. prices, food and fibre producer performance, and key inputs)	Supported

Are any of the following productivity-related data and measurement gaps a high priority?

1.	Sustainable productivity indexes and driver analysis	Well supported
2.	Return on R&D investment and extension funding	Supported
3.	Industry specific insights analysis	Supported

4. Summary of written responses

A few key themes were identified from the open text responses, including the need for an enabling environment, more integrated approaches, and knowledge integration.

1. Need for more integrated approaches	Focusing on the supply chain as a whole - Regional manufacturing and value-add opportunities - Data sharing and digital integration
	Need for more holistic thinking across issues and organisations - Whole-of-government coordination - National regulatory alignment
2. Need for an enabling environment	Smarter regulation - Simplification of overlapping regulations - Improved efficiency and timeliness of approvals
	Market access - Strategic government and industry partnerships and trade facilitation - Addressing non-tariff barriers and regulatory alignment
	Enabling a more level playing field - Reducing regulatory burden and complexity - Support for local innovation and manufacturing
	Mobilising resources - Unlocking investment and finance - Supporting innovation and commercialisation
	Overcoming barriers to investment and minimising cost - Streamlining regulation and investment processes - Employment and labour flexibility
	Access to capability building and training - Vocational education and sector-specific training - Public sector capability and alignment
3. Need for better infrastructure	Better physical and service networks - Address freight and transport bottlenecks - Fuel, inputs and water supply and reliability
	Better tools on-farm and for the supply chain - Digital regulatory systems - AgTech and innovation
4. Knowledge production, integration and dissemination	Addressing knowledge gaps - Productivity data gaps - Data access and sharing
	Better knowledge integration and collaboration - Communication alignment between government and industry - Indigenous leadership
	Extension, adoption and scaling - Extension models and practice change - Technology adoption and digital systems



Australian Government
Department of Agriculture,
Fisheries and Forestry

Roundtable: Unlocking Productivity in Australian Agriculture

12 August 2025 | Brisbane, QLD



Time	Session	Facilitator/Activity
8.30am	Registration	
9.00am	Welcome and acknowledgements	Adam Fennessy PSM, Secretary DAFF
9.05am	Opening Remarks	The Hon Julie Collins MP, Minister for Agriculture, Fisheries and Forestry Senator the Hon Anthony Chisholm, Assistant Minister for Agriculture, Fisheries and Forestry
9.20am	Process and housekeeping	Sky May ThinkPlace
9.25am	Participants' introductions and reflections	All participants at their tables
9.35am	What you told us: Insights into agricultural productivity and priority areas	Dr Jared Greenville, ABARES
9.50am	Prioritisation of topics	All participants
9.55am	<i>Concurrent discussions:</i> Participants' input into opportunities – priority topics 1&2	Table conversations and report back
10.25am	<i>Concurrent discussions:</i> Participants' input into opportunities – priority topics 3&4	Table conversations and report back
10.55am	Morning tea break	
11.10am	Summarising agreed priorities, outcomes and next steps	Sky May, ThinkPlace
12.05pm	Closing	The Hon Julie Collins MP, Minister for Agriculture, Fisheries and Forestry Senator the Hon Anthony Chisholm, Assistant Minister for Agriculture, Fisheries and Forestry
12.15pm	End meeting	



Australian Government
Department of Agriculture,
Fisheries and Forestry

CONVERSATION TRACKER

Roundtable: Unlocking productivity in Australian agriculture

12th August 2025

Hosted by Minister Collins & Assistant Minister Chisholm
Facilitated by ThinkPlace



Overview

The purpose of this document is to summarise key perspectives raised by participants at the *Roundtable: Unlocking productivity in Australian Agriculture* – held in Brisbane on 12 August 2025.

Perspectives gathered at the roundtable may not represent Government policy. It is noted that not all participants aligned on every position raised. This document has been compiled for roundtable participants to share with their organisations.

Through several prioritisation sessions and group discussions, participants decided on four key priorities:

1. **Reducing duplication across regulators**
2. **More streamlined regulatory and compliance processes**
3. **Strategic investment in emerging sectors and regional infrastructure**
4. **Support to develop farm business management skills**

Through deep-dives into these priorities – the following opportunities emerged:

- **Value Proposition and Cost Recovery:** Participants stressed that the cost of regulatory services must reflect their value to industry. Current cost-recovery settings risk eroding competitiveness and discouraging investment. Efficiencies in process, systems, and resourcing are needed to deliver more value at lower cost.
- **Urgency and Unified Vision:** There is a clear and immediate need for a unified, national vision for agriculture’s role integrating food, fibre, and fuel security into a broader food security strategy. This vision should cut across sectors and move beyond a fragmented “sub-sector” approach.
- **Harmonisation and Collaboration:** Inter-regulatory collaboration, alignment across jurisdictions, and a “One Agriculture” approach are critical to remove duplication, streamline processes, and enable cross-sector synergies.
- **Timeliness and Culture Change:** Approval processes must deliver “fast yes” or “fast no” decisions to reduce uncertainty. A shift from a precautionary culture to a balanced, risk-based regulatory posture built on trust and co-design between regulators and industry is essential.
- **Investment and Productivity:** Addressing barriers to capital access, aligning agricultural priorities with housing, renewables, sovereign capability, and national infrastructure planning will drive productivity and ensure Australia’s regions remain, secure, and economically competitive.
- **Industry’s role:** Industry recognised their role in lifting sector productivity, in-step with government priorities, including identifying opportunities for governments and industry to share risk, capability, efficiencies and innovations.

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Priority Opportunities

Participants reviewed and discussed the issues paper, identifying four priority opportunities that were explored in greater detail during subsequent group discussions. To guide these discussions, participants considered: Why is this a priority? What opportunities could be activated within it? Who would benefit and why? What are the risks? Who is responsible for delivery?



Fit-for-purpose regulation



Reducing duplication across regulators



More streamlined regulatory and compliance processes



Supporting faster and more transparent approvals



Investment in modern platforms and digital systems



Driving food and fibre productivity



Strategic investment in emerging sectors and regional infrastructure



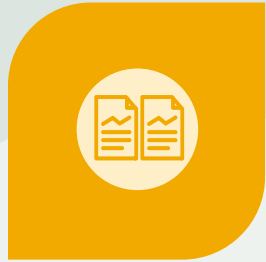
Supporting the alignment of RD&E across shared challenges



Support to develop farm business management skills



Need for integrated approaches along the entire supply chain



Fit-for-purpose regulation

Reducing duplication across regulators

1. Harmonised and collaborative regulatory Frameworks for National Consistency

Participants emphasised the need to address duplication and misalignment across federal, state, and local government regulatory systems, which create inefficiencies, costs, and frustration for industry. They identified the absence of a national single market approach as a longstanding issue, leading to conflicting decisions and fragmented compliance requirements.

A principles-based approach to harmonisation - covering areas such as transport, labour, licensing, packaging, quality, training, OHS, food safety, and planning was recommended over prescriptive regulation.

Developing a national roadmap, supported by evidence-based reviews of the regulatory landscape, including the recognition of industry standards, could help align mandates with current industry and global conditions, ensuring that regulatory frameworks remain fit for purpose.

2. Leveraging Technology and Data to Reduce Duplication

The group saw technology, particularly AI, as an enabler to modernise regulation, automate risk management, and replace outdated requirements. Data-driven approaches could give regulators confidence to retire unnecessary rules while maintaining safety and quality standards.

Participants called for harmonised export documentation across agencies, streamlined cooperative regulations into a single national market, and a unified approach policy, particularly for marine industries. Such measures would not only remove redundant processes but also create opportunities for real-time compliance monitoring and improved coordination between agencies.

3. Aligning Industry and Government Priorities

A recurring theme was the need to align industry vision with regulatory objectives. Participants proposed cross-portfolio negotiations underpinned by recognition of the highest point of compliance, ensuring regulation supports rather than hinders growth.

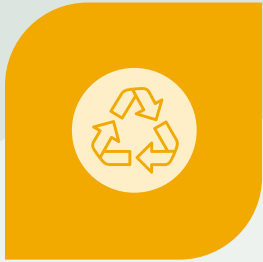
They also recommended industry-provided case studies to demonstrate the practical impact of regulation and identify areas which could be addressed in the short-term resulting in easy wins where duplication could be quickly removed.

This alignment should extend to national competition policy, EPBC Act reforms (inc. housing), and opportunities to integrate triple bottom line considerations into land use and development approvals.

4. Seizing the Strategic Opportunity for Reform

The urgency for reform was reinforced by current geopolitical uncertainty, supply chain vulnerabilities, and rising business costs. As an island nation, Australia has both the need and the ability to control its domestic regulatory environment to enhance sovereign capability and attract investment. The National Food Security Strategy was recognised as a means for identifying, and actioning, reforms that would secure Australia's food security and sovereignty.

Participants viewed harmonisation and efficiency gains as critical to improving competitiveness and resilience. Dedicated resources, committed personnel, and targeted investment were seen as necessary to drive these reforms, delivering infrastructure and policy settings that strengthen the national economy while reducing regulatory burden.



Fit-for-purpose regulation

More streamlined regulatory and compliance processes

1. Targeted regulatory reform for Maximum Impact

Participants emphasised that streamlining regulation must focus on areas where change is both actionable and delivers the greatest economic value. This includes targeting regulations where DAFF holds control or influence, and where reforms could have significant scale, reach, and efficiency gains.

The discussion highlighted the need for a principles-based approach to harmonisation across freight, chemicals, animal welfare, and biosecurity, ensuring alignment between federal, state, and local requirements.

A national focus on “failing fast” and delivering quick, evidence-based outcomes was seen as essential to improving responsiveness and avoiding costly delays that erode competitiveness.

2. Harnessing Technology, Data, and Industry Partnerships

The group identified technology, data sharing, and industry-government partnerships as key enablers of streamlined regulation. Leveraging internal data and modern technologies such as blockchain and AI could reduce duplication, automate risk management, and improve compliance monitoring.

Opportunities exist to integrate international standards, develop a single maritime window for trade, and enhance cross-portfolio data flows to speed up approvals. Participants also suggested enabling industry-led service delivery, such as issuing permits and operating authorised officer schemes, supported by government oversight, to improve efficiency while maintaining quality and safety.

3. Balancing Risk Management with Competitiveness

A recurring challenge identified was the cultural and structural tendency towards zero-risk tolerance in regulation, which increases compliance costs and stifles innovation. Participants noted that accepting some level of managed risk could improve efficiency, reduce duplication, and unlock faster infrastructure development. There was concern that excessive compliance spending diverts resources away from innovation and productivity gains.

They also warned that a lack of cross-government coordination, slow approval processes, and electoral cycle constraints could undermine reform efforts if not addressed through clear accountability and streamlined decision-making.

4. Strengthening Competitive Sovereign Capability and Market Access

Streamlined regulation was linked to broader economic and strategic goals, including enhancing Australia’s competitive sovereign capacity, food security, and competitiveness in global markets.

Participants called for reforms that align domestic schemes and standards with international benchmarks, remove investment barriers, and improve market access through more efficient biosecurity processes. They highlighted the importance of co-designing changes with industry to ensure practicality and buy-in. Ultimately, a whole-of-government approach supported by dedicated resources, harmonised standards, and clear action plans, is seen as critical to unlocking productivity and ensuring Australia maintains a leading position in agricultural trade.



Driving food and fibre productivity

Strategic investment in existing and emerging sectors and regional infrastructure

1. Building Competitive Sovereign Capability through Strategic Investment

Participants highlighted the importance of strengthening competitive sovereign capability to future-proof Australia's agricultural sector.

Investment in supply chain resilience, skilled workforces, and critical infrastructure was identified as essential to maintaining business confidence and global competitiveness. The discussion noted that other countries are actively investing in agriculture and agri-business, and without a similar commitment from Australia there is a risk of market failure.

Strategic investment must be guided by a clear roadmap, ensuring resources are prioritised where they deliver the greatest value to agricultural productivity and long-term sector stability.

2. Prioritising Infrastructure for Productivity and Competitiveness

Infrastructure was seen as a critical enabler for both economy wide and sector growth, with participants pointing to transport, digital connectivity, water, energy, housing, and logistics as priority areas.

The group stressed that DAFF can not operate in isolation but needs to work across government to understand and address supply chain inefficiencies. Access to affordable renewable energy, regional housing near industry hubs, and streamlined planning and approval processes were identified as key levers.

Investment in infrastructure should aim not only to expand capacity but also to remove bottlenecks, modernise existing assets, and improve overall operational efficiency.

3. Leveraging Multiplying Effects and Resilience

Investment in existing infrastructure and systems can deliver multiplier effects across the supply chain, enhancing resilience and build in redundancy. Participants emphasised that breakdowns in one part of the network can cause significant bottlenecks, highlighting the value of improved maintenance, speed optimisation, and better integration between transport and agricultural operations.

Advocacy across industry sectors and with DAFF was seen as essential to aligning priorities and accelerating infrastructure planning. A balanced approach to public, and private, domestic and foreign investment was encouraged to ensure both immediate improvements and long-term capacity building.

4. Regional and Long-Term Planning for Sector Growth

The group stressed that regional infrastructure investment is critical and time-sensitive. A coordinated five-year plan - developed in collaboration with stakeholders such as the NFF, RDCs, and business leaders was recommended to address long-term goals, including food security, regional manufacturing, and alignment with global environmental and trade standards.

By aligning national and regional priorities, Australia can position itself as a leader in global food security and sustainable agricultural production.

Participants also called for renewable energy and manufacturing zones to be integrated into agricultural planning to improve competitiveness and environmental performance.



Driving food and fibre productivity

Support to develop farm business management skills

1. Strengthening Training and Extension Services

Participants stressed that there should be no further cuts to extension services, as they are vital for improving farm business management skills. A multi-modal approach to training that combines video-based learning, on-farm practical sessions, and tailored resources, was recommended to maximise accessibility and effectiveness.

Incorporating mental health awareness, cultural competency, and workplace safety training (both on-farm and in-factory) was seen as critical to improving productivity, reducing insurance costs, and supporting social viability in rural communities.

Collaboration between industry organisations, employers, employees, government, and unions was identified as essential for delivering consistent, high-quality training with clear targets.

2. Capturing and Scaling Industry Innovation

The group highlighted the need for structured mechanisms to capture innovations emerging from within the industry and scale them across sectors. Without this, opportunities for efficiency gains, sustainability improvements, and workplace performance enhancements risk being lost.

Participants noted that improved farm business management skills could lead to more resilient workplaces, better capital utilisation, and long-term sustainability.

Establishing benchmarks and clear measures of success would help ensure innovation is embedded into standard practices rather than remaining isolated examples.

3. Addressing Gaps in Business Acumen and Management Capacity

Low business acumen and limited management capacity were identified as significant barriers to productivity and supply chain resilience. Participants suggested targeted training, guidance, and access to comparison tools to strengthen decision-making and planning.

Initiatives could include trademarks management, corporate resilience programs, and improved usability of supply chain systems. Studying management capacity as a driver of production gaps would help identify where interventions could yield the greatest impact. Skills and training investment from businesses themselves was encouraged to complement public sector support.

4. Expanding Formal Education and Career Pathways

Formal education and training pathways were seen as key to building long-term farm management capability. Participants proposed increased investment in TAFE programs, the introduction of an agriculture-specific apprenticeship, and incentives for mandatory training in business management.

These measures would create a skilled pipeline of future farm managers, improve sector-wide capability, and enhance the profession's appeal to younger generations. By aligning education with industry needs, the sector can ensure its workforce is well-equipped to manage farms as modern, competitive, and resilient businesses.

Group Discussion

To close out the day, participants were invited to share-back the key opportunities and risks from their group discussions. There was strong support to pursue economic reforms that would improve productivity, enhance economic resilience, and place agriculture at the centre of conversations around productivity, protecting national sovereignty, and ensuring food security for Australia and world. This included identifying an opportunity for increased collaboration between industry and government.



Fit-for-purpose regulation

Participants called for fit-for-purpose regulation that reduces red tape, duplication, and the cost of compliance, noting cost recovery is a major competitiveness barrier.

There was a focus on improving process and systems, particularly those relating to a more enabling environment such as reducing duplication, faster approvals and simplifying processes.

They urged DAFF to consider how service costs could be lowered, harmonise rules across all government levels, and modernise processes. Industry could partner with DAFF on functions such as biosecurity at the border, supported by a one-stop data platform to cut paperwork.

The group stressed that reform must avoid removing beneficial regulation.

Participants linked streamlined regulation to broader sovereign capability goals, including food, fibre, and fuel security, improved infrastructure, and workforce support. They emphasised the urgency for a unified vision, backed by a comprehensive land use policy and strategic investment in high-performing sectors, to ensure Australian agriculture remains globally competitive while delivering benefits to other industries such as tourism, mining, and transport.



Driving food and fibre productivity

Participants emphasised the multiplier effect of strategic investment, noting supply chain costs are a significant expense.

There were a wide range of views on options to drive food and fibre production and productivity with several common responses identified including opportunities to build on existing benefits of, and further align, RD&E across shared challenges. The need for integrated approaches across the entire supply chain was also agreed.

Long-term planning, co-investment with industry, and timely capital deployment, especially for export-heavy sectors, were seen as essential for global competitiveness. They called for ongoing investment in both existing and emerging sectors.

Participants opposed subsidy-heavy models, favouring public-good investments like timber for housing. Renewable Energy Zones linking manufacturing and agriculture were identified as opportunities to reduce costs and attract skilled workforces.