



Australian Government

Department of Agriculture, Water and the Environment
ABARES



2020
OUTLOOK
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Structural change in Australian agriculture

David Galeano

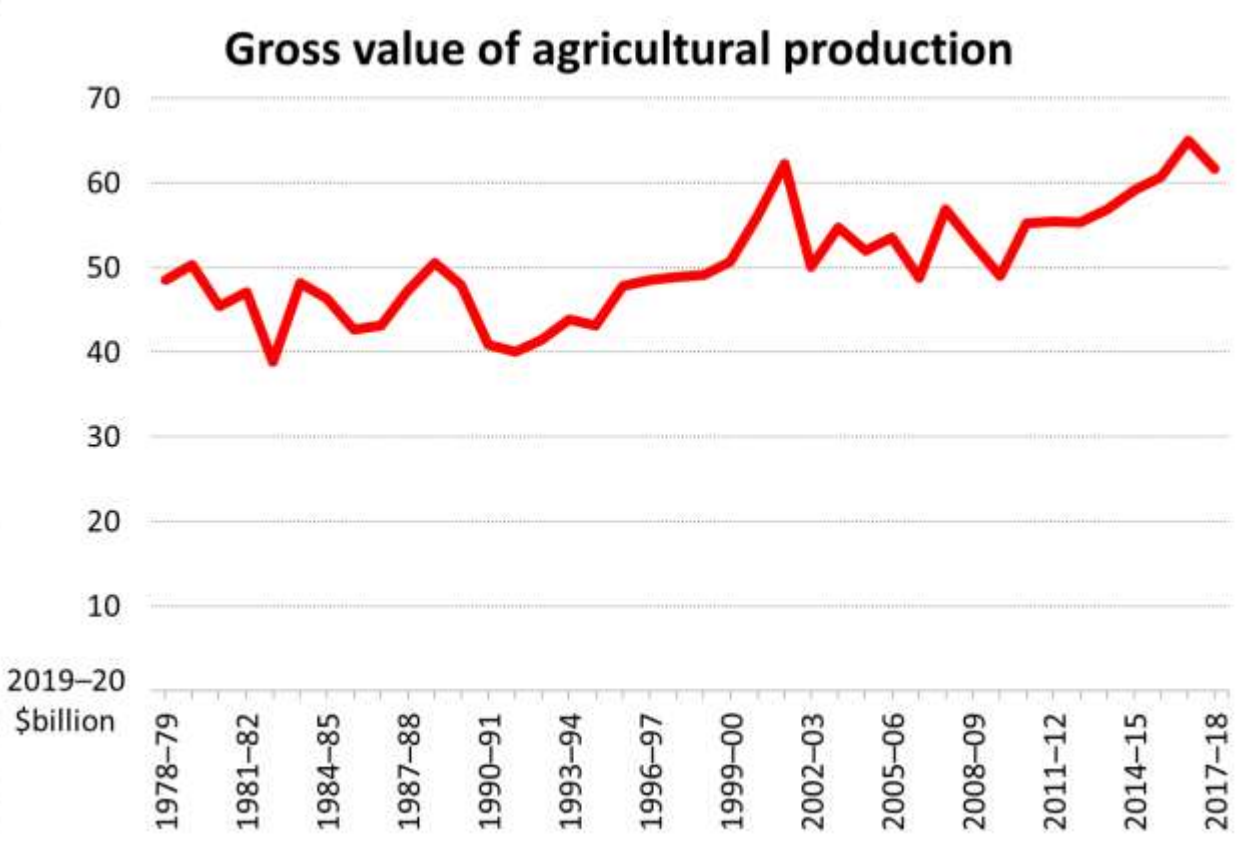
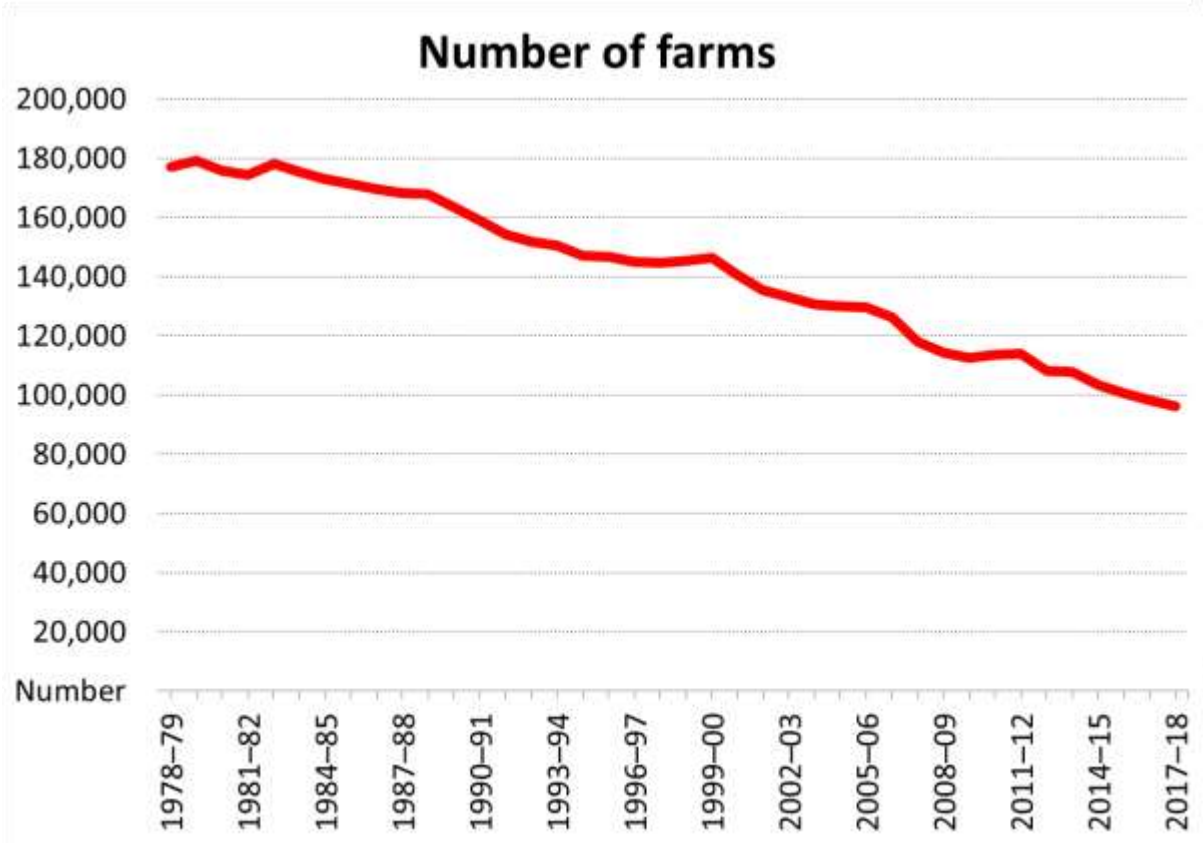
Australian Bureau of Agricultural
and Resource Economics and Sciences

3 – 4 March 2020



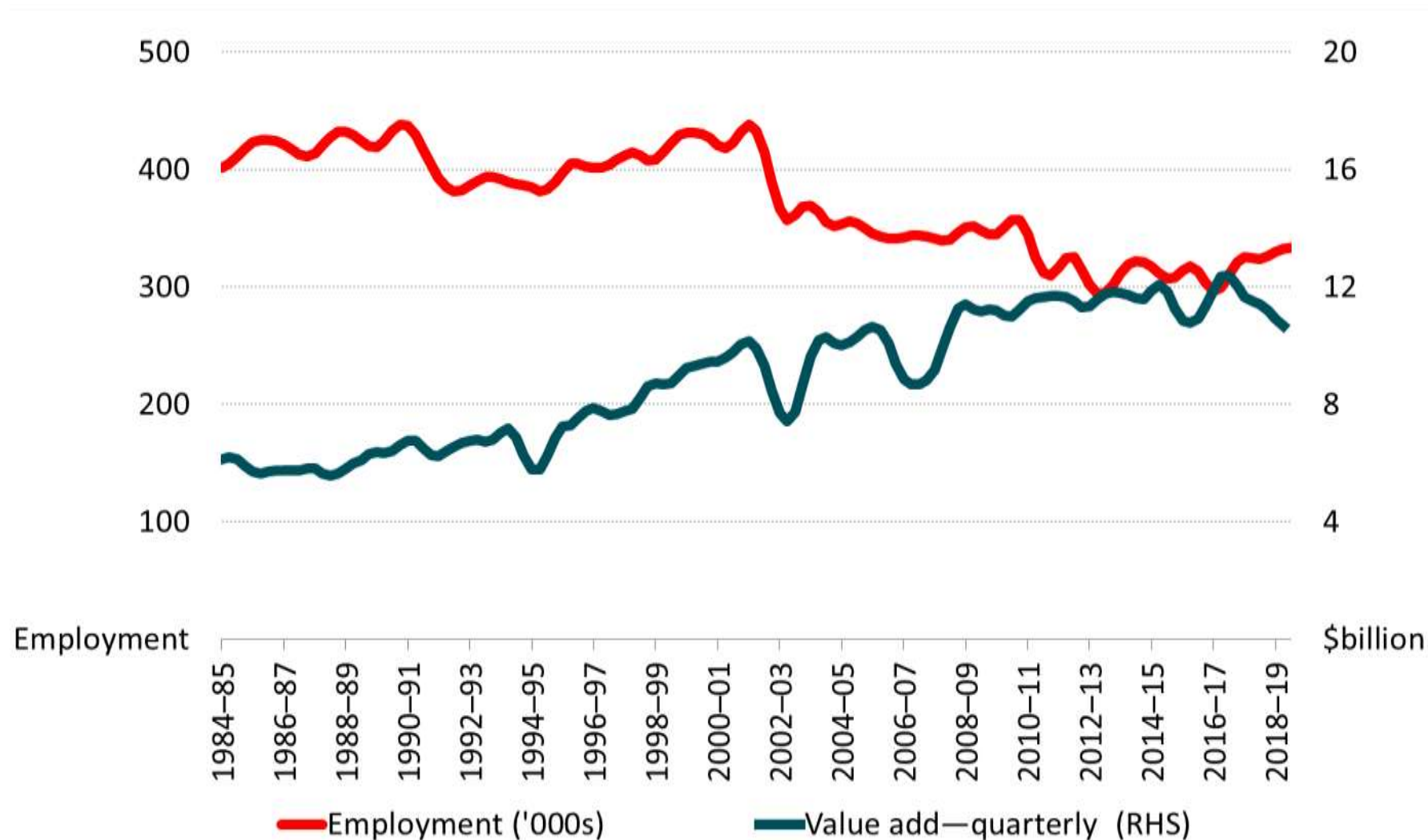
Research by the
Australian Bureau of Agricultural and Resource Economics and Sciences

Declining farm numbers but value increasing



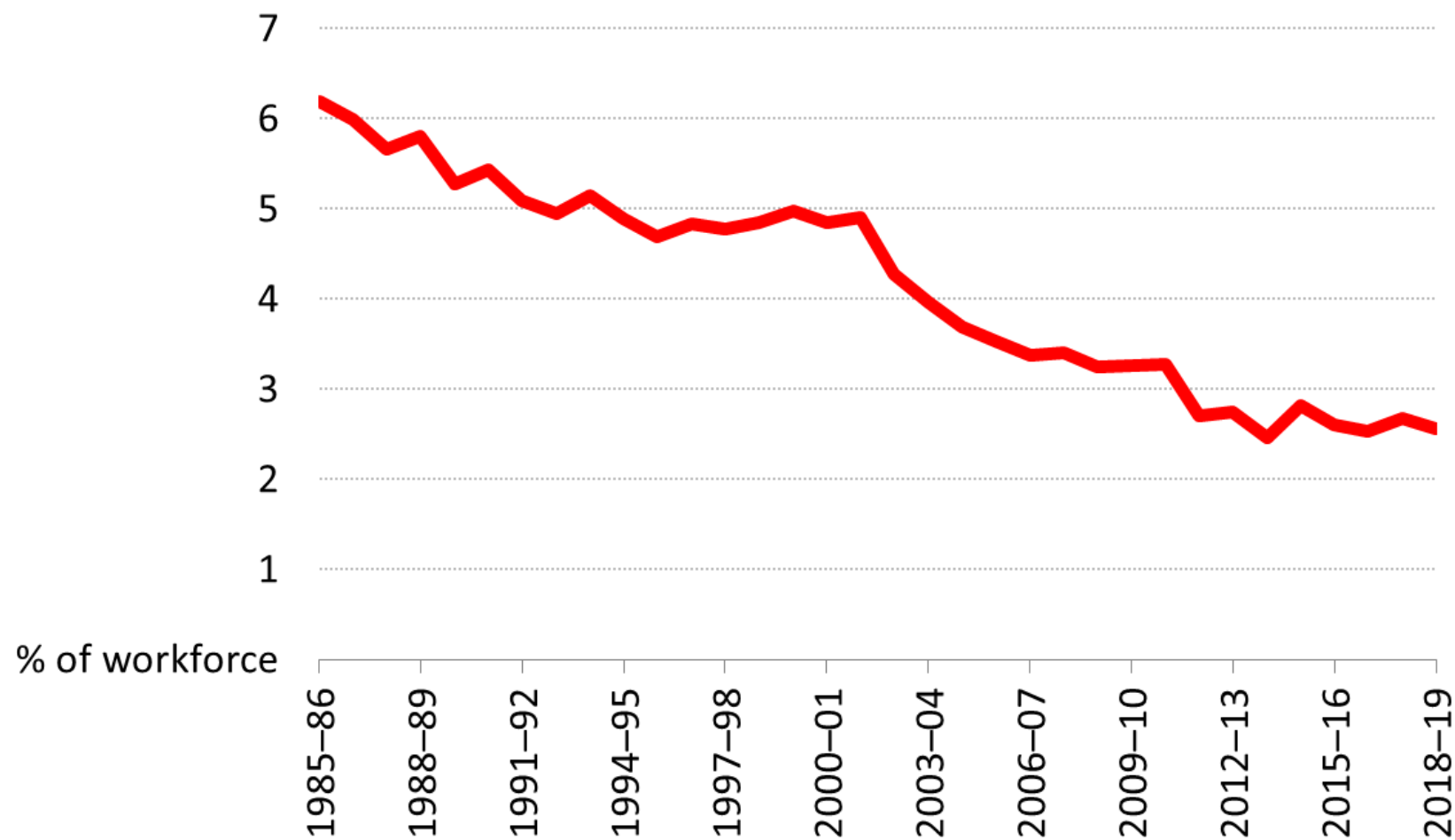
Source: ABS 2018, *Agricultural Commodities, Australia, 2017-18*

Agriculture gross value add increasing



Source: ABS Labour Force Survey cat. 2691 and Australian National Accounts cat. 5206

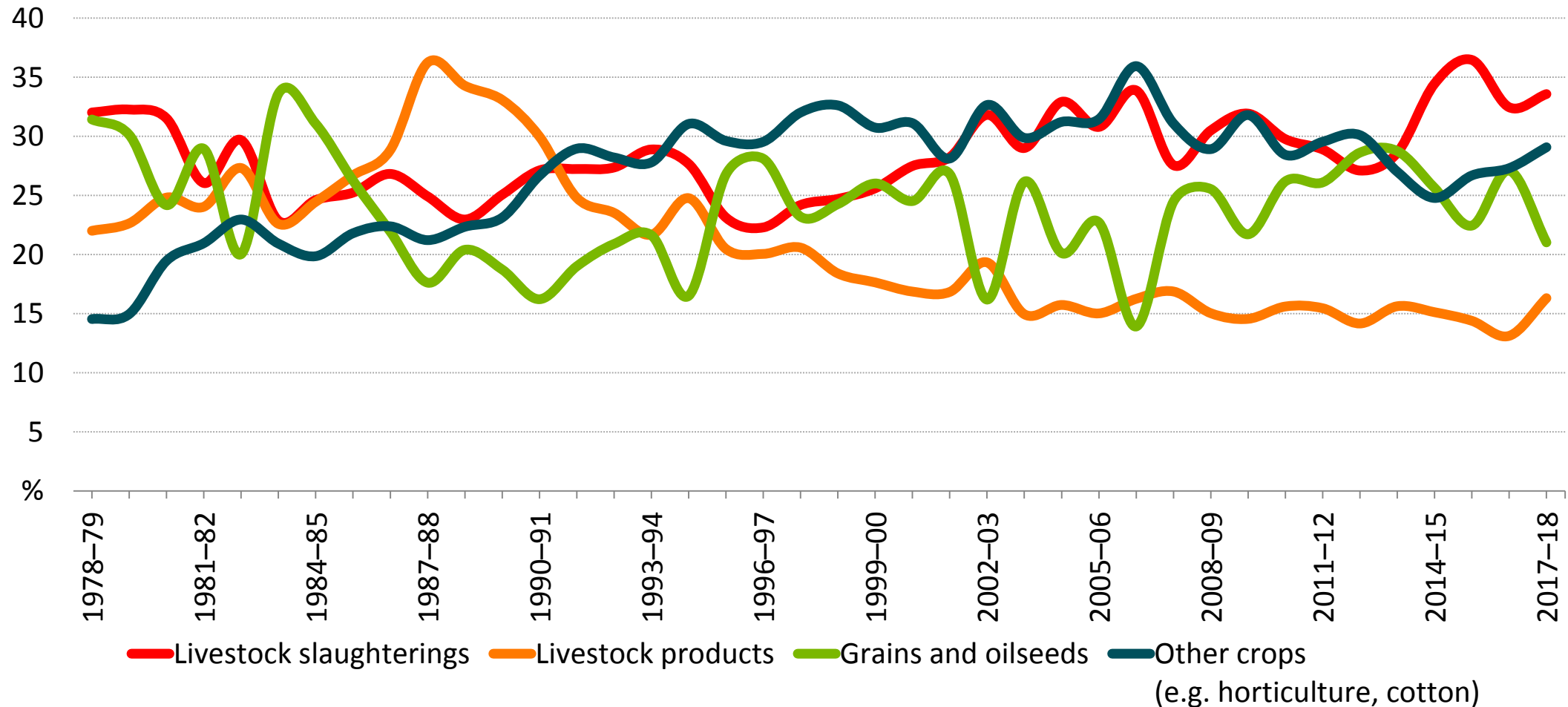
Agriculture share of employment falling



Source: ABS Labour Force Survey Cat. 6291

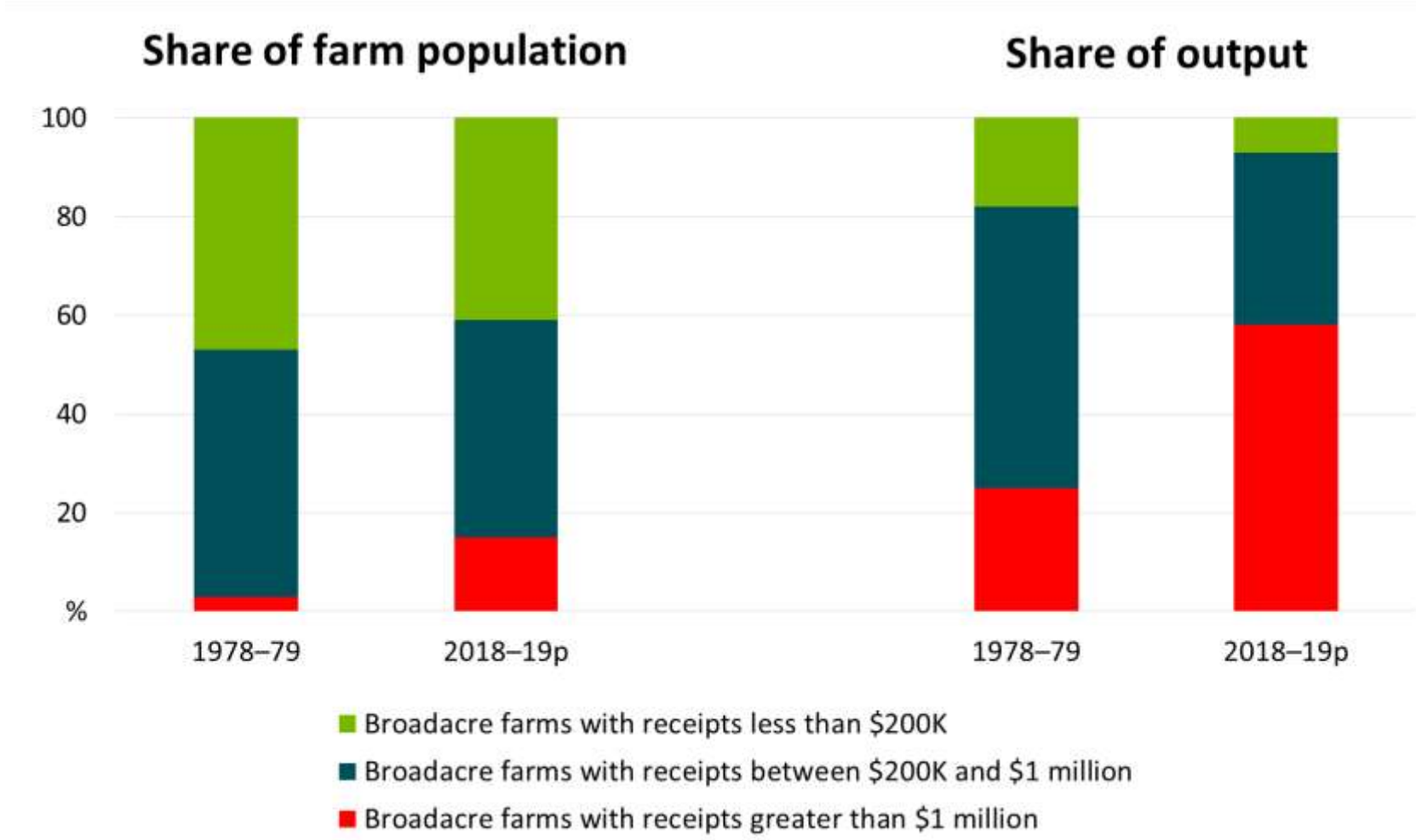
Agriculture is constantly changing

Share of agricultural gross value of production



Source: ABARES 2019, *Agricultural commodities: December 2019*

Large farms account for most land and output

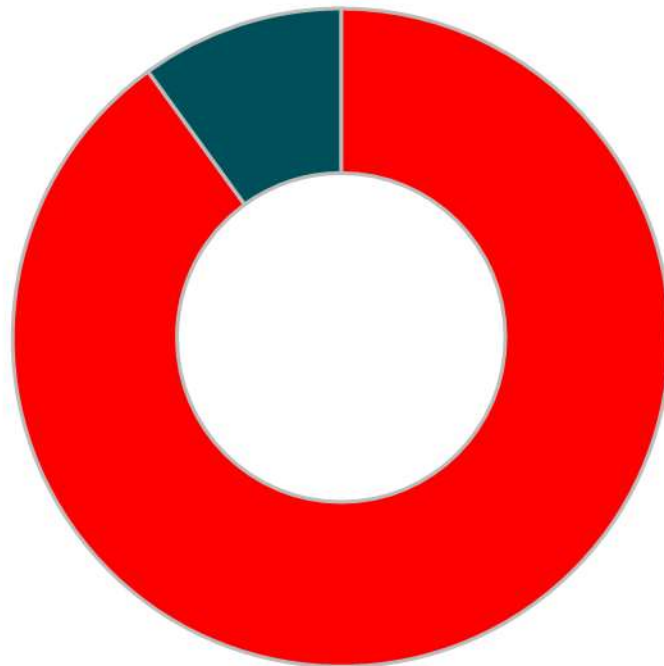


Note: **p** preliminary

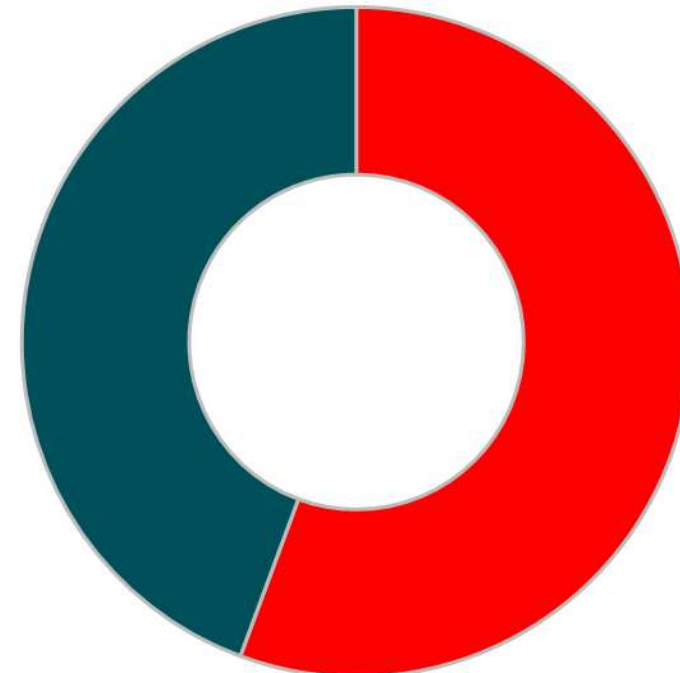
Source: ABARES Australian Agricultural and Grazing Industries Survey

Productivity growth has been important

Dairy (2000–2013)



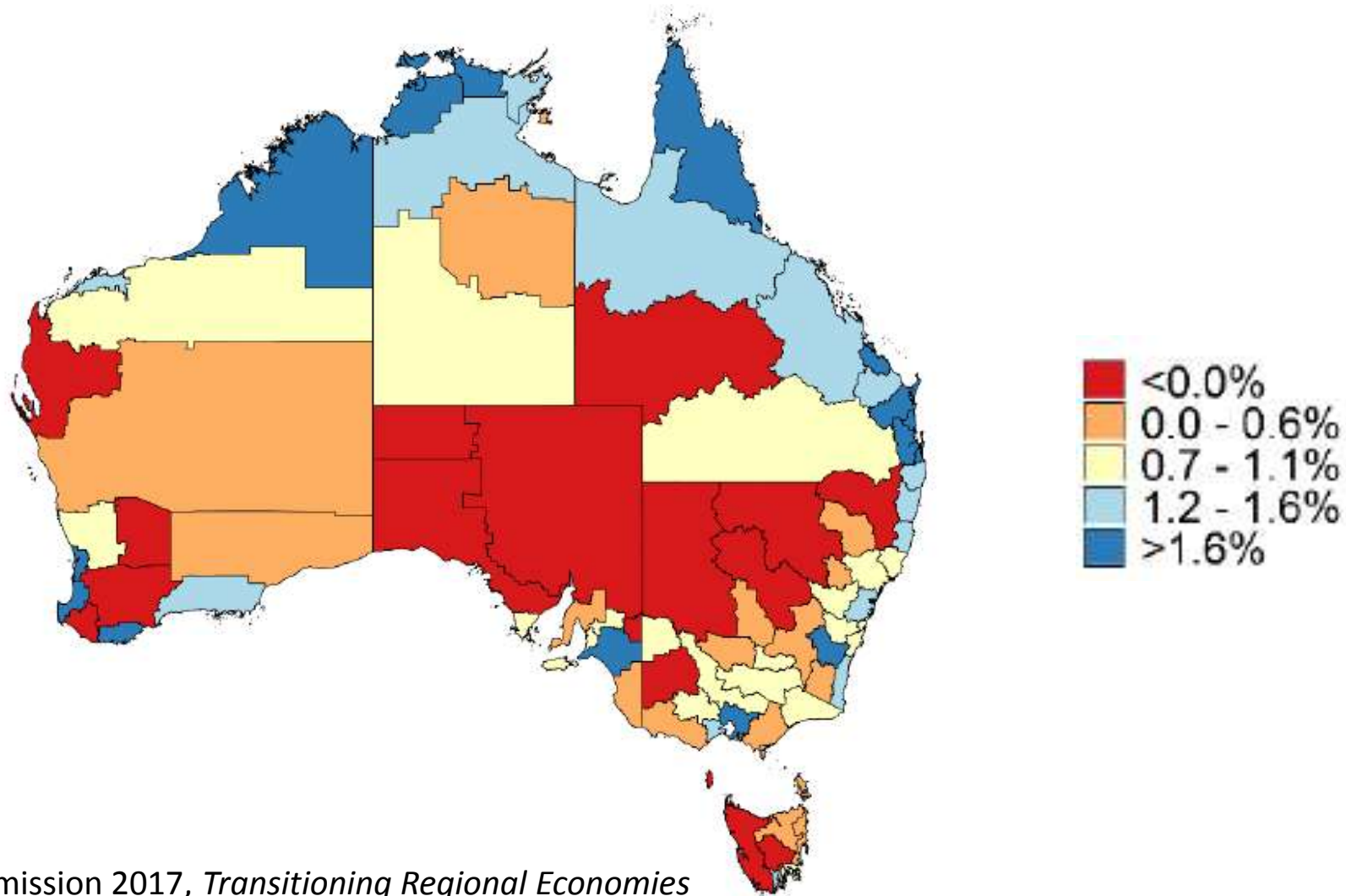
Broadacre (1978–2010)



- Within-farm TFP growth
- Resource re-allocation induced TFP growth

Population change

Average annual change 1991 to 2016



Source: Productivity Commission 2017, *Transitioning Regional Economies*

Innovation is the key to growth





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