Australian agricultural outlook

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Australian agriculture largely unhindered during COVID-19

Key areas for surety

- **Logistics and freight**
  - Horticulture
  - Meat
  - Seafood
  - Dairy

- **International processors**
  - Cotton
  - Wool

- **Access to labour**
  - Horticulture
  - Live Exports

- **Government service delivery**
  - All export sectors subject to sanitary and phytosanitary certification by export partners

Imports of agricultural inputs, Jan-Mar 2020

- Chemicals
- Fertilisers
- Agricultural machinery
- Stockfeed
- Veterinary vaccines

- Average 2015–19
- 2019
- 2020
Production strong after a favourable season

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Meat & live animals
Livestock products
Grains & oilseeds
All other crops
Fruit & vegetables
All other horticulture

s Estimate. f Forecast. z Projection.
Fall in exports, slow recovery ahead

-01 -03 -05 -07 -09 -11 -13 -15 -17 -19s -21f 2025

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Opportunities and challenges persist across a number of fronts

Effect of 2000 to 2019 climate conditions on average farm business profit

Emissions per unit of beef produced, 2008 to 2017

Source: Hughes et al. 2019 ABARES Insights (2019.06)
Source: Greenville et al. 2020 Insights (2020.10); FAO 2020
Playing to strengths will help manage uncertainty and create value

Agriculture value grows faster when focus is on raw product rather than processed.

Value created through exporting raw at least as good as from processed.

Australia has not missed out by focusing on raw products.
awe.gov.au/abares