

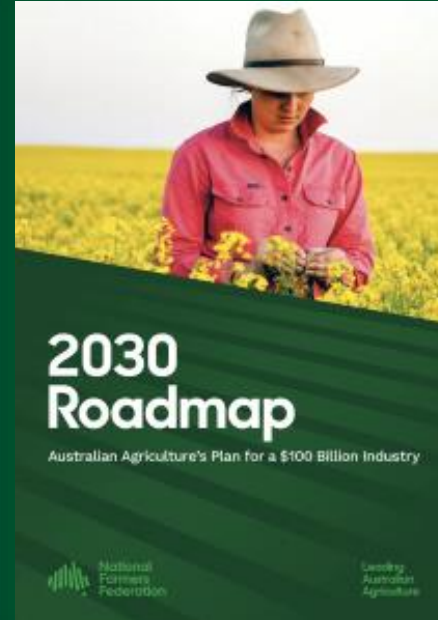
CropLife National Members Forum |
OCTOBER 2024

Anchors & Sails



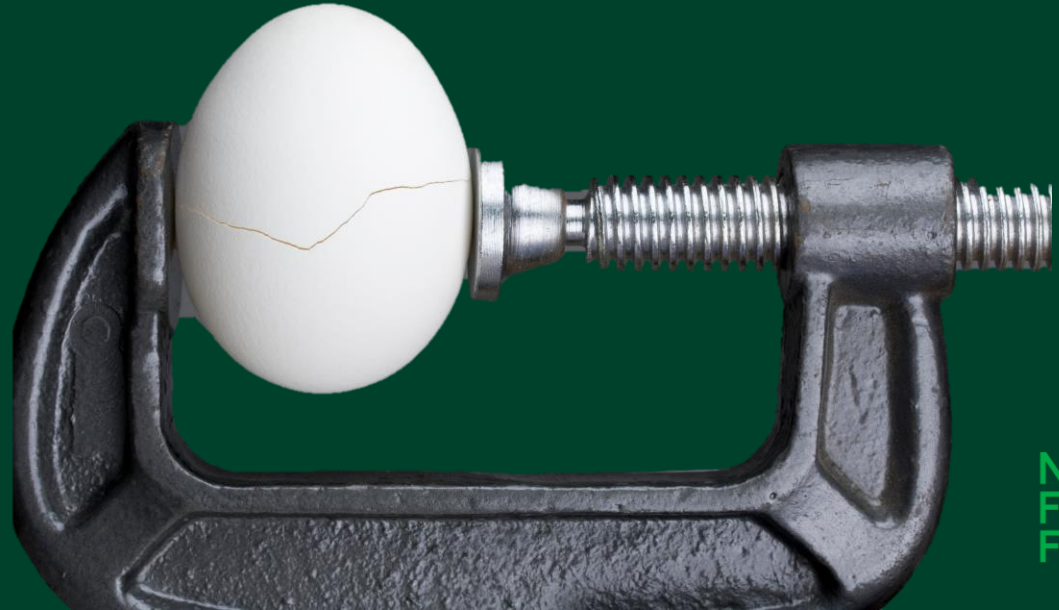
Our vision for Aussie agriculture

- Our 2030 Roadmap puts a plan behind our vision to grow the farm sector to \$100 billion by 2030
- Articulates our vision for a future-facing industry, with targets across markets; regional development; innovation; sustainability; people; and risk.
- Product of detailed national consultation over 2017 – 2018.
- Has bipartisan support of both major parties Federally.



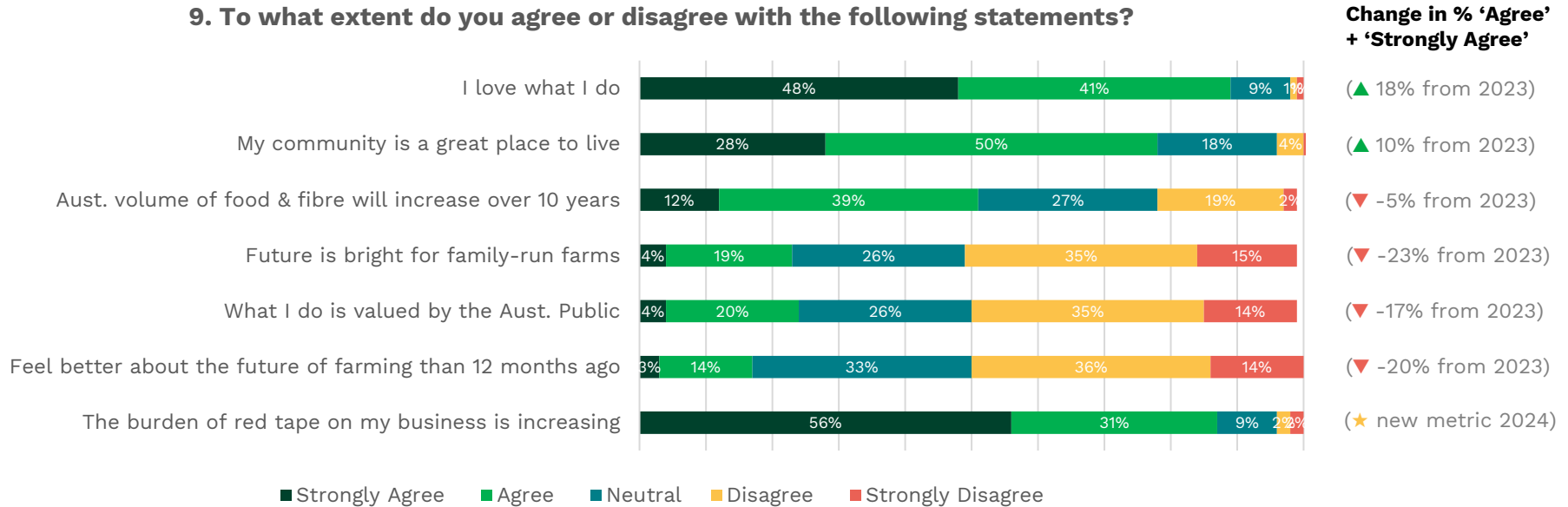
But right now, the policy environment is deteriorating...

- Live sheep phase-out
- Water buybacks
- Worker shortages
- Climate reporting
- EU deforestation laws
- IR changes
- Superannuation changes
- Environmental law reform
- Vehicle emissions standards
- Unfair markets
- Biosecurity levy
- Transmission lines
- Cultural heritage laws



Industry sentiment

9. To what extent do you agree or disagree with the following statements?



Issues of top concern

RANK	ISSUE	VERY CONCERNED	CONCERNED	NOT CONCERNED	% CHANGE FROM 2023
1	Protecting Australia's biosecurity	64.0%	30.0%	6.0%	▲ 12.7%
2	Market power of processors/supermarkets	58.3%	35.6%	6.2%	▲ 10.8%
3	Federal environment laws	54.9%	37.6%	7.6%	▲ 10.4%
4	Roads and transport infrastructure	56.5%	35.5%	8.0%	▲ 10.2%
5	Federal climate change policies	62.4%	28.6%	9.0%	▲ 10.0%
6	Our overseas trading relationships	37.4%	52.5%	10.1%	▲ 9.1%
7	The phase-out of live sheep exports	62.8%	24.1%	13.1%	▲ 12.2%
7	Local services (health, education etc)	47.1%	39.8%	13.1%	▲ 8.1%
8	The Murray Darling Basin Plan	32.4%	52.7%	15.0%	▲ 9.1%
9	Access to telecommunications	41.6%	40.2%	18.2%	▲ 8.8%
10	Mining/Energy developments on farmland	42.1%	39.5%	18.4%	▲ 5.2%
11	Animal welfare laws	38.6%	42.6%	18.8%	▲ 3.2%
12	Worker shortages	31.8%	48.7%	19.5%	▲ 6.9%
13	Workplace (industrial relations) laws	34.0%	45.9%	20.1%	▲ 3.5%
14	Cultural heritage laws	40.6%	35.7%	23.7%	▲ 3.0%

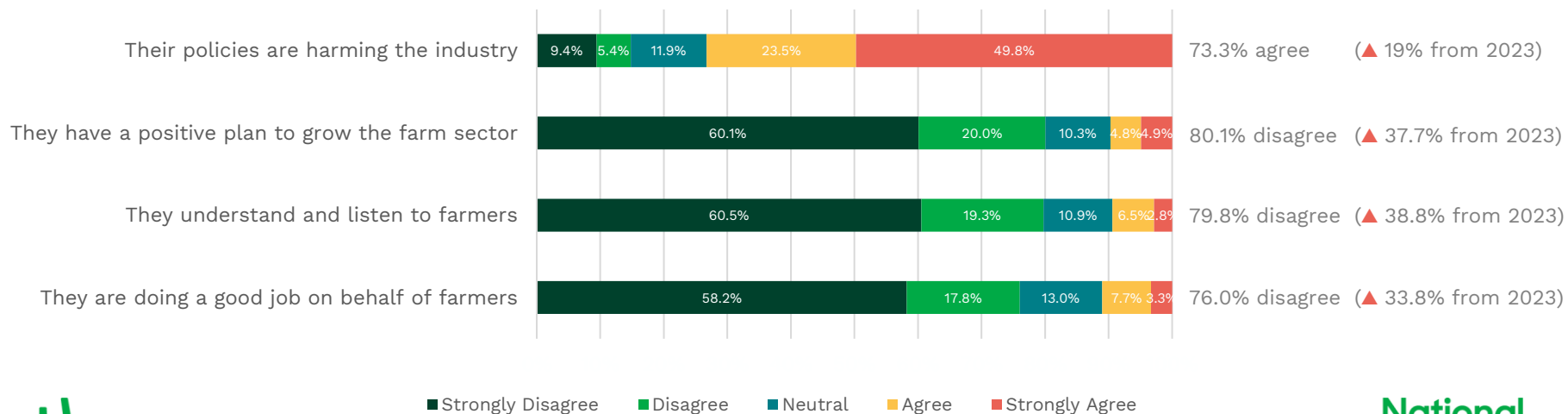
Denotes Top 3 issues among 'very concerned'



Sentiment towards the Federal Government

Sentiment towards the Federal Government has collapsed amid heated policy disputes with the sector. Ratings across 4 sentiment measures have deteriorated by an average of 32% over the course of the past 12 months. 73.3% of farmers now say Federal Government policies are harming the sector. While just 1 in 10 now say the Federal Government 'has a positive plan to grow the sector', 'understands and listens to farmers', or is 'doing a good job on behalf of farmers'.

18. To what extent do you agree with the following statements about the Albanese Government?



4 anchors weighing us down...

1. Increased risk of activist-led decision making
2. Access to skilled workers
3. Competition for land and water resources
4. Uncertain regulatory future for sustainability – environment laws, deforestation, climate reporting



3 things putting wind in our sails...

1. Normalisation of trade with China and growth in other markets
2. Emergence of new environmental markets
3. Efforts to improve competition in the supply chain



Ag-vet chemical concerns are increasing

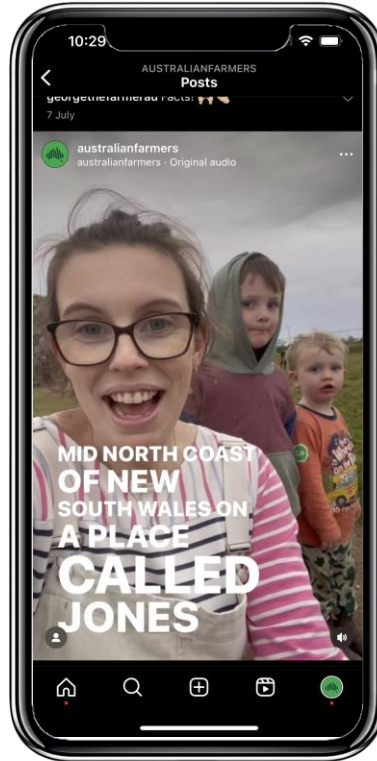
1. APVMA chemical reviews are resulting in loss of access to chemicals without equivalent alternatives: Paraquat and diquat, diazinon, chlorpyrifos as examples
2. Slow processing of product and permit applications continues to cost the industry, delaying farmers' access to new, required, or urgent products
3. Social licence concern as misinformation gets traction



Telling our Story

NFF's dedicated campaign fund to strengthen agriculture's reputation.

- \$750,000 invested in the last 3.5 years.
- Over 31 million online impressions.
- Independent market research showing recall and sentiment uplift in target demographics.

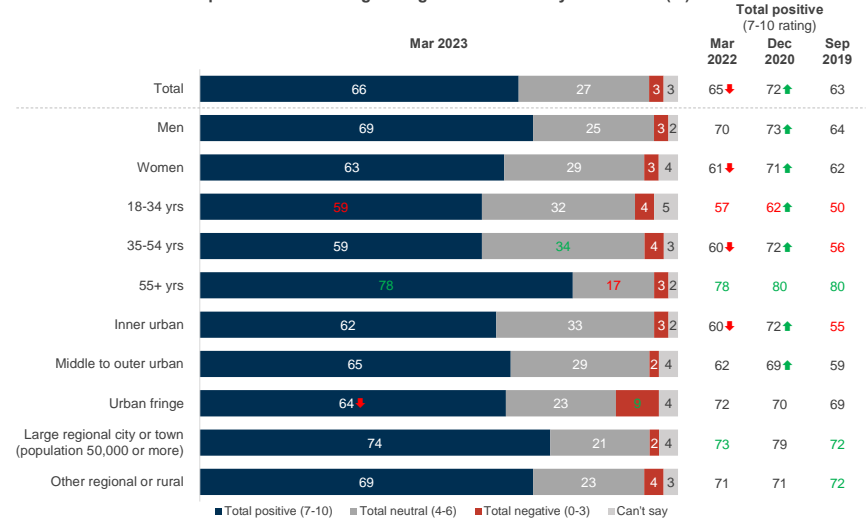


PILLAR 1: CUSTOMERS & THE SUPPLY CHAIN

2030 Aspiration: Agriculture is ranked Australia's most trusted industry.



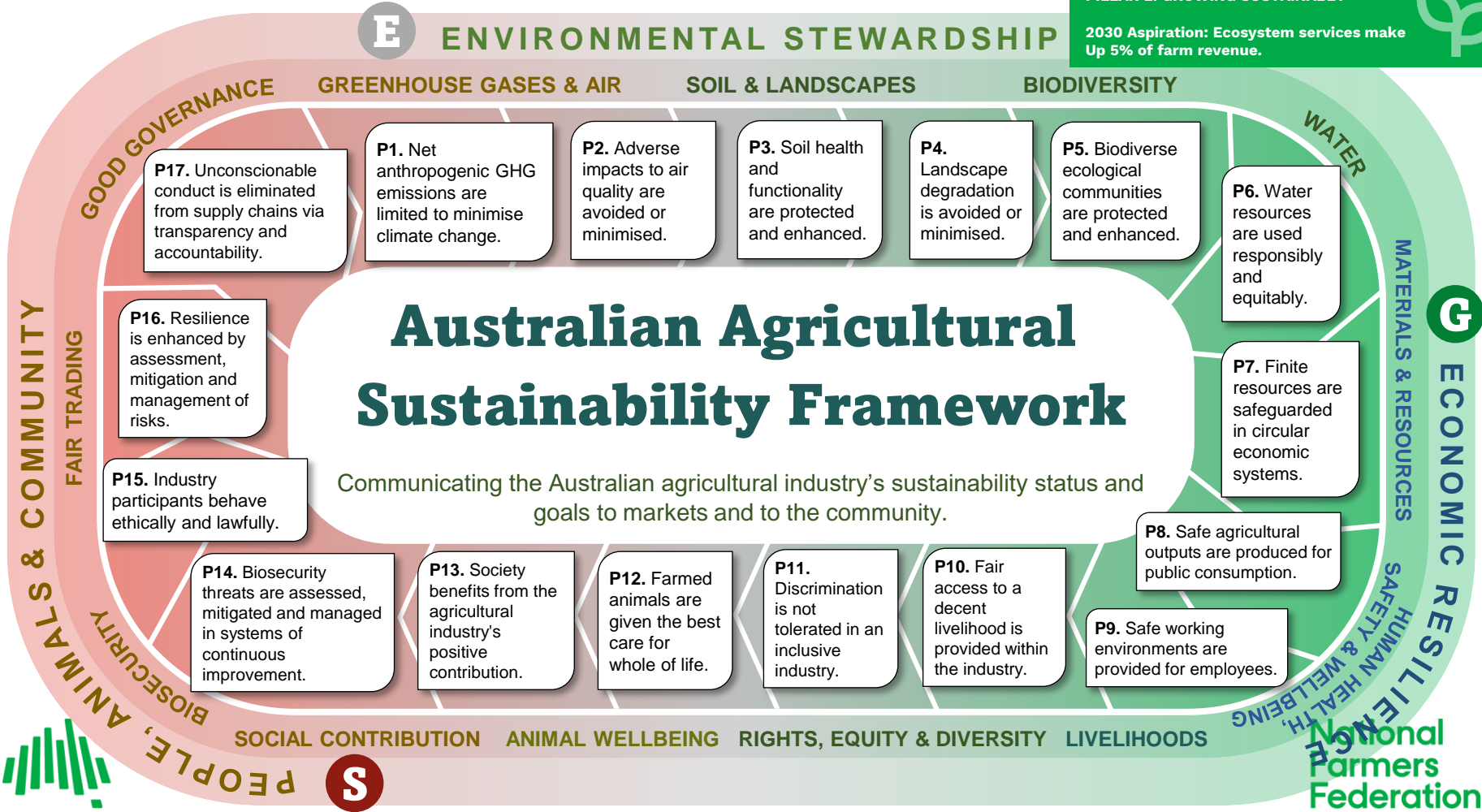
Opinion of the farming and agricultural industry in Australia (%)



Source: ABARES 2023



**National
Farmers
Federation**



E ENVIRONMENTAL STEWARDSHIP

GOOD GOVERNANCE GREENHOUSE GASES & AIR SOIL & LANDSCAPES BIODIVERSITY

P17. Unconscionable conduct is eliminated from supply chains via transparency and accountability.

P1. Net anthropogenic GHG emissions are limited to minimise climate change.

P2. Adverse impacts to air quality are avoided or minimised.

P3. Soil health and functionality are protected and enhanced.

P4. Landscape degradation is avoided or minimised.

P5. Biodiverse ecological communities are protected and enhanced.

P6. Water resources are used responsibly and equitably.

WATER

Australian Agricultural Sustainability Framework

Communicating the Australian agricultural industry's sustainability status and goals to markets and to the community.

P7. Finite resources are safeguarded in circular economic systems.

MATERIALS & RESOURCES

G ECONOMIC RESILIENCE

P8. Safe agricultural outputs are produced for public consumption.

P9. Safe working environments are provided for employees.

HUMAN HEALTH, SAFETY & WELLBEING

P14. Biosecurity threats are assessed, mitigated and managed in systems of continuous improvement.

P13. Society benefits from the agricultural industry's positive contribution.

P12. Farmed animals are given the best care for whole of life.

P11. Discrimination is not tolerated in an inclusive industry.

P10. Fair access to a decent livelihood is provided within the industry.

P15. Industry participants behave ethically and lawfully.

P16. Resilience is enhanced by assessment, mitigation and management of risks.

PEOPLE, ANIMALS & COMMUNITY

S

SOCIAL CONTRIBUTION ANIMAL WELLBEING RIGHTS, EQUITY & DIVERSITY LIVELIHOODS



PILLAR 3: UNLOCKING INNOVATION

2030 Aspiration: Every farm has the skills and connectivity to utilise digital agriculture.



Regional Tech Hub

regionaltechhub.org.au

1300 081 029



Australian Government

Department of Infrastructure, Transport,
Regional Development, Communications and the Arts



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Federation**

AG CAREER START

PILLAR 4: PEOPLE & COMMUNITIES

2030 Aspiration: A career in agriculture is an accessible aspiration for all.



Thank you

David Jochinke

President

djochinke@nff.org.au

@farmer_dj



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