



National Farmer Priorities Survey

OCTOBER 2023



National
Farmers
Federation



SEFTONS

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FOREWORDS



As the peak representative body for Australian farmers, it's our responsibility to ensure that farmers' voices are heard. This is what we strive to do each and every day at the NFF.

Through the National Farmer Priorities Survey, we've given every farmer the chance to speak up directly – in their own words – to tell Australians what matters to the people who put food on their tables and clothes on their backs.

What we've heard is profound. Farmers' love of what they do and where they live has shone through, which will be no surprise to anyone who has ever spoken to a farmer.

But unease about the future has also emerged. Farmers are concerned by a wide range of issues, including government policies that will shape their livelihoods.

It is critical that these concerns are heard and acted upon. Everyone who enjoys our world class Australian produce has a stake in our industry's future.

To the farmers across Australia who took the time to respond, thank you. We'll continue working on your behalf to highlight the views you've shared with us.

Fiona Simson

President, National Farmers' Federation



As a farmer in northern New South Wales, I am proud to be involved in this report, highlighting the sentiment of farmers across the nation on the issues that matter to them, their families, their industries and the ag sector more broadly.

Working in partnership with the National Farmers' Federation (NFF) will ensure their voice – as tabled in this report – is heard by the policy and decision makers who have the means to invest, resource, and develop policies, to respond to these issues.

Decisions are often driven by data. And now, we have the data to back up what we, the NFF, and their state and industry organisations are hearing on the ground – with more than 1600 farmers from across the country contributing to these report findings.

Our farmers grow the very best food and fibre, and often under exceptional circumstances, given the vagaries of climate, commodity markets, value chain dynamics, and growing compliance and regulation. And this is all done with a positive, can-do attitude, and remarkable resilience and agility. But in return, our farmers need to feel valued for the contribution they make. And this starts with good advocacy, and being consulted and part of the conversation on the decisions and policies that affect them.

So let's use this opportunity to listen to our primary producers, so we can continue to have a vibrant and prosperous future for those feeding and clothing our nation, and our international markets.

Robbie Sefton AM

*Managing Director, Seftons
Partner, Nangandie Pastoral Company*

EXECUTIVE SUMMARY

The agricultural landscape is changing, and at a rapid rate, as Australian farmers continue to adapt to a changing climate and invest in innovation to sustainably increase their productivity to meet growing expectations of customers, both in Australia and globally.

While this landscape presents many opportunities, there are external challenges creating roadblocks to the industry's success.

The National Farmer Priorities Survey sheds light on these issues, with more than 1600 farmers from across the country, and commodity sectors, having their say on the opportunities and issues facing them, their sector, and the rural economy more broadly.

The survey confirmed the nation's farmers are passionate about their way of life, their work, and their livelihoods, as well as their communities. However, there are signs that confidence in the industry's outlook is waning, with just over a third of respondents (at 37.2 per cent) feeling more positive, than a year ago, about the future of farming. And this being lower among beef, sheepmeat and wool producers as drought looms in a weaker commodity price environment.

Farmers' confidence in the Federal Government to address these challenges on their behalf is low, with a majority of farmers (at 54.3 per cent) believing the Federal Government's policies are harming the industry, and a minority (at 31.2 per cent) saying the current Government is doing a good job on behalf of farmers.

Specifically, Federal climate change policies and environment laws, biosecurity, market power of processors/supermarkets, roads and transport infrastructure, and overseas trading relationships were identified as key issues facing farmers – each raised as a concern by around eight-in-10 survey respondents.

Workforce shortages were found to be putting the brakes on on-farm productivity, with 87.2 per cent of respondents expressing an appetite to increase their labour force if hiring conditions were improved.

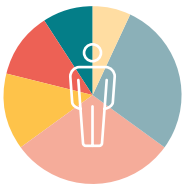
Addressing these worker shortages was identified as a key priority area, with farmers also calling on the Federal Government to increase investment in rural infrastructure, domestic food and fibre processing, and R&D, and do more to reduce red tape, level the playing field and protect arable farmland.

“Australia has some of the most efficient agricultural systems in the world. We have some of the highest environmental standards and accountability globally. We need to promote this more – both to global and to Australian consumers, so they value and prioritise buying our home grown produce.”

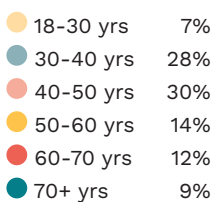
Survey respondent

DEMOGRAPHICS

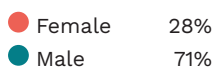
Open to those that have a management or ownership role in a primary production business, the survey attracted more than 1600 responses across a broad range of geographical regions within Australia and rural commodity sectors.



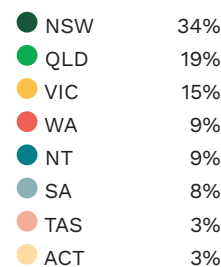
Age demographic



Gender



Farm location



Commodity sector



MEAT AND WOOL

Beef	17.2%
Sheepmeat	12.7%
Wool	10.6%
Goats	4.3%



DAIRY

Dairy	4.1%
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CROPS

Grains/Oilseeds/Pulses	13.9%
Sugarcane	5.4%
Cotton	3.1%
Rice	2.9%



HORTICULTURE

Fruit	5.1%
Vegetables	4.5%
Nuts	2.5%
Nursery/turf	1.5%



PIGS AND POULTRY

Pork	3.2%
Chicken meat	3.4%
Eggs	3.2%



FORESTRY

Forestry	0.9%
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SEAFOOD

Seafood	0.2%
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OTHER

Other	1.2%
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FARMER SENTIMENT

Farmers are passionate about what they do, and their communities, but less upbeat about the outlook for the sector

The nation's farmers are **passionate about their industry**, their work and their livelihoods. This shone through in the survey, with close to three quarters of farmer respondents (at 70.7 per cent) agreeing with the statement, 'I love what I do'. Farmers in Western Australia were particularly positive about their way of life, with 75.8 per cent holding this sentiment, followed closely by Victorian and New South Wales' farmers at 75.1 and 71.4 per cent, respectively.

By commodity sector, the nation's livestock producers were particularly passionate about their way of life, with 83.2 per cent of beef producers loving what they do, followed by wool growers at 77.8 per cent and sheepmeat producers at 76.5 per cent.

"I see young people returning to family businesses and planning a strong future. I want to see them enabled and not hamstrung by overreaching regulation."

Beef producer, Queensland

Farmers are also **connected to their communities**, according to the survey, with 67.5 per cent of respondents agreeing with the statement their community is a 'great place to live'. That sense of community was particularly evident amongst Victorian farmers, at 71.2 per cent, followed by New South Wales at 67.6 per cent and Western Australia at 67.1 per cent.

"Agriculture is not only food production, but also an important pillar of rural economic and social development. The development of the agricultural industry chain will drive rural employment opportunities and economic growth, and promote the sustainable development of rural areas."

Dairy producer, Western Australia

Farmers were less upbeat about the outlook for the sector, however, with just over half (at 55.8 per cent) expecting the **volume of Australian food and fibre** to increase over the next decade. Those in the cotton sector were the most positive about future production prospects, with 61.8 per cent expecting it to increase. While fruit and vegetable growers and sugar producers also held strong production projections at 61.7 and 61.0 per cent, respectively.

"Farms produce more than food and fibre. Ecosystem biodiversity, carbon sinks, these need to be talked about more."

Sheepmeat and wool producer, Tasmania

The nation's farmers were also asked their views around the **future of the family farm**, with just under half (at 45.6 per cent) citing the future as bright. Across the country, those in New South Wales, Victoria and the Northern Territory were the most positive in their outlook for the family farm – at 48.6, 48.4 and 48.3 per cent, respectively. While by commodity, those in fruit/vegetables were the most upbeat at 62.7 per cent, followed by sugar (58.7 per cent), cotton (55.3 per cent) and dairy (52.1 per cent).

"Family farms absolutely have a future. They will have to continue to evolve and professionalise into the future to remain competitive."

Apiarist, New South Wales/Victoria

The survey also provided a yardstick measurement on **farmer sentiment**, by asking respondents if they are more positive about the future of farming, now, than 12 months ago. Farmers were found to be split in their views, with 37.2 per cent feeling more positive than a year ago, 31.4 per cent remaining neutral, and 31.4 per cent indicating their positivity has waned.

Across commodity sectors, confidence was up amongst fruit and vegetable farmers, with 55.8 per cent feeling more positive, than a year ago, followed by sugar at 55.4 per cent. Meanwhile, only 26.6 per cent of beef producers felt more positive than this time 12 months ago, while it stood at 30.0 and 31.6 per cent in the sheepmeat and wool sectors.

"If you had asked me about the future of farming six months ago my answer would have been more positive."

Dairy producer, South Australia

"Positive sentiment in the red meat sector has declined and we are in for a couple of lean years."

Sheepmeat and forestry producer, Tasmania

Farmers were also asked if they felt **valued by the Australian public**, of which, 42.3 per cent answered in the affirmative, while 27.2 per cent disagreed. Those in the fruit and vegetables sector felt the most valued, at 60.7 per cent, while 54.0 per cent of sugar, 53.7 per cent of cotton and 53.4 per cent of dairy producers shared a similarly positive sentiment. Meanwhile, wool producers felt the least valued, at 34.7 per cent, followed closely by sheepmeat producers at 35.8 per cent.

"We need to get access to the narrative on what we all do in primary industries and educate the Australian people, especially the young, as to how important we are to their existence and wellbeing."

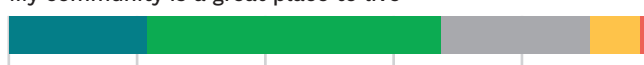
Mixed sheep and grains producer, Western Australia

Farmer Sentiment

I love what I do



My community is a great place to live



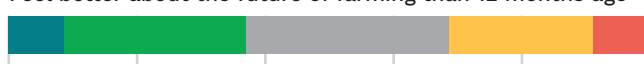
Australian volume of food & fibre will increase over 10 years



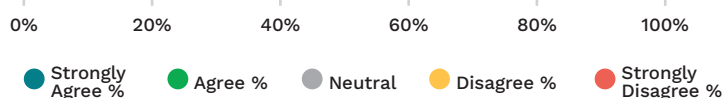
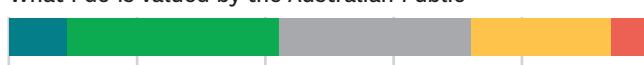
Future is bright for family-run farms



Feel better about the future of farming than 12 months ago



What I do is valued by the Australian Public



ISSUES AND PRIORITIES

Farmers air concerns across broad range of external influences

Whilst farmers are feeling buoyant about their role as a primary producer, and the communities in which they live, the survey found they were concerned about a myriad of external pressures. These ranged from biosecurity and overseas trading relationships, environmental laws, climate change and water policies, land use competition, labour markets, the power of processors/supermarkets, animal welfare and live sheep exports, and the state of regional infrastructure and services including roads, telecommunications, health and education.

Across the 15 issues raised in the survey, around three quarters of respondents said they were either 'very concerned' or 'concerned' by each issue – with the percentage ranging from 83.1 per cent of those very concerned/concerned about the market power of processors/supermarkets to 73.0 per cent in regard to access to telecommunications.

RANK	ISSUE	VERY CONCERNED	CONCERNED	NOT CONCERNED
1	Market power of processors/supermarkets	37.5%	45.5%	16.9%
2	Federal environment laws	34.0%	48.0%	18.0%
3	Roads and transport infrastructure	34.6%	47.2%	18.3%
4	Protecting Australia's biosecurity	39.5%	41.9%	18.7%
5	Federal climate change policies	41.7%	39.4%	19.0%
6	Our overseas trading relationships	28.2%	52.6%	19.2%
7	Local services (health, education etc)	28.8%	49.9%	21.2%
8	Animal welfare laws	28.3%	49.7%	22.0%
9	Workplace (industrial relations) laws	27.2%	49.2%	23.6%
10	Mining/Energy developments on farmland	28.3%	48.0%	23.7%
11	The Murray-Darling Basin Plan	18.0%	57.9%	24.0%
12	The phase-out of live sheep exports	33.8%	40.9%	25.3%
13	Worker shortages	22.6%	51.0%	26.4%
14	Cultural heritage laws	31.2%	42.1%	26.7%
15	Access to telecommunications	25.4%	47.6%	27.0%

Note: Rank calculated as the sum of Very Concerned % and Concerned %. Excludes 'Not Applicable' responses.

The three most pressing issues, as per the highest percentage of 'very concerned' respondents, were Federal climate change policies, with 41.7 per cent of respondents citing they are very concerned by the issue. Protecting Australia's biosecurity was also front-of-mind for 39.5 per cent of survey respondents, while the market power of processors and supermarkets, was of particular concern for 37.5 per cent.

By commodity, overseas trading relationships are the key issue for wool and dairy producers, while biosecurity is the major concern for beef producers, roads and transport infrastructure for sheepmeat, Federal environment laws for grains, mining/energy developments on farmland for sugar, worker shortages for cotton, and workplace (industrial relations) laws and market power of processors/supermarkets for those in the fruit and vegetable sector.

ISSUES AND PRIORITIES

Top Three Issues by Commodity



Beef

"Commodity price and the cost of production squeeze, also how farmers are perceived as caretakers of the land, soil, water/air quality."

Beef producer, Victoria

88.4%

Protecting Australia's biosecurity

86.3%

Roads and transport infrastructure

85.9%

Federal climate change policies



Sugarcane

"I'm very concerned about agriculture's image among the general public. We have lost control of the narrative and have let big green agendas set the narrative."

Sugar and grains producer, Queensland

77.5%

Mining/energy developments on farmland

76.5%

Federal environmental laws

74.2%

Workplace (industrial relations) laws



Sheepmeat

"Government intervention is my biggest limiting factor to production in my business. Have a look at the sheepmeat market for an obvious example."

Sheepmeat, wool and grains producer, Western Australia

82.5%

Roads and transport infrastructure

82.1%

Market power of processors/supermarkets

81.9%

Federal environmental laws



Cotton

"My concern around the issues that I've noted above arises purely from the Government response to those issues.. not those issues in and of themselves."

Cotton, grains and beef producer, New South Wales

74.8%

Worker shortages

74.0%

Local services (health, education etc)

74.0%

Market power of processors/supermarkets



Wool

"The impact of renewable energy developments on agricultural land and right to farm and the lack of meaningful consultation with communities and citizens affected."

Wool, sheepmeat and beef producer, New South Wales

86.4%

Overseas trading relationships

84.4%

Market power of processors/supermarkets

83.3%

Federal climate change policies



Dairy

"Science and evidence based policies are essential."

Dairy and beef producer, Tasmania

77.3%

Overseas trading relationships

75.5%

Worker shortages

73.6%

Federal climate change policies



Grains/Oilseeds/ Pulses

"Impacts of climate change on Australian agriculture and our sectors ability to increase resilience towards it e.g. drought preparedness."

Mixed grains and livestock producer, New South Wales/ Queensland

80.2%

Federal environmental laws

79.9%

Roads and transport infrastructure

77.9%

Protecting Australia's biosecurity



Horticulture (Fruit/Vegetables)

"Not enough attention is paid to biosecurity. It seems we, as a sector, ignore it until it blows up and aren't ready or doing enough."

Fruit grower, Tasmania

78.2%

Workplace (industrial relations) laws

78.2%

Market power of processors/supermarkets

77.6%

Local services (health, education etc)

Note: Includes 'Not Applicable' responses

ON-FARM PRODUCTIVITY

On-farm productivity is being hampered by external policy factors, land use competition and workforce shortages, according to the national survey

Farmers were found to be most concerned by **restrictive environment laws**, with more than half of all survey respondents, at 56.7 per cent, citing either a 'high' or 'medium' impact of these laws on their on-farm productivity. Concerns were particularly heightened amongst beef producers, with 57.9 per cent highlighting the impact on the productivity of their enterprise.

Land use competition from mining, infrastructure and urban encroachment was second on the list, being identified as having a high or medium impact by 50.0 per cent of survey respondents. And was most prevalent amongst fruit and vegetable growers, at 50.3 per cent.

Concerns were also raised around the uncertainty over the **phase-out of live sheep exports**, with it deemed to have a high, or medium impact, on 64.1 per cent of wool and 58.6 per cent of sheepmeat businesses. While across the agricultural sector more broadly, it stood at 49.1 per cent.

Sourcing and managing farm labour was also seen to be putting the brakes on on-farm productivity, for around four-in-ten (43.3 per cent) surveyed farm businesses. Wool producers were particularly concerned about the state of the labour market, raised as having a high or medium impact on their on-farm productivity by 45.2 per cent.

Productivity on-farm impact

Restrictive environment laws



Land use competition – mining, infrastructure, urban encroachment



Uncertainty over the phase-out of live sheep exports



Difficulty securing/managing my workforce



0% 20% 40% 60% 80% 100%

● High Impact ● Medium Impact ● Low Impact ● No Impact

Note: Excludes 'Not Applicable' responses

Key issues



“While there are signs the Australian public value farmers/agriculture it doesn’t translate to the reality. The live export of sheep is a case in point. If the Federal Government goes ahead with banning the live sheep trade this will have significant impact on our trading partners perception and trust in Australia and will provide a precedent for interference in other export industries.”

Mixed beef and grains producer, Western Australia

“In the name of the ‘greater good’, a lifetime’s devotion to create a farm, fit for the future, will be razed by governments’ decision to adopt the easy route and sling a 75m, 6 cable transmission line through my property as part of the Hume Link project. Like many others I’m not interested in compensation but rather to have the best solution for the future in the form of the less invasive, safer, more efficient ‘underground’ option.”

Beef producer, New South Wales

AGRICULTURAL WORKFORCE

Access to labour stifles productivity

The nation's agricultural sector is being stifled by workforce issues, according to the survey, with close to nine-in-10 agricultural businesses (at 87.2 per cent) saying they would employ at least one additional worker if hiring conditions were improved. Of which, nearly half, at 40.2 per cent, say they would employ more than 10 additional workers.

The survey found there are a number of issues limiting access to workers, with access to accommodation ranked as having the highest impact by 34.7 per cent of respondents. Community perceptions of agriculture was also considered to be the major barrier to sourcing workers for 21.2 per cent of survey respondents.

The cost of award wages was met with a more mixed response, with 17.6 per cent ranking it as having the highest impact on accessing workers, while 40.0 per cent had it down the list as having the least impact.

Meanwhile, around one in 10 respondents flagged visa pathways for overseas workers, lack of training for domestic workers or restrictive workplace laws as having the highest impact on their ability to access workers.

Factors impacting access to workers

Restrictive workplace laws



Lack of training for domestic workers



Limited visa pathways for overseas workers



The cost of award wages



Community perceptions of agriculture



Access to accommodation

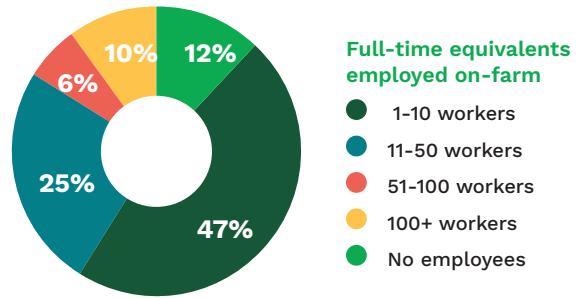


● Highest Impact

● Lowest Impact

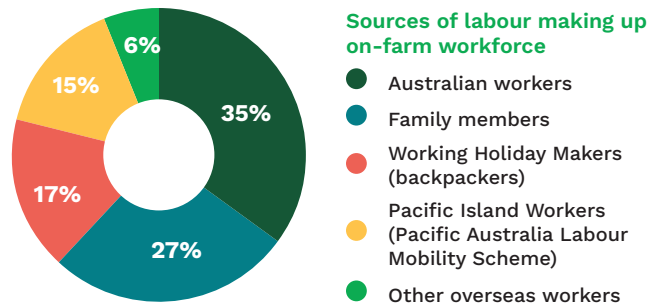
Number of Employees

The survey highlighted the importance of the labour market to the agricultural sector, with around nine in 10 surveyed businesses (at 88.0 per cent) employing at least one full-time equivalent (FTE). The proportion of farm businesses employing between one and 10 FTEs stood at 47.3 per cent, while a further quarter, at 24.8 per cent, employed between 11 and 50 FTEs, and 15.9 per cent had more than 50 FTEs.



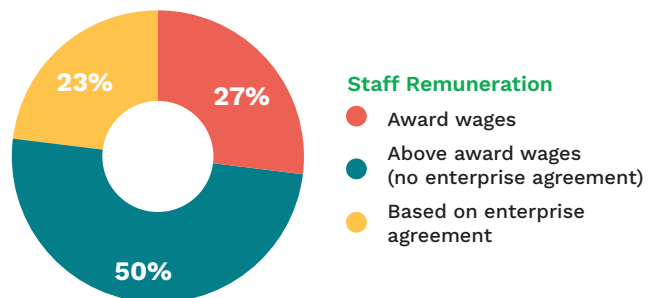
Labour source

The agricultural workforce was found to be made up of both domestic and international workers, with the domestic labour market (including family members) accounting for 62.0 per cent of the on-farm workforce. The overseas workforce (at 38.0 per cent), meanwhile, includes working holiday makers (16.7 per cent) and Pacific Island Workers (15.6 per cent) via the Pacific Australia Labour Mobility Scheme.



Remuneration

In terms of remuneration, half of those surveyed (at 50.0 per cent), paid their staff above the award wage (with no enterprise agreement), while around a quarter (at 22.9 per cent) paid wages in line with the enterprise agreement and 27.2 per cent, paid out the award wage.



Note: Excludes 'Not Applicable' responses

GOVERNMENT POLICIES

Farmers call out for Federal Government to step up, and do more

The nation's farmers reported a lack of confidence in the Federal Government's policy settings, with more than half of all survey respondents (at 54.3 per cent) going as far as to say they are harming the industry. This sentiment was particularly apparent in the wool and sheepmeat sectors, with 62.2 and 58.8 per cent of producers, respectively, of this conviction.

When asked if the Government holds a positive plan to grow the farm sector, there was a higher proportion of farmers that refuted the statement (at 42.4 per cent), compared to those that agreed (at 35.3 per cent).

Meanwhile, there were also more farmers that felt the Federal Government was not doing a good job for farmers (at 42.2 per cent), or understanding and listening to them (at 41.0 per cent), than the other way round, at 31.2 and 34.3 per cent, respectively.

To what extent do you agree with the following statements about the Federal Government?

They understand and listen to farmers



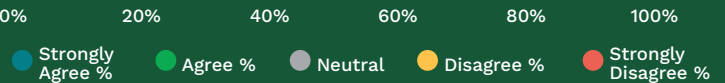
They are doing a good job of behalf of farmers



They have a positive plan to grow the farm sector



Their policies are harming the industry



ISSUES

The survey identified a number of areas where the nation's farmers feel the Government needs to step up, and do more. Investing in rural infrastructure, was top of the list, with 49.7 per cent of survey respondents calling on the Government to do more in this area. Beef, sheepmeat and wool producers were particularly vocal, with 64.4, 57.1 and 56.7 per cent, of respective producers, wanting increased infrastructure investment.

Reducing red tape was also high on the agenda, with 48.6 per cent of the nation's farmers wanting more to be done by Government in this area – with it being a key priority for beef, wool, sheepmeat and grain producers.

Other identified areas of focus for the Government, as per the survey, are levelling the playing field for farmers, investing in domestic food and fibre processing, and also R&D – research and development, protecting arable farmland and addressing worker shortages with around four in 10 farmers feeling more could be done across each of these issues.

Meanwhile, securing new overseas markets was a tick for the Government, with 57.2 per cent of respondents indicating they have struck the right balance. While close to half, at 48.1 per cent, felt they were responding adequately in regard to protecting the environment, and 40.1 per cent, in addressing climate change.

RANK	ISSUE	NOT DOING ENOUGH	ABOUT THE RIGHT AMOUNT	DOING TOO MUCH
1	Investing in rural infrastructure	49.7%	36.6%	13.7%
2	Reducing red tape on farmers	48.6%	36.4%	15.0%
3	Levelling the playing field for farmers	46.4%	38.5%	15.1%
4	Investing in domestic food/fibre processing	45.5%	42.7%	11.8%
5	Investing in rural R&D	44.9%	41.4%	13.7%
6	Protecting arable farmland	42.4%	38.9%	18.7%
7	Addressing worker shortages	42.3%	43.9%	13.8%
8	Investing in biosecurity	38.5%	44.6%	16.9%
9	Securing new overseas markets	34.7%	57.2%	8.1%
10	Addressing climate change	13.1%	40.1%	36.8%
11	Protecting the environment	20.9%	48.1%	30.9%



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