



Australia's National Science Agency

Northern Australian Beef Industry Situational Analysis

CSIRO supported by the CRC for Developing Northern Australian

Chris Chilcott | 8th November 2019 | TropAg Conference





Project Scope

- Identify key challenges and opportunities facing the northern beef industry, including
 - infrastructure,
 - policy,
 - investment,
 - environmental,
 - production,
 - knowledge,
 - training and human capital gaps
 - and the research or alternative solutions to address them

“ **whole supply chain** from on-farm production through to export markets, examine the industry’s current strategic plans and undertake extensive **consultation** with **producers, industry groups, universities** and **government** departments”

“...**one of eight industry situational analysis** to informing broader discussions on further policy, investment, R & D for Ministerial Forum consideration include rice, forestry, cropping, bush foods, aquaculture, health and infrastructure and communication sectors.”



How

Consultation

- 8 events and ~100 people
- Project Partners
 - Agforce
 - Kimberley Pilbara Cattlemen's Association
 - Northern Territory Cattlemen's Association, and
 - Cattle Council of Australia

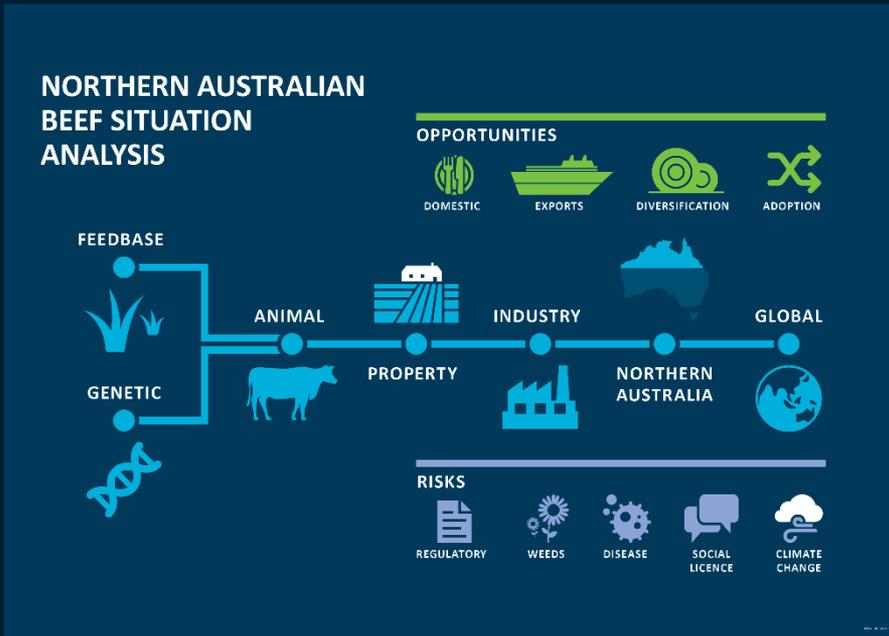


How

Literature review

- Review of reviews (>150 publications and strategies)
- Update on the *Australian Beef report*
- Industry-level cost–benefit analysis

“Not another review – is there anything exciting?”

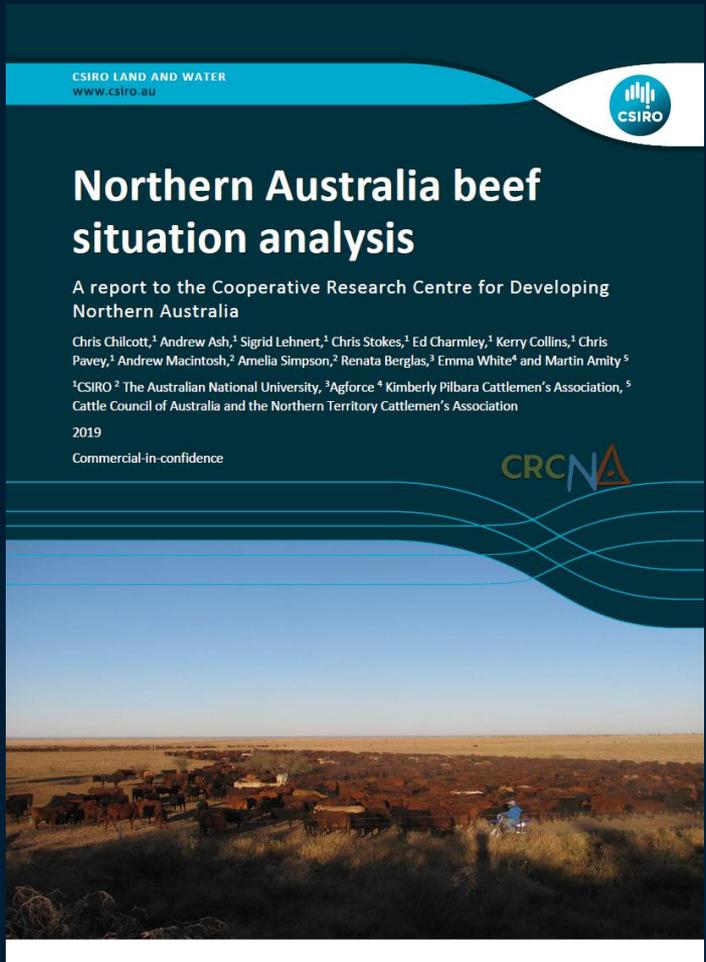




How

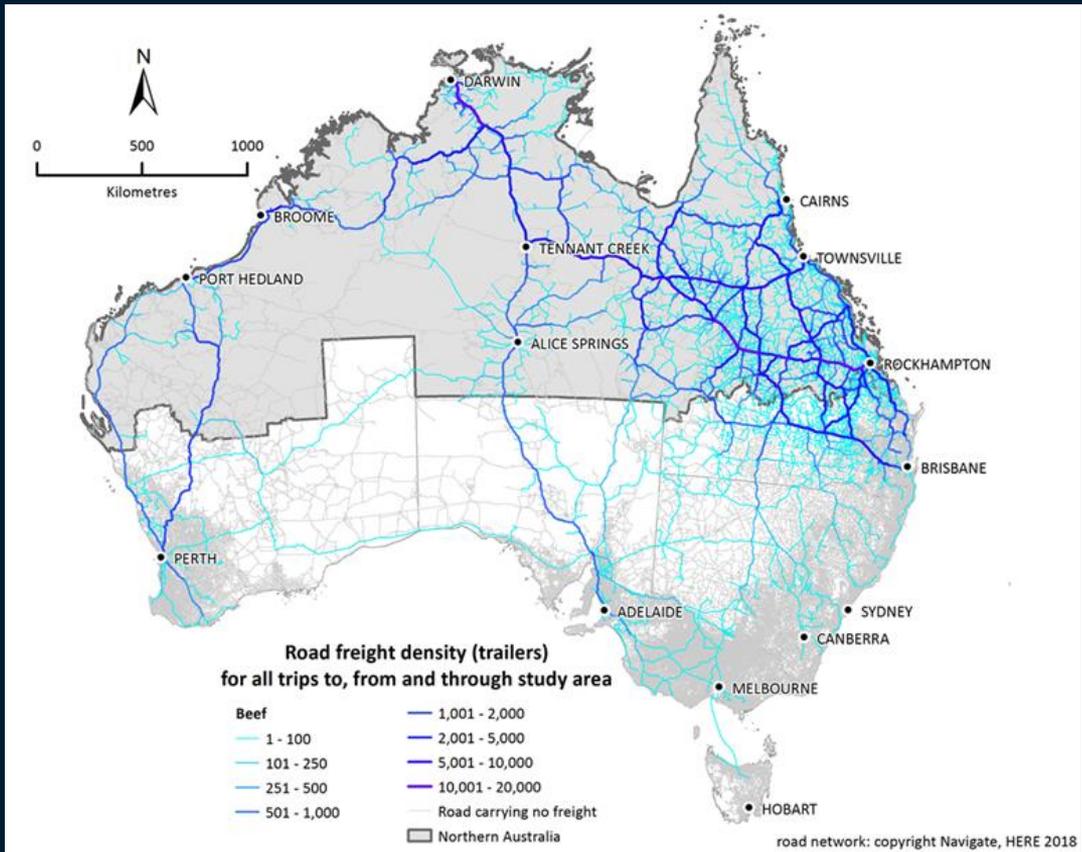
Next step

- Workshop to bring together recommendations and implementation plan
- Look for overlap between sectors
- Industry report to Government through the CRCNA and beyond.





Where is Northern Australia





Findings and Recommendations to date



“She ain’t broke”

- The competitive advantages of the northern Australia beef industry are its adapted production systems, low cost base and geographic positioning that allows it to take advantage of South-East Asian markets.

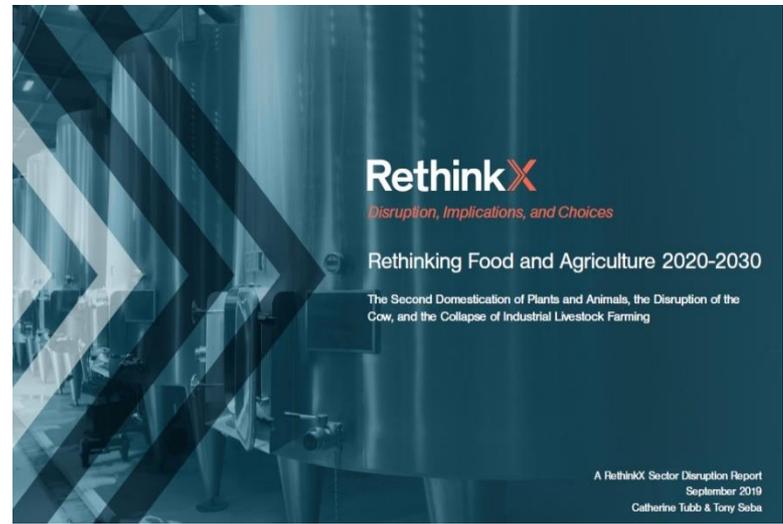
or “risks abound”

- However, over-reliance on a small number of markets make it vulnerable to market shocks.



Existential threats (or chip wrapper)

(the industry) ...is not immune to global megatrends and the impacts of associated policy responses





Findings and Recommendations

Theme 1: There is a need to improve the translation of proven R&D to farm practice for the majority of the northern Australia beef industry.

‘Failure to adopt is the number one issue for the industry.’

‘Can we use research opportunities to move some of the ‘better’ 75% up? R&D only as good as the adoption, and the extension services are lacking.’



Theme 1 recommendations

1. At an individual property level, significant improvements in productivity and profitability could be achieved by applying existing R&D
2. A key challenge is translating research into practice.... investment in innovative ways of transforming practice change and integrating this into business operations
3.Investment is required in tools to facilitate better management of climate variability and adaptation to climate.



Findings and Recommendations- Bigger, Better and smarter

Theme 2: There is an ongoing need for R&D for profitability and productivity gains for the top businesses

‘In order to keep up, let alone get ahead, we need to better deploy new technology on farm, but there is limited good advisory and technical services and the lack of connectivity is a real constraint.’

‘What changes to practice (the low-hanging fruit) that would immediately impact profitability. Could you go to each region and see what the two next best things are to make businesses more profitable?’



Theme 2 recommendations

4. More investment is needed to support: (i) transformational change to diversify production systemsand (ii) a holistic, systems approach to improving productivity, profitability and natural capital
5. ...test novel and risky technologies in order to make transformative gains.....‘blue-sky’ and promising prospectssuch as digital technologies, alternative protein sources, methane reduction technologies and targeted feed base improvements, including mosaic irrigation..... include evaluating farm system changes such as mixed farming, intensification and diversification of production systems (e.g. carbon farming).



Findings and Recommendations

Theme 3: There is a need to support the northern Australia beef industry to transform from its current state to a higher productivity state and ensure future viability

'Building infrastructure that enables new development as well as enhancing the existing infrastructure, overcoming truck breakdown costs (last mile issues such as access to abattoirs).'

'It isn't correct to assume there is sufficient infrastructure, sometimes it needs to be built before it is really needed.'



Theme 3 recommendations

6.comprehensive assessment of enabling infrastructure that would support the northern Australia beef industry,.....
7. The CRCNA..... through its situation analyses, assess the infrastructure needs of all industries and prioritise common and multi-user infrastructure for investment.....
8. to investigate the specific nature and magnitude of the barriers associated with pastoral interests and native title



Theme 3 recommendations

9.supply-chain analysis of regulations ...not just approvals and regulations associated with new developments but also includes existing regulations that impede efficiency and impose high costs.....
10. suite of analytical case studies that demonstrate the economic and environmental opportunities, trade-offs and risks associated with proactively addressing the environmental footprint of beef developments.
11.biosecurity in the forefront.....surveillancetechnological development... improved stakeholder engagementcommunications... stakeholder management.



Thank you

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