Queensland Primary Industries Forum

25-year blueprint for a better future

Summary report

Queensland Government

Introduction

The *Queensland Primary Industries Forum* was held at the Royal International Convention Centre in Brisbane on Wednesday February 26, 2025. We welcomed 250+ attendees from across Industry, key stakeholder groups and Government.

Participants gathered to consider their shared vision for the future of Primary Industries in Queensland – identifying key principles, priorities and objectives for success, and generating innovative ‘big ideas’ to ensure a prosperous future for all sectors.

The Hon. Tony Perrett

Minister for Primary Industries

"Today is about collating practical, deliverable, collective knowledge of those who work, live and breathe primary industries."

Committed to delivering a prosperous future for Queensland's Primary Industries:

- Increasing productivity and profitability with an ambitious target of $30B by 2030
- Ensuring businesses in the sector remain competitive, productive and resilient, with successions plans in place
- Delivering a regulatory environment for Primary Industries to thrive in.

Major engagement milestone:

- This is the largest Primary Industry consultation in more than a decade
- The blueprint is an opportunity to seek tangible and actionable outcomes for primary industries
- Undertaking engagement with major producers and industry suppliers, in addition to Local, State and Federal Government representatives
- Committed to working closely with the newly established Industry Working Group to develop a draft Blueprint for wider public consultation
- Dedicated engagement hub to keep community informed of ongoing consultation opportunities.

Director-General Graeme Bolton

Director-General of Department of Primary Industries

The system faces increasing uncertainty in response to diverse challenges:

- The sector is experiencing drivers and challenges including geopolitical conflict, supply chain disruption, biosecurity risk, climate change impacts, land use conflicts, labour shortages, emerging technologies and more.

We are seeking greater returns on investment moving forward:

- Committed to significant growth over a 5-year period
- Supporting diversification of product and means of production through wide-spread adoption of new approaches, innovation and technologies
- Using an evidence-based approach to produce best outcomes – rethink what we are doing and how we are doing it.

"Let's spend some time now to determine how we work together and what opportunities we should harness to support an industry that is the backbone of our nation."

The Challenges, Strategic Opportunities and Queensland's Competitive Advantage

Participants were asked to consider the challenges, opportunities and competitive advantages relevant to six key megatrends, including:

- Spatial conflict
- Climate variability
- Biosecurity
- Labour
- Shifts in Globalisation, and Environmental, Social and Governance (Social License)
- Digital and Technology.

Insights from participants highlighted the growing influence of global conflict, emerging trends and shifting climates. Queensland producers are adaptable, resilient and responsive to change, while the Australian environment fosters growth and innovation.

Spatial Conflict + Climate Variability

Megatrend	Challenges	Opportunities	Strategic Advantages
Spatial conflict	**Competing priorities:** Renewable energy; housing crisis; overseas migration; urban encroachment **Access:** Port access for commercial fisheries; streamlining supply chain transport logistics **Inconsistent planning regulations:** Local, State and Federal harmonisation **Rise of corporate investment farms** **Lacking regulation around installation of telecommunications infrastructure.**	**Effective categorisation:** Renaming of solar and wind 'farms' to prevent conflation **Engagement with First Nations native title holders:** Respect for cultural connection and heritage **Expansion in untapped regions:** Cape York; Lower Gulf **Coexistence of public infrastructure to reduce land use.**	**Geography:** Size and scale of available land; distance from geopolitical conflict in Europe and Middle East **Investment in clean energy and renewables:** Climate change mitigation.
Climate Variability	**Climate change impact:** Extreme weather; rising temperatures; declining fish stocks; biodiversity loss; pasture dieback **Globalisation:** Increased risk of exotic disease **Disaster capital of Australia:** Uncertainty and variability; ability to sustain drought, floods and bushfires; impacts on supporting infrastructure and supply chains; financial and mental health impacts **Lacking education on emerging opportunities** **Inconsistent climate change modelling and weather tracking .**	**Emerging 'green' practices:** In-shore aquaculture and agroforestry; clean energy farming **R&D and extension capability:** Improving productivity; driving adoption and uptake **Climate hazard planning:** Disaster management; resource security **Expansion in untapped regions:** Cape York; Lower Gulf **Long term adaption and resilience building** **Capital investment to reduce risk** **First Nations land/fire management.**	**Ecological diversity:** Soil types, weather conditions; genetic varieties proven weather resistant **Genetic varieties proven weather resistant** **Scientific capabilities:** Investment In R&D nation-wide **Scale of operations:** Rangelands/pasture **World-leading knowledge on disaster response and recovery** **Regional resilience.**

Biosecurity + Labour

Megatrend	Challenges	Opportunities	Strategic Advantages
Biosecurity	**Large land mass:** Speed of containment/response; reliance on mass transport and communication infrastructure **Climate influence:** Changing environment and landscape: increased cross-contamination risk **Variable marine environment:** Undefined containment boundaries **Under-resourcing:** Biosecurity Queensland workforce; veterinary labour shortage **Inadequate biosecurity boarder protections:** Proximity to Asia-Pacific threats; high risk imports.	**Emerging technology:** Genetic modification; surveillance; AI disease detection **R&D investment:** Bio-medical and veterinary research; eradication measures; diagnostic services **Engagement with 'near neighbours':** Real time threat reporting; knowledge sharing **Untapped capacity of Catchment and Landcare groups:** Community education and awareness-raising **On-farm and region-wide prevention measures.**	**Geography:** Island nation – natural coastal barrier; capacity to prevent boarder incursions; relatively low disease prevalence and variability compared to market competitors **R&D culture:** Investment in best practice biocontrol **Existing response networks:** NAPCAIRN **Extensive barrier fence networks** **Ample commercial and open fishing sites.**
Labour	**Diminishing workforce:** Ageing employees; overreliance on family legacies **Talent acquisition challenges:** Attraction of inner-city residents; loss of workers to competing industries **Lack of quality training and upskilling:** Limited educational opportunities and pathways **Reputational challenges:** Seasonality of roles; harsh working conditions; physical labour **Right to farm:** Perceived responsibility for climate change; growing animal welfare concerns; insufficient awareness of criticality of sector **Industrial regulation and compliance:** Exploitation; variable workforce conditions **Regional liveability:** Access to housing, education and healthcare.	**Diverse roles:** Scientific/research-based, logistics, processing, on-farm; hybrid workforce - FIFO **Investment in target demographics:** Women, migrants, people with disability and First Nations people/business owners; succession planning for existing workforce **Emerging industries:** Digitisation of lowly-filled roles; Advanced Manufacturing, AgTech **Skills development:** Micro-credentialing; investment in agricultural colleagues; investment in veterinary and allied health workforce.	**Geography:** Proximity to Asia **Attractive destination:** "Great place to work" **High-paying technological and scientific roles:** National STEM focus and investment; growing manufacturing sector **Regional service culture:** Migrants and interstate travellers encouraged to visit and work in regional areas **First Nations knowledge:** Traditional Ecological Knowledge.

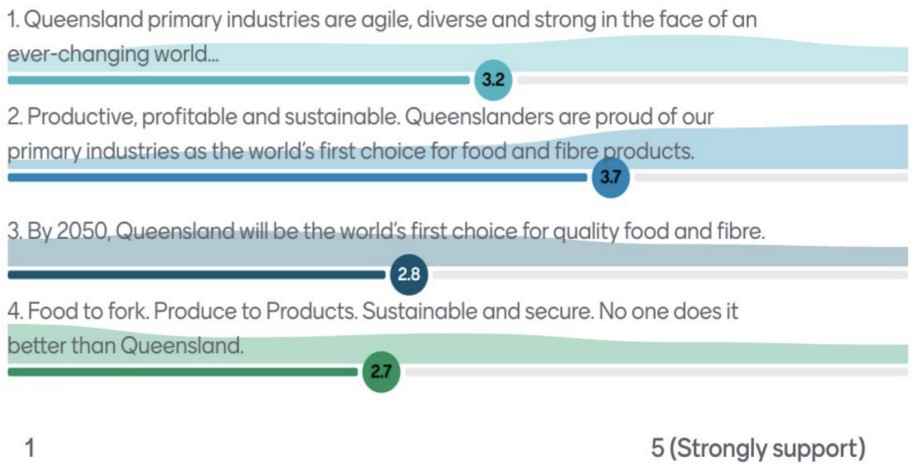
Globalisation/ESG + Digital/Technology

Megatrend	Challenges	Opportunities	Strategic Advantages
Shifts in Globalisation, and Environmental, Social and Governance (Social License)	**Disintegrating rule of law and geopolitical instability:** Lacking investor confidence **Inauthentic climate action:** Greenwashing; box ticking **Tariff measures and trade barriers domestically and internationally:** Supply chain disruptions **Lacking consumer responsibility:** Fair price for product **ROI for farmers:** Cost of ESG value-add **Varied market requirements:** Alignment with 'easy to operate' markets.	**Global disruption and resource uncertainty:** Assuming market gaps and new opportun **ESG positive markets:** Green energy supply, demand and export potential Export market investment: Resourcing; diversification; investment attraction Marketable ESG credentials **Alignment:** Government wide definition of ESG priorities Regulatory reform **Investment in license to operate challenges:** Ethical/humane farming practices for reduced biosecurity risk.	**Domestic confidence:** "Put a flag in it!" **International reputation:** clean and green **Strong position in global markets:** Strong demand in Asian markets.
Digital and Technology	**Mobile and internet access:** Inconsistent connectivity speed and quality; overreliance on satellite and low-orbit technology **Maintenance of technological infrastructure:** Aging physical infrastructure Prohibitive energy costs: **Lacking digital literacy and skills development** Gaps in STEM education and early skills development **Data sovereignty and ownership:** Data privacy and intellectual property concerns **Integration and interoperability of data across Government sectors:** Incompatible data capture and storage platforms; Information silos.	**Varied applications across the value chain:** Standardised training and upskilling; improved surveillance; disease response; precision livestock management; robotic; planting and harvesting; waste premiumisation Addressing labour shortages through technology use **Incentivises for AgTech adoption and technology acceleration:** Derisking; AI; Quantum **Access to standardised, industry-wide data sets:** Streamlining/regulating data collection and integration; improved data tracking and benchmarking.	**Geography:** "Isolation breeds innovation" **Modern, forward-thinking education sector:** Focus on digital competence and creativity **Existing data use policies and safeguards:** Open data and AI policies Rich history of extension, adoption and behaviour change **Political and democratic stability** **High-quality regional universities** **Existing technology platforms and networks.**

Our Shared Vision for 2050

Participants were presented with draft visions developed from preliminary survey data and consultation with the industry working group. These visions were ranked as follows:

Vision 1: Queensland primary industries are agile, diverse and strong in the face of an ever-changing world. We drive a healthy economy and environment for Queensland through innovation, high quality products, robust partnerships and community wellbeing.	**Vision 2:** Productive, profitable and sustainable. Queenslanders are proud of our primary industries as the world's first choice for food and fibre products.
Vision 3: By 2050, Queensland will be the world's first choice for quality food and fibre. We're fresher, faster to market, and less reliant on great weather.	**Vision 4:** Food to fork. Produce to Products. Sustainable and secure. No one does it better than Queensland.



**Results can be provided for industry vs govt.*

Our Shared Vision for 2050

Participants were asked to consider the critical elements for a shared vision for 2050, responding to the following questions. Ten key themes emerge from the 667 responses.

What elements are needed for a great primary industries system in 2050?

- Profitability (105/667)
- Sustainability (95/667)
- Innovation (78/667)
- Government support (76/667)
- Collaboration (66/667)
- Supply chain (64/667)
- Regional development (61/667)
- Water security (43/667)
- Technology adoption (40/667)
- Biosecurity (39/667)

Our Shared Vision for 2050

What parts of the vision statement do you like?

Total: 320 responses

- Sustainability (98/320)
- Profitability (80/320)
- Future focus (43/320)
- Triple bottom line (29/320)
- Community pride (25/320)
- Partnerships (24/320)
- Agility (21/320)

Are there any other vision statements you would like to suggest?

Total: 168 responses

- Profitable agriculture (115/168)
- Sustainable practices (22/168)
- Innovation and technology (14/168)
- Global recognition (9/168)
- Community and people (8/168)

During a room discussion, participants identified that including a future target and date is motivating and promotes meaningful investment and action. Comments highlighted a desire for future-focused, integrated aspirations, which position Primary Industries as positive and inspiring.

Priorities – Room Discussion

Participants were presented with draft priorities developed from preliminary survey data and consultation with the industry working group. In addition, participants shared the following core priorities that had not yet been captured, highlighting specific areas of concern and opportunity, emphasising the need for the co-design process.

- **Community education:** Promoting “great stories”; sharing why primary producers are essential
- **Consumer education:** Fair payment for produce
- **Security of access:** Poorly defined right to fish or farm
- **Profitability:** Business viability
- **Sustainability:** Farming to support life and improve environmental landscape
- **Food security and resilience:** Global focus on food security and nutrition
- **Succession planning:** Attracting the right people with the right skills
- **Infrastructure:** Reliable, timely transport logistics; improved communications
- **Adoption of innovative and value adding practices:** Change and behaviour management
- **Generating new market opportunities**

Priorities – Updated during the Forum

Draft priorities were revised based on participant insights and feedback to better incorporate their feedback. Note that these priorities are subject to further change.

- **Biosecurity:** Safeguard our environment, economy, communities, and lifestyle from escalating biosecurity threats.
- **Market growth and value-add:** Meeting existing consumer needs, and the demands of a growing population locally, and expanding our global exports. Deliver for current products and markets and expanding into new products and markets.
- **Social license:** Enhance / build community and consumer support for primary industries as the essential backbone of Australia.
- **Stable settings and investment attraction:** Invest in infrastructure, improve water and food security, reduce red tape and get the system settings right – helping harness strong investment attraction and success for the sector.
- **Agile people, workforce and liveable communities:** Attract, support and retain the best people. Agile regional communities will thrive in changing and challenging environments while delivering evolving consumer expectations.

Priorities - Updated during the Forum

Draft priorities were revised based on participant insights and feedback to better incorporate their feedback. Note that these priorities are subject to further change.

- **Innovation:** Accelerating fit-for-purpose technology and digital solutions to increase profitability and add value to food, fibre and foliage productions.
- **Investing in Infrastructure:** Invest in physical infrastructure to process locally and enable easy access to local, national and global markets.
- **Growing profitable businesses sustainably:** Deliver responsible economic, environmental and community outcomes that strengthen our reputation across current and new markets, builds on emerging markets and increases export opportunities. Make it viable and attractive for business.
- **Anticipating and adapting to system shocks:** Greater exposure to the global changing climate and geopolitical shifts. Anticipating and adapting to system shocks: must strengthen our ability to predict, prepare for and respond to ‘shocks’ that impact our primary industries system.

Summary of Objectives

Participants were asked to work together with their tables and develop objectives that would enable the Primary Industries sector to achieve its ambitious targets. They were encouraged to think broadly and strategically about the future. Suggestions from participants via group discussions and worksheets included:

Category	
Biosecurity	• Drive engagement outside of the agricultural sector, particularly with key risk creators, to enhance biosecurity practices sector-wide • Promote greater uptake of integrated biosecurity systems, including traceability improvements • Increase the number veterinarian personnel to manage biosecurity risks • Contain and eradicate fire ants by 2032 • Biosecurity training for community
Market Growth and Value Add	• Grow export market by 7-10% year on year until 2030 • Elevate business, financial and digital literacy • Diversification into non-traditional products + crops. • Establish systems and programs to enable primary producers to be price makers • Diversify commodity and crop types to drive export potential and competition in emerging markets
Social License	• Create a premium sustainable trademark/s for QLD primary produce that is valued by the consumer (domestic and international) that can be consistently supplied and provide a competitive advantage • Marketing and promotion of the industry • Recognise the right to farm is a priority for the security of the nation • Promote long-term secure access to farm, forestry and fishery resource • Safeguard and securing food + fibre supply chains
Stable Settings and Investment Attraction	• Reduce red tape and promote simple, clear legislation • 1/2 regulatory burden • Improve regulatory environment for investment attraction • Develop a collaborative, whole of system, through supply chain / value chain chains to provide the stability of "one sector" approach required to deliver the priorities efficiently + effectively • Update current land use mapping to include and protect strategic primary industry production to inform right to produce

Summary of Objectives

Category	
Agile People, Workforce and Liveable Communities	• Build a resilient workforce for the QLD AG sector through coordination, upskilling and tech • Promote collaboration between industry education providers, supported by Government to attract, train and retain talent • Establish on-job training, upskilling and credentials (industry driven training to incentivise greater industry investment in talent acquisition and succession planning) • Develop a baseline and future workforce needs assessments aligned with industry plans and regional priorities at a Statistical Areas Level 2 (SA2s) scale • Invest in hyflex training system to ensure targeted qualifications and skills development programs are available on demand
Innovation	• Ensure universal access to digital technology and connectivity industry-wide by 2030 • Invest in improved to IT to support effective tracking and monitoring of product movement and sales • Establish agreed target for adoption of technology to increase profitability • Develop enhanced business and equity model to better distribute value (profit) and de-risk innovation at the on-farm level • Increase support for startups through innovation grants and loans
Investing in Infrastructure	• Establish major distribution and manufacturing (process) centres in regional locations • Invest in a safe, high productivity state-wide transport network by 2030 • Double infrastructure investment e.g. rails, road, communications • Assess and prioritise infrastructure
Growing Profitable Businesses Sustainably	• Grow profitable business sustainably by enhancing water and energy efficiency • Unlock the value of existing waste and byproducts to increase productivity • Improve profitability of the grazing sector by 20% • Support dairy famers to produce 300 million litres of milk by 2030
Anticipating and Adapting to System Shocks	• Promote knowledge and understanding of the regional suitability of crops (trees/broadacre) in to manage climate variability • Increase the availability, quality and conservation of water resources • Improve holistic catchment management to maintain water quality • Improve water reliability during drought to maintain productivity. • Invest in cumulative land condition improvements and carbon farming

$30 billion by 2030

Participants were asked to consider obstacles and enablers for achieving the target of $30B by 2030. Key themes highlighted the criticality of cross-sector collaboration, industry support and embracing new approaches.

What are the obstacles to achieve this?

Total: 386 responses

- Government regulation (94/386)
- Climate change (84/386)
- Investment in infrastructure (83/386)
- Market access (79/386)
- Labour shortages (46/386)

What are the enablers to achieve this?

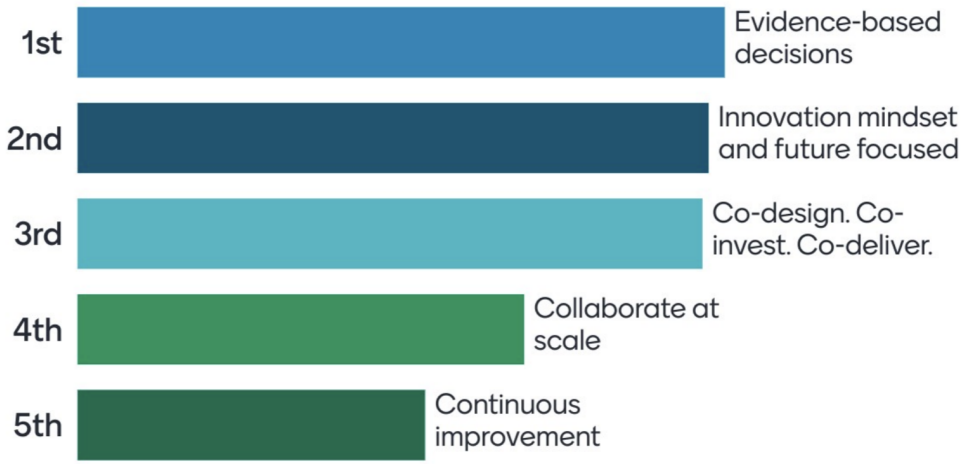
Total: 364 responses

- Industry collaboration (80/364)
- Government support (56/364)
- Infrastructure development (53/364)
- Research and innovation (36/364)
- Diversification (33/364)
- Consumer demand (30/364)
- Technology adoption (28/364)
- Water availability (23/364)
- Regulatory reform (14/364)
- Workforce development (11/364)

Guiding Principles

Participants were presented with draft guiding principles developed from preliminary survey data and consultation with the industry working group. These principles were ranked as follows:

Rank the guiding principles that are most important to you



Roles and Responsibilities

Participants were asked consider the role that Government, the Department of Primary Industries, industry and key stakeholders play in a combined systems approach.

Comments suggested that Government and industry will need to share responsibility and leadership roles. However, this will differ depending on the objective and priorities of individual projects.

The Department should also play a coordination role working across Government and leading relevant regulatory reforms.

Ideas generation

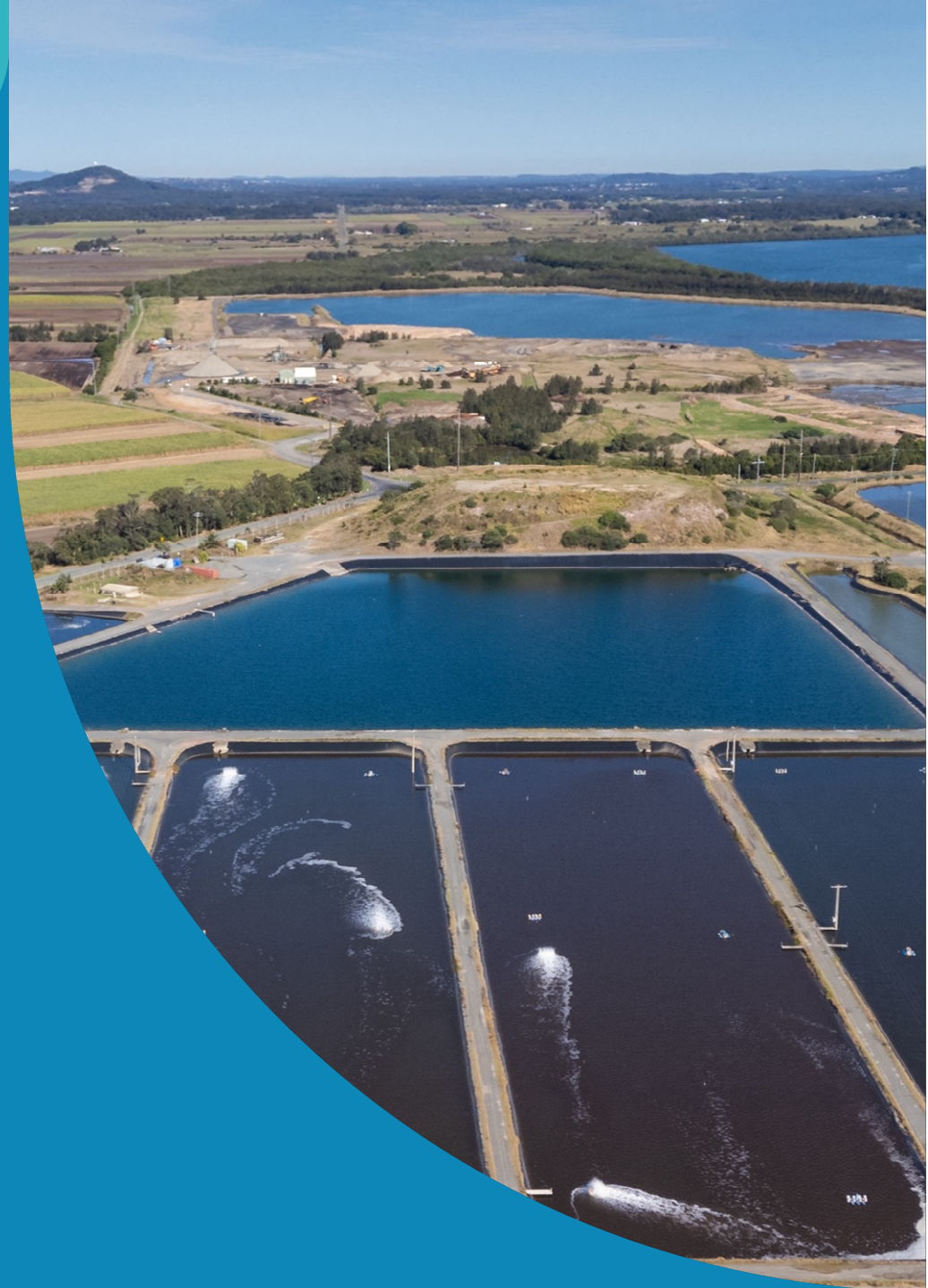
Your big ideas will be used to inform 5-year strategic action plans!

Next Steps

Next steps in our co-design partnership will include:

- Preparation of the draft blueprint
- Public consultation on the draft blueprint
- Finalise the blueprint based on feedback
- Consideration of the blueprint by Government
- Release and launch of the blueprint
- Commence preparation of 5-year action plans.

We expect to have the draft blueprint out for consultation post Easter, however we encourage you to stay up-to-date by visiting our eHub where consultation activities will be posted.



Appendix 1: Objectives from worksheets

1. Innovation and Value adding. Grants. Grants and loans for startups. Capacity building. Engaging with First Nations. Communicating opportunities to inspire people to join the sector. Differentiating brand QLD for value add.
2. Double infrastructure investment eg: rails, road, communications
3. 1/2 regulatory burden. Co-management resources
4. Biosecurity enhancement: Build capability in the system. Build awareness.
5. Invest in infrastructure that enables industry growth. Bottle necks and opportunities.
6. Growing profitable business sustainably by enhanced water + energy efficiency
7. Knowledge and understanding of the regional suitability of crops (tress + broadacre) in QLD under a changing climate.
8. By driving engagement outside the AG sector, Particularly the key risk creators, to drive strong biosecurity practises across the sector.
9. Biosecurity: Contain and eradicate fire ants by 2032. Partnerships with regional neighbours to prevent biosecurity risks.
10. Workforce: Collaboration between industry education sectors, supported by Government to attract, train and retain talent. Acknowledge on the job training knowledge eg: industry driven training that incentivises industry. Elevation of business/financial literacy and digital literacy.
11. Systems in place to help industry and Gov have visibility around potential shocks and their impacts to support planning to mitigate risk and inform response.
12. Have systems in place that enable primary producers to be price makers. Empower greater quality across supply chain.
13. What? Establish and maintain industry and government relationship and commitment to ensure timely and agile response to shocks. Why? To protect primary industry in QLD, food security and market opportunity.
14. Improve community awareness. Marketing and promotion of the industry. R,D,E Events. Social licence. Fish, beef and crops.
15. Fine tuning / review of regulations - tweak regulation. Adjustment to regulations. IT systems reporting improvement.
16. Food security at the core of decision making across all sectors.
17. Productivity and profitability. Improve communication in supply chain (Government and industry telling the story. Improved integrated biosecurity systems including traceability improvements. Reduce red tape - simple clear legislation.
18. Liveable communities: By understanding the emerging and future needs of the region to ensure we have a talent pipeline of the right people, in the right place, with the right skills. This would be done by developing baseline and future needs assessments with industry matched to industry plans and regional at a Statistical Areas Level 2 (SA2s) scale.
19. Universal access to digital technology and connectivity for primary industries by 2030.
20. Recognise the right to farm is a priority for the security of the nation.
21. Develop enhanced business and equity models that better distribute value (profit) and re-risk investment at the farm level from innovation.
22. To create a premium sustainable trademark/s for QLD primary produce that is valued by the consumer (domestic and international) that can be consistently supplied and provide a competitive advantage.
23. QLD Dairy framer produce 300m litres of milk by 2030/31. Financing the industries future. Better pathways into the industry mitigating risk for stable production. Productivity improvement.
24. To reduce the time taken to AGTech adoption.
25. To build a resilient workforce for the QLD AG sector through coordination, upskilling and tech.

Appendix 1: Objectives from worksheets

26. Be innovative. Achieve X levels of adoption of tech to increase profitability.
27. Grow export market by 7-10% year on year growth until 2030.
28. Market growth and value add. Liveable communities. Social licence.
29. A future ready workforce. To promote the primary industries a valued place to work opportunities, diversity, career advice. Attraction and retention. Support locals to work locally. Align training packages with industry needs. Hiflex training system (Qualifications v skills + timeframes) on demand.
30. Market growth + value add + investment. By attracting investment that supports value adding domestically.
31. Establishment of major distributions and manufacturing (process) centres in regional locations.
32. Biosecurity. Ensure ready access to an adequate pool of appropriately skilled workforce (Government + industry) for a timely response to an EAD incursion. Increase the number veterinarian personnel (vets and vet paraprofessionals) to manage animal biosecurity risks (regulations of veterinary technologies and veterinary nurses to enhance professional capacity + standards). Biosecurity training for community. Raising public awareness through marketing strategies. Awareness raising through other non-agriculture sectors.
33. Increasing the availability, quality and conservation of water resources. Water management plans that mitigate climate variability and grow AG production.
34. Update the current land use mapping to include and protect strategic agricultural production to inform: Right to produce. Agricultural and infrastructural growth. Create stable settings.
35. Market growth and value add. By improving market intelligence by understanding current and future needs and demands.
36. Delivering a safe, high productivity state-wide transport network by 2032.
37. Increase participation and implementation of best practice biosecurity programs through better engagement of industry, government and community.
38. Long term profitability and growth. Adoption and extension. Educate community and consumers (Government and industry partnerships). Long-term secure access to farm, forest and fishery resources.
39. The infrastructure investment. Assessing and prioritising the infrastructure enablers where agriculture has the most to gain and advocate for + collaborative finance.
40. Harmonised view of the future across sectors + Government (focus: anticipating, adapting to system shocks + social licence / performance)
41. Market growth + value adds. Diversification into non-traditional products + crops. Carbon farming.
42. Grow / drive / enhance "social licence" of primary industries.
43. Improve holistic catchment management for water quality and land productivity and sustainability.
44. Safeguarding and growing food + fibre supply chains.
45. Improve profitability of grazing sector by 20%, whilst improving land condition.
46. Improve water reliability during drought to maintain productivity.
47. Stable settings + investment attraction. Investment in enabling infrastructure. Improved regulatory environment for investment attraction. Build capacity to enable business.
48. Reduced incursions. Improved containment. Develop sustainable funding models.
49. Agricultural system leadership, stewardship and coordination. Develop a collaborative, whole of system, through supply chain / value chain chains to provide the stability of "one sector" approach required to deliver the priorities efficiently + effectively. Governance + Connection + Shared Action.
50. To enable infrastructure is in place for support primary industry supply chains.