

# PRIMARY INDUSTRIES PROSPER 2050

A 25-year blueprint for Queensland's primary industries





"Queensland's primary industries are productive, profitable and sustainable for future generations. We are the backbone of our economy and communities."



# Message from the Queensland Government



I am pleased to deliver the *Primary Industries Prosper 2050* consultation draft, a 25-year blueprint for the future of Queensland's primary industries. This draft represents the first step in the Crisafulli Government's Fresh Start for primary industries in our State and supports our ambitious target to boost Queensland's primary industries output to \$30 billion by 2030.

A long-term, strategic plan for Queensland's primary industries is needed to ensure this sector, which is a critical part of all Queenslanders' lives, strengthens as the backbone of the Queensland economy.

We must ensure we have the fundamentals in place and unlock opportunities to realise a primary industries sector that is profitable, drives future investment, creates secure jobs, and delivers local priorities.

In developing *Primary Industries Prosper 2050* I hope to reset the relationship between the primary industries sector and government, recognise local priorities, and proactively address the challenges the sector is facing now and in the future. To achieve our common goals we must come together and forge new, open partnerships built on mutual respect.

Our bold target requires a whole-of-government approach, which is something that has been lacking for some time. The Crisafulli Government is determined to deliver upon this for the betterment of our sector.

This 25-year vision must be practical, deliverable, and built on the collective knowledge of those who work, live, and breathe primary industries. This is why co-designing, co-investing, and co-delivering this strategy with industry

will be critical to its success. I would like to thank the members of the industry working group for their frank and invaluable advice in developing the draft strategy.

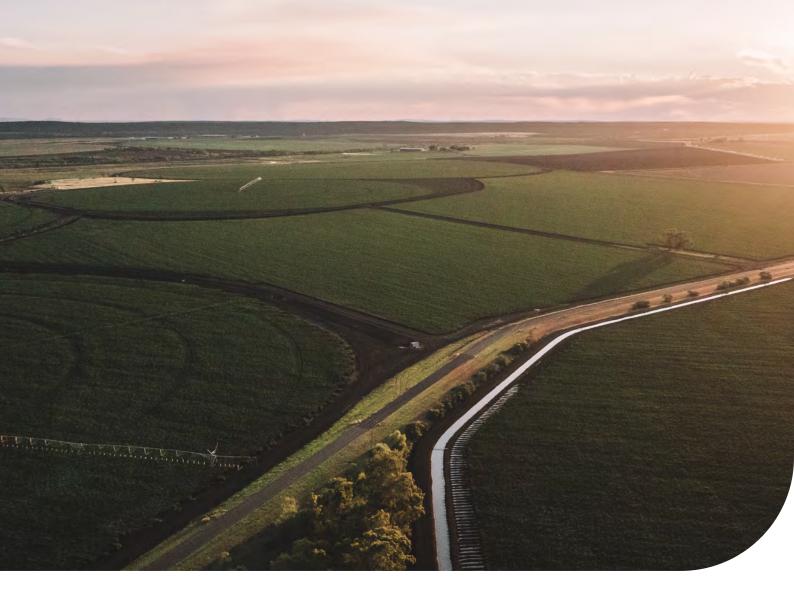
I would also like to thank the nearly 280 industry, government, and other sector stakeholders who freely gave their time, expertise, and insights at the Queensland Primary Industries Forum and through other consultation channels to help inform the direction of *Primary Industries Prosper 2050*.

I encourage everyone to have your say on this draft strategy to help us shape productive, profitable, and sustainable primary industries for present and future generations.

**Hon Tony Perrett, MP**Minister for Primary Industries
Member for Gympie







### The voice of industry

"If primary industries are to be a genuine powerhouse in Queensland, we will need all departments and industries on board, working cohesively and collaboratively."

"We should be clearly advocating for the right to operate, and for our invaluable contribution to communities and the economy to be recognised."

"The process employed to try and bring this together collectively is bold and to be applauded." "It is the role of the private sector to bring investment opportunities to government and the role of government to cut through, streamline and support investment."

"This era is about maturing the relationship between industry and government, and all people involved in the primary industries system."

"Let's wrap support around the people who have knowledge and excitement to contribute – invest energy where there is already energy."



# Why *Primary Industries Prosper 2050* matters

Queensland's primary industries are at a turning point. Global demand for sustainable food, fibre and foliage is growing fast, yet so too are the pressures we face.

The need for unified action has never been greater.

At the same time, emerging AgTech, home-grown innovations, new growth markets and new bioeconomy products offer extraordinary opportunities to grow and boost productivity and profitability.

*Primary Industries Prosper 2050* is a bold, long-term blueprint to seize opportunity and shape a thriving future.

This is not business as usual.

*Primary Industries Prosper 2050* is more than a vision. It is a joint commitment by government and industry to:

- drive transformation, not just incremental change
- tackle barriers with smart, enabling policy and infrastructure
- back the sector through whole-of-government support
- deliver innovation that is scalable and delivers measurable benefits
- set key performance indicators that are tracked and reported on
- empower local action through regional partnerships and industry leadership
- ensure prosperity is shared across sectors, regions and generations.

It is a shared commitment to shift from short-term thinking to generational succession planning — guided by clear priorities and outcomes, bold ambitions, and the right policy and investment settings to support change.

### **Tackling challenges**



### Together we will need to address:



### Market and geopolitical shifts

Increasing trade and geopolitical volatility, alongside evolving consumer expectations for healthy and sustainable products, poses challenges and uncertainty for primary industries.



### Escalating biosecurity imperative

Primary industries face increasing threats of new and changing biosecurity risks, exacerbated by climate variability and global trade dynamics.



#### Digital and tech

The rapid growth of disruptive technologies puts pressure on producers to accelerate their investment in emerging technologies and to re-skill their workforce to remain competitive.



#### Coexistence

Pressure on limited natural resources, especially water and land, is challenging the sector to evolve its business models to be more integrated across the economy, local communities, other industries and the environment.



#### **Regulatory settings**

It is critically important to establish timely regulatory and policy settings, which will enable industry to adapt.



#### **Climate variability**

Increasing climate variability is changing where and when we produce food, fibre and foliage, and putting pressure on the protection of livelihoods, infrastructure and the ability to operate profitable primary businesses.



#### **Workforce pressures**

Employers face the dual challenges of competing for a stable labour base while attracting a modern AgTech and data-enabled workforce. We need to drive young minds to see a future in primary industries and equip them with the education and training to achieve this.



### **Today's primary industries**

Primary industries are vital to Queenslanders, their economy and environment. They feed our families, our state, our nation, and the world. They provide the fibre that underpins a world-renowned cotton and wool industry. And they produce essential building products.

Today's diverse and vibrant primary industries are at the heart of Queensland's rural and regional communities. They employ more than 376,000 people across the supply chain, almost 13% of all Queensland's workforce, and directly support more than 41,500 primary industry businesses.

Underpinning our ability to produce high-quality food, fibre, and foliage products is our strong biosecurity system that protects human, animal, plant, and environmental health throughout Queensland. Adoption of emerging AgTech, which is focused on automating processes, adapting to climate variability and harnessing the power of data, is delivering pockets of productivity gains.

As our industries and businesses evolve at different speeds, scales, and timeframes, they contribute to the overall picture of a diverse sector that can be difficult to capture.



376,000

people across the supply chain



13%

of all Queenland's workforce



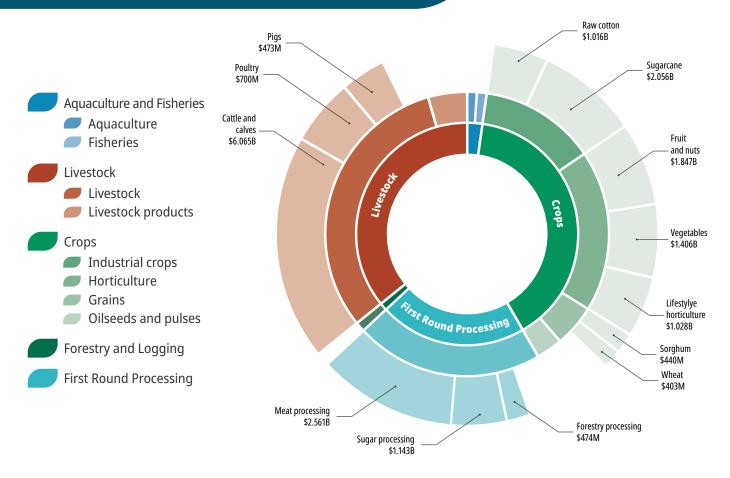
41,500

primary industry businesses

#### **Our regions** Northern Queensland The diversity of Queensland's regions is our greatest asset. They span tropical, subtropical, and temperate climates Central Queensland from northern Queensland through to central and southern Southern Queensland Queensland. Our primary industries enjoy year-round production of a wide range of products and commodities, Queensland Boating and and contribute significantly to the economy and liveability of our **Fisheries Patrol Clusters** regional communities. Northern Queensland is characterised by tropical and dry-tropical landscapes and pristine waters. From Cape York through to Townsville, it boasts highly productive fisheries, cropping, grazing, and contributes almost 25% of Queensland's gross value of production. **Central Queensland** is renowned for its extensive grazing, cropping and intensive production systems. It contributes almost 25% of Queensland's gross value of production and nearly 40% of beef output, 30% of sugarcane, and 10% of the state's horticulture production. **Southern Queensland** is home to the state's capital city, Brisbane. This region contributes more than 50% of Queensland's gross value of production. It is known for its fresh produce, native and plantation forestry, cropping, grazing, horticulture and fisheries, in addition to significant **Far North** beef, wheat, and cotton production. Queensland **North and Western** Queensland **Central Queensland** Wide Bay South East Queensland **Darling Downs and** South West

This map is based on the Regional Infrastructure Plan Area boundaries with DPI regions overlaid. **Source:** https://www.statedevelopment.qld.gov.au/infrastructure/infrastructure-planning/regional-infrastructure-plans.

### Sector snapshot – 2023-24 Queensland primary industries



Subsector/commodity	Value (AU\$ million)
Crops	
Grains	\$1,163
Industrial crops	\$3,072
Oilseeds and pulses	\$426
Fruit and nuts	\$1,847
Lifestyle horticulture	\$1,028
Vegetables	\$1,406
Livestock	
Cattle and calves	\$6,065
Other livestock	\$68
Pigs	\$473
Poultry	\$700
Sheep and lambs	\$72
Eggs	\$374
Milk (all purpose)	\$261
Wool	\$77

Subsector/commodity	Value (AU\$ million)
Fisheries	
Aquaculture	\$264
Commercial fisheries	\$250
Forestry	
Forestry and logging	\$230
Processing	
Cotton ginning	\$115
Flour mill and feed processing	\$81
Fruit and vegetables processing	\$273
Forestry processing	\$474
Meat processing	\$2,561
Milk and cream processing	\$137
Seafood processing	\$89
Sugar processing	\$1,143
Total	\$22,659*

<sup>\*</sup> All figures are rounded down to the nearest million for clarity and ease of presentation. Therefore, the sum of rounded figures may differ slightly from the exact total. **Source:** DataFarm, 2025 https://www.daf.qld.gov.au/news-media/campaigns/data-farm/primary-industries.



Sub category	Total (AU\$ million)	% of total
Beef and veal	\$6,732	41.82%
Industrial crops	\$4,768	29.62%
Grains, oilseeds and pulses	\$1,612	10.02%
Horticulture	\$506	3.15%
Live animals	\$243	1.51%
Forestry	\$117	0.73%
Fisheries and aquaculture	\$81	0.51%
Other	\$2,034	12.64%
Total	\$16,096	100%

**Source:** Australian Bureau of Statistics International Merchandise Trade data <a href="https://www.daf.qld.gov.au/news-media/campaigns/data-farm/export-trade">https://www.daf.qld.gov.au/news-media/campaigns/data-farm/export-trade</a>. **Note:** Statistics have been revised based on industry consultation to include estimates for sugar exports.









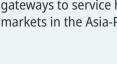
### **Our competitive advantages**

Queensland's primary industries are a highly competitive sector both nationally and internationally. Our competitive advantages come from our diverse climate regions, proximity to export markets and a global reputation for high-quality produce.



#### **Market proximity**

Queensland's location offers logistical advantages, with our ports as gateways to service high-demand markets in the Asia-Pacific region.





#### **Resilient regions**

Queensland's primary industries are well-versed and proactive in natural disaster and drought response and recovery, and at adapting to changing market demands and product expectations.



### Diverse climate and geography

More than 80% of Queensland's land is suitable for primary industry production, providing year-round produce across tropical, sub-tropical, and temperate climates. We also grow varieties that are weather resistant.



#### **Innovative sectors**

Queensland's strategic focus and investment in research, development and extension programs is supported through partnerships between industry, government and researchers. This delivers innovations in best practice, access to new products and technical innovations for commercialisation.



#### Premium clean and green

Queensland has a global reputation for being environmental stewards and producing high-quality, safe products that meet strict standards in production, processing, transportation, and animal welfare.



### Political and democratic stability

Australia's stable government, strong biosecurity system and regulatory settings provide private sector investment certainty.

## Our shared vision

Government and industry must work together to address our strategic challenges and realise our opportunities. We must harness them to prosper and be competitive, not only for today, but for future generations.

Our 2050 vision is...

Queensland's primary industries are productive, profitable and sustainable for future generations. We are the backbone of our economy and communities.

Our shared vision has been developed through a co-design process with the Queensland Government, our sector partners, and stakeholders. It is bold, ambitious, and aspirational. Importantly, it is achievable and has strong support from all parties, including across all Government agencies. Queensland's primary industries are open for business.





### **Our shared purpose**

*Primary Industries Prosper 2050* is a blueprint that will see Queensland's primary industries thrive, and be economically, environmentally and socially sustainable for the future. It will set the scene for ongoing prioritisation and the development of coordinated, targeted action.

Transforming together, industry and government are setting a new pathway to 2050. A bold future that is prosperous for business, our communities and the environment.

This 25-year blueprint sets a strong foundation for our primary industries 'system' while sending a clear message to investors that Queensland's primary industries are primed for growth through transformation.

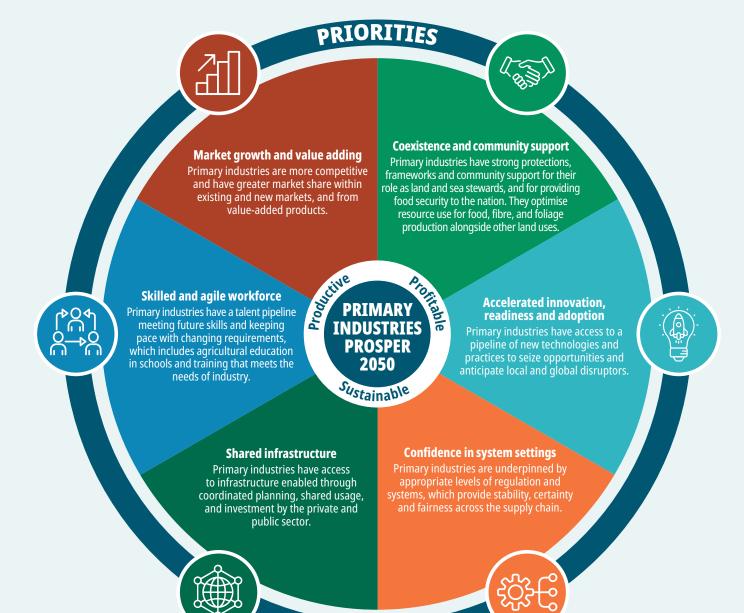
Together, we will deliver a future where Queensland's primary industries prosper.



### **Strategic priorities to 2050**

Priority areas will focus our efforts to help realise the shared vision for the 25-year blueprint and set a platform for future success.

Through public consultation we will refine drivers, and identify cross-sector opportunities and measures of success for each priority area. To deliver change on the ground, rolling five-year action plans will be developed to focus on sector, regional or specific issues. These plans, together with robust monitoring, evaluation and governance, will guide system-wide implementation, and include shared targets to achieve the vision and six priority outcomes. The plans will be co-designed, co-funded, and co-delivered to address practical and deliverable actions.







### Market growth and value adding

**Outcome:** Primary industries are more competitive and have greater market share within existing and new markets, and from value-added products.

#### Success:

- Greater than 5% p.a. increase in export market growth.
- Increase in waste transformation to high-value products.

#### **Opportunities:**

- Market growth: Harness primary industries' success in developing products to meet consumer needs, as well as expanding into new markets. Diversification supports revenue stability and resilience.
- Primary industries plus: Optimise energy
  efficiency to reduce primary industries input costs.
  Generate secondary sources of income to bolster
  productivity, profitability and resilience. Capitalise
  on additional revenue opportunities from energy,
  waste, agri-tourism, environmental markets and
  new technologies.
- Value adding: Through regional processing hubs, advanced manufacturing, waste utilisation, and product development to meet high-growth markets such as protein products, bio-fuels, nutraceuticals, and products not yet envisioned.
- Expand First Nations agriculture: Support the growth of Aboriginal and Torres Strait Islander production practices, promote native food products, and grow Indigenous-owned agribusinesses.



### Coexistence and community support

**Outcome:** Primary industries have strong protections, frameworks and community support for their role as land and sea stewards, and for providing food security to the nation. They optimise resource use for food, fibre, and foliage production alongside other land uses.

#### **Success:**

- Increase in positive public sentiment of Queensland primary industries.
- Greater recognition of environmental stewardship including conservation and biodiversity protections, emissions reduction and resource efficiencies.

#### **Opportunities:**

- Land and sea management: Sustainable
  management systems, underpinned by fair,
  transparent, and coordinated planning. They balance
  resource use for economic and environmental
  outcomes and strengthen confidence in the sector.
  These systems leverage opportunities across the
  resources, energy and environmental sectors to
  optimise resource use for the best outcomes.
- Food for the nation: Queensland's primary industries play a fundamental role in securing Australia's food security. Our primary industries provide regular access to sufficient, safe and nutritious food to meet dietary needs for an active and healthy life.
- Leveraging our reputation: Our reputation for sustainable, ethical, and high-quality products can be leveraged through data, labelling and branding to build greater brand awareness and expansion in new markets.





### Accelerated innovation, readiness and adoption

**Outcome:** Primary industries have access to a pipeline of new technologies and practices to seize opportunities and anticipate local and global disruptors.

#### Success:

Increase industry adoption of AgTech.

#### **Opportunities:**

- AgTech adoption: Innovations, disruptive technologies, automation and AI promise to change the way we operate. New methods of production will make the sector more resilient. Access to cost-effective digital tools, connectivity and education across rural and remote areas is key to success.
- Innovation: Queensland is a global test bed for the development and scaling of AgTech with a growing number of businesses working with and for the primary industries sector.
- Intelligence sharing: Data sharing agreements including intellectual property and intelligence will strengthen our ability to predict, prepare for, and respond to biosecurity, trade and other 'disruptions' that provide either opportunities or risks for our primary industries system.
- Build an AgTech and FoodTech innovation sector:
   Collaborate to build a vibrant AgTech and FoodTech innovation sector. This could include early and mid-stage product development, entrepreneurship programs, and scaling commercialisation, through regional place-based and collaborative approaches.



### Confidence in system settings

**Outcome:** Primary industries are underpinned by appropriate levels of regulation and systems, which provide stability, certainty and fairness across the supply chain.

#### Success:

25% reduction in regulatory burden.

#### **Opportunities:**

- Less regulation: To provide certainty to industry, the public and investors, regulation should be proportionate to risk, and effective and efficient in delivering protections and intended outcomes.
   Working in partnership across government portfolios, benefits should outweigh costs.
- Investment attraction: By getting the system settings right we will harness strong domestic and overseas investment attraction for sector growth.
- Supply chain equity: By empowering producers to understand their costs of production and negotiate across the supply chain, producers can work towards capturing a greater per cent of total supply chain value.
- Capturing data: By aligning to existing frameworks and measuring our improvement in delivering environmental outcomes and responding to climate variability, producers will provide confidence to investor markets.





#### **Shared infrastructure**

**Outcome:** Primary industries have access to infrastructure enabled through coordinated planning, shared usage, and investment by the private and public sector.

#### Success:

Increase in access to primary industries enabling infrastructure.

#### **Opportunities:**

- Coordinated planning and co-delivery: Multi-user
  infrastructure across sectors of the economy to improve
  access to and distribution of primary production inputs
  and improve supply chains. This will enable the sector
  to deliver food, fibre, and foliage to consumers faster
  and more efficiently.
- Supply chain efficiencies: Optimisation of common user infrastructure to enable efficient access to local, national, and international markets.
- Expanding capacity of existing infrastructure:
   To meet growth ambitions, on-farm and off-farm infrastructure will need to be optimised for increased exports and domestic supply. Water, energy, road, rail and other enabling infrastructure will need greater robustness to extreme weather events.



### Skilled and agile workforce

**Outcome:** Primary industries have a talent pipeline meeting future skills and keeping pace with changing requirements, which includes agricultural education in schools and training that meets the needs of industry.

#### Success:

- Increase in graduates entering primary industries jobs.
- Change in workforce composition towards higherskilled and/or digital and data-enabled roles.

#### **Opportunities:**

- Right people, right place, right skills: Existing workers motivated to stay in the sector and new workers with new skills motivated to join the sector.
- Career pathways: Build primary industries career pathways from schooling. Attraction and retention of workers with clear pathways to develop skills, with tailored streams for new entrants through to seasoned professionals.
- Workforce data: Fit-for-purpose workforce data to drive policy, programs, and strategy to successfully meet labour needs.
- New digital and data-savvy capability: Expand
  the size and capability of the workforce with data,
  digital, and AgTech skills to deliver on the innovation
  agenda and attract the next generation of workers.
  Working with the education, university and R&D
  sectors is critical.







### **Working together**

Queensland's primary industries operate together as a unique and diverse sector.

Government, primary producers, their service providers and everyone along the supply chain has a role in ensuring a prosperous primary industries system. Local governments, researchers, data analysts, Aboriginal and Torres Strait Islander peoples, businesses, developers, marketers, advisers, and investors also play a critical role.





### **Principles**

These principles will guide how government and industry agree to work together to develop and deliver on *Primary Industries Prosper 2050* and action plans.

#### Being genuinely united

Industry and government will co-design, co-invest and co-deliver a shared vision. The Department of Primary Industries will lead coordination of effort across government to drive action as part of a whole-of-government approach.

### **Evidence-based decision** making

We will use robust science and data to drive evidence-based decision making and certainty.

#### **Profitable and productive**

Together, we will focus our efforts to support profitable, productive and sustainable businesses.

### Building trust between industry, communities and government

We will demonstrate our long-standing commitment to animal welfare, land, water and marine stewardship.

#### **Accountable**

We will have strong cross-sector governance, and regularly report on the plan's success measures, holding all stakeholders to account for our progress.

#### Being bold enough to fail safely

We will challenge the status quo and adopt a future-focused mindset. We will test and adopt innovations.

### Our roles and responsibilities

Each of the participants in the Queensland primary industries sector play a crucial role in the state's economy and in advancing the primary industries sector's productivity, profitability and sustainability. Collaboration between these participants is essential for the overall health and growth of Queensland's primary industries.



#### Participant groups **Roles and** Government (Federal, State and Local) Research and Development Organisations responsibilities Representative Bodies (industry bodies Aboriginal peoples and Torres and associations) Strait Islander peoples **Education Institutions Financial Sector** Primary Industries (primary producers, **Individuals and Communities** supply chain and agribusiness companies) (consumers and advocacy groups including environmental groups) **Intelligence** Enhancing sector competitiveness by collecting and analysing data from outside and across the primary industries sector to inform decision making, optimise actions and resources, and anticipate risks and opportunities in a continuously changing environment. **Advocacy** Representing the interests of primary industries, influencing policy, and engaging and raising public awareness ensures long-term support, resource availability and investment, and innovation in the sector to strengthen trade opportunities and build market share. Research and development Driving innovation in new products, processes and practices, and extending them through to adoption to improve sector efficiency, address environmental challenges, and capitalise on market opportunities. **Education** Real-world education and training encouraging youth engagement and developing a skilled and adaptive workforce equipped with the technical skills, innovation, and business knowledge to ensure the sector is future-ready and has long-term industry growth. Leadership and coordination Setting sector-wide direction supported by outcomesbased regulatory frameworks, system-wide policies, and financial models to promote business growth and position primary industries as an attractive investment proposition. Stewardship On-ground adoption of best land and sea management practices, innovation and technology, and adaptation to disruptions to protect and sustain primary industries businesses and Queensland's natural resources for future generations.



**AgTech:** Any innovation used across the agribusiness and associated value chains (the agri-system) to improve efficiency, profitability, sustainability and credibility. It includes hardware and software, business models, new technologies and new applications.

**Coexistence:** Sustainable coexistence signifies a balanced, empathetic, and forward-looking approach, where industry and community thrive together, valuing both people and the environment, while cultivating enduring relationships. It follows the principles of collaboration and cooperation, shared benefit, stewardship of natural resources, fairness and trust and resilience.

**Education institution:** A business or organisation that provides instruction and teaches someone to boost their ability or enhance their skills.

**Government:** The democratic authority at a federal, state and local level. This includes departments, agencies and associated subsidiaries such as government-owned corporations and statutory bodies.

**Primary industries:** The sector includes businesses that involve agricultural, apicultural, aquacultural, commercial wild-catch fishing, forestry, grazing and horticultural activities. It also includes associated first round processing that enhances primary value (e.g. meat processing, milling and packaging).

**Productivity:** A core economic statistic that measures how well inputs such as labour, land, capital, materials and services have been used to generate outputs such as sugar, livestock and wool. It is an important measure of the competitiveness of primary industries and a determinant of economic wellbeing.

**Profitability:** A measure of business financial health and ability to sustain growth, calculated as the surplus after deducting all expenses.

**Research organisations:** An entity or group of people whose goal is to conduct research to create or investigate a method, product or process. This may be to generate new knowledge or to inform the tech's development. Includes universities, CSIRO, Rural Research and Development Corporations and private institutions.

**Stewardship:** The care and responsible management of social and environmental factors on behalf of future generations to enable long-term sustainable, productive and profitable outcomes. The trust placed in our production systems is based on ensuring the quality of these essential inputs is not diminished, so they are sustainable and verifiable into the long-term.

**Supply chain:** Identifies the set of actors and activities that bring a primary industries product from production in the field to final consumption, where at each stage value is added to the product. The terms 'value chain' and 'supply chain' can be used interchangeably.

**Sustainability:** The production of food, fibre and fuel which is environmentally, socially and economically responsible. It means practicing responsible stewardship of the environment, caring for our people and animals and ensuring economic resilience for the community and industry.

**Value adding:** Encompasses any process or service in the supply chain that adds to the value of products to customers. First round value adding is the first step of transformation from the primary product, such as slaughter, cotton ginning, sugar milling, and packaging. It can occur where primary production occurs or at a separate facility.

### **Next steps**

#### We want your feedback

Help shape the future of your Queensland primary industries by joining the conversation.

Public consultation on this draft *Primary Industries Prosper 2050* blueprint runs from the end of April until early June 2025. It will include an online survey, and face-to-face and online events for communities, industry and other key stakeholders across Queensland.

The aim of this consultation is to:

- Collect feedback and gather input on this draft 25-year blueprint, *Primary Industries Prosper 2050*
- Gather early ideas for the development of a series of 5-year action plans.

#### How to get involved

You can provide feedback on *Primary Industries Prosper 2050* by completing the survey on our Engagement Hub. <a href="https://dpi.engagementhub.com.au/primary-industries-blueprint">https://dpi.engagementhub.com.au/primary-industries-blueprint</a>.

Further information about the consultation events, including how to be involved in the development of the 5-year action plans, will be shared on our Engagement Hub and through our social media channels.

You can also subscribe for updates on our Engagement Hub.

#### **Contact us**

For further information about our 25-year blueprint, *Primary Industries Prosper 2050*, go to <a href="https://www.daf.gld.gov.au/strategic-direction/25-year-blueprint">https://www.daf.gld.gov.au/strategic-direction/25-year-blueprint</a> or call us at 13 25 23.



### Thank you

The Department of Primary Industries would like to thank everyone who has contributed to the development of Primary Industries Prosper 2050 - primary producers, industry bodies, representatives from across government agencies, investors, universities, the R&D community, and our supply chain partners. These contributions are integral to the co-design process and are highly valued.

The department looks forward to working together with organisations, groups and individuals towards a prosperous 2050 primary industries sector.



#### **Acknowledgement of Country**

The Department of Primary Industries proudly acknowledges Aboriginal people and Torres Strait Islander people as the Traditional Custodians of the Country. We recognise their continuing connection to land, sea, waters and sky. We pay our respect to them, their cultures and to their Elders past and present and commit to ongoing reconciliation.

This publication has been compiled by Department of Primary Industries.

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