

Securing NSW dairy and fresh food supply



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Executive summary

The Department of Primary Industries and Regional Development (DPIRD) is dedicated to working with industry to deliver policies, programs and research outcomes to grow a strong and sustainable primary industries sector.

The NSW dairy and fresh food sectors are dynamic, with industries varying in production methods, supply chain models and end markets. Despite these differences, these industries share challenges associated with producing and supplying highly perishable products to meet the needs and demands of consumers.

The Gross Value of Production (GVP) for NSW primary industries reached \$25.5 billion in 2024/25 marking the fourth consecutive year above \$20 billion, driven by reasonable seasonal conditions supporting above average production output for many of NSW key commodities. Exports of NSW primary industries products were valued at \$12.8 billion which was the fourth consecutive year above \$10 billion owing to growing international demand for NSW high quality primary industries products.

The GVP of NSW's dairy and fresh produce as it leaves the agricultural sector was estimated at a combined \$11.4 billion in 2024-25.¹ After this, dairy and fresh produce progressed through the food supply chain, adding further substantial value. NSW fresh food industries are integrated into national supply chains to reliably deliver food products to both domestic and international markets.

The NSW Government is committed to working with stakeholders across the primary industries sector and recognises the role NSW Farmers Association and other peak bodies play in advocating for and providing support to these sectors. Research and Development Corporations are also important in supporting research and development for our dairy and fresh food industries.

This report provides an overview of production and supply challenges facing both NSW dairy and fresh food industries, and key areas of focus for dairy and fresh food supply.

The report is the culmination of an extensive review of contemporary reports into Australia's food systems¹ and targeted consultation with NSW industry stakeholders, their advocacy bodies and supporting organisations – including through six stakeholder roundtables.² DPIRD technical experts have supported this process through technical input to inform engagement and identification of actions needed to address production and supply constraints.³

Local and global events continue to impact supply chains. Market access and workforce issues also pose challenges for our producers, and at the farm gate, producers are working to maintain production in the face of a changing climate and competition for access to natural resources.

We continue to take action to address these issues, through advocacy at the national level and investment in targeted research and development, with a strong focus on biosecurity and climate risks and programs to address the needs of both the NSW dairy and fresh food sectors.

The NSW Government has also strengthened support for industry through the recent establishment of two independent statutory Commissioners:

- an independent Biosecurity Commissioner, Dr Katherine Clift, has been appointed to address issues relating to pests and weeds management and improving related coordination and collaboration between stakeholders, and

¹ See Appendix 1.

² See Appendix 2.

³ See Appendix 3.

- an independent Agriculture Commissioner, Ms Alison Stone, has been appointed to provide advice and recommendations to the NSW Government on agricultural matters, including productivity, land use conflict and food security.

A key pathway for securing sustainable dairy production and supply in NSW is the reinvigoration of the Dairy Industry Action Plan (DIAP) through the appointment of a new independent Chair to its Dairy Action Plan Implementation Panel. To date, the Implementation Panel has already implemented eight of the plan's 19 actions⁴, while the appointment of a new Chair would provide a further opportunity to conduct a refresh of those recommended actions yet to be completed.⁵ The DIAP is industry-led and its implementation will continue to build upon the foundations of a successful and profitable future for the NSW dairy industry, with a focus on:

- **Research, Development, Extension & Adoption**, to facilitate improvements in productivity and industry profitability through a collaborative approach to, and increased investment in, dairy research, development, extension and adoption that is tailored to NSW
- **Confidence**, to renew producer confidence in the NSW dairy industry and to increase supply chain collaboration, transparency and profitability while maintaining community trust and support
- **Skills & Business Resilience**, to improve profitability in an evolving market and changing climate by enhancing farmer, employee and service provider skills; improving capacity to plan and manage dairy businesses; and increasing the ability to manage risks
- **Stronger Futures**, to support investment in future growth and profitability by providing support for tomorrow's farmers, taking a targeted approach to critical infrastructure, and addressing regulatory constraints or uncertainties.

About this report

Through the extensive engagement with dairy and fresh food supply and production issues, including conducting a literature review and industry consultation, the DPIRD has found that concerted action is required under the following themes to drive progress on sector risks and constraints:

1. National coordination to address supply chains and market transparency
2. Horticultural market access
3. Access to a capable workforce
4. Industry research and development needs
5. Climate and natural resource vulnerability

These themes are drawn from evidence and reflect priority areas where the DPIRD can provide impact, and the Minister for Agriculture can advocate on behalf of industry within the NSW Government and at a national level through ministerial forums.

This report outlines actions already undertaken or currently underway by the NSW Government to support the sector, and opportunities where further action could address supply chain and food security challenges in both the fresh food and dairy sectors.

⁴ The DIAP actions were revised by the Dairy Action Plan Implementation Panel at a workshop in November 2023 with the original 28 actions condensed into 19 broader themed actions.

⁵ See Appendix 4.

Importantly, delivery of the actions identified in this report will be informed by other key initiatives, including the recently released DPIRD Research, Development and Extension Strategy 2025-2030, and the work of the independent statutory Commissioners.

DPIRD will continue to engage and work with the dairy and fresh food producers, industry representatives and other stakeholders to address production and supply challenges facing NSW dairy and fresh food industries.

Delivery themes and actions

1. National coordination to address supply chains and market transparency

Perishable food production systems rely on critical inputs being available in a timely manner and at an appropriate price.

Through its focus on trade and market access, the Australian Government has a key role in delivering actions that can support improved outcomes for dairy and fresh food production. This includes trade negotiations to address market barriers (such as tariffs) and improve the terms and access of agricultural and food products into international markets that are led by the Department of Foreign Affairs and Trade (DFAT) with the support of the Department of Agriculture, Fisheries and Forestry (DAFF). These issues can have a significant influence on the resilience of dairy and fresh food sector to other external shocks.

DAFF also lead the implementation of policy and programs that support a globally competitive and sustainable Australian food industry program, and the collection and reporting of primary industries data through its research arm, the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES).

Issues such as market transparency, competition and pricing that impact the NSW sector and consumers are also addressed nationally through the Australian Consumer Law, which the Australian Competition & Consumer Commission (ACCC) is responsible for administering. Feedback from consultation highlighted Australia's high reliance on imports for key inputs or ingredients, like agrichemicals and fertilisers (or their ingredients), machinery and parts, feed additives, and some specific livestock feeds, such as soybean meal used in the intensive livestock industries. Due to this reliance, supply chains can be easily disrupted due to external events, which can be mitigated through better knowledge of vulnerabilities and planning.

Market transparency, in the case of fresh food production for this report, refers to the visibility of price and non-price factors (e.g. objective standards setting, assessment and labelling) to stakeholders in the supply chain.

Stakeholder feedback was that a lack of transparency can lead to imbalances in bargaining power between producers, wholesalers, processors and retailers. On the other hand, increased transparency, through timely information on these non-price factors, can support effective and informed decision making by producers.

Findings:

Supply chains are vulnerable due to a reliance on critical inputs, many of which are imported to Australia. There is a lack of easily accessible information on the availability of key inputs. A better understanding of supply chain vulnerabilities would support industry to better manage risks and identify opportunities to increase domestic manufacturing to build supply chain resilience. Options to increase the efficient use of key inputs are also needed.

Improved pricing signals, market transparency and feedback mechanisms support trust between supply chain participants and informs on-farm production decisions, especially for smaller scale production. There are gaps in market transparency at the processing, wholesale or retail levels, which can lead to an imbalance in access to information and poor allocation of resources by producers or the supply chain.

There are opportunities to support consumers to make more informed purchasing decisions. This can be supported through increasing their awareness of the provenance of dairy and fresh food products via 'Country of Origin Labelling' and increasing adoption of technology to implement value-based marketing where products are marketed based on known quality attributes.

What is happening at the national level:

- The Australian Government has agreed to recommendations from the Independent Review of the Food and Grocery Code of Conductⁱⁱ. The Australian Government has made the Food and Grocery Code of Conduct mandatory, coming into force on 1 April 2025, with an anonymous complaints pathway established through the ACCC. The Code of Conduct is supported by the establishment of a Food and Grocery Code Supervisor.
- The Australian Government commissioned Jobs and Skills Australia to undertake an independent study on the workforce needs of Australia's food supply chain. The report was released in January 2025.ⁱⁱⁱ
- The ACCC undertook an inquiry examining pricing practices of the supermarkets, and the relationship between supplier (farmgate), wholesale and retail prices. The final report was released in March 2025.
- The Parliament of Australia, House of Representatives Standing Committee on Agriculture delivered the report of its inquiry into food security in Australia in November 2023.^{iv} The Australian Government response is pending.
- DAFF's Food and Grocery Sector Group (FGSG) is developing strategies and options to mitigate risks and maintain continuity of food supply in an emergency.
- The Office of Supply Chain Resilience (Department of Industry, Science and Resources) is investigating critical supply chain vulnerabilities, including discrete agricultural supply chain issues.
- The Australian Government has committed to the development of a national food security strategy aimed at improving supply chain resilience, minimising price volatility and reducing the cost of food to consumers. A national food council has been established to advise on the development of the strategy. Consultation on the strategy is planned for 2026^v.

What we have done:

- The Minister for Agriculture wrote to the Federal Minister for Agriculture, Fisheries and Forestry seeking support in advocating for supply chain vulnerability assessments for the dairy and fresh food sector and to improve data sharing with industries.
- The Minister for Agriculture met with the ACCC to advocate for further progress against their recommendations to improve market efficiency and transparency within dairy and fresh food industries.

What we are doing:

- The DPIRD is engaged with Australian Government counterparts to resolve supply chains issues and identify opportunities to collaborate and leverage opportunities to benefit NSW producers.

- The DPIRD will review the Australian Government response to the ‘Inquiry into food security in Australia’ once published.

What we can investigate further:

- The DPIRD will continue engagement with industry to identify actions to address market or supply chain transparency gaps, increase confidence in quality standards and feedback mechanisms, and improve consumer awareness of dairy and fresh food provenance, credentials and labelling.

2. Horticultural market access

Maintaining or improving access to existing markets or obtaining access to new markets typically requires investment by stakeholders through the supply chain to meet various trade rules and product requirements. Technical barriers affecting interstate and international trade typically impact production practices within the supply chain.

Feedback from horticultural industry stakeholders highlighted the benefits of improving market access for exports to achieve industry growth and help manage supply and demand imbalances, especially for some vegetable and fruit product lines given their more volatile production.

Finding:

The horticultural industry is exposed to large variations in supply relative to demand. This can have significant implications for the resilience of the sector and acts as a barrier to investment in new technology or innovations to lift productivity. Access to markets can help to buffer this supply volatility, however ongoing efforts to reduce technical market access barriers both interstate and internationally are needed.

What we have done:

- The DPIRD has constructed a \$9 million development of the Centre for Australian Horticulture Market Access (CAHMA) at the Central Coast Primary Industries Centre within the University of Newcastle’s campus in Ourimbah; this significant upgrade to existing facilities will enable the rapid transition of experimental outcomes to commercial practice, including product storage, packing and food safety research

What we are doing:

- The NSW Government and the DPIRD can progress efforts to simplify and improve processes that govern and track the movement of horticultural products between states and territories
- The DPIRD is a member of the national Plant Property Identification Governance Committee, which aims to establish nationally consistent arrangements to identify, locate and provide information about property used for agricultural plant production. These arrangements should support future end to end traceability arrangements and emergency management

What we can investigate further:

- Collaborate with Horticulture Innovation Australia on shared priorities to improve market access and resilience
- Identify opportunities for the DPIRD to align research programs to address technical market access barriers and inform market access negotiations

3. Access to a capable workforce

Labour is a critical input to the agricultural industry. Building a stronger, capable and more resilient workforce is important for driving productivity and responding to factors that will shape and transform the agriculture sector.

Feedback from industry indicated a broad range of challenges relating the workforce. In particular, improved data availability will be important to addressing fundamental skills, education and workforce shortage issues.

Finding:

Workforce issues are complex and include long term issues such as seasonal worker arrangements and the availability of appropriate worker accommodation. Efforts by industry and policy makers to address workforce challenges are made difficult by limited data availability. Building awareness of opportunities and upskilling the sector through investment in education and training programs is critical.

What we have done:

- The DPIRD is supporting delivery of key training and skills packages for the dairy and fresh food sector, including through Dairy START, a foundational skills program for new dairy employees delivered by Dairy NSW in partnership with Tocal Agricultural College
- The NSW Government has invested an additional \$5 million for the AgSkilled workforce training program until 30 June 2025, supporting more agricultural workers to access training and help them adapt to evolving industry demands and opportunities
- The DPIRD held a dedicated NSW Agricultural Workforce Roundtable with key stakeholders to discuss a range of workforce challenges and opportunities across the agricultural landscape
- The DPIRD released the NSW Primary Industries Workforce Strategy 2025-2030 in December 2025^{vi}. This outlines a vision for delivering profitable, sustainable, and innovative agriculture, forestry, and fishing industries in NSW. It focuses on building a capable, diverse, and resilient workforce for these industries. The strategy identifies priority areas including improving business adaptability and innovation, fostering workforce diversity across NSW, and strengthening careers and capabilities in primary industries.

4. Industry research and development needs

Research and development is a key driver of Australian agriculture and fisheries' capacity to support long-term food security, providing a reliable output of quality fresh foods into the supply chain. The productivity and sustainability of dairy and fresh food industries is also reliant upon an effective, sustainable biosecurity system to avoid threats to production systems from pests, weeds and diseases. Research and development will be required to address future food production challenges, where more food will be required to support larger populations at the same time as there will be increased competition for the resources that produce that food.

Feedback from consultation were that productivity related research and development links to other challenges faced by industry by reducing the risks associated with input supply and price volatility as well as mitigating the challenges posed by labour constraints.

Findings:

Achieving input efficiencies eases the challenges of cost and supply. This can be achieved by continuing research and extension of technologies aimed at lifting the efficient use of inputs in fresh food production systems and implementation models that support adoption. Demonstration sites which reflect local conditions can demonstrate technology innovation.

An effective biosecurity system is fundamental to maintaining productivity on farms. Australian food production systems are increasingly vulnerable to weed, pests and diseases that impact food production at the farm level and through the food supply chain, with perishable food supply chains especially susceptible. There is a need to ensure biosecurity programs remain fit for purpose in line with Australia's increasing risk exposure.^{vii}

The fresh food production system is interconnected to other systems including environment, transport, and health. Regulatory overlap exists where there is more than one regulator and/or multiple regulations governing similar outcomes. Together, government agencies can address the multiple economic, environmental and social impacts of unnecessary regulation.

What we have done:

- The DPIRD Farms of the Future program has been refocused and expanded to deliver state-wide capacity building programs to improve on-farm connectivity, skills and AgTech adoption.

What we are doing:

- The DPIRD is utilising its expertise to support dairy and fresh food producers through a broad program of research, development and extension of innovations on farm. This includes key input efficiency programs such as water use productivity and sustainability^{viii} and on-farm energy^{ix}
- The DPIRD has a program of regulatory review for agriculture, biosecurity, fisheries and food, and works with other agencies to enhance outcomes and minimise risks and unintended impacts of other regulatory frameworks on primary production
- The DPIRD is working on strategies to support NSW diagnostic and pathology capability, and vaccine research to meet future industry needs.

What we can investigate further:

- Work with industry to prioritise projects that target strategic outcomes for the dairy and fresh food sector, consistent with the DPIRD Research, Development and Extension Strategy 2025-2030.

- Further engagement with industry to identify regulatory barriers to the efficient operation and growth of dairy and fresh food industries to promote greater awareness and dialogue within the NSW Government, noting that many barriers may sit outside of the Minister's portfolio responsibilities.

5. Climate and natural resource vulnerability

Dairy and fresh food production in a changing climate represents a major challenge for these sectors. For example, reduced rain in winter and spring is impacting available water for crop growth, with less frequent but more extreme rain events, while warmer temperatures exacerbate droughts, heighten fire conditions and lead to changing pest and disease risks and livestock stress. Consequently, where and how much food can be produced in NSW and nationally will change, with substantial impacts on food supply chains.

Feedback from stakeholders highlighted the need to monitor how climate change is impacting food production systems at regional and local levels. In addition, stakeholders emphasised the role of government in assisting farmers understanding and investing in new technologies and management practices to move to future production systems and meet carbon targets.

Findings:

There is a need to monitor how climate change is impacting food production systems at regional and local levels. Data collection and access is key to detecting changes, assessing impacts, and supporting future climate R&D and modelling.

Fresh food industries experience various levels of vulnerability to climate impacts and differ in their ability to access carbon market opportunities. Seafood and horticulture industries identified exposure to climate change patterns while extensive livestock industries require better tools, technologies and support to assess and participate in carbon markets.

More affordable and simpler technologies to measure carbon baselines are required. Industry recommends increased demonstration and trials of emission reduction and sequestration technology. Upskilling and support with these technologies and business benchmarking is needed to equip producers with the information needed to make investment decisions.

Land and water resources are finite and competition for access to these resources is a key overarching issue for the fresh food sector. There is a wide range of views and judgments about priority land uses and conflict can arise over decisions taken in the past, those under consideration and anticipated in the future^x.

There is a need for an integrated approach to the monitoring and management of land-based activities to reduce threats to water quality in marine and estuary environments and the impacts this has on aquaculture and fisheries productivity.

Stakeholders see the planning system as a barrier to investment, with planning approvals difficult to navigate, costly and applied in an inconsistent manner.

What we have done:

- The Minister for Agriculture promoted to the NSW Minister for Water the need to improve water quality in waterways to prevent disruptions on aquaculture production, which has now been addressed via the release of the NSW Government 'Water Quality Governance Roadmap'.^{xi}

- The DPIRD has released the Marine Heatwave Plan for 2023/24^{xii} to support seafood industries' climate adaptation and heatwave efforts
- The DPIRD has published its Climate Vulnerability Assessments which has analysed and mapped, at a regional scale, the climate impacts for 28 commodities and 14 biosecurity risks across agriculture and fisheries^{xiii}
- The DPIRD has undertaken a significant body of work to allow integration and recognition of NSW agriculture industries' carbon farming activities by the Australian Carbon Credit Unit (ACCU) Scheme, including:
 - Input to the creation of 3 new ACCU methods which relate to the production of fresh food
 - Contribution to protocols to inform the development of new methods through DPIRD led Mitigation in Life Cycle Assessment project, for the dairy industry

What we are doing:

- The DPIRD is monitoring relevant international climate policy developments (including voluntary carbon markets) by contributing to United Nations led processes, protocols and standards
- The DPIRD is leading the first project of the Zero Net Emissions Agriculture CRC that focusses on developing guidance for on-farm Green House Gas accounting
- The DPIRD is developing an emission reduction roadmap for NSW primary industries, following extensive consultation and collaboration
- The DPIRD is working, in collaboration with the new Net Zero Ag CRC, on the development of metrics and equations for the accounting of several emission reduction methods (e.g., low methane emissions pastures, beef and sheep),^{xiv} which will allow industry efforts to be effectively accounted for and underpin eligibility for carbon credits
- The DPIRD involvement in research projects investigating potential mitigation technologies and practices, which generate data on efficacy to inform calculation of emissions abatement, and information on co-impacts of proposed mitigation measures
- The NSW Government continues to improve land use planning outcomes through the establishment and appointment of an independent NSW Agricultural Commissioner, Alison Stone and the ongoing work of the DPIRD

What we can investigate further:

- The CSIRO and the Bureau of Meteorology are collecting data and monitoring changes to prepare the seafood industry for potential impacts - and the DPIRD could build on this work by developing adaptation strategies, better collaborating with industry and citizen science on data collection and preparing for restoration work after marine heatwave events
- The DPIRD can build on its Climate Vulnerability Assessments in collaboration with industry, to provide fine scale analysis, test adaptation strategies, analyse the value of these strategies and conduct case studies, which would allow primary producers to better understand how climate change will affect their farming business and what benefits they might derive through mitigation and adaptation options
- The DPIRD has a range of projects investigating potential mitigation technologies and practices, that will generate data on efficacy to inform calculation of abatement, and information on co-impacts of the mitigation measures.

Appendix 1: Literature review

For the purposes of this report, the following definitions have guided engagement:

- **Fresh foods** include dairy, eggs, meat (poultry, beef, sheep, pork), seafood and horticulture and are characterised by a high level of perishability and minimal or limited transformation prior to the receipt by the final consumer.
- **Food production and supply** refers to the process of growing, processing, packaging, preserving, and transporting food that is safe and ready for human use. Production and supply are considered from the primary producer's perspective.
- **Food security** refers to the production and supply of safe and sustainable⁶ fresh food.

Six recent inquiries into Australian food, agriculture, or vulnerable supply chains, by state and federal governments, were reviewed, with the priority challenges and opportunities, identified from stakeholder submissions, collated (see Table 1).

Inquiry name	No. submissions
Food security in Australia – 2023 – Parliament of Australia	177
Food production and supply in NSW – 2022 – Parliament of NSW	77
Australia's maritime logistics system – 2023 – Productivity Commission	144
Vulnerable supply chains – 2021 – Productivity Commission	59
Perishable agricultural goods inquiry – 2020 – ACCC	35
National Freight and Supply Chain Priorities – 2018 – Commonwealth	127

Table 1: State and Federal Inquiries and number of submissions received

In total, this process captured the views of 29 industry organisations with a direct involvement in NSW fresh food supply chains (see Table 2).

General	Horticulture	Intensive livestock	Dairy and Extensive livestock	Seafood
National Farmers Federation	Australian Fresh Food Alliance	Australian Chicken Growers Council	Sheep Producers Australia	Seafood Industry Australia
Australian Food and Grocery Council	Citrus Australia	Australian Pork Ltd	Red Meat Advisory Council	NSW Seafood Industry Council
Australian Farm Institute	Fruit Growers of Victoria	Egg Farmers Australia	South Coast Beef Producers	Sydney Fish Market
Bioenergy Australia	Borrato Farms	Inghams Group	Cattle Council of Australia	Fisheries RDC

⁶ Note: 'sustainability' will be taken to refer to the productive capacity of the environment (fisheries, soil, water, landscape) but will not consider biodiversity, greenhouse gas emissions, carbon use, or recyclability of materials.

General	Horticulture	Intensive livestock	Dairy and Extensive livestock	Seafood
Murray Irrigation	Hort Innovation		Australian Beef Association	
NSW Farmers	AUSVEG		Dairy Connect	
			Australian Meat Industry Council	
			Meat & Livestock Australia	
			Australian Dairy Farmers	

Table 2: Industry contributors to the submissions reviewed by the DPIRD

In addition, a number of specific reports undertaken for industry or different federal or state government agencies were also included in the literature review. Further several specific industry strategic plans or policy documents were screened to increase the range of industries and issues covered. These sources included:

- Reshaping Australian Food Systems (CSIRO, 2023)
- Analysis of Australia's Food Security and the COVID pandemic (ABARES, 2020)
- Positioning for prosperity? Catching the next wave (Deloitte, 2014)
- Agriculture Industry Action Plan (DPI, 2014)

Further, where little information was captured for a specific industry, strategic plans or policy documents for that industry were screened to increase the range of issues covered:

- Australian Pork Ltd (Strategic Plan 2020-2025)
- Berries Australia (Strategic Plan 22-25)
- Citrus Australia (Policy and Advocacy)
- AUSVEG (Federal Election Priorities 2022)
- NSW Dairy Industry Action Plan 2021
- NSW Farmers' Annual Conference 2023 Motion Outcomes.

Appendix 2: Industry Roundtables

Five roundtables⁷ were organised by broad industry groups:

- Extensive livestock – cattle, sheep and goats
- Intensive livestock – pigs, poultry meat and eggs
- Dairy
- Seafood – commercial fisheries and aquaculture
- Horticulture – fruit and vegetables

Given the shared challenges faced by industry regarding workforce issues, a separate process was adopted through a separate ‘Workforce Roundtable’ bringing together representatives from across the agricultural supply chain.

Participants in this consultation process included peak industry organisations, industry research and development organisations, and processor and wholesale group representatives. The industry roundtables focussed on three tasks described in Figure 3 below.

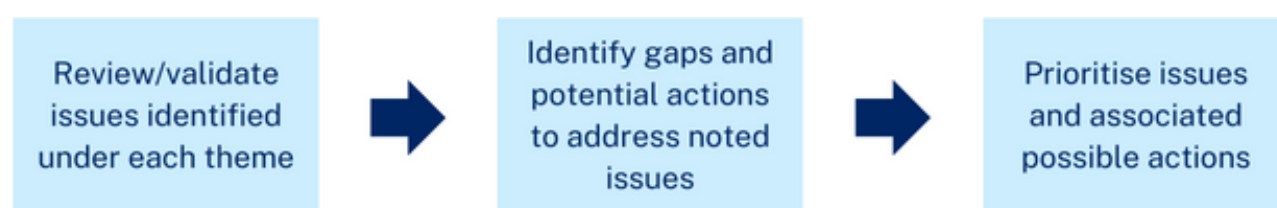


Figure 3: Roundtable objectives

Participants reviewed, discussed and added to the issues and solutions presented, with respect to their respective industries. They then undertook two prioritisation exercises on a virtual whiteboard:

- rating the issues identified from low to high, in terms of potential impact on production and supply.
- selecting, out of all the actions identified, five actions which would have most impact on production and supply.

Following the roundtables, the information was collated, summarised and then shared with participants for additional feedback and confirmation of the priority issues and associated actions.

A total of 42 peak industry associations were invited, with 37 (87%) attending the various roundtables, via 66 industry representatives

Invited industries

Aqua Association Inc

Egg Farmers of Australia

Aquaculture Research Advisory Committee

Family Fresh Farms

⁷ Given the immediate and acute challenges faced by industry regarding workforce issues, a separate process was adopted through a separate ‘Workforce Roundtable’, bringing together representatives from across the agricultural spectrum, and as such this roundtable was not restricted to just fresh food. This roundtable focussed on two areas: 1. developing a capable workforce through attraction, skills, and training, and 2. addressing business challenges such as workforce planning, safety, and housing.

Invited industries

Australia Livestock and Property Agents Association	Fisheries RDC
Australian Chicken Growers' Council	Freshmark (Fresh Markets Australia)
Australian Chicken Meat Federation	Hort Innovation Australia
Australian Eggs	Meat and Livestock Australia
Australian Fresh Produce Alliance	Ministerial Fisheries Advisory Council
Australian Livestock Markets Association	Murray Dairy
Australian Meat Processing Corporation	NSW Branch, Australian Workers' Union
Australian Mushroom Growers Association	NSW Cherry Growers Association
Australian Pork Limited	NSW Dairy Action Plan Implementation Panel
Australian Table Grape Association	NSW Farmers
AusVeg	NSW Irrigators Council
Berries Australia	NSW Seafood Industry Council
Citrus Australia	NSW Wine Industry Association
Clarence River Fishermen's Co-Operative	Oxley Island Dairy - Dairy NSW representative
Commercial Fishermen's Coop	Professional Fishers Association
Commercial Fishing Advisory Council	Red Meat Advisory Council
Dairy Australia	Seafood Industry Australia
Dairy NSW	Subtropical Dairy
EastAUSmilk	Sydney Fish Market

Appendix 3: Prioritisation of issues and themes for consultation

To manage the wide array of issues reported in the literature, issues were collated and organised into themes for the purpose of consultation and engagement.

Five priority themes were identified to focus discussion with stakeholders, accounting for their impact on the supply of fresh food in terms of production (pre farmgate), the supply chain (post farmgate), the number of fresh food industries impacted, and the likely scale of impact on businesses.

Near term substantive risks		Long term challenges and opportunities		
Theme 1	Theme 2	Theme 3	Theme 4	Theme 5
Confidence in input costs and availability	Strengthening market transparency	Production in a changing climate	Capturing productivity opportunities	Capable and available workforce

Three additional themes were elevated for discussion at the roundtables, by industry:

Additional themes prioritised by specific industries

Regulatory simplification (All)

Land use and access to resources (Dairy, Intensive Livestock, Seafood, Horticulture)

Market access (Horticulture)

The themes of *Land Use/Access to resources* and *Biosecurity and Food Safety*, though important, were set aside given the NSW Government's commitment to appoint an independent Agriculture Commissioner and an independent Biosecurity Commissioner and given the DPIRD's ongoing dedicated investments and intergovernmental commitments in these areas.

Other potential themes (such as *Transport and Logistics issues*) were noted but not prioritised as either the necessary actions to address the theme fall outside of the Minister for Agriculture's remit, industry did not elevate the rating during consultation or to avoid duplication with other agencies' programs and Australian Government areas of responsibility.

Detail of prioritised themes for consultation

Theme 1: Input costs and availability	Theme 2: Productivity opportunities	Theme 3: Production in a changing climate	Theme 4: Market transparency	Theme 5: Workforce shortages ⁸
Certainty and costs of critical inputs ⁹ from overseas	Overcoming productivity challenges	Working towards a carbon neutral industry	Improving quality and timeliness of market feedback to producers	Developing a capable workforce – skill, training and education
Certainty and cost of water	Adoption of existing knowledge and technology	Mitigating production shocks from extreme weather events	Enabling traceability systems for improved on-farm decision making	Business challenges – workforce planning, safety, housing and reputation
Certainty and cost of energy	Sustainable biosecurity system to mitigate productivity impacts	Increased monitoring of change and adaptation options Linking sustainability, agricultural emissions and community expectations	Product labelling	

Other noted themes (discussed where relevant to industry consultation)

Production shocks ¹⁰	Community expectations	Red Tape barriers	Land/ water use conflict	Transport and Logistics
Impact on critical information technology	Animal welfare	Providing policy certainty to promote investment	Protecting productive land and marine grounds to maintain production and industry confidence	Roads
Prevention	Sustainability	Simplifying regulation to promote investment	Ensuring a healthy environment	Ports
Preparedness				Rail
Diversification of supply chains				Interstate connections
Consideration of cumulative events				

Sustainable biosecurity and food safety

Production shocks ¹¹	Community expectations	Red Tape barriers	Land/ water use conflict	Transport and Logistics
Sustainable funding	Increasing weeds, pests and food safety control programs	Updating regulations to keep pace with threats	Increasing surveillance activities	Engaging more with industry

⁸ This theme was addressed through a separate, dedicated roundtable

⁹ Critical inputs: fertilisers, feed, pallets, packaging, machinery parts, chemicals, seeds, ingredients, tyres, vaccines

¹⁰ Extreme weather events (flood, fire, drought), Power outage, Cyber-attack, Pandemic, Biosecurity emergencies

¹¹ Extreme weather events (flood, fire, drought), Power outage, Cyber-attack, Pandemic, Biosecurity emergencies

Appendix 4: Dairy Industry Action Plan actions summary¹²

Completed actions

- Survey the use of service providers by farmers, with the aim of identifying gaps and barriers to the uptake of services.
- Reimagine the proposed Buy Fresh Local campaign to promote the value of the NSW dairy industry.
- Provide vocational education and training for farm employees, such as through the continuation of the Tocal College course subsidy.
- Identify high-priority vocational training needs for dairy farm employees and address those needs – including through identifying gaps in existing programs, and considering barriers affecting industry uptake
- Develop skills attraction programs to promote the transfer of relevant external skills into the dairy industry.
- Raise the issue of freight rule harmonisation with other jurisdictions.
- Undertake an infrastructure and utilities stocktake to identify needs and prioritise upgrades to support the dairy industry, for consideration as part of broader infrastructure and utilities planning. This should include consideration of heavy vehicle access.
- Consider options to promote youth in dairy. For example, this could include consideration of school-level training programs and investment in agricultural high schools.

Continuing actions

- Continue the DIAPIP group to oversee implementation of the Action Plan and publish regular reports on its progress.
- Continue to support co-investment and delivery of the dedicated Research, Development & Extension Plan
- Engage with and support dairy industry service providers so as to maximise their effectiveness in servicing the dairy industry.
- Promote dairy as a career and support pathways for entry.
- Support provision of and investment in farm best management practice extension, education and adoption.
- Support provision of and investment in farm business management practice extension, education and adoption.
- Develop standardised processes for milk testing at a national level.
- Support land use planning amendments and agency education to facilitate dairy development.
- Review and make recommendations regarding water-related regulation, including regulation regarding Murray Darling Basin issues, off-river water storage in coastal catchments and regulation related to harvestable rights limits in coastal catchments.

¹² The DIAP actions were revised by the Dairy Action Plan Implementation Panel at a workshop in November 2023 with the original 28 actions condensed into 19 broader themed actions.

- Continue to support and enhance dairy access to the Farm Innovation Fund, including by identifying the best methods of reaching dairy farmers and considering methods of extending access to the Fund to share farmers and lease farmers.
- Waive stamp duty requirements for dairy farmers that are purchasing their first dairy farm, and intend to continue operating it commercially.

Appendix 5: References

- ⁱ For further information on the dairy and fresh food sectors refer to the DPIRD Performance Data and Insights 2025. <https://www.dpi.nsw.gov.au/about-us/publications/pdi>
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- ⁱⁱⁱ Jobs and Skills Australia (2025) Food Supply Chain Capacity Study, <https://www.jobsandskills.gov.au/studies/food-supply-chain-capacity-study#studyreport>
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- ^v Department of Agriculture, Fisheries and Forestry (2025). Feeding Australia: A National Food Security Strategy. <https://www.agriculture.gov.au/agriculture-land/farm-food-drought/food/national-food-security-strategy>
- ^{vi} NSW Department of Primary Industries and Regional Development (2025) NSW Primary Industries Workforce Strategy 2025–2030. December 2025 https://www.dpi.nsw.gov.au/_data/assets/pdf_file/0006/1653810/NSW-Primary-Industries-Workforce-Strategy-2025-30.pdf
- ^{vii} NSW Farmers (2022) The House Standing Committee on Agriculture - Inquiry into food security in Australia Submission No. 143. https://www.aph.gov.au/Parliamentary_Business/Committees/House/Agriculture/FoodsecurityinAustralia/Submissions
- ^{viii} NSW Department of Primary Industries (2023). Agricultural Water Management <https://www.dpi.nsw.gov.au/agriculture/water>
- ^{ix} NSW Department of Primary Industries (2023) Energy. <https://www.dpi.nsw.gov.au/dpi/climate/energy>
- ^x NSW Agriculture Commissioner (2021) Improving the prospects for Agriculture and Regional Australia in the NSW Planning System. https://www.dpi.nsw.gov.au/_data/assets/pdf_file/0019/1361611/Improving-the-Prospects-for-Agriculture-and-Regional-Australia-in-NSW_NSW-Ag-Commissioner.pdf
- ^{xi} NSW Department of Climate Change, Energy, Environment and Water (2024), NSW Water Quality Governance Roadmap. https://water.dpie.nsw.gov.au/_data/assets/pdf_file/0003/617781/nsw-water-quality-governance-roadmap-2024.pdf
- ^{xii} DPI (2023) Marine Heatwave Response Plan 2023/24. https://www.dpi.nsw.gov.au/_data/assets/pdf_file/0008/1500956/DPI-Marine-Heatwave-Response-Plan.pdf
- ^{xiii} NSW Department of Primary Industries (2023) Vulnerability assessment. <https://www.dpi.nsw.gov.au/dpi/climate/climate-vulnerability-assessment>
- ^{xiv} NSW Department of Primary Industries (2023) Animals and livestock research. <https://www.dpi.nsw.gov.au/dpi/about-us/research-and-development/projects/animals>