

Food Sustainability, International Food Markets & Agriculture

GAP IV Annual Growth Summit

NSW Parliament House
Sydney, 19 -20 September 2013



The Institute of
Chartered Accountants
in Australia



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EXECUTIVE SUMMARY

Food Sustainability, International Food Markets and Agriculture was the theme of the 4th Australian Annual Growth Summit, hosted by public policy network Global Access Partners as part of its *National Economic Review* series, on 19-20 September 2013 at NSW Parliament House.

The National Economic Review is an annual event fostering outcome-based engagement on key issues, such as productivity, infrastructure, innovation, job creation and future economic growth. The format encourages open and constructive dialogue and generates unique networking opportunities for speakers, delegates and special guests.

The **2010 Summit**, the first in the series, called for a wider definition of growth and emphasised the benefits of using new parameters to measure economic and social progress. The **2011 Summit** examined the impact and opportunities of Australia's predicted population growth while the **2012 Summit** focused on productivity, public value and leadership.

The National Economic Review 2013 brought together a select audience of government executives, policy makers, industry and business leaders, academics and social commentators. The programme included speeches by **the Hon. Andrew Roberts MP**, Minister for Fair Trading, NSW Government, **Major General, the Hon. Michael Jeffery AC CVO**, 24th Governor General of the commonwealth of Australia, and **the Hon. Philip Ruddock MP**, Chief Government Whip. The international guest speaker was **Ms Clare Shine**, Vice-President and Chief Program Officer of Salzburg Global Seminar.

The 2013 Summit discussed the performance and potential of Australian agriculture in domestic and international markets. Investment, trade policy, infrastructure, transportation, research and development, and policies to support soil and water sustainability all emerged as major themes.

Forecasts suggest that global food demand may increase by 60% by 2050, with world food imports worth over \$750 billion per year. Asia will account for much of this growth, as China, India and the rest of the region develop apace.

Food may again become the next 'hot' commodity for Australia, and as a major global supplier of high-quality primary produce, we must grasp the opportunities arising in rapidly expanding regional markets.

Through food production and the international application of our agrarian research and expertise, Australia already contributes to the diets of 400 million people. Around 70% of our wheat, beef, dairy, mutton and lamb are exported overseas, earning over \$30 billion per year.

However, our climatic extremes and threats to our arable land and water resources pose formidable challenges. Future increases in food production will depend on improved productivity, smarter innovation and more sustainable use of existing resources.

SUMMARY OF KEY POINTS & RECOMMENDATIONS

- ▶ The Asian food boom will offer Australian agriculture profitable new markets if **farmers and exporters modernise their supply chains and tailor production to increasingly cosmopolitan tastes**. Australian food manufacturers need to add value to increase profit margins and product differentiation, rather than rely on exports of bulk, unprocessed material.
- ▶ **Promotion and advertising should be improved in Asia** to maintain Australia's reputation as a reliable supplier of high-quality, high-margin and environmentally sustainable food. A complacent attitude and lack of product differentiation are damaging Australian food exports in the region.
- ▶ Government and industry should **invest more in agrarian R&D, pursue and encourage regional and global free trade agreements and embrace foreign investment** without ceding control of the supply chain to overseas interests or governments.
- ▶ The Government needs to **reduce red tape**, simplify the plethora of existing support schemes and focus on sectors which can develop and sustain a competitive advantage. It should also **examine the effective food retail duopoly** exercised by Woolworths and Coles in the domestic market and promote more competition in the sector.
- ▶ **Efforts to pursue soil carbon schemes and develop cattle grazing, cotton production and other agriculture in the North** hold promise, but cannot be seen as automatic panaceas for economic growth or environmental benefit.
- ▶ **Environmentally sustainable practices can increase productivity, reduce input costs and improve the health of the soil**. Australia should recognise its natural capital of soil, water and vegetation as strategic assets and manage them holistically to maintain or regenerate a productive and resilient landscape. Wetlands and natural tree cover should be restored where possible, and farmers should be incentivised to act as stewards of the land.
- ▶ **Agriculture should embrace new mapping and monitoring technology to create the 'smart' farms of the future**. Sensor-laden aerial drones and field robots, combined with sophisticated data analysis and GPS tracking, can reduce labour and input costs, tackle weeds and increase efficiency.
- ▶ **There must be improved education** for Australia's farmers, consumers and children and encouragement for Australian superannuation schemes to invest in the sector over the long term.
- ▶ With problems regarding the viability of smaller farms, ageing farm operators and family succession, **the ownership of agricultural land may have to consolidate** to achieve scale and generate the investment required.

Keynote presentations and blogs by the Summit speakers and delegates are available at www.openforum.com.au/foodsustainability.

THE SUMMIT'S OUTCOMES & PROJECTS

GAP is coordinating several projects to ensure the Summit's long-term policy impact. These include the formation of advisory boards and taskforces to facilitate stakeholder engagement, online discussions through Open Forum and further consultations and research.

▶ **GAP Taskforce on Agriculture & The Environment**

GAP will conduct a major research and public policy investigation into agriculture and food sovereignty in Australia. It will host a **two-year taskforce** to continue the discussions begun at the 2013 Summit to spark growth and innovation in the sector. The taskforce will pursue a practical agenda to implement ideas generated by the Summit, with a particular focus on developing the North.

▶ **GAP Institute for Active Policy**

GAP continues to develop an **Institute for Active Policy**, an independent organisation supporting evidence-based policy-making. Utilising the 'Second Track' process, the Institute will improve and accelerate political decision making by creating sustainable networks of government, public service, business and civil society stakeholders. These networks will facilitate cross-disciplinary and collaborative approaches to the many regulatory challenges facing Australia.

GAP will report on the outcomes of these and other projects at the next *National Economic Review* Summit, planned for 18 and 19 September 2014 in Sydney.

▶ **2014 Growth Summit on Education**

The topic of the 2014 Summit will be Education. Select speakers and thought leaders will present their professional opinions and personal thoughts on the Government's priorities, Australia's international standing in academic research, teaching innovations, new technology, and the increasingly competitive marketplace for this ever more commoditised service.

The work of the two advisory bodies established in 2013, **GAP Taskforce on Leadership in Education** and the **Early Childhood Education Advisory**, will feed into the planning and content of the 2014 Summit.

GAP welcomes partnership proposals from interested organisations and individuals.



PARTNERS & SPONSORS

National Economic Review 2013 was organised by Global Access Partners Pty Ltd (GAP) – a not-for-profit public policy network which initiates high-level discussions on the most pressing social, economic and structural issues and challenges across a broad range of Australian economic sectors.

Through its pioneering '*Second Track*' Process programme of initiatives, GAP seeks to foster links between community, government and academia to streamline the process of 'fast-tracking' solutions to key issues, increase stakeholder participation in policy formation and decision making, and develop novel, cross-disciplinary approaches to regulatory problems by engaging key stakeholders in discussions and research.

The Summit was co-sponsored by **GAP's partners** whose role extends beyond the event through membership in the national consultative committees and advisory bodies facilitated by GAP.

Our thanks go to the following organisations for their contribution and foresight in supporting the development of the 2013 Summit:

- **Australian Centre for Health Research**
- **Edith Cowan University**
- **HP Enterprise Services**
- **The Institute of Chartered Accountants in Australia**
- **IAG**
- **Integrated Wireless**
- **National Australia Bank**
- **Open Forum**
- **SAP Australia & New Zealand**
- **UXC**

(for more information on the sponsors and partners, see App. 3, pp. 47-57)



KEYNOTE SPEAKERS

National Economic Review 2013 was held in the Legislative Assembly Chamber of the NSW Parliament House. **Opening Dinner** on 19 September and the **Plenary Sessions** on 20 September were structured under the following headings:

- **Introduction**
"What's in the Bowl of Rice? The Opportunities for Australian Agriculture"
- **Session One**
"The Dining Boom: How Do We Secure Our Place at the Table?"
- **Session Two**
"Our Kitchen is a Mess: Discussion on the Domestic Constraints on Food Production"
- **Lunch Session**
"Technology & Innovation: Our Newest Agriculture Export"

Each session began with thought provoking addresses from the keynote speakers, followed by a dialogue between delegates in a parliamentary style (*for a full programme, see App. 1, pp. 37-38*).

The keynote speakers and session chairs of *National Economic Review 2013* were (*in alphabetical order; for speakers' profiles, see App. 2, pp. 39-46*):

Mr John Brady

Chief Executive Officer
Kagome Australia

Mr Yasser El-Ansary

General Manager, Leadership & Quality
The Institute of Chartered
Accountants in Australia

Ms Catherine Fritz-Kalish

General Manager
Global Access Partners

Mr Bruce Gosper

Chief Executive Officer
Australian Trade Commission

Maj. Gen. Michael Jeffery AC CVO

24th Governor General of the
Commonwealth of Australia

Ms Lisa Middlebrook

Executive Manager
Policy & Strategy, Global Access Partners

Ms Claudine Ogilvie

Chief Information Officer
Ridley Corporation

The Hon. Anthony Roberts MP

Minister for Fair Trading
NSW Government

The Hon. Philip Ruddock MP

Chief Government Whip
Australian Government

Ms Clare Shine

Vice-President and Chief Program Officer
Salzburg Global Seminar

Ms Fiona Simson

President
NSW Farmers Association

Senator, The Hon. Arthur Sinodinos AO

Assistant Treasurer, Australian Government
Senator for New South Wales

Mr Peter Strong

Executive Director
Council of Small Business of Australia (COSBOA)

Prof Salah Sukkarieh

Professor of Robotics and Intelligent Systems
School of Aerospace Mechanical
& Mechatronic Engineering
Director of Research and Innovation
Australian Centre for Field Robotics

Dr Ian Watt AO

Secretary
Department of the Prime Minister & Cabinet

Mr Martijn Wilder AM

Partner
Baker & McKenzie



REPORT OF PROCEEDINGS

DAY ONE - Thursday, 19 September 2013

OPENING DINNER

**“What’s in the Bowl of Rice?
The Opportunities for Australian Agriculture”**

Ms Lisa Middlebrook
Executive Manager, Strategy & Policy
Global Access Partners

Ms Middlebrook welcomed guests to the opening dinner. She outlined GAP’s long-standing role in driving public policy discussions and the Summit’s focus on agricultural opportunities and development.

She thanked the event’s steering committee and sponsors before introducing its opening speaker, **Mr Bruce Gosper**, Chief Executive Officer of the Australian Trade Commission.



**KEYNOTE ADDRESS - “A new global food market:
Trends and opportunities for Australia”**

Mr Bruce Gosper
Chief Executive Officer
Australian Trade Commission

Mr Gosper discussed the benefits Australian agriculture can reap from Asian population growth and economic development. He recalled that Australia’s comparative advantage in extensive sheep farming helped it overcome American attempts to impose import restrictions on lamb in the late 1990s, and pledged to match vigorous marketing by industry with a firm diplomatic stance on free trade policy.

Australia must secure clear comparative advantages, develop and market superior products and ensure that Asian markets are opened to its goods to fully exploit the growing Asian food boom. Australia has struggled with agricultural trade restrictions for half a century, suffering in particular from the end of the UK-Australia Trade Agreement in 1973 when Great Britain joined the European Economic Community. This terminated privileged access to a major market it had taken for granted since colonisation and led to butter exports to Britain falling from 79,000 tonnes in 1973 to just 7,000 a few years later and apple exports declining from 86,000 tonnes to 27,000. The national dairy herd almost halved as a result, and fruit trees all over Southern Australia were felled.

Europe’s Common Agricultural Policy and similar protectionist measures elsewhere have cast a long shadow over Australian trade diplomacy ever since,

and the need for better market access has driven Australian policy initiatives as a result. These include the deliberations of the Cairns Group, a long campaign for liberalisation through the General Agreement on Tariffs and Trade and the World Trade Organization (WTO) and, more recently, a tapestry of bilateral and regional Free Trade Agreements to help Australia's neighbours pursue agricultural reform, address food security and reduce tariff and other barriers on Australian produce.

A number of foreign trade restrictions and policy-induced surpluses remain, but their baleful influence is declining. Economic and demographic shifts are transforming global consumption and a more demand-driven environment will be less subject to the trade distortions of the past. However, despite these welcome trends towards freer trade, Australia cannot afford to be complacent. The WTO's World Trade Report for 2013 reveals that Australia's comparative agricultural advantage has declined over the past twenty years. Modernisation and investment at home can reverse this trend, but improved branding, marketing and distribution in Asia are also required to compete against fierce local and international competition.

The United Nations Food and Agriculture Organization predict that global food production will have to rise 70% from 2007 to meet increased demand by 2050. Earth's population may rise by almost a third to over 9 billion people by that date, with city dwellers increasing from around half to 70% of the total and the built environment expanding by the equivalent of Greater London every month. Urbanites tend to buy more expensive foodstuffs, therefore sales of meat, fish and dairy products will all increase more than those of cereals, fruit and vegetables. Asia will account for almost three quarters of this growth, although regions such as Latin America will also see significant change.

While developing countries will modernise their agriculture to meet more of their domestic demand, the value of all food imports may still increase by over 170% by 2050. Asia's food and agricultural imports alone could rise from US\$120 billion to US\$590 billion, and government officers from Austrade, Department of Foreign Affairs and Trade, the Department of Agriculture, Australian Quarantine and Inspection Service, and Customs will help Australian firms to take advantage of these opportunities.

Mr Gosper declared that *'markets are dynamic, tastes change, and competition is stiff'*. He quoted Alison Watkins of Grain Corp who recently argued that *'our edge will be as a reliable supplier of high-margin, safe, green and high-quality food.'*ⁱ Australia must be the **'developing world's delicatessen' and avoid competing in a 'low-margin supermarket role'**.



Rebecca Dee-Bradbury of Mondelez International agrees that *'high value-added products will clearly be a significant part of market growth in Asia – convenient, natural, healthy, safe, tasty food from trusted and high-equity brands'*ⁱⁱ. Securing national access to a foreign market will not guarantee the success of Australian firms within it if they fail to meet consumer demand or market their goods effectively.

▶ China

Australia is well placed to capitalise on its reputation as a reliable supplier of high-quality, safe food in China. China's middle class is rapidly expanding and its consumers are more affluent, better informed

and more sophisticated than ever before. There is a growing focus on health, convenience, and premium brands with consumers developing a preference for western cuisines and demanding safer food. To avoid the choking congestion of their sprawling cities, more urban and time-poor Chinese consumers are purchasing food and groceries online, creating new distribution channels for Australian exporters. **Beef exports, for example, set a new record in August 2013 of over 16,000 tonnes, an extraordinary increase of 930% in a year.** A host of opportunities are emerging in dairy, meat, baby foods, seafood, fresh fruit, gift-packed food, fruit juices and drinks, honey, breakfast cereals, olive oil, health foods, ingredients and seasonings.

China is a major agricultural producer itself and will boost its own yields through modernised farming practices. Australia is assisting this effort through **the export of food-related services and technology**, establishing, for example, pilot hydroponic and aquaculture operations to bring fresh, low-mileage fish and vegetables to Shanghai. **Providing farming hardware and technology, expertise, quality assurance and food safety services** not only helps local authorities to achieve their food security goals, but embeds Australian companies in regional value chains, opening new markets for high-value inputs. Such value chains play an increasingly important role in Asia and the global economy, and represent **an important area of opportunity for the Australian food sector.**

Success has been achieved despite China's complex regulatory environment and ongoing trade restrictions, but Australian firms must also act to improve their position. Chinese markets are intensely price competitive, but Australian products tend to **pitch on value or quality** rather than price, even in comparison to rival imports from Europe and the US. Australia must reinvigorate its promotion and packaging to **advertise its origins** as Chinese consumers often struggle to identify

Australian made goods, despite looking favourably on its supposedly 'green and clean' image. Chinese retailers and distributors, in common with others across the region, report that Australian firms take their good reputation for granted and should be more proactive.

▶ Japan

Meat and Livestock Australia's eye-catching 'Genki' beef campaign in Japan offers **an example of effective advertising abroad** and is boosting Australia's reputation as a wholesome source of food. The advertising connects the Japanese concept of Genki, which encompasses energy as well as physical and mental wellbeing, with existing perceptions of Australia as a clean and healthy environment. Anxieties about food safety and security have understandably heightened in Japan following recent earthquake, tsunami and nuclear calamities and this, combined with its aging population, has increased the value of Australia's green and healthy brand.

There are further opportunities for supplying olive oil, cheese, seafood, health foods, processed foods, fruit, vegetables, nuts and wine to Japanese consumers.

▶ India

Sales in India's grocery retail market will rise from US\$9 billion today to US\$34 billion in 2016 while its organised hospitality sector will more than double, from under \$US2 billion to nearly US\$5 billion. Food imports are increasing by 30% per year, and Masterchef Australia is the most popular cooking show on Indian TV. Although Australia faces strong competition from major European and American firms, its brands are establishing a presence, as are franchises such as Muffin Break and Gloria Jean's. Further opportunities exist in wine, dairy, meat and snacks, cereals and biscuits.

▶ **Indonesia**

Despite the Indonesian government's commitment to greater self-sufficiency, its food imports are growing strongly, increasing by US\$5 billion – over 50% - in the past two years. As in other parts of Asia, grain consumption in Indonesia is declining relative to meat, dairy and eggs, especially amongst middle and upper-income earners and urban residents. As Indonesian tastes become more westernised, markets for baked goods, pizza, and other convenience foods are developing, and demand for wheat to produce flour is increasing. Indonesian authorities are driving domestic production of beef, sugar and rice, giving Australian firms a chance to provide agribusiness **expertise and technology**. Once again, however, a complacent attitude to marketing and promotion is holding Australian exports back. Indonesian importers of wine report that Australia is falling behind its French, Italian, South African and Chilean competitors, for example, and Australia must build stronger relationships, localise its packaging and to educate the market about Australian regional varieties.

▶ **Thailand**

The 2005 Thailand-Australia Free Trade Agreement reduced or eliminated tariffs on most Australian food exports, and Australia is now an important supplier of ingredients to the local food processing industry. Thailand has a **fast growing premium and convenience processed food sector**, offering scope for the supply of gourmet foods, chocolate and confectionary, fruit juice, jams and spreads, pasta products, snacks and dairy foods. Unfortunately, Thai distributors also report that Australian suppliers have missed out on opportunities through **slow responses to enquiries**. New Zealand, South African, French and Korean producers have all conducted recent, large-scale, multimedia

campaigns promoting their brands, and Australia is suffering by comparison.

▶ **North and South America**

North America will continue to be an important region for Australian exports, and new markets are opening in Latin America. New agreements have seen Australian beef become a mainstay in Chilean supermarkets, for instance, despite Chile being a major beef producer itself.

The Australian Trade Commission is developing a National Food Brand in collaboration with the Australian Food and Grocery Council to improve international marketing. It is also mapping out production and supply chains in key markets to help Australian exporters, while Austrade is working to secure its share of international agricultural investment.

Foreign direct investment should be welcomed to improve sustainability and efficiency in our existing agricultural zones and develop new farms in the North. Such investment can commercialise new technologies and crops, modernise food processing and improve distribution networks to keep Australia competitive. It will also integrate Australia with global value chains and complement our outbound investment in Asia.

Just as Germany is renowned for its well-engineered cars, so Australia should become known as a **premier producer of food**. As opportunities around the world emerge, smart and active brand positioning must accompany Australia's diplomatic efforts to secure a level-playing field. Australia's agricultural and food industries must change to satisfy the changing needs of new and growing markets. Australia cannot coast to success.

Miss Middlebrook thanked Mr Gosper and introduced the event's international guest speaker, **Ms Clare Shine**, Vice-President and Chief Program Officer of Salzburg Global Seminar.

INTERNATIONAL GUEST SPEAKER
"Finite planet, infinite potential: How can we spice up our tired old recipes?"

Ms Clare Shine
Vice-President and Chief Program Officer
Salzburg Global Seminar

Ms Shine underlined the importance of global free trade, noting that Australian and other foreign wines are now commonly available even in France.

Salzburg Global Seminar was founded in the aftermath World War II to encourage greater community input into government reconstruction plans, and its mission remains as important as ever.

Ms Shine questioned whether the current economic system can deliver food sustainability and increase long-term wellbeing for all and called for change in line with enlightened self and national self-interest to reduce global inequality. She remembered that political leaders were unfamiliar with concepts such as 'polluter pays', biodiversity, the precautionary principle and climate change before the first Rio environmental summit in 1990 when governments were dominated by strong agricultural ministries with junior environmental counterparts.

Over the past 25 years, however, successive treaties and heightened environmental awareness have reconfigured law, investment, risk analysis, land management and community engagement, and new issues, such as the low carbon economy, are in turn entering the public consciousness. However, Ms Shine cautioned that many of the same problems have been endlessly aired since the foundation of

the Club of Rome in 1967 and for all the lofty goals and talk of cross-sector coordination and multi-stakeholder platforms, the same barriers of fragmentation, rigidity and inefficiency remain.

Government departments must collaborate towards the same broad goals, rather than pursue mutually contradictory and self-defeating policies which can facilitate, for example, the introduction of environmentally damaging and invasive species in the pursuit of short-term profit. Ms Shine urged experts from different fields to escape their 'personal echo chambers' and communicate at events such as this Summit to build mutually productive networks and pursue holistic solutions as no one group monopolises power or truth. She argued that solutions can often be found on the 'fault lines' of problems and emphasised the crucial importance of incentives to drive effective action.

She encouraged experts to consider 'who they couldn't talk to, who they didn't know how to talk to, and how they are blocked from achieving their objectives' to analyse how

consultation can be widened and progress achieved. The terminology, training and codes of professionals trained in agriculture or the environment are so different, for example, that there is little common ground or language to facilitate communication between them. The gulf between managed and wild eco-systems must also be closed in practice as well as theory, as farm productivity rests on the health of the wild. The dynamic resilience of our eco-systems is degraded by the mismatch between our short-term, linear thinking in pursuit of profit and our long-term goals of sustainability. The rigid distinction between



different types of environment must be eased and imagination, sustainability and justice embraced as the new building blocks of change.

She sought new protections for whistleblowers to encourage transparency, and criticised the average 17-year gap between the publication of scientific evidence on an environmental problem and effective action to tackle it. The WTO allows national governments to pursue measures to protect environmental and human health without falling foul of its free trade agreements, but many countries in Europe and elsewhere have been reluctant to impose them.

Conflicts over scarce food, water and energy may arise as populations grow and countries develop. A range of innovative and integrated solutions are required, including the wider use of technology and smarter and more flexible approaches to governance. We must improve our 'risk literacy', investigate natural accounting and ultimately change politics itself, rather than merely tinker with individual policies. Australia must demonstrate global leadership as the head of the G20 in 2014 and turn today's risks into tomorrow's opportunities. **Australia has pioneered the incorporation of ecological issues into public policies** and, through the export of this knowledge and new techniques, can become an agent of wider change.

Asked if Australia should concentrate on securing its domestic food supply, given its poor soil quality, unreliable rainfall and vulnerability to climate change, and export its food technology instead of food itself, Ms Shine argued that countries with healthy food surpluses have more ability to steer the global community in the right direction and are capable of exporting both produce and know-how.

Mrs Catherine Fritz-Kalish
General Manager
Global Access Partners

Mrs Catherine Fritz-Kalish, General Manager of Global Access Partners, thanked the hosts, speakers, guests and sponsors before drawing the evening to a close.



OPENING DINNER SUMMARY

- ▶ The Asian food boom will offer Australian agriculture profitable new markets if farmers and exporters modernise their supply chains and tailor production to increasingly cosmopolitan tastes. Australian food manufacturers need to add value to increase profit margins and product differentiation, rather than rely on exports of bulk, unprocessed material.
- ▶ Promotion and advertising should be improved in Asia to maintain Australia's reputation as a reliable supplier of high-quality, high-margin and environmentally sustainable food. A complacent attitude and lack of product differentiation are damaging Australian food exports in the region.
- ▶ Providing farming hardware and technology, expertise, quality assurance and food safety services embeds Australian companies in regional value chains, opening new markets for high-value inputs.
- ▶ Foreign direct investment should be welcomed to improve sustainability and efficiency in our existing agricultural zones and develop new farms in the North.

DAY TWO - Friday, 20 September 2013

WELCOME & INTRODUCTION

Ms Lisa Middlebrook
Executive Manager, Strategy & Policy
Global Access Partners

Ms Lisa Middlebrook welcomed attendees and offered her thoughts on improving Australia's agricultural performance. Although figures suggest that Australia is producing more than ever before, there are many anecdotes suggesting that bumper crops are left to rot in the fields for want of markets or viable prices. Modern technology and genetic engineering are increasing yields and making foods safer, but their spread is opposed by environmentalists. Figures also vary as to how much Australian consumers must spend on food compared to other OECD residents. What is certain is that the populations of both Australia and the world will continue to grow and more food will have to be grown on a shrinking acreage.

She then introduced the keynote address by the **Hon. Anthony Roberts MP**, Minister for Fair Trading in the New South Wales Government.

KEYNOTE ADDRESS

The Hon. Anthony Roberts MP
Minister for Fair Trading
NSW Government

Minister Roberts praised GAP's Annual Growth Summit as *'an increasingly important and recognised event, where some of the sharpest minds in the country gather to discuss issues of national importance'*. He then outlined the vital part agriculture will play in 'Making NSW Number One Again' and stressed the importance of productivity,

innovation and market solutions to the new Federal Government.

Society must support a sustainable food system that satisfies community needs. The concept of sustainability must not be captured by fringe groups or become a byword for economic stagnation or technological regression. Sustainability is more than the protection of our precious environment, important though that is, but must also encompass the long-term viability of our key industries and the communities they support. This is particularly important where generations of farming families have nurtured their properties, as their practices and produce are inextricably interwoven with the communities to which they belong.

The NSW Government has partnered with primary producers to develop an Industry Action Plan for agriculture and returned agriculture and rural communities to the heart of Government. Upon its election in 2011, the Coalition State Government restored the Department of Primary Industries under the Hon. Katrina Hodgkinson MP and, shortly afterwards, created a new Office of Agricultural Sustainability and Food Security to identify the state's strategic farmland. The Government's scientists, researchers and extension staff are collaborating with farming communities to develop more productive and climate specific crop varieties, helping farmers increase yields while cutting water use.

The Government is also educating the consumers of tomorrow. Students are introduced to the world of agriculture through the LandLearn NSW programme, and the Ministry of Fair Trading works with schools to improve awareness of the markets which dominate our daily lives.

Food sustainability and consumer affairs both rely on healthy markets, product and service innovation, the free flow of reliable information and limited and appropriate legislation to maintain fair trade.

The Australian Consumer Law prohibits deceptive conduct and misleading representations, and the NSW Government has been active in labelling disputes regarding the true country of origin of food, olive and palm oil standards and the provenance of free-range eggs. These issues are of increasing concern to consumers, who often pay a premium for goods which are less than what they purport to be. CHOICE recently prepared a 'Super Complaint' on mislabelled free-range eggs for NSW Fair Trading to investigate, for instance. As the Government works to open doors overseas, it must also secure a level-playing field at home, but such labelling issues should not be allowed to raise new 'soft' trade barriers to limit competition.



When questions were invited from the floor, one speaker noted that the USA has recently adopted more stringent country of origin requirements on its food labels, making clear to consumers where their food was actually grown, rather than merely packaged.

The Minister agreed that the Federal Government could take a similar approach, recalling that frozen vegetables have been labelled as coming from New Zealand when they had merely passed through the country from elsewhere. Consumers should be given all the information they need to make informed choices and the NSW government will continue to raise the point at federal councils.

He went on to agree that clear disclosure of the true sugar and salt content of processed food would encourage consumer healthier choices and reduce diabetes and obesity. Minister Roberts hoped that enlightened market forces would encourage greater transparency, with the public favouring foods with honest product labelling. The State Government has cracked down on false and misleading statements – such as cheap imported lamp oil being sold as expensive extra virgin olive oil – and the Minister discussed how the State Government has successfully required petrol stations to display their true, non-discount, prices to motorists.

Mrs Catherine Fritz-Kalish then introduced **Dr Ian Watt AO**, Secretary of the Department of the Prime Minister and Cabinet, to chair the opening session.

SESSION ONE

“The Dining Boom: How Do We Secure Our Place at the Table?”

Session Chair

Dr Ian Watt AO

Secretary

Department of the Prime Minister and Cabinet

Dr Watt stressed the importance of what he termed the '*wining and dining boom*' which, unlike the mining boom, is only just under way. The Brookings Institute estimates that Asian growth will triple the global middle class to 1.7 billion by 2020. China alone will account for 43% of the projected increase in demand for food up to 2050. Many nations, in Asia and elsewhere, are eager to compete for these new opportunities, and Australia can only succeed by reliably delivering the high-quality, value-added goods which the rapidly growing Asian middle class demand.

Domestic agricultural productivity has plateaued since the mid-1990s, due to droughts, floods and cyclones and ageing water, transport and energy infrastructure. Insufficient investment and research have also held back the nation's farms. Northern Australia is endowed with resources which remain underutilised in part because it lacks the required water, energy and transport infrastructure to sustain agriculture there.



Re-energising productivity and tailoring products to developing markets will maintain international competitiveness, while better water and soil management will strengthen resilience and secure higher crop yields. Australia must **maximise the benefit from the \$700 million already spent every year on research and development** and maintain its pest and disease-free status to underpin its foreign sales and marketing. Australia should pursue ever stronger trading ties in the region, tackle remaining technical barriers and continue to advocate free trade.

Long-term agricultural policy goals will deliver certainty for industry and encourage investment in larger-scale and new technology. The new Federal Government will release two white papers in the coming year on the economic potential of the agro-

foods sector and Northern Australia, and it is an exciting time for those interested in these issues.

Dr Watt then introduced the session's speakers and welcomed **Major General, the Hon. Michael Jeffery AC, CVO** and current chairman of Soils for Life, to the podium.

"Exporting Australia's agricultural know-how"

Maj. Gen. Michael Jeffery AC CVO **24th Governor General of the** **Commonwealth of Australia**

General Jeffery warned that although the world may need to almost double food production by 2050 to feed a projected population of 9 billion people, **it is losing 1% of its agricultural land to urban sprawl every year.** Soil degradation and the depletion of irreplaceable geological aquifers in China, India, Africa and the Middle East will also threaten yields. Australia can produce more food through increased grazing in the North, but its main contribution could be **the export of its expertise in technology and soil, water and bio-diversity management.** Australia must invest in research and integrate its policies to restore a 'great Australian landscape' which is fit for purpose, be it wilderness, agriculture, water catchment, urban living or mining.

As well as increasing its yields, Australia must improve the nutritional value and mineral density of its food to reduce the \$15 billion cost of obesity, cardio-vascular disease and diabetes every year. Lengthy storage and transport times may affect food's nutritional value, and General Jeffery recommended a return to eating in harmony with the seasons.

He traced the decline in the resilience of Australia's eco-systems and called for better management of our soil, water and vegetation. Despite the excellent work of many innovative farmers and scientists,

Australian soils are losing their carbon and declining in health. Southern Australia is becoming more arid, Western Australia is plagued by erosion and dry land salinity, and climate change is producing more erratic and unreliable rainfall for all. Damage to rivers and streams, high evaporation and run-off rates and a reduction in available ground water in the South are all causing problems, but General Jeffery remained confident of Australia's ability to reverse these adverse trends.

Soils for Life launched *'Innovations for Regenerative Landscape Management'*ⁱⁱⁱ in 2012, a report which showcased 19 farming enterprises generating productive and sustainable environmental and economic outcomes. General Jeffery stressed the importance of improving soil carbon rates as the foundation of water retention, bio-diversity and agricultural production. However, Australia's dry land agricultural soils rarely have soil carbon rates above 1.5%, a half or even a third of the natural total. Acidification through chemical inputs also affects about half of Australia's productive land and prevents the planting of acid sensitive crops. Fortunately, the adoption of intensive cell grazing, no till and pasture cropping, composting and organic fertilisers can all enhance fertility.

Soil health and water use are inextricably linked, as every gram of soil carbon can retain up to eight grams of water. Healthy soils act as a sponge and release their moisture gradually, but half of Australia's rainfall evaporates before it can penetrate the ground and only 2% is saved in our dams. Many rivers run below their flood plains and the loss of 80% of our wetlands has severely affected our water system's health. The Murray Darling basin once had 40,000 wetlands, and regenerating these would retain 100 ggalitres or more.

Vegetation is the link between soil health and productivity. It adds organic matter to the soil,

improving its structure and water retention, and protects against evaporation, run off and erosion. We must revegetate the surface of the planet and create bio-diverse cultures once more. Trees are as vital in cities as they are in the country, reducing temperatures through shade and photosynthesis and improving the environment for all.



Clear policy goals should be set as a 'light on the hill'. The Government must recognise soil, water and vegetation as key strategic assets and manage them in an integrated way. Farmers should be rewarded fairly for their produce and as stewards of the agricultural landscape on behalf of the nation. Science must be refocused by asking the right questions of it and developing **a national information collection, analysis and distribution chain** for policy makers, farmers, scientists and universities. We must reconnect urban Australia with its rural roots.

Regenerating Australia's landscapes demands concerted action across the whole of government, including education, health, mining, indigenous affairs, regional development, trade and national security, as well as the departments responsible for agriculture and the environment.

There is enough grass in Northern Australia to double the national cattle herd to 50 million and the lack of surface water across Kimberley, Northern

Queensland, Catherine and parts of the Northern Territory in the dry season could be solved by tapping into aquifers which are replenished in the wet season. Alongside the economic benefits and employment potential for the indigenous population, the cattle would reduce the amount of grass burned in wildfires every year and the billion tonnes of carbon dioxide released into the atmosphere as a result – more than all of Australia’s coal-fired power stations, industry and motor vehicles combined. Camel farming for Arab markets could also be developed, with feral animals managed through controlled watering points under satellite observation.

In closing, General Jeffery quoted the observation of F.D. Roosevelt that *‘the history of every Nation is eventually written in the way in which it cares for its soil’*^{iv}. This remains as true as ever today. To save ourselves, we have to save our soil.

“Fulfilling the big opportunities – beyond Agri-food industry fragmentation”

Ms Claudine Ogilvie
Chief Information Officer
Ridley Corporation



Dr Watt introduced the second speaker, **Ms Claudine Ogilvie**, Chief Information Officer of Ridley Corporation Ltd, who offered a brief overview of her company, Australia’s largest supplier of animal feed. She argued that Australia should be internationally competitive in animal

feed, given its high proportion of arable land to population, large food surplus and relative proximity to Asia.

She focused on measures to strengthen the Australian agro-food industry, defining ‘brand Australia’ as *‘clean, green, sustainable and safe’* and emphasising that Asia is prepared to pay a premium for safe, traceable, nutritious food. She supported **strong industry standards to protect Australia’s consumers at home and reputation abroad** and noted the dire consequences of avian flu outbreaks and the bovine spongiform encephalopathy scare in the past. She welcomed the return of agriculture to the top of the Government agenda after many years of relative neglect, but acknowledged Labor’s National Food Plan, manufacturing competitiveness task force and the Senate inquiry into food processing sector as ‘steps in the right direction’, alongside the new Prime Minister’s emphasis on manufacturing innovation and agricultural exports.

Just as agriculture should benefit from bi-partisan support, the industry should unite to offer a single and powerful voice in defence of common interests such as market access and free trade. Ms Ogilvie called for agriculture to remain an integral part of free trade negotiations with China and for business to adopt an ‘end to end’ view of its supply chain. Relatively high labour costs mean that **Australia must compete by adding value**, using cutting edge technology, increasing automation, improving supply chains and generating a premium for its products.

The Government can encourage the food industry by **cutting red tape and bureaucracy, improving tax write-offs** for the depreciation of machinery and **encouraging foreign investment**. Foreign capital has contributed to the nation’s development since its foundation and has accounted for a quarter of the total investment in Australia since the dollar’s floatation in 1983. The US, Britain and Japan still

account for half of the total, while China, despite the concern its interests have provoked, still accounts for only 4%, mainly in mining and energy. Australia's lack of a home grown multinational agri-business company is telling, and better regulation, cooperation and development is required to help Australian firms take the global stage.

"Food Sovereignty"

Ms Fiona Simson
President
NSW Farmers Association

Ms Fiona Simson, President of the NSW Farmers Association, addressed the issues of food sovereignty and foreign ownership of agricultural land. She outlined her family's long association with farming and declared herself *'unashamedly passionate'* about its future. Food security and sovereignty became issues in the recent election campaign while the Lowy Institute's survey of public opinion in 2012^v found that 81% of Australians oppose foreign ownership of Australian farmland. Ms Simson welcomed a debate on the topic, but maintained that **most farmers recognise the usefulness of foreign investment in developing production**. Australia's agricultural exports are currently dominated by unprocessed wool and grains, with strong demand for some of our processed meat. Investment is required to add value to our produce.

She acknowledged the difficulty of differentiating between desirable foreign investment and unwanted foreign control of the food chain and agreed that key strategic assets should remain in Australian hands, although these are still to be defined. NSW grain farmers would place eastern ports and grain silos at the top of their list, for example, and the proposed purchase of Graincorp – and its valuable water licenses - by multinational

Archer Daniel Midlands is one of the first decisions the new Treasurer Joe Hockey will face. However, she repeated that **foreign investment is the only way to deliver the \$600 billion required to modernise and increase agricultural productivity to meet increasing global consumption**.

An OECD index^{vi} finds Australia the 17th most restrictive country in terms of statutory regulation of foreign investment, behind China, Indonesia, Canada and New Zealand, but ahead of the US, Great Britain and Argentina. New Zealand, for example, requires any purchase over five hectares to be referred to the provisions of its Overseas Investment Act, while in the US it is compulsory for all foreigners who acquire or transfer an interest in agricultural land to report that transaction within 90 days. The US Federal Government does not restrict ownership of farmland by foreigners, but about half its states do, with some forbidding foreign entities entirely. Canada's foreign investment review process is similar to Australia's and seeks to ensure it benefits the nation, while some Canadian provinces have their own restrictions on purchasing farmland.

Ms Simson conceded that the community expects a different standard to apply to land sales to foreign entities, particularly when they involve change of use from farm land to open cast mines. It is reasonable therefore for foreign investors to meet some form of **national interest test**, but the Foreign Investment Review Board operates under a mantle of secrecy, applying a vague set of criteria to large purchases of land encompassing national security, competition, other government policies, economic impact and the 'character' of the investor. The benchmarks employed are obscure and the decisions kept secret in most cases. Ms Simson supported **a national register** to allow the community to understand the level of foreign investment, given that this information is now only available through individual title searches or

outdated Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) figures.

She urged the consideration of a range of new solutions. Chinese-owned Kimberley Agricultural Investment (KAI) recently leased 13,400 hectares of land in the Ord River area of Western Australia and will invest more than \$700m to increase production for export, for example. KAI must meet development milestones, including irrigation and an Aboriginal development package, and the scheme offers a promising model to replicate elsewhere. The lease arrangements allow for significant investment without ownership being lost to the nation.

The interest of foreign companies in Australia is a credit to our country's potential and shames domestic investment funds reluctant to invest for want of short-term gains. Ms Simson hoped that increased foreign investment will spark domestic interest because, as Samuel Johnson once observed, "*Agriculture not only gives riches to a nation, but the only riches she can call her own*"^{vii}.

DISCUSSION

Dr Watt thanked the speakers and opened the debate to the floor.

One guest worried that a million Australians are '*food insecure*', although the planet already produces enough food to feed 12 billion people. The increase of food-related heart disease, cancer and diabetes is weighing down the health system, and the speaker warned against exporting these problems to Asia alongside processed food. She linked the population's health with that of the land and urged a holistic, rather than purely economic, approach. She argued that the profit-based global food system is failing and that an 'agro-ecological'

approach could double global food production while reducing poverty.

Another delegate noted that the Soils for Life report highlighted the barriers dissuading farmers from adopting more ecologically friendly practices. Many are 'locked in' to the existing system through commercial contracts and bank loans and, as they would suffer financially if they changed, the speaker argued that the Government should subsidise such transitions.

The difficulty of overcoming ingrained cultural attitudes was acknowledged, as older farmers often encourage their children to cleave to traditional ways. There were appeals for the burden and inconsistency of regulation to be reduced and calls for targeted tax breaks, grants for rehydrating wetlands and more assistance for land care. Urban Australia must be connected to its rural roots, with projects such as school gardens teaching children about food production and the soil.

Another participant recalled that pork exports to Singapore boomed from zero to \$150 million in 1999 when the market was liberalised. He remembered that pork farmers had actually opposed efforts to enter the country as they saw it as a waste of time. Australian pork is not marketed in Singapore as 'clean and green', as this is seen as the preserve of New Zealand, Denmark and Canada, but as 'fresh', and the speaker argued that Australia's supposed selling point of 'clean and green' isn't as effective as some people assume. He also criticised the length of time it takes to remove trade restrictions on food, despite the best efforts of Austrade.

Another speaker praised the viewing of land, water and vegetation as strategic assets, but warned that, to be effective, such ideas must be backed by solid evidence. She cautioned against undue expansion in the North as its soils are highly vulnerable to erosion and northern developers must bear in mind the

appalling salinity problems caused by overuse of ground water in the Murray Darling basin in the past. Furthermore, while grazing cows may reduce carbon emissions by limiting wildfires, the methane they produce in the process is a far more potent greenhouse gas.

Others wondered about the seriousness of the threat posed by open cast coal mining to farmland in New South Wales.

Fiona Simson thought the key to minimising its impact lay in balance, planning and strategy. Australia needs both food and energy, but there are no planning requirements for agricultural land and none is set aside to protect it from mining or urban sprawl. The assessment process should balance mining, farming and community interests for the good of the nation as a whole.

The next contributor observed that mankind has considered itself in crisis since the dawn of history, and was optimistic that problems caused by humans could be cured by people too. He raised a question about the influence of the exchange rate on Australian competitiveness.

Dr Ian Watt cautioned against expensive and futile government attempts to artificially stabilise the dollar at any particular level, believing that the best protection against a high or changing rate is a strong, productive and resilient economy.

Another expert critiqued elements of General Jeffery's speech. Although farmers are concerned about the landscape, government grants in the 1960s encouraged rampant land clearing, and disc ploughing soon caused serious erosion. The situation has improved since then, and dust storms now stem from deserts, rather than poorly managed farms. 90% of farmers use no till techniques, with many employing double retention strategies to minimise water evaporation and protect the soil.

Most graziers maintain a minimum cover of grass, and river sedimentation from agricultural erosion is minimal compared to the past. Both sides of politics have shown interest in soil carbon sequestration, but there is little independent evidence of its utility. Australia has the most weathered soils in the world, and extreme wetting and drying cycles in farming areas mineralises the carbon in the ground.

A university representative backed these comments, noting that a metastudy of 53 carbon sequestration schemes had found their potential to be very limited. He backed the reduction of nitrous oxide emissions from fertilisers as an alternative.

General Jeffries agreed that many farmers make significant efforts to protect the land, but argued more could be done, particularly in tackling salinity in Western Australia. He believed the effectiveness of soil carbon schemes could be improved by adopting best practice on suitable soils, and again appealed for greater research and development and fair deals for farming communities.

The following speaker backed development in the North to reduce welfare dependency among the Indigenous population, although she did not underestimate the challenges involved. Indigenous people are a small percentage of the Australian population, but form a majority in the North and their interests must be taken into account.

Dr Watt noted that the new Government has moved Indigenous policy into the Prime Minister's office to signal its importance and Mr Abbott's personal commitment to the issue. He closed the session by reminding attendees that Australia enjoyed its recent mining boom without suffering significant inflation due to its floating rate of exchange. He repeated the Government's intention to produce white papers on Northern Development and agricultural productivity and pledged further reforms. He thanked the speakers for their

eloquence and the audience for their attention, before Lisa Middlebrook brought the session to a close.

SESSION ONE SUMMARY

- ▶ Australia must maximise the benefit from the \$700 million already spent every year on research and development and maintain its pest and disease-free status to underpin its foreign sales and marketing.
- ▶ Government and industry should invest more in agrarian R&D, pursue and encourage regional and global free trade agreements and embrace foreign investment without ceding control of the supply chain to overseas interests or governments. The Government needs to reduce red tape, simplify the plethora of existing support schemes and focus on sectors which can develop and sustain a competitive advantage.
- ▶ While 81% of Australians oppose foreign ownership of Australian farmland, most farmers recognise the usefulness of foreign investment in developing production. Foreign investment is the only way to deliver the \$600 billion required to modernise and increase agricultural productivity to meet increasing global consumption.
- ▶ Efforts to pursue soil carbon schemes and develop cattle grazing, cotton production and other agriculture in the North hold promise, but cannot be seen as automatic panaceas for economic growth or environmental benefit.
- ▶ Environmentally sustainable practices can increase productivity, reduce input costs and improve the health of the soil. Australia should recognise its natural capital of soil, water and vegetation as strategic assets and manage them holistically to maintain or regenerate a productive and resilient landscape. Wetlands and natural tree cover should be restored where possible, and farmers should be incentivised to act as stewards of the land.
- ▶ Agricultural science must be refocused by asking the right questions of it and developing a national information collection, analysis and distribution chain for policy makers, farmers, scientists and universities.

SESSION TWO

“Our Kitchen is a Mess: Discussion on the Domestic Constraints on Food Production”

Session Chair

Senator, the Hon. Arthur Sinodinos AO
Assistant Treasurer, Australian Government
Senator for New South Wales

Lisa Middlebrook introduced the Session Chair **Senator, the Hon. Arthur Sinodinos AO**, Assistant Treasurer and Liberal Senator for New South Wales.

Senator Sinodinos praised GAP for bringing public and private stakeholders together to forge innovative solutions to national problems, and hoped state and federal government would take note. The Abbott Government recognises the importance of proper consultations to define problems, generate solutions and secure long-term stakeholder support.



The new administration is committed to developing agriculture in general and the North in particular and believes the food boom can be as successful as the recent mining bonanza. Boosting agrarian exports will require substantial investment, a review of regulations, partnership between public and private sectors and an understanding of how infrastructure underpins growth. Senator Sinodinos was confident that northern expansion will deliver growth and offer a gateway to Asia.

He then introduced the session’s opening speaker, **Mr John Brady**, Chief Executive Officer of Kagome, a large Japanese owned tomato processing company operating in Australia.

“Infrastructure”

Mr John Brady
Chief Executive Officer
Kagome Australia

Mr Brady offered a ‘cold shower’ of realism to temper the optimism expressed elsewhere, given the high costs of producing and processing food in Australia. He accepted that successive state and federal governments have paid lip service to agriculture and that Australia should be well placed to increase exports to Asia, given its variety of land, widespread irrigation and history of innovation, but he painted a bleak picture of the reality. He saw farmers ‘walking off the land’, food processors closing their plants or moving offshore and imports of finished goods proliferating on domestic supermarket shelves. He said a number of his customers, including McCains, National Foods, Heinz, Windsor Farms and Rosella, had shut or relocated plants or closed down entirely in recent years.

Mr Brady noted that only six of the top 50 Australia exporters to Asia are food producers, and just one exports food already packaged for consumption. Australian food exports are still raw materials in the main, like its mining products, rather than value-added finished goods. On the domestic market, he complained that dairy farmers receive paltry farm-gate prices for their milk, with the major supermarkets selling it at cut rates as loss leaders. At a global food forum held in Melbourne in April, one speaker claimed that conditions for farmers were the worst for 15 years, and the stock price for the Australia Agriculture Company has fallen 8.5% over

the past year, while the Australian stock market has increased by 12.9%.



High-input costs are crippling Australian food manufacturing, with utility and taxation costs adding \$50 an hour above a worker's wage, according to Terry O'Brian, Managing Director of Simplot Australia. Horticulture represents 18% of Australia's farm production, but Australia ran a trade deficit of \$697 million in fruit, nuts and vegetables in 2010/11. Mr Brady called for vision from the nation's policy makers to redress the situation and help farming replace mining as the next substantial and sustainable boom.

He blamed the inertia of federal leaders and a short election cycle for **the lack of a long-term view**. He complained of rising water prices and appealed for even more water to be released from the Murray Darling river system for agriculture. He said the efficiency of his tomato production ranks with that of California, and well ahead of European producers, and argued that Australian agriculture can compete on world markets, given sufficient scale, despite its higher labour costs.

He highlighted three factors as crucial to competitiveness – increased scale of production,

evidence-based farm and irrigation management and a concentration on 'value added' products. Although he eschewed direct subsidisation, he asked for support in five areas, including greater access to **competitively priced water**, the extension of **broadband connectivity** to rural regions, reduced costs and expanded services for **rail freight**, government payments to cover **50% of all R&D** and capital expenditure and federal campaigns to **educate consumers** and increase pride in Australian food.

"The retail duopoly"

Mr Peter Strong
Executive Director
Council of Small Business of Australia

Senator Sinodinos then welcomed **Mr Peter Strong**, Executive Director of the Council of Small Business of Australia (COSBOA), who was forthright in his condemnation of the duopoly Coles and Woolworths exercise in the food and related retail industry. Their overwhelming domination of the market works to the detriment of suppliers, consumers and small competitors, and they fail to act with the responsibility their domination should demand. Despite community concerns, their power is only increasing as they win further concessions denied to smaller companies due to their vigorous lobbying and unrivalled access to the corridors of power.

Mr Strong was outspoken in his disdain for the 'hegemony' which controls what Australians see, eat, drink, hear and buy in the nation's bland, uniform and ubiquitous shopping malls. He criticised the duopoly's collaboration with major retail landlords such as Westfields, Stocklands, Centro and the Queensland Investment Corporation to exclude competition, and called for **planning reform**. He noted that the interests of the retail duopoly often coincide with those of the Shop, Distributive and

Allied Employees' Association regarding issues such as penalty rates, whose increase only drives smaller shops – with non-unionised workforces – out of business.

These companies use their overwhelming buying power to exploit farmers, food producers and sub-contractors, such as cleaners and trolley collectors, with desultory 'take it or leave it' contracts. Mr Strong warned that high-profit targets set by the Woolworth board will only make things worse. He saw a worrying disconnect between the senior management of these companies and their field staff, who are tempted to indulge in underhand practices to meet onerous sales targets knowing that the parent company will disclaim or ignore any responsibility for their actions, given the unwieldy size of these firms.

COSBOA is pursuing discussions with 'the big two' to present a true picture of Australian retail competition to the Government. Mr Strong raised the possibility of a compulsory code of practice, but doubted its possible effectiveness, given the massive legal resources which would be ranged against any small supplier or farmer brave enough to take action against the duopoly.

He observed that their '*scorched earth policy*' is not an inevitable function of big business and praised the banks for reforming their previously rapacious treatment of smaller firms. He called for **changes in contract law** to protect smaller shops from major landlords and perhaps a Royal Commission to investigate the current situation. COSBOA will continue to fight for the self-employed and smaller retailers, and Mr Strong closed by reiterating his demands for fair access to the market place, security and fairness in contracts and the right to pursue due process in law without being overwhelmed by the '*might of the few*'.

"Investing in agriculture's future: The role of natural capital in enhancing productivity"

Mr Martijn Wilder AM
Partner
Baker & McKenzie

The session's final presentation was delivered by **Mr Martijn Wilder AM**, a partner in Baker and McKenzie, who further explored the economic importance of a healthy agricultural environment. He defined natural capital as soil, water, landscapes and fisheries, remembering that some fish stocks in Canada have irrevocably collapsed due to over exploitation. Threats to Australia's natural capital include climate change, weather instability and habitat destruction, with clashes between farmers, environmentalists and miners for available land.

He accepted that all stakeholders, including farmers, seek healthy landscapes and saw the issue as how to achieve this common goal. Farmers require a consistent income and farmers and investors alike seek long-term capital growth which damaging actions for instant profit will only impede. He noted that Australian superfunds fail to invest in agriculture, while foreign investors are keen to promote sustainability – although this term is often abused to garner goodwill without firm definitions or concrete evidence-based action behind it. He urged better water use and crop management, but warned that the impact of soil carbon schemes may be overstated by its champions.

He favoured **greater energy efficiency to reduce farming costs and environmental inputs**, observing that Low Carbon Australia had helped Queensland abattoir company JBS cut its energy costs. He agreed that farming research and development and transitions must be properly financed and saw promise in new products such as bio-aviation fuels. The coming food boom will benefit countries with less fossil-fuel intensive agriculture, more reliable

production, and access to healthy land and soils. To maintain a competitive edge in the global food market, Australia must develop and adopt more productive, sustainable and input-efficient farming practices and meet the challenges of land degradation, climate change and rising fuel and fertiliser costs.

DISCUSSION

Senator Sinodinos then opened the floor for questions and comments.

The opening contributor agreed that major companies exploit small food producers by offering desultory terms while driving retail competition out of business through cut-throat prices. He also urged measures to prevent collusion between major firms and trade unions to damage the interests of smaller companies.

Senator Sinodinos reassured him that such matters will be considered by the Government's competition policy review and a balanced view taken of their costs, impacts and unintended consequences.

Another delegate was convinced that Australia could gain a competitive advantage by switching to more sustainable farming practices and practising first-class soil management. She acknowledged the cost of acidic soils to grain producers in Western Australia and called for long-term, patient investment in sustainable farming for the national interest, rather than short-term, profit-centred and environmentally damaging '*land grabs*'.

Mr Wilder felt the key lies in changing people's view of the business case for sustainability. Farmers understand its importance, but the Government must support adjustment in an inherently conservative industry. He warned that many international pension funds have stringent

environmental criteria and will spurn investment in Australia if their standards aren't met. Agriculture has long cycles, inherent instabilities and much of the investment growth lies in growing land values, rather than the food produced. He called for clearer public policy on foreign investment but acknowledged that whoever buys the land cannot take it away.

Issues of demand were then raised, given that much of the discussion had centred on supply. A member saw consumer apathy as injurious to the public interest, but cautioned that few urban, coastal Australians know or care about how their food is produced. He hoped that demand could be mobilised to generate change, not least through clear and honest labelling of food. Children and adults alike should be educated about the food on their plate and a 'fair go' for all suppliers and retailers should be guaranteed. State and federal governments must show courage and leadership, and the NSW Government is ready to meet the challenge.

A farm worker called for greater internet access in rural areas to encourage the use of smart technology and digital services.

In response, several other speakers observed that Australian mobile access was often poor even in affluent areas of major cities. There were calls to incorporate human capital in calculations of natural capital to improve the sustainability, resilience and future of the farming workforce.

John Brady repeated his call for improved internet provision in country areas, given that many IT firms are willing to supply individual pieces of imported kit, but not the integrated data solutions farmers require. Agricultural companies must create their own solutions, using internet, GPS and sensor technology, to pursue productivity gains.

Mr Wilder agreed that connectivity is required for cutting-edge farm management and underlined that energy use decreases once smart metering is used.

Others called for **the voice of the self-employed** to be heard in the education and training sector. School leavers and the unemployed should be encouraged to start their own businesses as well as pursue alternative routes, as research shows that personality traits such as independence of mind and a streak of stubbornness which may cause problems in schools are ideal for entrepreneurs.

The next speaker agreed that soils in South Australia are very fragile and lack underground water and rivers to replenish them. However, techniques such as no till farming have been widely adopted allowing recent droughts to be weathered without damage to the soil. He agreed that farming, as with any other business, should invest in its own success, rather than rely on hand-outs from the public purse, but stressed the importance of improving less fashionable aspects of infrastructure such as **road quality and trucking regulations** to improve productivity. While some regulation is important to protect public safety, today's truck operators are entangled in a great deal of unnecessary red tape. He also called for reduced delays and expense in certifying old and new chemicals alike for agricultural use.

A farmer based in South West Victoria said his business balanced high-input fertilizer-based systems with some permanent vegetation and agro-forestry to achieve carbon neutrality.

Senator Sinodinos agreed that greater public consultation and bi-partisan support could encourage support for such schemes. New farming practices should be complimentary, increasing both production and environmental benefits, and he called for a **'coalition of the willing'** to allow all stakeholders to further their interests within the same broad policy.

Mr Wilder agreed that coalitions of interests must be mobilised, observing that the climate change debate, for one, is much less 'toxic' beyond Australia and the United States.

A financial services professional argued that tighter definitions of sustainable agriculture and proof of its effectiveness are required to encourage substantial investment in it.

Mr Wilder remembered that the Wentworth Group has advocated a 'natural capital' balance sheet to underline the value of natural systems and the loss incurred in their destruction. However, he warned that achieving a carbon balance on individual farms was difficult without pursuing energy efficiency or capturing methane from landfills.

A subsequent participant agreed with John Brady about the extent of unwarranted optimism in the discussion, but strongly disagreed with most of his prescriptions. He believed claims that Australia could become Asia's food bowl to be unsubstantiated, as the farmers who will supply Asia will be Asian themselves. The Asian continent has untold agricultural potential and as its nations grow wealthier, their agricultural productivity will increase. As people leave the land for the cities, increasing economies of scale and mechanisation will boost productivity to western levels. Fewer farmers produce more food because subsistence peasant agriculture is extremely inefficient and even simple modernisation like the replacement of wooden ploughs with steel and better seeds for future crops will greatly improve yields. **Australia can compete in certain specialised areas, provided it has a competitive domestic market;** but this cannot be achieved by special and expensive subsidies whether or not they come in the form of extending the NBN for small numbers of rural farmers or running expensive freight train services for their goods. Such provision would merely distort competitive pressure in the domestic market, and misallocate resources.

Rather than return to paternalistic government intervention, Australian agriculture requires **smarter regulation** to create more competitive domestic markets and drive more efficient and innovative Australian companies able to compete abroad.

Another contributor returned to the idea of educating consumers to buy more Australian made goods. However, as Australians spend 10% more of their gross income at the supermarket than Americans, and Coles and Woolworths are 10% more profitable than their American counterparts, the bulk of the benefit would be pocketed by the big supermarkets rather than their small suppliers.

One member who has worked with the Australian cotton industry since 1986 offered his thoughts on comparative advantage in agriculture. He asked why cotton production had not already spread to the North if it was profitable and practical to do so. Although cattle production could be intensified there, he was skeptical about the potential for other crops in the region. **The wider problem is not developing land to grow produce, but finding people willing to pay realistic prices for food.** He raised the example of Shepperton, an area with 100 years of proven productivity and excellent soils, which is losing its fruit trees through lack of viable markets.

Another speaker noted that plans for cotton trials in the North had reached a late stage of development a decade ago before the company involved had been taken over and the project dropped.

More information on the fate of the Rosella Company was offered, noting its relaunch under new ownership and its current processing of Australian onions in Tasmania, rather than Pakistan as before.

The dearth of graduates in agriculture was then lamented, with six jobs available for every suitably qualified graduate today. Agriculture involves a wide range of professionals beyond the farming

community, but where seven universities once focused on the subject, only one does now. Agriculture is three times more productive than would be the case without past spending on research and development, but there has been no increase in the real value of funding from the public purse since the 1970s. Academic stipends are too low, and career paths too uncertain, to encourage graduates to enter the sector, which has contributed to its plateauing productivity since the 'green revolution' of the 1970s. The new Government has pledged to increase research and development spending and recognises its importance to Australia.

Senator Sinodinos observed **a mismatch between the traditional qualifications** available at institutes of further education and **the needs of modern mechanised farms**, and felt that education should attune itself to the new realities.

Others noted that the workforce in many agricultural areas comes from overseas on '57' visas and undermines the long-term employment prospects for Australians.

There was further criticism of the assumption that a true market operates for global food. Just as there is a domestic retail food duopoly, four grain traders control between 75% and 90% of all grain sales around the world. There is one company which controls 25% of commercially traded seed, with 80% controlled by six firms. Free trade agreements are negotiated in secret, and one delegate criticised their lack of transparency and democracy. She blamed the current system for leaving a billion people overweight and 700 million short of food. She opposed the Trans-Pacific Partnership as it might allow foreign companies to exploit Australia and appealed once more for these fundamental issues to be addressed.

Senator Sinodinos reminded her that parliamentary processes exist to review treaty and trade agreements and ensure democratic scrutiny and debate.

The issue of succession planning on farms was raised, as older farmers are living and working longer, giving little opportunity to their children to take over and introduce new techniques.

Another speaker felt that farmers' families should be left to organise their own succession, without outside intervention, but it was argued that stamp duty imposes a significant financial penalty if farms are passed from parents to children while the parents are still alive, rather than after death.

Another speaker warned against undue pessimism as the agricultural sector is competitive, successful and viable in many areas. Given its inherently higher labour costs, Australia should concentrate on products where labour can be replaced by capital, such as wheat, sheep, beef and cotton. Policy makers should identify further areas of competitive advantage and improve them by increasing their scale. Australia has 130,000 farmers, which is far more than it needs, and rather than subsidising outdated farm structures, **aggregation should increase efficiency** and major capital investment encouraged from abroad.

The final speaker from the floor warned that although economic reform has lifted hundreds of millions of Chinese people out of poverty, their newly found relative affluence is creating an epidemic of type 2 diabetes as Chinese consumers know little about the effects of western food. In conclusion, he offered an example of Australian technological innovation in the shape of a device which can identify plants by the light they reflect and allow weeds to be sprayed with pinpoint accuracy by large booms to reduce herbicide, fertiliser and water use while increasing productivity

Sen. Sinodinos thanked everyone for their contributions and brought the session to a close.

SESSION TWO SUMMARY

- ▶ To maintain a competitive edge in the global food market, Australia must develop and adopt more productive, sustainable and input-efficient farming practices and meet the challenges of land degradation, climate change and rising fuel and fertiliser costs.
- ▶ Given its inherently higher labour costs, Australia should concentrate on products where labour can be replaced by capital, such as wheat, sheep, beef and cotton. Policy makers should identify further areas of competitive advantage and improve them by increasing their scale.
- ▶ The Government should examine the effective food retail duopoly exercised by Woolworths and Coles in the domestic market and promote more competition in the sector.
- ▶ There must be improved education for Australia's farmers, consumers and children and encouragement for Australian superannuation schemes to invest in the sector over the long term.
- ▶ Education should attune itself to the new realities as there is a mismatch between the traditional qualifications available at institutes of further education and the needs of modern mechanised farms.
- ▶ With problems regarding the viability of smaller farms, ageing farm operators and family succession, the ownership of agricultural land may have to consolidate to achieve scale and generate the investment required.

LUNCH SESSION

Mr Yasser El-Ansary
General Manager, Leadership & Quality
The Institute of Chartered
Accountants in Australia



Mr Yasser El-Ansary, General Manager of Leadership and Quality for the Institute of Chartered Accountants, offered a vote of thanks, before introducing **Prof Salah Sukkarieh**, Professor of Robotics and Intelligent Systems and Director of Research and Innovation at the Australian Centre for Field Robotics.

"Technology and Innovation: Our Newest Agriculture Export"

Prof Salah Sukkarieh
Professor of Robotics and Intelligent Systems
School of Aerospace Mechanical
& Mechatronic Engineering
Director of Research and Innovation
Australian Centre for Field Robotics

Australia is an international leader in the automation of outdoor machinery. The Australian Centre for Field Robotics collaborates with partners in mining, stevedoring, transportation, defence and environment management to develop and deploy this technology. Robotics can improve efficiency

and safety, reduce labour costs and increase productivity, and Prof Sukkarieh offered a host of agricultural examples in his speech.

Agriculture robotics have a significant following in the United States and Europe where industry, government and university collaborate to address key productivity and biosecurity issues with robotics and intelligent systems. In the USA, robot 'swarms' are being developed to plant seeds and monitor growth, for example, while a 'slugbot'^{viii}, developed by the University of West England's Intelligent Autonomous Systems Laboratory, can travel along rows of vegetation to remove and digest slugs to recharge its own battery. Denmark's 'Hortibot' can navigate among crops to spray them and strawberry growers in the USA are looking to use robots for harvesting to cut labour bills.

New crop planting practices must be adopted to accommodate these machines, as robotic manipulators are still not as dextrous or precise as human hands. As a result, Comprehensive Automation for Speciality Crops^{ix}, a \$25 million funding programme involving several American Universities, is working on 'augmented automation' for workers harvesting apples and grapes.

Prof Sukkarieh outlined his partnerships with Land and Water Australia, Meat and Livestock Australia and the Australian Weeds Research Council to detect invasive species and monitor crops. Small commercially available pilotless helicopters can be loaded with sensors and cameras and partnered with intelligent software to detect and spray aquatic weeds or identify invasive Mesquite trees on grazing land. A project in partnership with the Australian Research Council for modelling swarm behaviour involved capturing a hundred locusts from a swarm, fitting them with tiny retro-reflectors and tracking them with a strobe light equipped UAV. Another scheme with BioSecurity

Queensland^x detects dangerous South American fire ants around Brisbane by detecting the heat of their mounds in winter with sensors slung under a manned helicopter.



Robots can muster cattle in a paddock more calmly than men on motorised buggies, while a robot originally designed with BAE Systems in Britain has been used on almond and apple farms to measure water conductivity, ground ions and tree health and build 3D whole-of-farm models at centimetre accuracy. Data fusion and machine learning algorithms can undertake the identification of individual fruit, calculate crop yields and model tree architecture. A new grant from HAL will develop a solar powered robot for large-scale vegetable farms able to destroy weeds without herbicides with its manipulator arm.

Although many current programmes focus on gathering crop intelligence to support more informed decision-making by farmers, the technology provides a strong base for autonomous pruning, thinning and harvesting. The use of Google glasses to give farm labourers information about which crops are ready to pick is also being investigated.

In the longer term, robotics can transform agriculture through autonomous robot operations which can prune, spray and map simultaneously. More funding is required to turn this vision into

reality but projects in other industries prove their potential for farms. The Port of Brisbane has 34 autonomous shuttle carriers moving freight without direct human operation 24 hours a day, for instance, significantly reducing fuel, labour and lighting costs. Automated harvesting, when it becomes fully practical, will offer predictability, fuel efficiency and reduce environmental impacts while centimetre mapping will improve land stewardship by monitoring changes and impacts in minute detail. Engineers are being attracted into agriculture as a result and the subject is finding its way into rural school curriculums.

In answer to questions, Prof Sukkarieh agreed that service robotics could have applications in health care. In terms of engagement with industrial partners, he said that 80% of his funding comes from commercial research grants over 3 to 5 years. These technologies could also be used to control feral animals, such as the 10 million wild pigs currently roaming the bush. Unmanned drones can carry thermal sensors to detect animals, although arming them would have obviously ethical and legal implications. Attempts to automate sheep shearing have proved less practical, however.

PRESENTATION SUMMARY

- ▶ Agriculture should embrace new mapping and monitoring technology to create the 'smart' farms of the future. Sensor-laden aerial drones and field robots, combined with sophisticated data analysis and GPS tracking, can reduce labour and input costs, tackle weeds and increase efficiency.

The Hon. Philip Ruddock MP
Chief Government Whip
Australian Government

Miss Middlebrook then introduced **the Hon. Philip Ruddock MP**, Federal Member for Berowra, to offer a summary and vote of thanks.



Mr Ruddock praised the discussion for its fealty to the Summit's original objectives, thanking each speaker in turn. He noted the interest in China and elsewhere in Australian milk and wine, acknowledged the work of OzAid and the CSIRO in Africa in developing dry land farming and agreed that the export of Australia's expertise will prove as important as its agrarian goods. He then thanked Global Access Partners for running the Summit and congratulated Lisa Middlebrook on her birthday.

Mr Ruddock reiterated the Abbott Government's commitment to pursue agrarian productivity and expansion in the north before bringing proceedings to a close.



THE STEERING COMMITTEE

The Steering Committee of business and government executives and academia worked for a year on the Summit's programme, goals and objectives, topics for discussion and a continuity strategy, to ensure outcomes are achieved beyond the event. The members of the Steering Committee for *National Economic Review 2013* were (in alphabetical order):

Mr Stephen Bartos

Executive Director, Canberra
ACIL Allen Consulting

The Hon. Neil Batt AO

Executive Director
Australian Centre for Health Research

Mr Alan Bennett

General Manager & Vice President
HP Enterprise Services

Ms Olga Bodrova

Senior Research Analyst, Global Access Partners

Mr Alan Castleman

Chairman, Australian Unity (Emeritus)

Ms Sasha Courville

Project Director, Natural Value Strategy,
Finance and Strategy, NAB

Mr Justin Crosby

Policy Director, NSW Farmers

Ms Laura Eadie

Research Director, Sustainable Economy Program
Centre for Policy Development

Mr Peter Fritz AM

Group Managing Director, TCG Group

Mrs Catherine Fritz-Kalish

General Manager, Global Access Partners

Prof James Guthrie

Head of Academic Relations
Institute for Chartered Accountants in Australia

Mr Warwick Hearne

Consultant, Executive Solutions

Ms Helen Hull

Editor, Open Forum & First 5000

Mr David Masters

Corporate Affairs Manager
Microsoft Australia

Ms Lisa Middlebrook (Chair)

Executive Manager
Global Access Partners

Ms Claudine Ogilvie

Chief Information Officer, Ridley Corporation

Mr Alok Ralhan

Director, Australian Business Foundation

Prof Tony Peacock

Chief Executive Officer, CRC Association Inc

Mr Vivek Puthucode

Head of Industries, SAP ANZ

The Hon. Philip Ruddock MP

Chief Government Whip
Australian Government



PARTICIPATING ORGANISATIONS

129 delegates from the following **95 organisations** participated in *National Economic Review 2013* (for the full list of delegates, see App. 4, pp. 58-64):

- ▶ 21 think
- ▶ A Faster Future
- ▶ ACIL Allen Consulting
- ▶ Amdocs
- ▶ Australian Centre for Field Robotics
- ▶ Australian Centre for Health Research
- ▶ Australian Council of Deans of Agriculture
- ▶ Australian Financial Review
- ▶ Australian Food and Grocery Council (AFGC)
- ▶ Australian Food Sovereignty Alliance
- ▶ Australian Manufacturing forum
- ▶ Australian Trade Commission
- ▶ Austrian Consulate General Commercial Section
- ▶ Baker & McKenzie
- ▶ Bondi Labs
- ▶ Cape York Institute
- ▶ Cedar Meats Australia Pty Ltd
- ▶ Centre of Policy Development
- ▶ Chairman
- ▶ Champ Ventures Pty Ltd
- ▶ Choice
- ▶ Commercialisation Australia
- ▶ Commonwealth Bank
- ▶ Cooperative Research Centres Association
- ▶ Council of Small Business of Australia (COSBOA)
- ▶ Country Women's Association
- ▶ CSIRO
- ▶ CSIRO Animal, Food and Health Sciences
- ▶ Deakin University
- ▶ Department of Agriculture
- ▶ Department of Communications
- ▶ Department of Finance
- ▶ Department of Prime Minister and Cabinet
- ▶ Edith Cowan University
- ▶ Enzyme Group
- ▶ Executive Solutions
- ▶ Fauna and Flora International Australia
- ▶ First Steps Count Inc.
- ▶ Global Access Partners
- ▶ Growth Farms Australia
- ▶ Herbert Smith Freehills
- ▶ HP Enterprise Services, South Pacific
- ▶ IAG
- ▶ IBM Australia
- ▶ Ignite Energy Resources Pty Ltd
- ▶ Institute for Sustainable Futures, University of Technology, Sydney
- ▶ Integrated Wireless
- ▶ International Capital Growth Services
- ▶ International Centre for Complex Project Management
- ▶ James Horne and Associates
- ▶ James N. Kirby Foundation
- ▶ Jigsaw Farms
- ▶ Kagome Australia
- ▶ Landcare
- ▶ Macquarie University
- ▶ MADGE Australia Incorporated
- ▶ McCullough Robertson Lawyers
- ▶ MinterEllison
- ▶ Moraitis
- ▶ MSCI
- ▶ National Australia Bank
- ▶ National Retail Association
- ▶ Navy Health
- ▶ National ICT Australia
- ▶ NSW Farmers Association
- ▶ NT Farmers Association

- ▶ Office of the Hon. Anthony Roberts MP,
NSW Minister for Fair Trading
- ▶ Office of the Hon. Barry O'Farrell MP,
NSW Premier
- ▶ Optus
- ▶ Origin Securities Pty Limited
- ▶ Perpetuity Capital
- ▶ PricewaterhouseCoopers
- ▶ Queensland Farmers Federation
- ▶ Ridley Corporation
- ▶ Salzburg Global Seminar
- ▶ Shearwater Solutions
- ▶ Six Black Pens
- ▶ SmartNet
- ▶ SPC Consulting Group
- ▶ Stipa Native Grasses Association
- ▶ Sydney Food Fairness Alliance
- ▶ TCG Group
- ▶ The Australian
- ▶ The Crawford Fund
- ▶ The Futures Project
- ▶ The Strategy Associates Pty Ltd
- ▶ University of Melbourne
- ▶ University of Sydney
- ▶ University of Sydney Business School
- ▶ University of Technology, Sydney
- ▶ Ventureonauts
- ▶ Victor Perton Global Partners
- ▶ Youth Food Movement of Australia



APPENDICES

PROGRAMME

Day One – Thursday, 19 September 2013

Strangers' Function Room, NSW Parliament House
Macquarie St, Sydney

6:30pm _____ *Pre-Dinner Drinks, Registration*

7:00pm _____ Dinner

**“WHAT’S IN THE BOWL OF RICE?
THE OPPORTUNITIES FOR AUSTRALIAN AGRICULTURE”**

Introduction

Ms Lisa Middlebrook
Executive Manager, Strategy & Policy, Global Access Partners

Keynote Address

“A new global food market: Trends and opportunities for Australia”
Mr Bruce Gosper
Chief Executive Officer, Australian Trade Commission

International Guest Speaker

“Finite planet, infinite potential: How can we spice up our tired old recipes?”

Ms Clare Shine
Vice-President & Chief Program Officer, Salzburg Global Seminar

9:25pm _____ Closing Remarks

Ms Catherine Fritz-Kalish
General Manager, GAP

9:30pm _____ *Close*

Day Two – Friday, 20 September 2013

Legislative Assembly Chamber, NSW Parliament House
Macquarie St, Sydney

8:15am _____ *Registration*

8:55am _____ Welcome and Introduction

Ms Lisa Middlebrook
Executive Manager, Strategy & Policy, GAP

Keynote Address

The Honourable Anthony Roberts MP
Minister for Fair Trading
New South Wales Government

9:25am _____ **SESSION ONE**

**“THE DINING BOOM:
HOW DO WE SECURE OUR PLACE AT THE TABLE?”**

Session Chair

Dr Ian Watt AO
Secretary, Department of the Prime Minister & Cabinet

1st Speaker

“Exporting Australia’s agricultural know-how”
Major General, the Honourable Michael Jeffery AC CVO
24th Governor General of the Commonwealth of Australia



		<p><i>“Fulfilling the big opportunities – beyond Agri-food industry fragmentation”</i> Ms Claudine Ogilvie Chief Information Officer, Ridley Corporation</p>
	2 nd Speaker	
		<p><i>“Food Sovereignty”</i> Ms Fiona Simson President, NSW Farmers Association</p>
	3 rd Speaker	
10:15am	DISCUSSION	
11:00am	<i>Morning Tea Break</i>	
11:30am	SESSION TWO	<p>“OUR KITCHEN IS A MESS: DISCUSSION ON THE DOMESTIC CONSTRAINTS ON FOOD PRODUCTION” Senator, the Honourable Arthur Sinodinos AO Assistant Treasurer, Australian Government</p>
	Session Chair	
		<p><i>“Infrastructure”</i> Mr John Brady Chief Executive Officer, Kagome</p>
	1 st Speaker	
		<p><i>“The retail duopoly”</i> Mr Peter Strong Executive Director, Council of Small Business of Australia</p>
	2 nd Speaker	
		<p><i>“Investing in agriculture’s future: The role of natural capital in enhancing productivity”</i> Mr Martijn Wilder AM Partner, Baker & McKenzie</p>
	3 rd Speaker	
12:35pm	DISCUSSION	
1:30pm	LUNCH	<p>Strangers’ Function Room, Parliament House</p>
	Introduction	<p>Mr Yasser El-Ansary Chief Executive Officer, Institute of Chartered Accountants in Australia</p>
		<p>“TECHNOLOGY & INNOVATION: OUR NEWEST AGRICULTURE EXPORT”</p>
	Speaker	<p>Prof Salah Sukkarieh Professor of Robotics and Intelligent Systems School of Aerospace Mechanical & Mechatronic Engineering Director of Research & Innovation, Australian Centre for Field Robotics</p>
	Question & Answer	
2:45pm	Summary & Vote of Thanks	<p>The Honourable Philip Ruddock MP Chief Government Whip, Australian Government</p>
3:00pm	<i>Close</i>	



SPEAKERS PROFILES

Mr John Brady
Chief Executive Officer
Kagome Australia

John has been with KAGOME since March 2012. Previously he had senior management roles in large fresh and processed food manufacturing businesses. Prior to coming to Australia in 2004, he had a wide variety of FMCG sales and marketing assignments with multinational companies, living in Europe, the Middle East and Asia. John is the strategic pathfinder, accountable for the company's future direction. This includes creating the appropriate collaborative environment for team members to flourish. As KAGOME Australia is a vertically integrated business - he is first to promote the provenience of its products and the 100% Australian Grown nature of its offer. John has led the push towards business sustainability and the concept that team members are stewards of the land and accountable for total environmental impact. He lives and works in Echuca during the week, spending weekends with his family in Melbourne. John is a keen cyclist and enjoys participating in triathlons.

Mr Yasser El-Ansary
General Manager
Leadership & Quality
The Institute of Chartered Accountants in Australia

Yasser El-Ansary is the General Manager of Leadership & Quality for The Institute of Chartered Accountants in Australia, based in Sydney. Joining the Institute in early 2009, Yasser has over 15 years of experience in a variety of business and advisory roles, having started his career in the specialist field of tax. Yasser is responsible for leading the Institute's public policy team, which spans a wide variety of disciplines dealing with major issues that impact businesses and the broader economy. An important part of Yasser's role is to work closely with the Federal Government and its agencies on policy and administration matters, as well other regulatory bodies both within Australia and abroad. In addition, he is involved in developing and executing the organisation-wide strategic imperatives of the Institute, and talking to its 70,000 plus members right across the country. Prior to his current role, Yasser was the Institute's Tax Counsel, and has held previous positions with Australand Holdings Limited, PwC, the Federal Department of the Treasury and Rio Tinto Limited. Yasser is a Chartered Accountant and holds a Bachelor of Commerce from the Australian National University and a Master of Taxation Law from the University of New South Wales.

Ms Catherine Fritz-Kalish
General Manager
Global Access Partners

Catherine Fritz-Kalish is co-founder and General Manager of Global Access Partners Pty Ltd (GAP). She oversees most of the organisation's marketing and sales functions, as well as the day-to-day operations of the business. She is responsible for effective planning, delegating, coordinating, staffing, organising and decision making. Over the last twelve years, under Catherine's guidance, GAP has grown to be a proactive and influential network which initiates high-level discussions at the cutting edge of the most pressing commercial, social and global issues of today. Through forums, global congresses, annual summits and government advisory boards, GAP facilitates real and lasting change for its stakeholders, partners and delegates by sharing knowledge and creating input for government policy. Over the past few years, GAP has established a number of national consultative committees which are working to shape the face of the Australian business and policy environment. Catherine's broader business experience includes coordination of a number of international initiatives as part of the annual programme for the small and medium sized enterprise unit of the OECD (Organisation of Economic Cooperation and Development), at headquarters in Paris, France; marketing and brand management within all 7 divisions of the George Weston Foods Group; and just prior to establishing GAP, working within the TCG Group of companies particularly in the area of startup incubator establishment. Catherine holds a bachelor of science degree from the University of New South Wales, and a Masters of Business in International Marketing from the University of Technology, Sydney. She is a mother of three children and is passionate about helping those less fortunate through the not-for-profit business she co-founded, *Thread Together*, which provides brand new clothing to those in need across Australia.

Mr Bruce Gosper
Chief Executive Officer
Australian Trade Commission

Mr Bruce Gosper commenced as Chief Executive Officer of Austrade on 1 February 2013. Mr Gosper was Deputy Secretary with the Department of Foreign Affairs and Trade from February 2009 until his appointment to Austrade. In that role he was Australia's Senior Trade Policy Official, responsible for all trade negotiations. Mr Gosper was Ambassador and Permanent Representative to the World Trade Organization (WTO) in Geneva from 2005 until 2009. He was also Chair of the WTO General Council in 2008–09 and Chair of the WTO Dispute Settlement Body in 2007–08. From 2000–2005, Mr Gosper was First Assistant Secretary, Office of Trade Negotiations, in the Department of Foreign Affairs and Trade in Canberra. Prior to that, he served as Minister (Commercial) at the Australian Embassy in Washington (1998–2000). Mr Gosper was also an Adviser to the Minister for Trade (1996–1998), and Assistant Secretary, Agriculture Branch, Department of Foreign Affairs and Trade, Canberra (1995). Before joining the Department of Foreign Affairs and Trade, Mr Gosper worked for the Department of Primary Industries and Energy, and served overseas as Minister-Counsellor (Agriculture) at the Australian Embassy in Tokyo (1989–1992). Mr Gosper has also worked for the Department of Trade and Resources (1980–1987). Mr Gosper was born in Parramatta in 1957. He is a graduate of Macquarie University and the University of New England. He is married and has three sons.

Maj. Gen. Michael Jeffery AC CVO
24th Governor General of the
Commonwealth of Australia

Major General Jeffery was born in Wiluna, Western Australia in 1937 and educated at Kent Street High School and the Royal Military College, Duntroon. He graduated into Infantry and served operationally in Malaya, Borneo, Papua New Guinea and Vietnam, where he was awarded the Military Cross and the South Vietnamese Cross of Gallantry. After command of all combat elements of the Army from platoon to division – including the Special Air Service Regiment – he retired in 1993 to assume the appointment of Governor of Western Australia, which he held for almost seven years. His major interests during his tenure were in youth affairs, education, environment and the family. For his services to the State he was appointed a Companion in the Order of Australia, a Commander of the Royal Victorian Order and a Citizen of Western Australia. On his retirement as Governor in 2000 he established in Perth, a not for profit strategic research institute – Future Directions International (FDI) – whose objective is to examine longer term issues facing Australia. On 20 December 2000 he was awarded an Honorary Doctorate of Technology by Curtin University. On 11 August 2003 he was sworn in as the twenty-fourth Governor-General of the Commonwealth of Australia, serving in that capacity until 5 September 2008. Upon his retirement as Governor-General, he accepted Chairmanship of FDI, Outcomes Australia and Soils for Life, along with patronages of a number of other not-for-profit organisations. He is the Australian Chairman of The Queen Elizabeth Diamond Jubilee Trust and has recently been appointed the Advocate for Soil Health by the Prime Minister. Major General Jeffery is a Companion of the Order of Logohu (PNG), a Knight of St John, a Citizen of Western Australia, a Paul Harris Fellow and an honorary life member of the Returned and Services League.

Ms Lisa Middlebrook
Executive Manager
Policy & Strategy, GAP

Lisa Middlebrook is Executive Manager for Policy and Strategy at GAP. She is responsible for policy and programme development and external relations for many GAP projects. Within this role she manages GAP's annual economic summit and helps guide several of GAP's ongoing taskforces. In this capacity, Lisa also serves as the Deputy Chair of the National Standing Committee on Cloud Computing. Prior to assuming her role at GAP in September 2009, Lisa spent two years as a Director of the Federal ALP, while there establishing the Federal Labor Business Forum, and handling external relations and business affairs. Immediately prior to that, she served as the Director of Business Development at the Lowy Institute. In addition, Lisa has an extensive background in the non-profit sector, and she spent three years as the CEO of the Johnny Warren Foundation. Lisa spent six years with the Democratic Leadership Council (DLC) and Progressive Policy Institute in Washington DC where she was a Senior Adviser on trade policy and was also responsible for external relations with the corporate community and non-profit foundations. She was instrumental in helping establish political relationships for Australia with regard to the US/Australia Free Trade Agreement. Prior to the DLC, she served at the Australian Embassy in Washington working on US Congressional Relations and trade issues. Lisa is a graduate of the University of California Los Angeles (political science and international relations) and volunteers with several charities including the Steve Waugh Foundation.

Ms Claudine Ogilvie
Chief Information Officer
Ridley Corporation

Claudine Ogilvie is the Chief Information Officer (CIO) for Ridley Corporation. As an active member of the agribusiness and processing industry, Claudine drove the creation of the Australian Food and Grocery Council (AFGC) Agribusiness Forum in 2012 with key industry CEOs, and is part of the Executive Committee. She is a member of the National Association of Women in Operations (NAWO). Furthermore, she is also part of the Australian Agribusiness Association (AAA) industry reference group, and a member of the NSW Farm Writer's Association. Claudine was accepted into the exclusive Australia ASEAN Emerging Leaders Program 2013 (A2ELP, in conjunction with the Asia Pacific Roundtable, Kuala Lumpur); and in 2012, she was one of only a handful of candidates accepted each year into the Asialink Leaders Program (Melbourne University). She joined the Australian Government Food Security Delegation to China in March 2012, and contributed to the joint government report. She has developed and authored a number of papers on manufacturing competitiveness, agribusiness and food security. Prior to Ridley, she managed KPMG's Consumer and Industrial Markets business, she was the Regional Product Manager (Australia, NZ, PNG and Pacific Islands) at International SOS. She also held sales operations and marketing roles for British Petroleum (BP Australia). She has a Bachelor of Business from the University of Technology Sydney, Australia and a Diploma of Business Management from the Ecole Supérieur de Commerce Reims, France.

The Hon. Anthony Roberts MP
Minister for Fair Trading
NSW Government

The Hon. Anthony Roberts MP is the NSW Minister for Fair Trading. He was elected the Member for Lane Cove in 2003. Prior to becoming a State Member of Parliament, he was Mayor and Deputy Mayor of Lane Cove Municipal Council. Anthony proudly served with the Australian Army on peace keeping operations in Bougainville as part of Operation Bel Isi. He was also an adviser to Prime Minister John Howard.

The Hon. Philip Ruddock MP
Chief Government Whip
Australian Government

Philip Ruddock was first elected to the House of Representatives as the Member for Parramatta, New South Wales, at a by-election on 22nd September 1973. Since 1992 until the present he has held the seat of Berowra. The electorate of Berowra blends high-density suburban areas with a semi-rural fringe. Having held a number of Shadow Ministry portfolios Mr Ruddock was appointed Minister for Immigration and Multicultural Affairs from 11th March 1996 through to 7th October 2003. This made him the longest serving Federal Immigration Minister. During this period he also had responsibility for Reconciliation and Aboriginal and Torres Strait Islander Affairs. On 7th October 2003, he was sworn in as the Federal Attorney-General, an appointment he held until the Federal Election on 3rd December 2007. He has wide committee experience, having served on the Joint Standing Committee on Foreign Affairs, Defence and Trade; the Joint Standing committee on Intelligence and Security; Coalition Foreign Policy and Defence Committee; and Coalition Legal and Immigration Committee. With degrees in Arts and Law from Sydney University Mr Ruddock practised law prior to entering parliament. He resides in Pennant Hills, in the heart of his electorate with his wife. The couple has two adult daughters Kirsty and Caitlin.

Ms Clare Shine
Vice-President and Chief Program Officer
Salzburg Global Seminar

Clare Shine was appointed vice president and chief program officer of the Salzburg Global Seminar in 2012, after a career spanning law, business and the arts. She is a UK-qualified barrister with 20 years' experience as environmental policy analyst for inter-governmental organizations, national governments, the private sector and NGOs. A bilingual French speaker and professional facilitator, Clare is an Associate of the Institute for European Environmental Policy and member of the IUCN Commission on Environmental Law. Her work and publications have focused on biodiversity, international trade, governance, transboundary cooperation and conflict prevention, with in-region capacity-building across four continents and the Mediterranean Basin. She has played an influential role in biosecurity policy development, working as legal adviser to the World Bank, European Commission and Council of Europe. Clare co-authored the *European Strategy on Invasive Alien Species* endorsed by 43 countries and recently advised the EC on implementing the Nagoya Protocol on access and benefit-sharing for genetic resources. Clare has been a regular freelance contributor to the *Financial Times* arts section since 2003. She began her career in industry after studying literature at Oxford University and holds post-graduate degrees from London University and the Sorbonne University, Paris.

Ms Fiona Simson
President
NSW Farmers Association

Fiona Simson is a Director of Plantation Trading Pty Ltd, a 5500ha family mixed farming enterprise near Premer on the Liverpool Plains in NSW. With broadacre farming and commercial and stud poll hereford cattle operations, Fiona is particularly responsible for the administration, marketing and risk management of the business. Fiona holds a Bachelor Degree in Arts/Business, and has tertiary qualifications in workplace training and adult education. Elected President of NSW Farmers in 2011 on a platform of renewal, excellence and inclusiveness, Fiona is the first woman to fill this role. Fiona was re-elected President in July 2012 and again in 2013. With husband Ed, and children Jemima and Tom, Fiona is passionate about ensuring a strong future for agriculture, and maintaining a strong and united voice to ensure that farmers' voices are heard and taken into account at all levels of Government.

Senator, The Hon. Arthur Sinodinos AO
Assistant Treasurer, Australian Government
Senator for New South Wales

Senator the Hon. Arthur Sinodinos AO, is the Federal Assistant Treasurer. He was sworn in on 18 September 2013. Arthur is known for his focus on substantive topics affecting Australia's increasingly complex economic and financial landscape. He is an expert on financial markets, economics and public policy, reflecting his experience gained through previous roles as an economist with the Commonwealth Treasury and Department of Finance. He worked for former Prime Minister John Howard, who as Opposition Leader employed him as his Senior Economic Adviser from 1987-89. When Howard returned as Opposition Leader from 1995-96, he appointed Arthur as his Senior Economic Adviser and later Policy Director. In 1997, Arthur became Prime Minister Howard's Chief of Staff, a position he held for nine years. The role gave him experience at the highest levels of national policy development and politics. He resigned his post in 2006 to work at Goldman Sachs JBWere and most recently the National Australia Bank. Arthur was a member of various pro-bono boards including the Mary MacKillop Foundation, a charity which funds "small life changing projects" for the underprivileged, the Aboriginal Employment Strategy Pty Ltd and the Australian Institute of Management. In 2008, Arthur was appointed an Officer of the Order of Australia for his service to politics through the executive function of government, to the development of economic policy and reform and to the Greek community. He returned to politics in October 2011, when he succeeded Liberal Senator Helen Coonan from NSW. In December 2011, Opposition Leader Mr Abbott announced the creation of the Coalition Deregulation Taskforce to cut government red and green tape by \$1billion a year and appointed Arthur as chairman of the taskforce. In September 2012, Arthur joined the Coalition frontbench when he was appointed to the position of Shadow Parliamentary Secretary to the Leader of the Opposition.

Mr Peter Strong
Executive Director
Council of Small Business of Australia (COSBOA)

Peter Strong has spent much of the last 20 years in change management at the business, community and national level. He has worked for the Australian Government and with NGOs, the World Bank and the United Nations. He has worked on national business and employment policy and internationally on projects aimed at assisting countries and regions experiencing substantial economic and social change. This has included work in China where he has assisted unemployed women start small businesses through the development of a business incubator and business advisory services. He also worked in Turkey with Government and community leaders preparing for that country's entry into the European Community and for coping with the changes coming from industry and enterprise restructuring. Mr Strong worked in the former Soviet Republics providing support and assistance in the major structural changes occurring in the early to mid-1990s. He also developed a workshop on business incubators in Vietnam in 1997. Peter has facilitated policy and program in all these countries as well as throughout Australia on a range of subjects and issues related to small business. He has participated in and managed workshops with Ministers of State on policy development and implementation for a range of employment and business related activities. Peter has written several related publications and represents small business interests on a number of government and industry advisory groups including the Tax Office, the Australian Consumer and Competition Commission, ASIC, superannuation roundtables and the Australian Treasury. Peter has been Executive Director of COSBOA since May 2010. Peter is also a Director of the Australian Booksellers Association.

Prof Salah Sukkarieh
Professor of Robotics and Intelligent Systems
School of Aerospace Mechanical
& Mechatronic Engineering
Director of Research and Innovation
Australian Centre for Field Robotics

Professor Salah Sukkarieh is an international expert in the research, development, operationalisation and commercialisation of field robotic systems. He has lead a number of robotics and intelligent systems R&D projects in logistics, commercial aviation, aerospace, education, environment monitoring, agriculture and mining, and has consulted to industry including Rio Tinto, BHP, Patrick Stevedores, Qantas, BAE Systems, QLD Biosecurity, Meat and Livestock Australia, and the NSW DPI amongst others. Salah is the Professor of Robotics and Intelligent Systems at the University of Sydney, and the Director of Research and Innovation at the Australian Centre for Field Robotics. He has supervised over 10 research fellows, and graduated over 25 PhDs, 5 Masters and 60 honours students. He has received over \$30m in government and industry funding, national and international. Salah is on the editorial board for the Journal of Field Robotics, Journal of Autonomous Robots, and Transactions of Aerospace Systems, and has over 300 academic and industry publications in robotics and intelligent systems.

Dr Ian Watt AO
Secretary
Department of the Prime Minister & Cabinet

Dr Watt was appointed as Secretary of the Department of the Prime Minister and Cabinet from September 2011. Previously, Dr Watt was Secretary of the Department of Defence from August 2009 to September 2011. From January 2002 to August 2009, Dr Watt was Secretary of the Department of Finance and Deregulation (formerly the Department of Finance and Administration). He became the longest serving Finance Secretary in April 2009. From March 2001 to January 2002 he was Secretary of the Department of Communications, Information Technology and the Arts. Prior to that, he was Deputy Secretary of the Department of the Prime Minister and Cabinet and Executive Coordinator of the Economic, Industry and Resources Policy Group until March 2001. Dr Watt was First Assistant Secretary of Economic Division, Department of the Prime Minister and Cabinet between March 1994 and November 1996. Prior to that, he was Minister (Economic) at the Embassy of Australia in Washington for two-and-a-half years. Dr Watt completed the Advanced Management Program at the Harvard Business School in 1999. He is the former chair of the Organisation for Economic Co-operation and Development's (OECD's) Working Party of Senior Budget Officials and also the former chair of the OECD Asian Senior Budget Officials. In June 2008, Dr Watt was made an Officer of the Order of Australia. In 2009, he was the recipient of La Trobe University's Distinguished Alumni Award.

Mr Martijn Wilder AM
Partner
Baker & McKenzie

Martijn Wilder is head of the Firm's Global Environmental Markets practice. He focuses on climate law and finance, federal and international environmental law, environmental and clean energy infrastructure projects and agribusiness. He is regarded as a legal pioneer in the development of legal mechanisms and regulations underpinning the emergence of international carbon and broader environmental markets. He is ranked as a Star Individual (the highest ranking available) by Chambers Global, is listed among the best lawyers in his field by Best Lawyers Australia 2009-2013 and is listed in the International Who's Who of Business Lawyers 2009-2013. He is also listed for Australia, Agriculture & Rural Affairs, Best Lawyers International 2013. Martijn is chairman of Low Carbon Australia, a board member of the Clean Energy Finance Corporation, chair of the NSW Climate Change Council, on the governing board of the Renewable Energy and Energy Efficiency Partnership, and a director and governor of WWF. He is also a committee member of the Australian Initiative for Sustainable Aviation Fuels. Martijn is a professor of climate change law at the Australian National University and an affiliate, Cambridge Centre for Climate Change Mitigation Research Department of Land Economy University of Cambridge.



SPONSORS PROFILES



The Australian Centre for Health Research's vision is for an open and receptive health sector in which important issues affecting the delivery of health and healthcare to Australians are considered from a broad range of perspectives.

This will contribute to a healthy Australia whose citizens receive world-leading, affordable healthcare from an efficient and effective mix of the public and private healthcare sectors.

The Australian Centre for Health Research was established to fill a gap in the health environment. In establishing ACHR we were aware that there was no organisation which existed specifically to raise the level of public discussion on health issues, which had a commitment to the private sector within the context of the Australian dual public and private system. We seek to have sensible, non-ideological positions become part of the continuous health debate with a determination to have sensible policies adopted.

The ACHR's current supporters include representative organisations from the health sector including health funds, aged care, private hospitals, the Pharmacy Guild and Dental Association and those interested in improving the health landscape in Australia.

In recent years the ACHR has produced papers in the areas of connected health care, risk equalisation in health, pharmacogenomics, the impact and cost of health sector regulation, structural barriers to reform of the Australian health system and lessons for the Medicare system. Each of these papers has received useful public interest and assisted in informing the health dialogue in Australia.

In 2011, the ACHR published a book of essays, *"Health Care in Australia: Prescriptions for Improvement"*, covering various aspects of the Australian health system.

Future projects include a workshop on connected care, a research paper into productivity in the health sector, electronic health research and discussion, and other events focussed on promoting discussion in the health area.

www.achr.com.au



Edith Cowan University (ECU) is a large multi-campus institution serving communities in Western Australia and a significant cohort of international students.

Awarded university status in 1991, ECU has since developed innovative and practical courses across a wide range of disciplines, established a vibrant research culture and attracted a growing range of quality research partners and researchers, many working at the cutting edge of their fields.

ECU has more than 23,300 students at both undergraduate and postgraduate levels. Approximately 3,600 of these are international students originating from 104 countries. More than 320 courses are offered through four faculties:

- ▶ Business and Law
- ▶ Health, Engineering and Science
- ▶ Education and Arts, which includes the Western Australian Academy of Performing Arts (WAAPA)
- ▶ Regional Professional Studies

ECU works closely with private and public sector organisations, locally and overseas, in designing its study programs.

The University has two metropolitan campuses in Mount Lawley and Joondalup, and also serves Western Australia's South West region from a campus in Bunbury, 200km south of Perth.

www.ecu.edu.au



GAP is a not-for-profit public policy network based in Sydney that is comprised of government, industry, academia and community leaders across Australia and around the world. Established in 2000, GAP specialises in new approaches to public policy development and the facilitation of government / industry / community interactions on the most pressing social, economic and structural issues and challenges across a broad range of Australian economic sectors.

Through its pioneering '*Second Track*' Process programme of initiatives, GAP seeks to foster links between community, government and academia to streamline the process of 'fast-tracking' solutions to key issues, increase stakeholder participation in policy formation and decision making, and develop novel, cross-disciplinary approaches to regulatory problems by engaging key stakeholders in high-level discussions and research.

GAP's diverse initiatives and ventures include long-term programmes and one-off projects in regulation and public policy, industry policy, healthcare, knowledge capital, innovation, information and communication technology, security & privacy, sustainability & climate change, education, deliberative democracy, and philanthropy & social investment, to name a few.

GAP runs national and international conferences, multidisciplinary forums and executive roundtables, coordinates community & stakeholder research projects and feasibility studies, and oversees pilot projects to trial new business ideas. GAP's online think-tank, Open Forum, is a well-established online platform with an extensive community network, uniquely positioned to attract and engage target audience and informed contributions.

GAP's partners include Federal and State governments, major corporate enterprises and industry bodies. Every dollar invested by government in GAP initiatives leverages two dollars from the private sector.

www.globalaccesspartners.org



HP operates in more than 170 countries and embraces social and environmental responsibilities globally with a commitment to conducting business in ways that positively impact society and the planet. HP's Global Citizenship program covers a broad agenda, including governance, environment and society.

During the coming decade HP is committed to focusing on enhancing environmental sustainability across the product life cycle, building a leading human rights program, driving strong and sustained social and environmental responsibility in its supply chain, advancing an accountability approach to ensure respect for privacy and addressing global health and education issues through social innovation.

Building on the size and scale of HP and its deep history in global citizenship, the company is uniquely positioned to create these positive outcomes. HP's approach to global citizenship includes innovative technology that provides the foundation for many of global citizenship initiatives, plus there are over 300,000 dedicated employees worldwide who are committed to making a difference. Global citizenship ensures the ability to attract and retain the best people.

HP's collaborative spirit creates powerful partnerships across institutions, industries, sectors and borders. These partnerships improve the collective capability to address the serious challenges that the world faces.

www.hp.com



The Institute of Chartered Accountants in Australia

The Institute is the professional body for Chartered Accountants in Australia and members operating throughout the world.

Representing more than 70,000 current and future professionals and business leaders, the Institute has a pivotal role in upholding financial integrity in society. Members strive to uphold the profession's commitment to ethics and quality in everything they do, alongside an unwavering dedication to act in the public interest.

Chartered Accountants hold diverse positions across the business community, as well as in professional services, government, not-for-profit, education and academia. The leadership and business acumen of members underpin the Institute's deep knowledge base in a broad range of policy areas impacting the Australian economy and domestic and international capital markets.

The Institute of Chartered Accountants Australia was established by Royal Charter in 1928 and today has around 60,000 members and more than 12,000 talented graduates working and undertaking the Chartered Accountants Program.

The Institute is a founding member of the Global Accounting Alliance (GAA), which is an international coalition of accounting bodies and an 800,000-strong network of professionals and leaders worldwide.

www.charteredaccountants.com.au



Insurance Australia Group Limited (IAG) is the parent company of a general insurance group with controlled operations in Australia, New Zealand, Thailand and Vietnam, employing over 13,500 people.

Its current businesses underwrite approaching \$10 billion of gross written premium per annum, selling insurance under many leading brands including NRMA Insurance, CGU, SGIO, SGIC and Swann (Australia); NZI, State and AMI (New Zealand); Safety and NZI (Thailand); and AAA Assurance (Vietnam).

IAG also has interests in general insurance joint ventures in Malaysia, India and China. Standard & Poor's has assigned a 'Very Strong' Insurer Financial Strength Rating of 'AA-' to the Group's core operating subsidiaries.

www.iag.com.au



Specialist provider of mission critical wireless communications

Integrated Wireless (IW) is an Australian company focused on delivering ruggedised wireless solutions to the Healthcare, Agedcare, Industry and Manufacturing, Corrective Services, Retail, Hospitality and Educational sectors. Integrated Wireless, formerly known as Ascom Nira, has operated in Australia for more than 20 years providing reliable paging, wireless duress and mobile voice communications solutions.

With over 2,000 clients throughout Australia and New Zealand using a wide variety of our wireless Duress, Messaging and Voice Communications systems, Integrated Wireless is a major force in the wireless applications market. IW's solutions integrate tightly with our clients vital support systems and assists them to protect their employees while increasing their productivity.

IW builds solutions using the **Ascom** range of wireless hardware and software applications, locally developed software and hardware, as well as technology from partners such as Ekahau, Secure Care, Wavcom, Daviscomms, Meru Networks, and WiPath. With offices in Sydney, Melbourne and Brisbane and partners in all other states and territories Integrated Wireless provides a complete customer support structure which includes sales and after sales service. IW provides “round the clock” support to many of Australia's busiest hospitals, biggest prisons and successful manufacturers.

Integrated Wireless' development team specialises in the development of mission critical Java applications and resilient appliance based hardware solutions. Their design and service personnel possess a wide range of wireless (UHF, DECT and WiFi) skills in conjunction with IP Telephony and integration capabilities.

www.integratedwireless.com.au

National Australia Bank

National Australia Bank is a financial services organisation with over 43,000 people, operating more than 1,800 stores and business banking centres, and is responsible to more than 480,000 shareholders. While our core franchise is Australian-based, we also have interests in New Zealand, Asia, the United Kingdom and the United States. Each of our brands is built with a common aim: to have fair products and services, fair fees and charges and world-class relationships built on the principles of help, guidance and advice.

Our goal is to deliver sustainable and satisfactory returns to our investors. We believe that what is good for our customers is also good for business. So by focusing on the customer, offering fair products and services – and by simply being a better bank for our people and the community – we can achieve great results for all our stakeholders.

We are not just looking at the short term – our strategy is about planning for the future. That is why we will continue to build on and deliver the strategy we announced in 2009 to:

- focus on our strong Australian franchise and manage international businesses for value
- maintain balance sheet strength
- reduce complexity and cost
- enhance our reputation

Our purpose is to do the right thing and help our people and customers realise their potential. This is part of who we are and guides how we do business. Our corporate responsibility (CR) approach is founded on this purpose. It is focused on getting the fundamentals right for our customers, being a good employer and addressing our broader responsibility to society. We believe that when we get it right for our customers and make NAB a great place to work, our investors stand to benefit. Put simply, our purpose and commitment to CR is good for our business.

www.nab.com.au



Open Forum (www.openforum.com.au) is an independent, interactive online community focused on the issues which matter to Australia's public policy debate.

Initiated by Global Access Partners (GAP) in July 2007, our bloggers and readers includes people of all ages, from all over Australia and from all political spheres. Open Forum's network features senior business executives, government policy makers, academics, thought leaders and community advocates, as well as interested private citizens.

Open Forum is staunchly non-partisan. We believe this independence is fundamental to the success of any policy development forum. Our user-generated content allows us to explore areas which are of relevance to the regulatory process, track citizen sentiment around particular issues and use these as the basis for briefing notes and recommendations to government agencies.

Speeches, related blogs, articles and updates on the outcomes from the Summit are highlighted on Open Forum in a special productivity featured forum, Food Sustainability, www.openforum.com.au/foodsustainability.

www.openforum.com.au



Imagine a better run world where innovations in information technology have the potential to improve the lives of people everywhere. SAP's vision is to help the world run better and improve people's lives by making every customer a best-run business. At the global level, SAP is helping government agencies in diverse countries accomplish more for citizens. Our innovations even help people around the world gain access to clean drinking water, nutritious food, educational opportunities and life-saving healthcare.

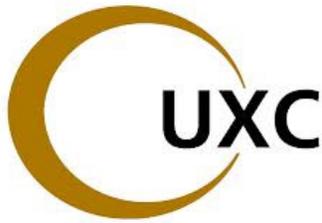
At the business level, SAP is helping companies stay ahead of change and innovate for growth through better use of Innovative technology. At the personal level, SAP is inspiring people to be their best and connect with companies and governments so they can have a greater voice. Here are some facts:

- SAP helps our customers produce and service 66% of the world's medical devices, enabling safe medication administration for millions of patients every day
- SAP helps leading airlines fly over 1.1 billion passengers more safely – and smarter – every year
- Every day, SAP helps our customers deliver safe and compliant products to over 800 million consumers.
- SAP helps customers with innovative, efficient point of sale solutions for \$12 trillion of consumer purchases touching millions of people.
- SAP helps relief agencies deliver aid to over 25 million people annually in times of disaster.
- SAP helps millions of people gain access to secure banking through secure mobile technology
- SAP helps utilities better manage hundreds of millions of bills per month

As strategic enablers to the world's economy for over 40 years, SAP is uniquely positioned to help create a better run world. For a nation to be competitive in today's global economy it has to develop a smart economy, leveraging the best of technology, infrastructure, knowledge, people and innovation.

With more than 60,000 employees working with a community of 3 million developers, 11,500 partner organisations supporting 200,000 customers backed by 1.4B Euro investments in Research and Development, SAP is well placed to help change the world.

www.sap.com.au



UXC Limited is the largest Australian-owned IT company providing ICT solutions in Consulting, Business Applications, Infrastructure and the Cloud. The company currently services over 2,500 client organisations in the private and public sectors across Australia and New Zealand.

UXC is publically listed on the Australian Stock Exchange and is in the S&P/ASX 300. The organisation comprises four “Go to Market” groups:

▶ **Consulting Group**

Five separate entities deliver the UXC Consulting services to the market. These are UXC Consulting; UXC Engineering Solutions, UXC Training, UXC Professional Solutions, and Telsyte. Services are provided by these entities in the following specialist areas: Training, Business Transformation, Information Management, Telecommunications Consulting, Project, Program & Portfolio Management, Change Management, IT Research, IT Strategy & Architecture, IT Professional Services and Mobility.

▶ **Enterprise Applications Group**

The EAS sector is fulfilled by three UXC business units. They are Eclipse, Oxygen and Red Rock Consulting. These business units consult in, and implement, ERP systems for mid-to-large size organisations. They individually represent Microsoft Dynamics, SAP and Oracle, thus allowing UXC the opportunity to deliver against the client requirements - whatever the enterprise platform.

▶ **Infrastructure Solutions**

It all gets connected by UXC Connect. This significant business unit specialises in the areas of: Workspace Innovation; Contact Centre; Security; Mobility; Entertainment & Content; Managed Services; Data Centre Optimisation; and Outsourcing.

▶ **Cloud Solutions**

UXC Cloud Solutions integrates the entire capability and specialises in cloud-based business management applications designed to enable businesses to reduce costs, increase productivity and enable mobility.

www.uxc.com.au



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RECOMMENDED READING

- ▶ **Opportunities for China and Australia in Food Security**, by Claudine Ogilvie, KPMG 2012 www.kpmg.com/au/en/issuesandinsights/articlespublications/pages/opportunities-china-australia-food-security.aspx
- ▶ **Food boom will be no mining boom** - Laura Eadie, ABC Environment, 12 February 2013; www.abc.net.au/environment/articles/2013/02/12/3687617.htm
- ▶ **Australia can't feed the world but it can help** – Peter Langridge, Simon Prasad, The Conversation, 18 January 2013; <http://theconversation.com/australia-cant-feed-the-world-but-it-can-help-11269>
- ▶ **Burning crops**; by Linda Kinkade, Today Tonight Adelaide, 24 June 2013; www.todaytonightadelaide.com.au/stories/burning-crops
- ▶ **Australia must get its act together to capture Asian markets: Mondelez chief** – by Andrew White, 14 August 2013; The Australian, www.theaustralian.com.au/business/in-depth/food-for-thought-to-capture-asian-markets/story-fni4k1kl-1226696613215
- ▶ **Foreign investment in agriculture? How about a plan for profitability** – The Conversation; 2 September 2013; <http://theconversation.com/foreign-investment-in-agriculture-how-about-a-plan-for-profitability-17635>
- ▶ **Lower tax zone no solution for high-cost territory**; by Matt Wade, 16 August 2013; Sydney Morning Herald; www.smh.com.au/federal-politics/federal-election-2013/lower-tax-zone-no-solution-for-high-cost-territory-20130815-2rzmy.html

ENDNOTES

- i <http://www.theland.com.au/news/agriculture/agribusiness/general-news/tailormade-for-asia/2668476.aspx?storypage=0>
- ii <http://www.theaustralian.com.au/business/opinion/it-will-take-more-than-luck-for-australia-to-become-the-food-bowl-of-asia/story-e6frg9jf-1226696602491#>
- iii <http://www.soilsforlife.org.au/resources.html>
- iv Franklin D. Roosevelt: "Statement on Signing the Soil Conservation and Domestic Allotment Act", March 1, 1936. <http://www.presidency.ucsb.edu/ws/?pid=15254>
- v <http://lowyinstitute.org/publications/lowy-institute-poll-2012-public-opinion-and-foreign-policy>
- vi <http://www.oecd.org/daf/inv/investmentfordevelopment/45563285.pdf>
- vii *'Agriculture not only gives riches to a nation, but the only riches we can call our own, and of which we need not fear either deprivation, or diminition.'* - "The Beauties of Johnson: Consisting of Maxims and Observations – Volume 1" (1782) by Samuel Johnson; Page 3.
- viii <http://www.wired.com/gadgets/miscellaneous/news/2001/10/47156?currentPage=all>
- ix Comprehensive Automation for Specialty Crops (CASC) is a matching grant program funded by the USDA Specialty Crop Research Initiative and industry to develop comprehensive automation strategies and technologies for the specialty crop industry, with an initial focus on apples and nursery trees. It is a multi-disciplinary, multi-institutional group comprised of engineers, scientists, extension educators, growers, and industry representatives in universities, government labs, and companies spanning five states, representing some 70% of all US apple production. It aims to develop information, mobility, and manipulation technologies that will provide the infrastructure for the deployment of sensors and tools that will enhance crop monitoring, foster better and quicker decision-making, reduce labour stress, and increase fruit quality and yields. It also seeks to build systems to automatically detect plant stress and disease and insect infestations; systems to inventory nursery trees (including caliper information) and crop load; and to integrate this data into information management databases that allow growers to quickly and efficiently assess fruit, tree, and farm conditions. It aims to accelerate technology adoption by determining the return on investment of the technologies developed and the barriers to adoption and reduce the time from technology development to adoption through a nationwide extension and outreach program.
- x First detected in the Brisbane area in February 2001, these South American ants pose a serious social, economic and environmental threat. Fire ants have been declared a notifiable pest under the Plant Protection Act 1989 and landholders must report suspected sightings of fire ants on their property to Biosecurity Queensland or face heavy fines.