

AUGUST 2024

National Farmer Priorities Survey



National
Farmers
Federation

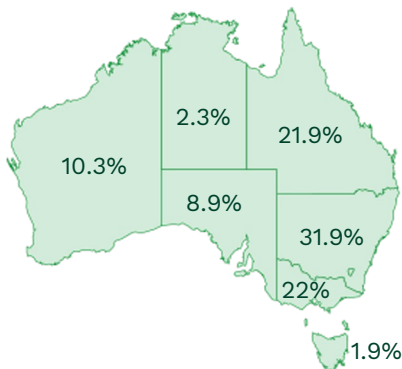
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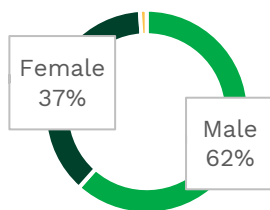
Who responded?

1,026 responses were received in total to this year's survey.
The survey was in-field from **6 – 15 August 2024**.

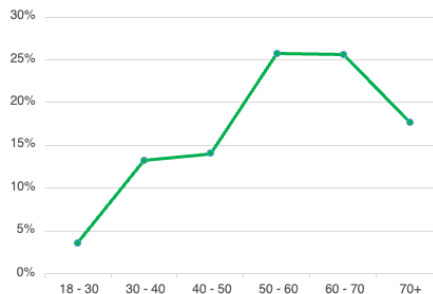
Location



Gender



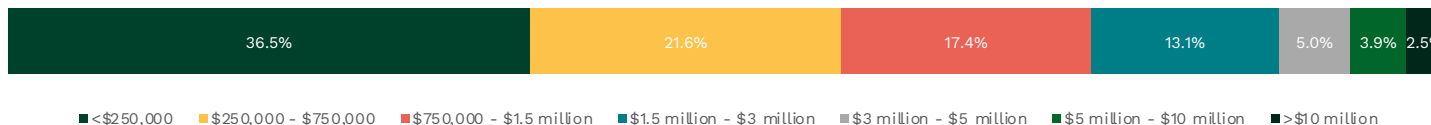
Age



Commodities grown

Beef	26.6%
Sheepmeat	16.7%
Wool	13.1%
Goats	2.8%
Dairy	3.4%
Grains/Oilseeds/Pulses	16.7%
Sugarcane	1.9%
Cotton	2.1%
Rice	0.9%
Fruit	2.7%
Vegetables	2.5%
Nuts	0.7%
Nursery/turf	0.3%
Pork	0.7%
Chicken meat	1.0%
Eggs	1.6%
Forestry	0.7%
Seafood	0.2%
Other	5.4%

Farm turnover



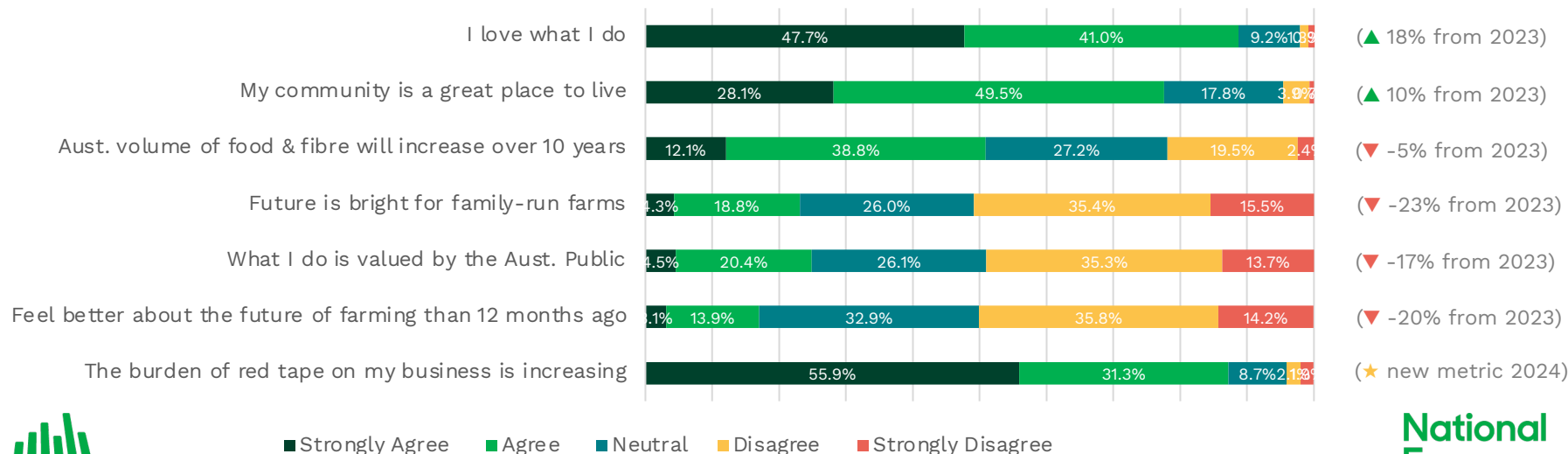
Industry sentiment

Australian farmers remain **passionate about their industry**, their work, and their community. This year's survey found 9-in-10 respondents (89%) agree with the statement 'I love what I do', up 18% on the last survey. While more than three quarters (78%) say their **community is a great place to live**, up 10% on 2023.

Farmers are less upbeat about the prospects for their sector, however, with only half (51%) believing the **volume of Australian food and fibre** will increase in the coming decade, down 5% on last year. A smaller number of farmers, at 23%, believe the **future is bright for family-run farms** (down from 46% with that view a year ago), while 25% feel that what they do is **valued by the public** (was 42% previously). Just 17% say the **outlook for farming** is better than a year ago (down from 37% previously), while in a new metric 87% of farmers cited the increasing **burden of red tape** on their business.

To what extent do you agree or disagree with the following statements?

Change in % 'Agree' + 'Strongly Agree'



Issues of top concern

Across the board, farmers expressed heightened levels of concern across a broad range of external pressures, with between 76.3% and 94% of respondents either 'very concerned' or 'concerned' by each issue. **Protecting Australia's biosecurity** emerged as the top ranked issue for 2024 (with 94% expressing concern, up from 81.3% in the previous survey), while 93.8% were concerned by the **market power of supermarkets/processors** (up from 83.1% in 2023). **Federal environment laws** also remained top-of-mind for 92.4% of farmers (up from 82%), to round out the top 3 issues nationally.

The largest swings in concern levels, compared to the 2023 survey, were seen in relation to **biosecurity** (up 12.7% on 2023) and **live sheep exports** (up 12.2%).

RANK	ISSUE	VERY CONCERNED	CONCERNED	NOT CONCERNED	% CHANGE FROM 2023
1	Protecting Australia's biosecurity	64.0%	30.0%	6.0%	▲ 12.7%
2	Market power of processors/supermarkets	58.3%	35.6%	6.2%	▲ 10.8%
3	Federal environment laws	54.9%	37.6%	7.6%	▲ 10.4%
4	Roads and transport infrastructure	56.5%	35.5%	8.0%	▲ 10.2%
5	Federal climate change policies	62.4%	28.6%	9.0%	▲ 10.0%
6	Our overseas trading relationships	37.4%	52.5%	10.1%	▲ 9.1%
7	The phase-out of live sheep exports	62.8%	24.1%	13.1%	▲ 12.2%
7	Local services (health, education etc)	47.1%	39.8%	13.1%	▲ 8.1%
8	The Murray Darling Basin Plan	32.4%	52.7%	15.0%	▲ 9.1%
9	Access to telecommunications	41.6%	40.2%	18.2%	▲ 8.8%
10	Mining/Energy developments on farmland	42.1%	39.5%	18.4%	▲ 5.2%
11	Animal welfare laws	38.6%	42.6%	18.8%	▲ 3.2%
12	Worker shortages	31.8%	48.7%	19.5%	▲ 6.9%
13	Workplace (industrial relations) laws	34.0%	45.9%	20.1%	▲ 3.5%
14	Cultural heritage laws	40.6%	35.7%	23.7%	▲ 3.0%

Excludes 'Not Applicable' responses

Denotes Top 3 issues among 'very concerned'



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Issues and priorities by commodity



Beef

1. Protecting Australia's biosecurity
2. Market power of processors/supermarkets
3. Federal climate change policies



Sheepmeat

1. Protecting Australia's biosecurity
2. Roads and transport infrastructure
3. Market power of processors/supermarkets



Wool

1. Market power of processors/supermarkets
2. Protecting Australia's biosecurity
3. Roads and transport infrastructure



Dairy

1. Market power of processors/supermarkets
2. Roads and transport infrastructure
3. Federal environment laws



Grains/Oilseeds/Pulses

1. Federal environmental laws
2. Roads and transport infrastructure
3. Federal climate change policies



Horticulture (Fruit/Vegetables)

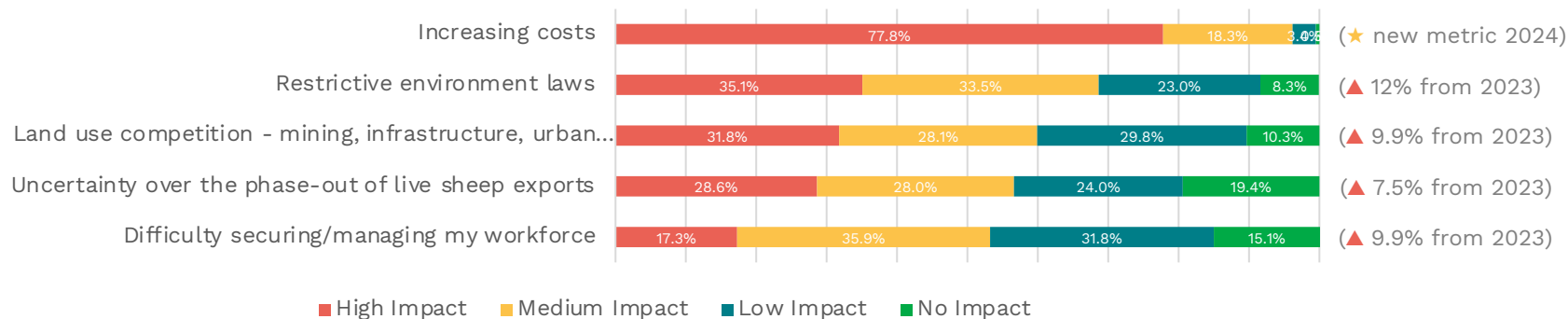
1. Protecting Australia's biosecurity
2. Market power of processors/supermarkets
3. Federal environmental laws



On-farm productivity impacts

Cost increases – a new measure in this year's survey – were voted as having the most significant impact on on-farm productivity, with 96.2% of farmers citing costs as having a 'high' or 'medium' impact on their business. The perceived impact of **restrictive environment laws** increased from last year to 68.7%, with an additional 12% of farmers citing the high or medium impact on the productivity of their business. **Land use competition** from mining, infrastructure and urban encroachment impacted 9.9% more farmers than last year, while a similar increase was recorded in relation to **sourcing and managing farm labour**. The phase-out of **live sheep exports** was also cited as having a high/medium impact by 56.6% of respondents across the country.

11. What is the current productivity impact of the following on your business or region?



Excludes 'Not Applicable' responses

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In their own words: sentiment & key issues

In open response answers regarding the industry outlook, common themes included:

- **Regulatory and Policy Concerns:** Many farmers expressed frustration with increasing regulatory burdens and government policies that they perceive as detrimental to their operations. This includes concerns about environmental laws, land use restrictions, and the phase-out of live sheep exports.
- **Economic Pressures:** Rising costs of inputs such as fuel, fertiliser, and wages were raised as significant concerns. Farmers saying they feel squeezed by increasing costs while market prices for their products are stagnant or in decline.
- **Labour Shortages:** Difficulty in securing a reliable workforce is a recurring issue. Farmers cite restrictive visa pathways, lack of training for domestic workers, and the high cost of wages as barriers to hiring.

“If agriculture is expected to 'produce more with less' we need policies and opportunities that support growth and profitability.”

Farmer, WA

“Every business we deal with now seems to be a multinational with poor competitive marketplaces.”

Farmer, SA

“Renewable energy projects devastating the land and the Government both state and Federal allowing it.”

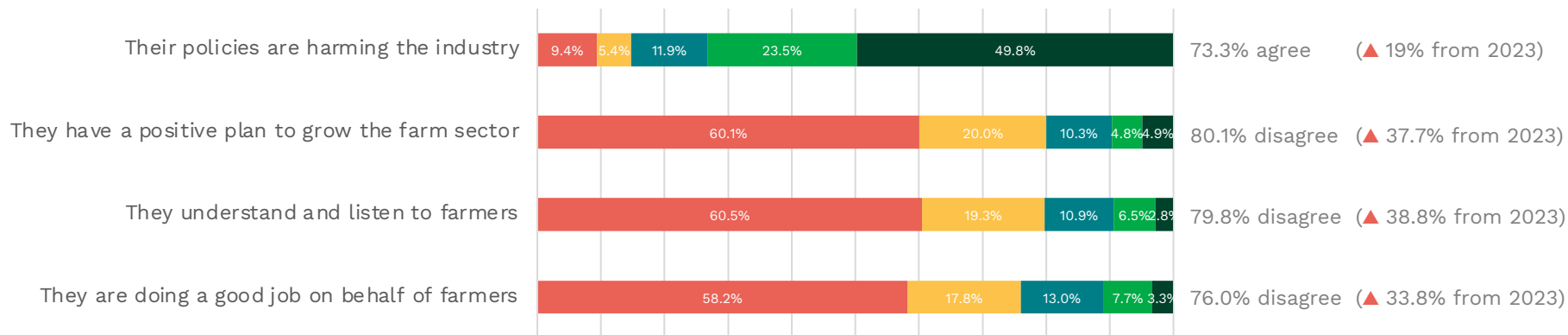
Farmer, NSW



Sentiment towards the Federal Government

Sentiment towards the Federal Government has collapsed amid heated policy disputes with the sector. With ratings across four sentiment measures deteriorating by an average of 32% over the course of the past 12 months. Around three-quarters of farmers (73.3%) now say **Federal Government policies** are harming the sector. While just 1-in-10 say the Federal Government 'has a **positive plan to grow the sector**', '**understands and listens to farmers**', or is 'doing a **good job on behalf of farmers**'.

18. To what extent do you agree with the following statements about the Albanese Government?



Strongly Disagree Disagree Neutral Agree Strongly Agree

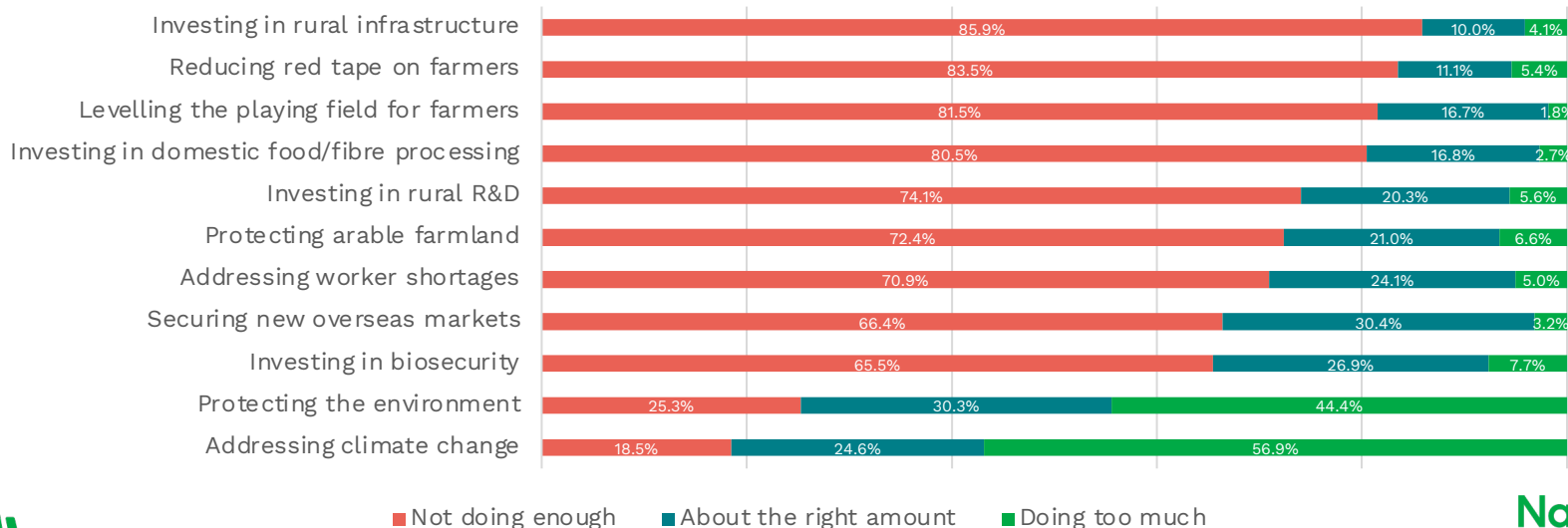


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Government focus on key issues

The top 5 issues where farmers believe the Federal Government is 'not doing enough' have remained unchanged from 2023. **Investment in rural infrastructure** remains the top area for improvement (with 85.9% of respondents calling on the Government to do more), followed by **reducing red tape** (83.5%) and **levelling the playing field for farmers** (81.5%). Conversely, the areas polled where farmers believe the Government is 'doing too much' are **protection of the environment** (44.4%) and **addressing climate change** (56.9%) – reflecting concern over the prioritisation of these policy areas.

19. Is the Albanese Government doing enough on the following issues?



In their own words: message to government

The following themes emerged from messages farmers would like to convey to the Federal Government:

- **Government Policies and Regulations:** Many farmers expressed frustration with government policies they perceive as overly burdensome or disconnected from the realities of farming. There is a call for reducing red tape and creating more supportive policies for the agricultural sector.
- **Economic Concerns:** Farmers are worried about rising costs, particularly fuel, fertiliser, and wages, which are not matched by increases in the prices they receive for their products. They urge the government to address these economic pressures.
- **Engagement with Rural Communities:** There is a strong desire for the Prime Minister and government officials to engage more directly with rural communities and understand their challenges. Farmers feel that their voices are not adequately heard in policy-making processes.

“Come out and spend quality time with farmers, not just for a photo opportunity. And listen to what is being said.”

Farmer, QLD

“Collaborate with agricultural businesses and advocates and listen and learn about the constraints of compliance, red tape, and input costs.”

Farmer, NSW

“Stop treating Australian agriculture like the bad guys and stop pandering to your inner-city seats.”

Farmer, WA



Further information



02 6269 5666
reception@nff.org.au

Seftons

02 6766 5222
admin@seftons.com.au



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