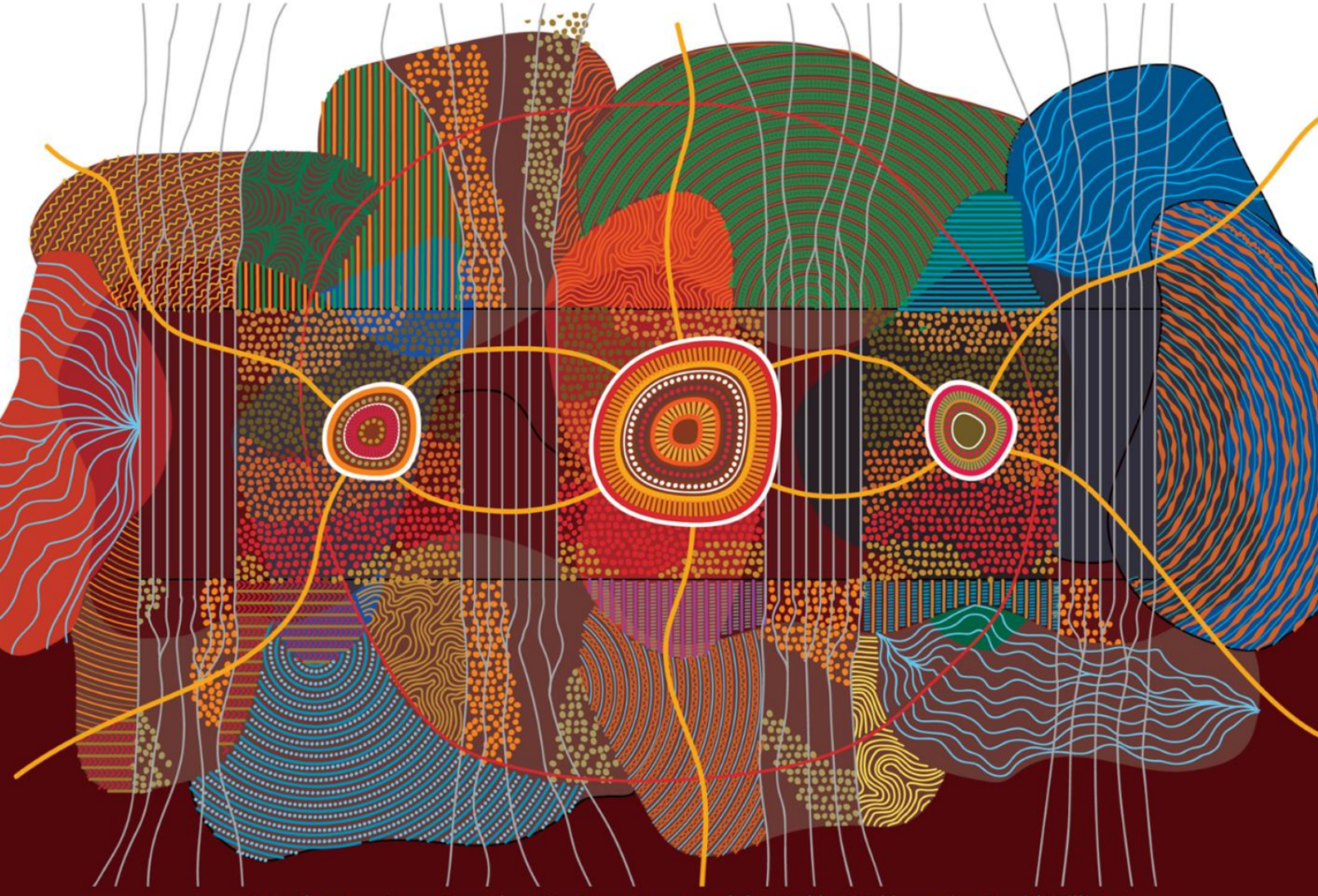
Indigenous Agricultural Product Framework Project

Mid-Outcome Report #2

August 2024



Together We Grow, Together We Prosper' artwork by Wakka Wakka artist, David Williams.

Australian Government
Department of Agriculture, Fisheries and Forestry

Australian Government
Indigenous Land and Sea Corporation

The ILSC GROUP

National Farmers Federation

PEOPLE. COUNTRY. OPPORTUNITY.

Acknowledgement of Country

We acknowledge Aboriginal and Torres Strait Islander people as the Traditional Custodians of our land and waters. We respect the spiritual, social, cultural, environmental, and economic practices connected to Country, and ongoing importance of cultural and heritage beliefs, languages and Lore today.

The National Farmers Federation and the Indigenous Agricultural Product Framework team pay our respects to Elders, past and present, and to the youth, for the future. We extend this to all Aboriginal and Torres Strait Islander people reading this report.

Please note that in this document the term Aboriginal and Torres Strait Islander people is used. We acknowledge and respect that it is preferable to identify Aboriginal and Torres Strait Islander people, where possible, by their language group or nation. The term 'Indigenous' is used when part of an existing name, title, or accepted terminology by the sector.

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The following section of the report contains quotes from the general Australian populus – aged 18 years and over. Some of the quotes demonstrate that some people have stereotyped, naïve, and uninformed opinions about the nature, scale and complexity of Indigenous agriculture in Australia. Some readers, including many Aboriginal and Torres Strait Islander readers, may find these views offensive or distressing. The quotes are included in this report because they demonstrate the scale of change that is required to inform and educate the general population about the strengths of, and opportunities for, Indigenous agriculture in Australia. The quotes are clearly indicated using a different font and layout (see example below), for readers who would prefer to skip this content.

This is an example of a quote.

Version control

Modified by	Date	Version
PwC Indigenous Consulting	29-7-24	v1.0
Yamagigu Consulting Pty Limited (formerly PIC)	14-8-24	v.1.1

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Executive summary

This report (Mid-Outcome Report #2) provides a comprehensive mid-term review of the Indigenous Agricultural Product Framework Project. Previously, the project has conducted extensive consultation with Aboriginal and Torres Strait Islander producers, community, and non-Indigenous individual and groups to develop a set of characteristics of and definition for 'Indigenous agricultural products'. This work has determined broad support for a credential that could provide consumers and others with confidence in the authenticity of product claims, and potentially provide producers with a premium thereby building prosperity for Aboriginal and Torres Strait Islander producers and communities.

This report describes the findings from three streams of work: research with consumers to understand their attitudes towards and expectations for Indigenous agricultural products and a credential system; estimates for the market size and wider economic and community value of Indigenous agricultural products; and barriers and opportunities within capital markets.

The report finds that consumer sentiment towards Indigenous agricultural products and an associated credential is positive. Procurement buyers – wholesale and other organisations buying in bulk from producers to resell to others – and retail consumers or 'end users' are particularly supportive of a credential system that would enable them to identify Indigenous agricultural products and have confidence that value was being derived by Aboriginal and Torres Strait Islander people. The main issue for both groups currently is one of access: products are not available, not consistently available, or cannot be distinguished from 'like' products that are not Indigenous owned or produced. Many retail consumers are prepared to pay more for credentialed products and perceive that Indigenous agricultural products are healthy, ethical and provide benefit to Aboriginal and Torres Strait Islander communities.

Results from the economic analysis show that estimates for the current and potential future size of the market for Indigenous agricultural products are highly sensitive to Aboriginal and Torres Strait Islander ownership thresholds. A more restrictive threshold where a credential would be applied only to businesses that are majority-owned by Aboriginal and Torres Strait Islander producers estimates a current market size of around $195m. A less restrictive threshold allowing for 50% ownership – common in agricultural industries which are dominated by partnership ownership structures – reveals that the current size of the market could be around $633m. Accounting for flow-on, second order effects such as jobs and receipts generated through the supply chain and additional consumption shows that the total economic contribution under the less restrictive ownership threshold could be around $1.4b and around 1,900 jobs.

Indigenous agricultural products are associated with less quantifiable value as well. Interviews with producers revealed substantial community benefits associated with the intergenerational transfer of cultural knowledge and community cohesion by providing a mechanism for Aboriginal and Torres Strait Islander people to connect with Country and culture. Many Indigenous agricultural producers incorporate inclusive and participatory leadership and decision-making processes into their operations, strengthening community cohesion and reinforcing traditional ways of knowing, being and doing.

Findings from interviews with representatives from government and private capital markets reveal broad support for Indigenous agricultural businesses. However, a credential associated with Indigenous agricultural products is unlikely to provide producers with an advantage when it comes to funding applications. The main reason for this is that risk and decision-making processes and structures within private lending institutions in particular do not currently place 'value' in credential systems. Opportunities for growth may be found in blended capital approaches and through strategic partnerships between Indigenous and other businesses.

1: Project background

Context

For tens of thousands of years, Aboriginal and Torres Strait Islander people across Australia have cultivated land and harvested native plants, animals and fungi for medicinal use, tools and materials, and food. In contrast to the myth of Aboriginal and Torres Strait Islander people being mere 'hunter gatherers', the evidence shows a rich pre-colonial history of advanced agricultural and aquacultural techniques.[1]

Despite fierce resistance, European colonisation had a devastating impact on Aboriginal and Torres Strait Islander people,[2] the impacts of which continue to be felt today. Relative to non-Indigenous Australians, Aboriginal and Torres Strait Islander people experience worse health and socioeconomic outcomes.[3] In agriculture, Aboriginal and Torres Strait Islander people are under-employed, and despite having interests in more than half of Australia's landscape, most of the revenue generated from the 'Indigenous estate' provides no benefit to Aboriginal and Torres Strait Islander people.[4]

The development of a definition and associated credential system for Indigenous agricultural products presents one way of delivering increased economic self-determination for Aboriginal and Torres Strait Islander people. This could be achieved through the premium which may be associated with verified authentic products, business ownership, and employment opportunities. If the definition and credential was restricted to Aboriginal and Torres Strait Islander-owned businesses, the employment effect could be greater, as these businesses have an employment rate for Aboriginal and Torres Strait Islander people around 60% higher than for non-Indigenous businesses.[5]

Alongside the benefit to Aboriginal and Torres Strait Islander people, there has been growing consumer demand for Indigenous agricultural products resulting from a general interest in the health benefits of native Australian ingredients, and a drive to support small, regional and Indigenous businesses across Australia.[6] There is good reason, however, to consider the expansion of Indigenous agricultural products to encompass more than

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[1] B Pascoe (2014). *Dark Emu*. Magabala Books.
[2] NSW Government (undated). Aboriginal resistance, conflict and massacres. NSW Public Service Commission. https://everyonesbusiness.psc.nsw.gov.au/node/57.
[3] Australian Government. (2020). Closing the Gap Report 2020. National Indigenous Australian Agency. https://ctgreport.niaa.gov.au/sites/default/files/pdf/closing-the-gap-report-2020.pdf.
[4] J Gilbert, J Pratley, P Prenzler, J McCormick. (5 April 2024). Indigenous employment in Australian agriculture. FutureAg Conference paper. https://futureagexpo.com.au/blog/indigenous-employment-australian-agriculture#:~:text=Approximately%205%2C900%20First%20Nations%20people,1%2C300%20or%2028.2%25%20from%202016.
[5] Standing Committee on Indigenous Affairs (2021). *Report on Indigenous participation in employment and business*. The Parliament of the Commonwealth of Australia. https://www.aph.gov.au/-/media/02_Parliamentary_Business/24_Committees/243_Reps_Committees/Indigenous/Pathways_and_Participation/Report.pdf?la=en%26hash=0FF8A974D86F9A87BB46B5F236D4FCFD110C515B#:~:text=Indigenous%20businesses%20have%20an%20employment,in%20that%20growth%20and%20success.
[6] Y Sultanbawa, F Sultanbawa (2021). *Australian Native Plants: Cultivation and Uses in the Health and Food Industries*. CRC Press.

only native produce. While some Aboriginal and Torres Strait Islander people have established businesses selling 'bushfoods', only a very small proportion (1–2%) of the industry's produce and dollar value is generated by Aboriginal and Torres Strait Islander people.[7] While Aboriginal and Torres Strait Islander people are under-represented in the agricultural workforce,[8] their connection with some agricultural industries (such as cattle) could justify the inclusion of non-native species into a definition of Indigenous agricultural products.[9]

Given Aboriginal and Torres Strait Islander peoples' historical and contemporary involvement in both native and non-native Australian agriculture, the approach to developing a definition for Indigenous agricultural products and any associated credential system should consider the views of a wide group of Aboriginal and Torres Strait Islander stakeholders. The definition and credential system should be sensitive to Australia's history, both before and after colonisation, as well as to Aboriginal and Torres Strait Islander peoples' preferences and priorities.

Scope

In partnership with the Indigenous Land and Sea Corporation (ILSC) and the Department of Agriculture, Fisheries and Forestry (DAFF), the National Farmers Federation (NFF) has contracted *yamagigu* to develop the evidence base to support and inform the establishment of Indigenous agricultural product credentials.

These credentials will help verify the provenance of Indigenous agricultural products and deliver improved economic benefits to Aboriginal and Torres Strait Islander people.

The key elements of the project are to:

1. Consult and engage with stakeholders across the agriculture landscape, including Indigenous communities and business, farmers, processors and governments to develop and agree a definition of Indigenous agricultural products.

2. Consult and engage with these same stakeholders to identify a credential system to differentiate Indigenous agricultural products.

3. Estimate the economic and community value of Indigenous agricultural products that are currently produced for domestic and international markets.

4. Identify benefits and barriers to growth, including regulatory issues.

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[7] R Mitchell, J Becker. (19 January 2019). *Bush food industry booms, but only 1 per cent is produced by Indigenous people*. ABC News. https://www.abc.net.au/news/rural/2019-01-19/low-indigenous-representation-in-bush-food-industry/10701986

[8] J Gilbert, J Pratley, P Prenzler, J McCormick. (5 April 2024). *Indigenous employment in Australian agriculture*. FutureAg Conference paper. https://futureagexpo.com.au/blog/indigenous-employment-australian-agriculture#:~:text=Approximately%205%2C900%20First%20Nations%20people,1%2C300%20or%2028.2%25%20from%202016

[9] F Stevens (1974). *Aborigines in the Northern Territory Cattle Industry*. Australian National University Press. Note that the term 'Aborigine' is now considered offensive.

5. Assess the export maturity of Indigenous agricultural products, with recommendations to improve economic impact.

While we have endeavoured to capture a diverse representation of the views and values of the industry/sector and Aboriginal and Torres Strait Islander people, we know that these groups are not homogenous. Our findings and reports reflect only the views of those consulted within the context of this project and at the time of engagement and may not represent shared agreement by all cohorts.

Purpose and structure of this report

This document responds primarily to the key elements 3 and 4, above, and describes the findings from three streams of work:

1. Mixed methods research on consumer attitudes and expectations

2. Estimating the community and economic value in the current domestic and international markets

3. Critiquing the private sector market potential.

This document, Mid-Outcome Report #2, is descriptive in nature. The findings reported here will be synthesised with two remaining pieces, barriers to growth from regulatory issues and scoping business model options and presented in the Benefits and Gaps Analysis due in January 2025.

The Benefits and Gaps Analysis will consolidate all findings and provide recommendations for improving the economic impact of Indigenous agricultural products.

The report is structured into four main sections. Section 2 describes the findings of the mixed methods research with procurement buyers and retail consumers, collectively 'consumers' of Indigenous agricultural products. The section finds that procurement buyers – organisations that typically buy agricultural products in bulk directly from producers and sell the product to end users or others in the supply chain – see the potential for Indigenous agricultural products though currently experience issues identifying Indigenous producers and achieving consistency in supply to meet demand. Retail consumers – the end users for potential Indigenous agricultural products – were very supportive of the concept of Indigenous agricultural products and believed strongly in the importance of Aboriginal and Torres Strait Islander ownership. Retail consumers were very interested in a credential that could provide them with confidence that claims about the provenance Indigenous agricultural products could be trusted.

The previous phase of consultation with community and the sector identified that the definition of ownership was critical. Initial analysis also suggested that the potential scope of eligibility could differ depending on whether a 50% ownership requirement was adopted (which would capture 50-50 partnership structures common in the broader agricultural industry), compared to the 51% ownership requirement usually adopted for Indigenous certification. As such, these differing ownership assumptions were tested to give all stakeholder and decision makers transparency which will help inform ongoing discussions.

Section Three presents the findings of economic analysis conducted by specialist firm Polis Partners. Polis Partners used publicly available Indigenous agricultural data and reports to estimate the size of the current and potential market for Indigenous agricultural products under two scenarios – one with a less restrictive threshold for what constituted an Aboriginal and Torres Strait Islander owned business or organisation (at least 50%), and one with a more restrictive threshold (at least 51%). The analysis shows that the size of the market is very sensitive to ownership thresholds, with estimates of the current market size ranging from $195m (51% ownership) to $633m (50% ownership) under the two

scenarios. Section Three also presents estimates of the potential wider economic impact in terms of jobs and receipts generated through the supply chain and additional consumption – the 'total' economic contribution of Indigenous agricultural products, using the same scenarios as for the market sizing. The section also describes the findings of a series of in-depth interviews with Indigenous producers and shows the various ways that Indigenous agricultural production contributes to communities. These include through knowledge transfer and a sense of belonging and identity, community cohesion and health, and leadership and empowerment.

Section Four presents the findings of a series of interviews with representatives from the private sector with a focus on government and private lenders. The purpose of this section is to understand the context for many Indigenous agricultural producers' claims that they experience challenges accessing the necessary capital to build their businesses. The section reports that while funders had generally positive views about certification and supporting Indigenous business generally, that certification – for any products, Indigenous or not – did not feature in lenders' assessments of risk when making credit and loan assessments. Blended capital approaches which combine different types of capital (e.g., grants, loans and equity investments) may offer Indigenous agricultural producers a more flexible and appropriate capital raising avenue than traditional financial products.

Section Five details the next steps for the Indigenous Agricultural Product Framework Project, which includes to present a detailed analysis of benefits and gaps in January 2025. Appendix A includes Polis Partners' economic analysis in full, and Appendix B presents detailed case studies of seven Indigenous agricultural businesses, highlighting the key themes detailed in the community value section of the report.

Limitations

There are two primary limitations that should be noted when reviewing the findings detailed in this report. First, the findings represent what *yamagigu* learned from stakeholders consulted. While the report consolidates findings from more than 20 interviews, four focus groups and an online survey, there were several groups that were unavailable for consultation during the specified window. Businesses open to engaging with *yamagigu* for this phase of the project tended to be (though were not exclusively) smaller-scale businesses. The section on procurement buyers could have benefited from expanded consultation with businesses operating at a larger scale (e.g., national grocery chains), and also businesses and government agencies who could speak to the potential export market for Indigenous agricultural products. *yamagigu* will continue to establish these relationships with key stakeholders who were not available for consultation at this time. Early conversations indicate that there is likely to be substantial international interest in certified Indigenous agricultural products from some of these larger sector organisations and agencies. These views will be more fully developed in the Benefits and Gap Analysis. Relatedly, the retail consumer section is based on the views of a 'general population' sample – adults aged 18 years and over. It may be that the general population is not the primary retail consumer target for Indigenous agricultural products. Given the early stage of this work there was not enough evidence to identify groups who may be more or less inclined to purchase *and pay a premium for* Indigenous agricultural products. Future work should be conducted to segment the retail consumer market to identify groups who would be willing to pay for certified products.

The second limitation relates to the availability of data to inform the economic analysis. There are incomplete (and sometimes non-existent) publicly available data on ownership structures within Indigenous agricultural businesses, revenue and other financial metrics, and the types of agricultural industries Indigenous businesses are operating in. The economic analysis is therefore subject to the assumptions used and detailed in that report.

2. Consumer attitudes and expectations towards Indigenous agricultural products

Consumers were categorised into two parts: *procurement buyers*, who purchase directly from producers in a wholesale capacity and often to resell to other buyers (e.g., restaurants, grocery stores); and *retail consumers*, the 'end user' who purchases products to consume themselves. Different engagement methods were used for each group.

Procurement buyers

Engagement methods with procurement buyers

Procurement buyers were identified through desktop research, including by reviewing Supply Nation corporate members who identified as belonging to agricultural sectors.

Potential interviewees were contacted via email with a brief description of the project and a request for interview. In total, *yamagigu* secured five interviews with representatives from the following sectors:

- Restaurants
- Manufacturers of consumable goods
- Wholesale distributers.

The perspectives from this group were complemented with the views and experiences of Indigenous agricultural producers with respect to procurement buyers. Interviews were conducted in August 2024 over Microsoft Teams.

Enablers to procuring Indigenous agricultural products

Growing consumer demand

Indigenous agricultural producers reported growing interest in the wholesale/procurement of their products, particularly from corporate and government sectors, and the need for consumer education to promote these products. Procurement buyers are increasingly prioritising locally sourced and ethically produced foods, which often includes Indigenous agricultural products grown by Aboriginal and Torres Strait Islander communities.

> *I think there's definitely a groundswell of interest from bigger companies, government, and the likes of Qantas, that are looking to support more and more Indigenous business in this native food space.*

> *The demand for [our product] is quite high and outstrips our ability to supply that demand. I could move a hundred times more than what I do.*

With the rise of eco- and First Nations tourism, experiences such as bush food tastings, culinary tours, and workshops provide consumers with firsthand exposure and appreciation for these unique foods.

Supporting Indigenous business through joint ventures and collaboration

Procurement buyers highlighted the potential benefits of establishing joint ventures between Aboriginal and Torres Strait Islander and non-Indigenous businesses to ensure successful outcomes. Some buyers perceived that some Aboriginal and Torres Strait Islander businesses could benefit from support to ensure their business growth was sustainable.

We need to have more legitimate joint ventures between Indigenous and non-Indigenous business to work together towards the solutions.

[The] best outcome is if we work together for a mutually successful outcome.

There was a strong emphasis on the importance of fair pricing for farmers and long-term partnerships to ensure sustainability. Procurement buyers supported the idea that establishing long-term partnerships between buyers and producers fosters trust and collaboration. In turn, these partnerships could provide stability and predictability, allowing producers to plan for the future and make long-term investments. Financial stability enables producers to re-invest in their operations, improve potential productivity, and continue to support their communities.

I'm very keen to see that the farmer gets fair return and value. To me it's a long-term partnership.

[It's important to] ensure that it goes back to community or there's some benefit going back to community.

Whilst procurement buyers expressed a strong preference for sourcing from Indigenous producers, they understood that there was a need for a more holistic approach in the supply chain for Native/bush foods, where Indigenous agricultural producers were not available.

I try and prioritise what I call 'allied businesses', people that understand the connection of these ingredients to Country and culture.

Cultural connection

Recognising and honouring the cultural connection to products and Country enriches the collective understanding of Aboriginal and Torres Strait Islander heritage, sustainability, and community wellbeing. It underscores the importance of preserving these traditions for future generations while fostering respect and appreciation. Procurement buyers are seeing a growing trend in the consumer demand for these products, not only for consumers' own use or consumption, but also for the demonstrated importance of the product's connection to culture and to Country. Aboriginal and Torres Strait Islander-owned procurement buyers saw great value in the connection Indigenous agricultural products have with Aboriginal and Torres Strait Islander culture, and with Country.

Native food is inherently connected to Country and culture.

Our food's not just food. It's the way that we form connection with Country.

Procurement buyers highlighted a need for Aboriginal and Torres Strait Islander producers to receive business support around demonstrating the cultural integrity of their products and returns to community. They perceived that retail consumers were actively looking for these aspects, and further business support could help smaller businesses/producers capitalise on this. The production and sale of Indigenous agricultural products also have other significant cultural and economic impacts, including community cohesion, sense of identity, and potential for economic growth. The interviewed procurement buyers recognise this and expressed their conscious efforts to incorporate Aboriginal and Torres Strait Islander producers in their supply chains.

Native food's going to be a really important piece of Reconciliation within our country.

One of the things we constantly hear about is getting people back on Country, community cohesion, and a sense of identity.

Food brings people together. We get together, we share food, we share knowledge, and we solve problems.

Barriers to procuring Indigenous agricultural products

Procurement buyers identified several challenges related to accessing and consistently sourcing Indigenous agricultural products.

Visibility of Indigenous business

One of the primary difficulties procurement buyers mentioned was the challenge in locating reliable suppliers of Indigenous agricultural products. Buyers reported that they had limited visibility of suppliers in the market, and often relied on a single known producer or using word of mouth to connect with alternate suppliers. They also reported difficulty in identifying which, if any, producers identified as Aboriginal and Torres Strait Islander. Even when they were able to identify producers as being Aboriginal and Torres Strait Islander, buyers often struggled to access levels of supply that matched their needs.

We struggle to find Indigenous agricultural products.

You want to put something on your menu, you've got to continue with that. You can't change the menu every day because you can't get a product. And native ingredients have, you know, fought with that issue over many years.

Procurement buyers also reported that the small number of Aboriginal and Torres Strait Islander-owned agricultural enterprises restricts the variety and volume of products available in the market. Procurement buyers seeking to support Aboriginal and Torres Strait Islander businesses or diversify their product offerings may find it difficult due to the limited choices.

It's very hard for me to determine, as there's minimal Indigenous-owned agriculture businesses that I have access to or know about or sell to or try and sell their product to me.

Supply chain inconsistency

Procurement buyers pointed out that even when suppliers are identified, the availability of products can be inconsistent. Seasonal variations and small-scale production can often lead to fluctuations in supply. This inconsistency makes it hard for businesses to rely on these products for regular use.

Procurement buyers reported that sourcing Indigenous agricultural products is a complex endeavour that comes with a unique set of logistical challenges. Many Indigenous agricultural regions are located in remote areas, far from urban centres and major distribution hubs. Transporting products from these areas to markets involves long travel distances, increasing costs and time. These costs are often passed down the supply chain, increasing costs to consumers. Many remote Aboriginal and Torres Strait Islander communities, where a large portion of Indigenous agricultural products are produced, lack essential infrastructure, such as reliable roads, storage facilities, and communication networks.

Freight logistics is always one thing. Freight is adding tremendously to the cost of product that's shipped all around the country these days.

We've seen a lot of First Nations businesses drop out of the market because of the challenges they've faced particularly in the last five years.

The market is seeing an ongoing trend where demand for native foods and other Indigenous agricultural products far exceeds supply. In some instances, this is leading to high prices. While higher prices can potentially benefit producers, they may also limit accessibility for some consumers, and potentially restrict market growth. Procurement buyers explained that fluctuations in the price of Indigenous agricultural products can also be due to seasonality and lack of scale.

What we're finding now with the increased popularity of these ingredients, of course what happens is just the skyrocketing in terms of prices because we're not meeting the demand.

Just fluctuations in the price, which I guess I anticipate somewhat because of the seasonality of them and because they're not produced on scale, a lot of these things.

Lack of consumer knowledge or education

One key theme consistently raised through our engagement with procurement buyers was the lack of consumer knowledge. There appears to be a need for better education and awareness about native foods among consumers and within the industry to promote their use and ensure accurate information.

If we could demonstrate that on our menu more fully, because we would have that knowledge or that product was available, then I think it would help consumer decisions, but mainly from international tourism, more than Australians.

The knowledge of Indigenous-owned agricultural brands, like for me [as a procurement business] is very limited. So, for the general consumer, it would be even more limited.

Procurement buyers reported a gap in consumer education about native foods in particular, including in relation to the nutritional value, cultural significance and culinary versatility of bush foods. They speculated that without proper education, potential buyers or end consumers may hesitate to try these products or incorporate them into regular use or consumption.

If we were just peddling, say, bush tomatoes, there's very few people out there who know what to do with bush tomatoes.

People always ask me, 'how do I access more information? Where do I go to?' We do need better resources and we need better research resources.

Procurement buyers also suggested that end consumers may have misconceptions or stereotypes about Indigenous agricultural products, viewing them as 'exotic' or 'niche' rather than mainstream and accessible. This can impact procurement buyers because products may be seen as novel, and have a lower demand, whereas other products that may be more recognisable have a much higher demand. It was acknowledged that there is often a lack of visibility in mainstream retail outlets, making them less accessible to the average consumer.

You ask Australians about native food and they're flat out naming five of them, let alone six and a half thousand.

The Australian audience at this time still thinks that kangaroo and witchetty grubs are native food.

Buyers also reported that even when consumers were interested in and willing to buy Indigenous agricultural products, they were not aware of where to find them. This sentiment was shared by procurement buyers who also reported difficulty accessing these products from Aboriginal and Torres Strait Islander producers.

I run a restaurant, and I'm not super aware of an Indigenous organisation I could go to [to] buy products produced by other Indigenous organisations.

Competition from non-Indigenous business

Non-Indigenous businesses dominate the agricultural market, often having well-established networks, greater resources and stronger market influence, making it difficult for Aboriginal and Torres Strait Islander producers to compete. The scale and reach of larger and non-Indigenous businesses can overshadow smaller Aboriginal and Torres Strait Islander businesses, limiting their visibility and market share. Integrating into existing supply chains can be challenging for Aboriginal and Torres Strait Islander producers due to a lack of connections and established relationships within the industry.

And they [non-Indigenous producers] are just going to keep out competing us [Indigenous producers] because they've got the land, they've got the mass, they've got the market.

Non-Indigenous businesses have also been known to market their products as Indigenous, which may be misleading consumers. Authentic Aboriginal and Torres Strait Islander businesses lose out on potential sales and market opportunities due to competition from falsely marketed products. Consumers may unknowingly purchase inauthentic products, leading to a loss of trust in the market for Aboriginal and Torres Strait Islander goods. This mistrust can harm genuine Aboriginal and Torres Strait Islander businesses, making it harder for them to build and maintain customer loyalty.

There's a lot of black cladding of First Nations products. People say it happens with the art, my god, it happens with our food.

Marketing expertise

Aboriginal and Torres Strait Islander suppliers often encounter barriers with marketing their products effectively which can impact their business growth and market presence. Marketing efforts require financial investment, which can be a significant barrier for small or emerging Aboriginal and Torres Strait Islander businesses with smaller budgets. Building brand recognition takes time and consistent effort, something that Aboriginal and Torres Strait Islander suppliers might struggle with due to their smaller scale of operations. Access to marketing tools, platforms, and professional services can also be restricted due to these resource constraints.

It's tough for growers to be that marketing division as well. Unless you're a massive company, you know, but in the context of Indigenous suppliers and growers, it's very hard to have to take on the marketing role as well.

Challenges in market scale

According to one procurement buyer, large food retailers and manufacturers are reluctant to use ‘foraged’ foods due to higher food health and safety concerns. Health standards in the manufacturing process can deter the procurement of some Indigenous agricultural products that have been foraged or wild harvested, due to the lack of traceability in its

origin and the product's potential exposure to uncertified or unknown treatments (e.g., poison sprays).

> *If it's foraged, [the buyers are] very reluctant to do anything because once they start putting in their safety plans, it's not something they want to put on that retail shelf.*

Some medium to large companies may have Indigenous procurement targets but can face difficulties integrating more Indigenous agricultural products into their procurement purchases. This can be due to the larger size of the procurement requirements, which outstrips the supply of this product in the market. Therefore, procurement buyers explained that larger companies may not invest in a potential product that has a minimal percent additive of an Indigenous agricultural product or Native foods, if they are unable to maintain regular supplies to consumers. To ensure profitability, a product line of this nature would need to be seen as novel or run as a limited batch.

Procurement buyers' support for a credential system

The procurement buyers engaged through this phase advocated for and supported the establishment of a credential system for Indigenous agricultural products. They highlighted a strong need for a system to distinguish Indigenous from non-Indigenous agricultural products and provide a competitive edge to Indigenous producers. Procurement buyers saw a direct relationship between Indigenous agricultural products' certification and quality standards to protect these products' integrity and ensure fair practices.

> *I think there's an opportunity in Australia to have... an appellation system for Australian First Nations products.*
>
> *That certification process is actually essential. We should be placing a value on these products from a cultural, a community, and a natural resource point of view.*

Both Indigenous and non-Indigenous procurement buyers expressed a strong commitment to supporting Aboriginal and Torres Strait Islander producers, suppliers and communities, emphasising the importance of helping these groups get started and succeed in the industry.

> *I've always wanted to try and support more [Indigenous] engagement in the supply chain.*
>
> *We're pretty dedicated to representing a unique Australian cuisine which is obviously all about Australian produce and...native products.*
>
> *I probably would prefer to buy from an Indigenous-owned ag business than the standard white fella supply chain.*

Indigenous branding and certification could benefit consumer decisions and restaurant purchasing trends. Procurement buyers reported that certified products are more likely to be perceived as genuine, reassuring consumers that their purchase is supporting Indigenous economic development. Restaurants and foodservice providers can leverage Indigenous branding and certification to enhance their menus with authentic, high-quality ingredients – similar to that of certified organic products. Procurement buyers suggested that certified Indigenous agricultural products could be marketed as premium offerings, appealing to consumers interested in unique and culturally significant products.

Retail consumers

Engagement methods with retail consumers

The views and perspectives of retail consumers were assessed using focus groups to gain qualitative insights and an online survey for quantitative insights. The focus groups were conducted over four sessions in August 2024 with 36 total participants.

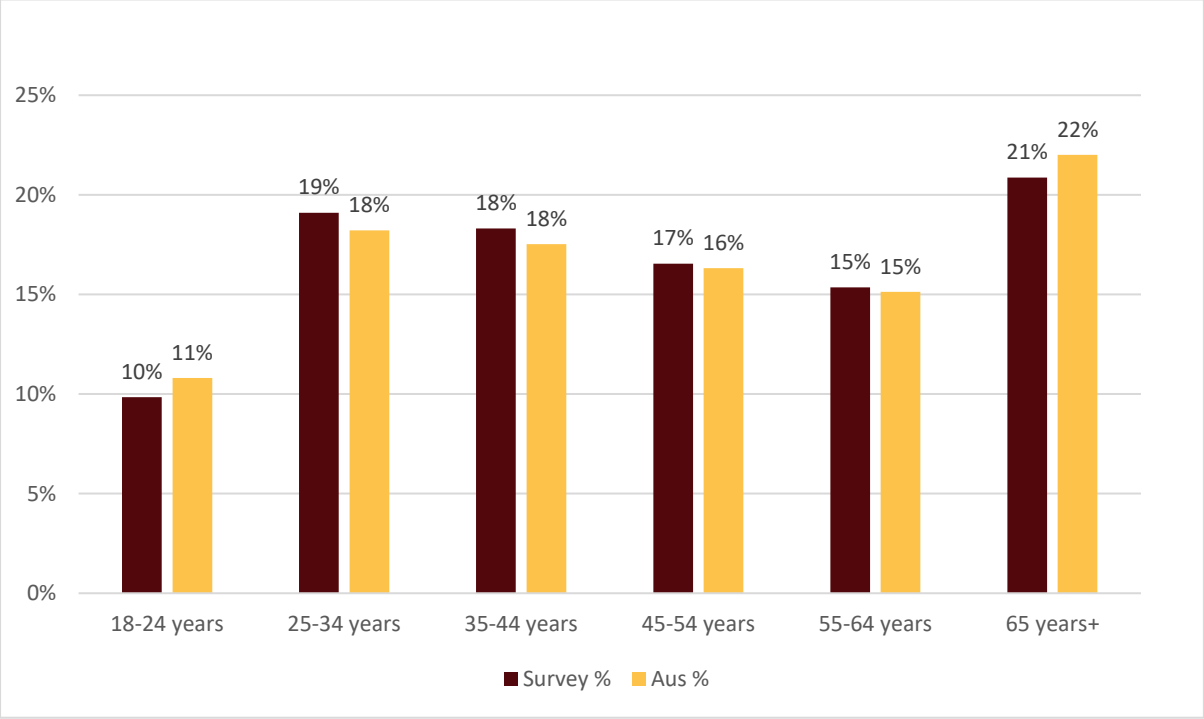
Focus group participants were recruited with the support of Pure Profile, an online market research firm with access to many thousands of Australian consumers via a market research 'panel'. Consumers sign up to the panel and receive rewards (e.g., gift vouchers) in return for their participation in market research of relevance to them. Focus group participants for this project were aged 18 years or over and received $80 for their participation in a 60-minute focus group.

Online survey respondents were also recruited using the support of Pure Profile. In total, 508 people participated. As for the focus groups, participation was limited to people aged 18 years and older.

The age, gender and usual living location of online survey respondents was very similar to the broader Australian population, with one exception being that respondents to the online survey were slightly less likely to live in urban areas, and more likely to live in regional areas compared with the general population. Figure 1 shows the age distribution of online survey respondents compared to the general Australian population. Figure 2, Figure 3 and Figure 4 show the same comparisons for gender, state and territory of residence, and remoteness area, respectively.

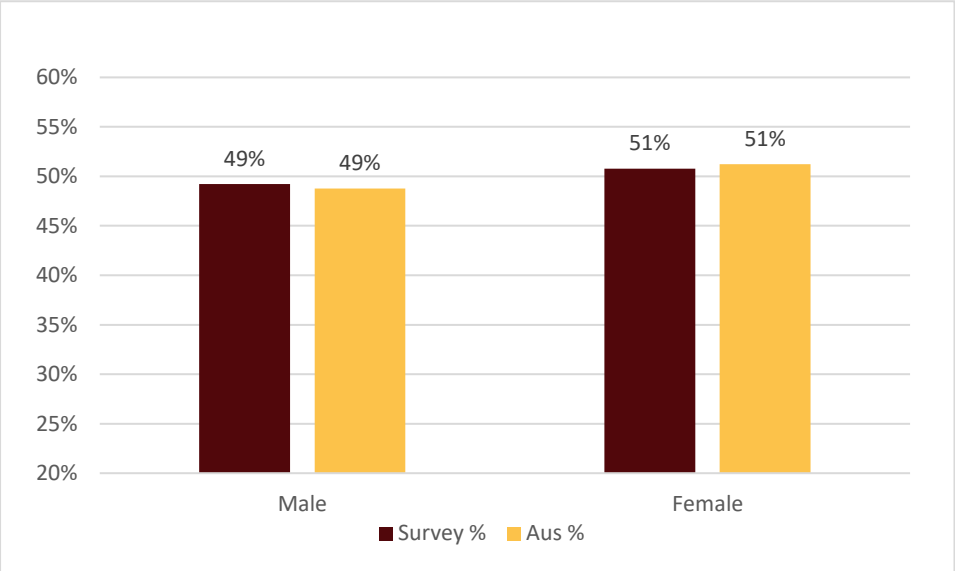
Together, the comparisons suggest that the data from the survey are representative of the Australian population.

Figure 1. Age of respondents to online survey (n=508) compared with the general population



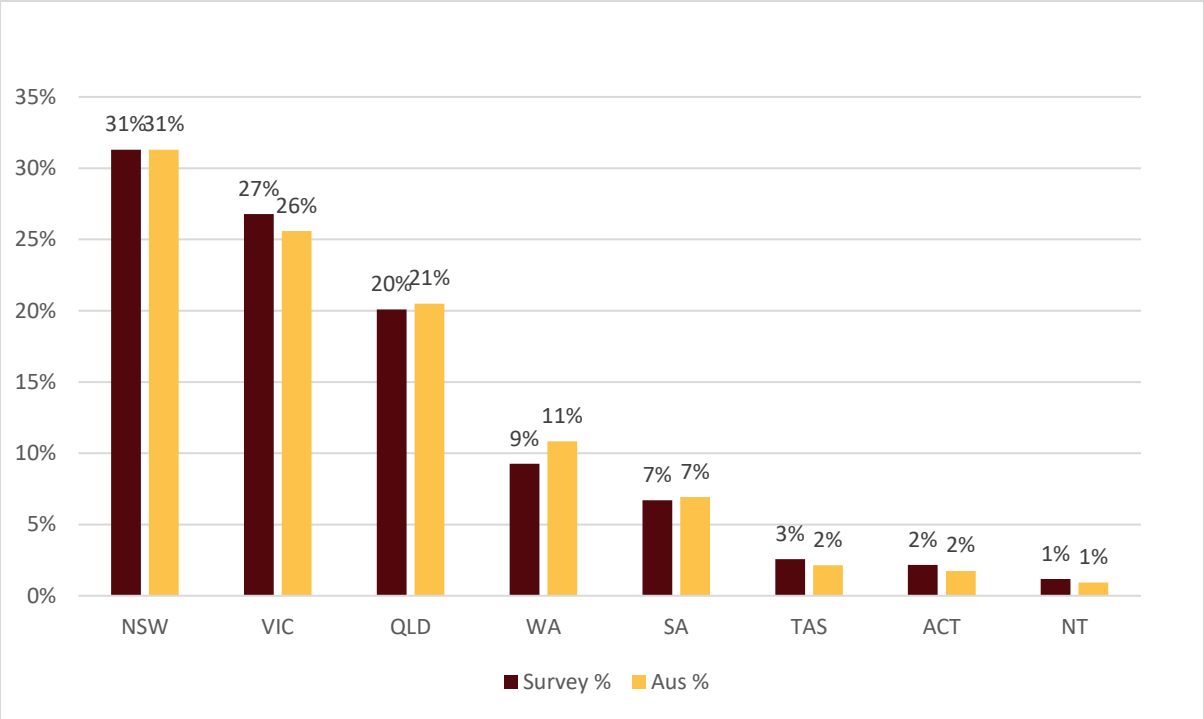
Source: Australian Bureau of Statistics (2022). *2021 Census of Population and Housing.*

Figure 2. Gender of respondents to online survey (n=508) compared with general population



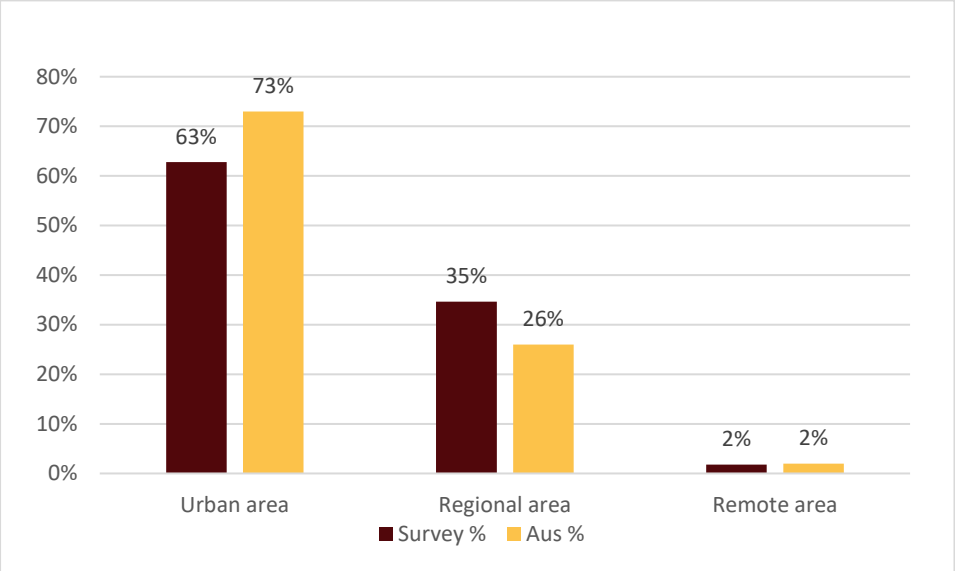
Source: Australian Bureau of Statistics (2022). *2021 Census of Population and Housing.*

Figure 3. State or territory of residence for respondents to online survey (n=508) compared with general population



Source: Australian Bureau of Statistics (2024). *National, state and territory population December 2023.*

Figure 4. Remoteness area of residence for respondents to online survey (n=508) compared with general population



Source: Australian Bureau of Statistics (2024). *Population estimates by LGA, Significant Urban Area, Remoteness Area, Commonwealth Electoral Division and State Electoral Division, 2001 to 2023.*

Support for characteristics defining Indigenous agricultural products

Focus group and survey participants were asked about the extent to which they associated Indigenous agricultural products with the characteristics developed during previous stages of the project. All of the characteristics received support from retail consumers.

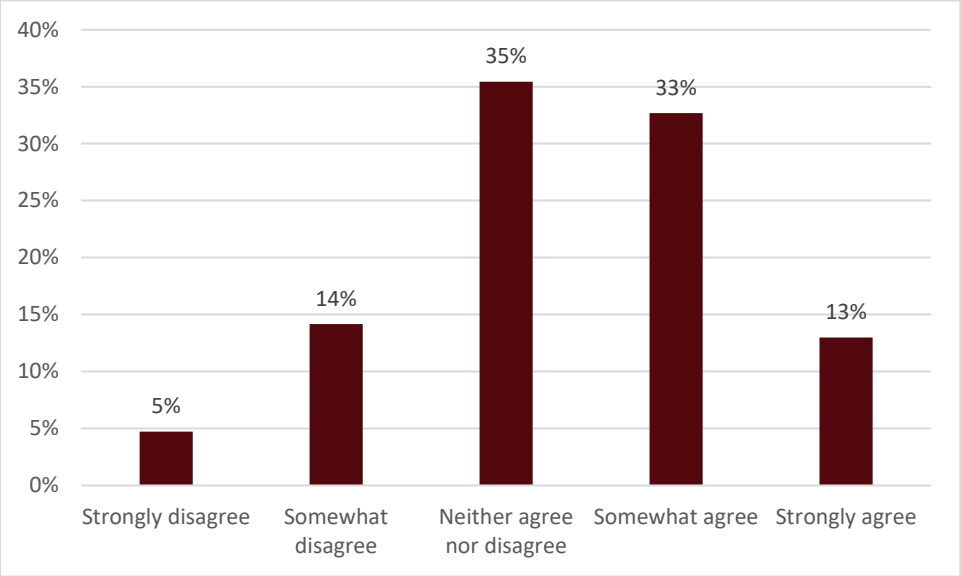
Retail consumers were readily able to identify features of Indigenous agricultural products, despite these products not yet being specifically 'marketed' or having an identified credential. When asked, most focus group participants indicated that food products native to Australia fitted their understanding of Indigenous agricultural products.

> *I think it should be something that has been part of the Indigenous diet for the last thousands of years.*

> *I think of crops that are grown in this country, that are naturally grown and occur here.*

A large majority of respondents to the online survey (46%) indicated that they agreed that Indigenous agricultural products were only those that were sourced from native plants and animals (see Figure 5).

Figure 5. Proportion of online survey respondents who believe that Indigenous agricultural products are only those that come from native plants and animals.



Aboriginal and Torres Strait Islander producers

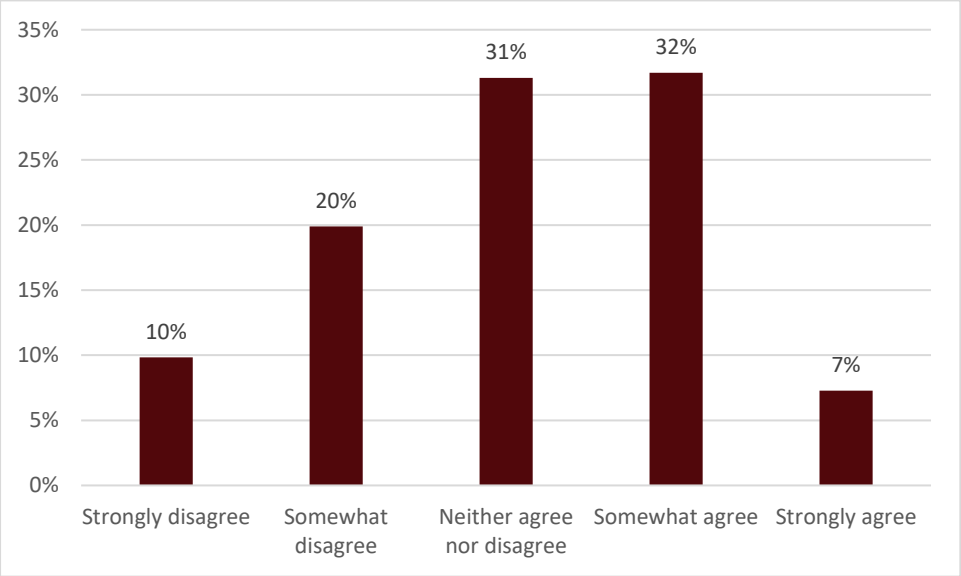
Focus group participants were readily accepting of non-native products being included as Indigenous agricultural products, provided Aboriginal and Torres Strait Islander people were producing the product. There was an assumption that Aboriginal and Torres Strait Islander producers used traditional methods or processes and that this was sufficient to classify an agricultural product as Indigenous.

> *I think, you know, cattle have been here for a long time as well. And Indigenous people have really great knowledge of the lands and might be able to grow cotton or cattle in more sustainable ways that are in line with Indigenous practices.*

> *If it's an introduced species, I don't mind, because if it's still going to Aboriginal people, it would still be produced in the traditional way.*

A smaller though substantial minority of online survey respondents (39%) agreed that Indigenous agricultural products could include non-native plants and animals (see figure 6).

Figure 6. Proportion of online survey respondents who believe that Indigenous agricultural products can include non-native plants and animals.



While most retail consumer volunteered native agricultural products as being 'Indigenous', they tended to speak more passionately about the importance of Aboriginal and Torres Strait Islander producers and ownership.

> *[Indigenous agricultural products should be] made by Aboriginal people and made on Aboriginal land.*

> *[Indigenous agricultural products means that] Aboriginal and Torres Strait Islander people produce the stuff, they own the companies, they work there, and they produce the products using the natural resources.*

Many focus group participants believed ownership was a way of demonstrating the product's connection to Aboriginal and Torres Strait Islander culture and the authenticity of the Indigenous processing methods used to create the product.

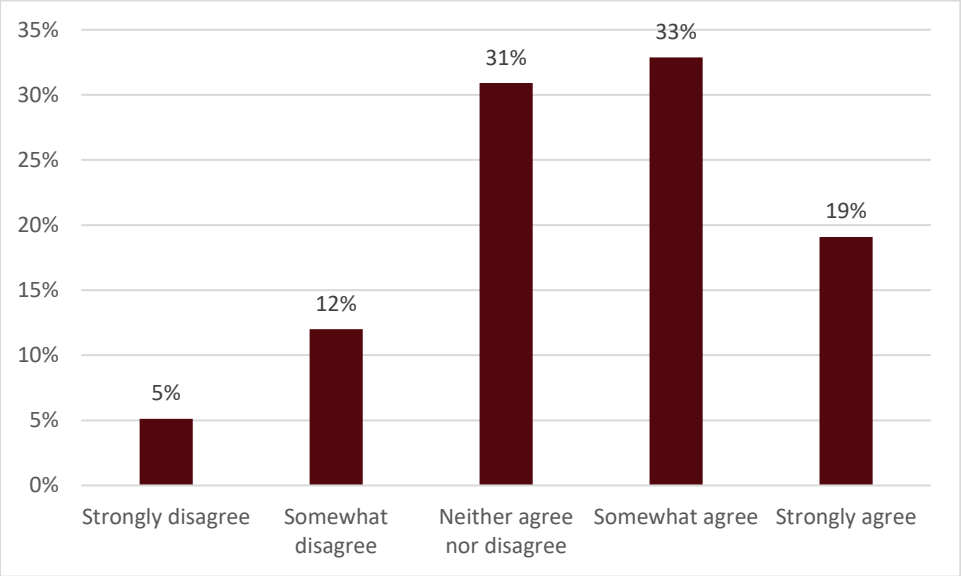
> *[The products are] about the people just as much. I wouldn't necessarily expect the whole company to consist of purely Indigenous people, but I think that the majority should be, to sort of highlight the cultural aspect of it and like make sure it's interwoven in the production. I'd expect a good chunk of it would be connected to people.*

Others believed that while Aboriginal and Torres Strait Islander ownership was important, Indigenous agricultural products were more defined by the extent to which the production methods drew from traditional knowledges. This roughly corresponds to the 'connection to Culture' characteristic agreed during earlier phases of the project.

> *Ownership itself doesn't really have that much weight. The owners of said company could be Aboriginal, but you've gotta look at the practices that are employed, right? Just because the ownership of a company is Aboriginal it doesn't necessarily make it an Aboriginal product if the process and the process behind it [aren't drawing from] traditional practices.*

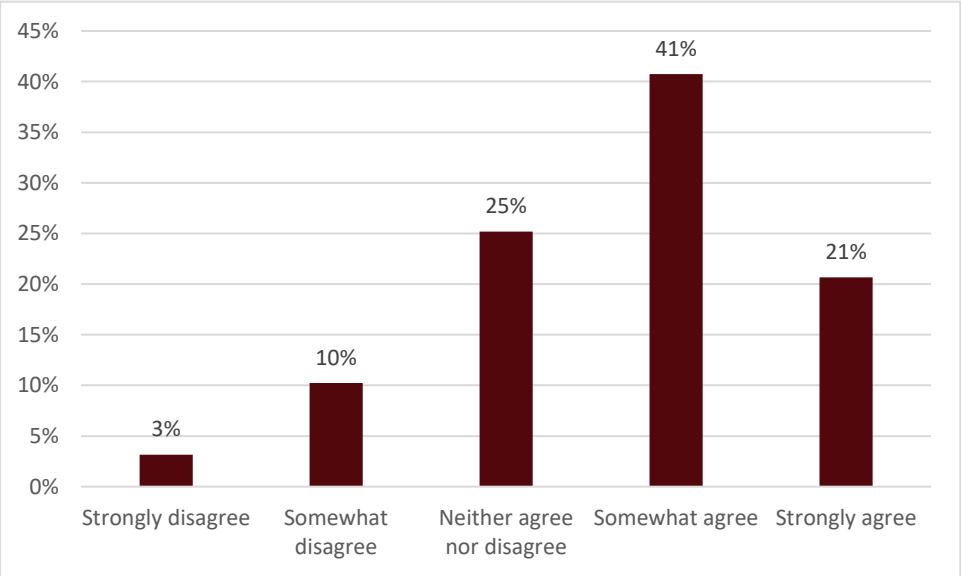
These sentiments were echoed in the results from the online survey, where the majority of respondents (52%) agreed that Indigenous agricultural products should be produced by Aboriginal and Torres Strait Islander people (see Figure 7).

Figure 7. Proportion of online survey respondents who thought it was important that Indigenous agricultural products are produced by Aboriginal and Torres Strait Islander people.



An even larger proportion of online survey respondents (62%) agreed that they would expect Indigenous agricultural products to be produced by businesses that are majority owned by Aboriginal and Torres Strait Islander people (see Figure 8). Focus group participants similarly expressed a high degree of concern around ownership, with several proposing that businesses should be owned "at least 50%".

Figure 8. Proportion of online survey respondents who expect that Indigenous agricultural products should be produced by businesses that are majority owned by Aboriginal and Torres Strait Islander people



Connection to Country and culture and caring for Country

Focus group participants volunteered other characteristics of Indigenous agricultural products that broadly aligned with the product characteristics agreed during earlier phases of this project. For example, many focus group participants mentioned that they would expect Indigenous agricultural products to have and be able to demonstrate a connection to Country:

[I think Indigenous agricultural products would be] foodstuffs, but like generated within their specific lands.

I think [Indigenous agricultural products] would have to be produced locally to make and be able to carry the Indigenous label. I don't think it should apply to anything manufactured or produce that side of Australia.

Likewise, focus group participants offered that Indigenous agricultural products would be produced in ways that maintained and improved the health of the land, corresponding to the 'caring for Country' characteristic.

Facilitator: And what does that traditional way do? Do you have an idea of what that traditional way might look like?

Participant: More sustainable, better for the land.

and

Indigenous people have really great knowledge of the lands and might be able to grow cotton or little cattle in more sustainable ways that are in line with Indigenous practices.

Access and benefits sharing

Finally, while no focus group participant used the words 'access and benefits sharing', many discussed concepts related to sharing and distributing economic benefits arising from the production of Indigenous agricultural products. Many believed that Indigenous agricultural products would be associated with increased employment of Aboriginal and Torres Strait Islander people and that benefits would be shared with local communities.

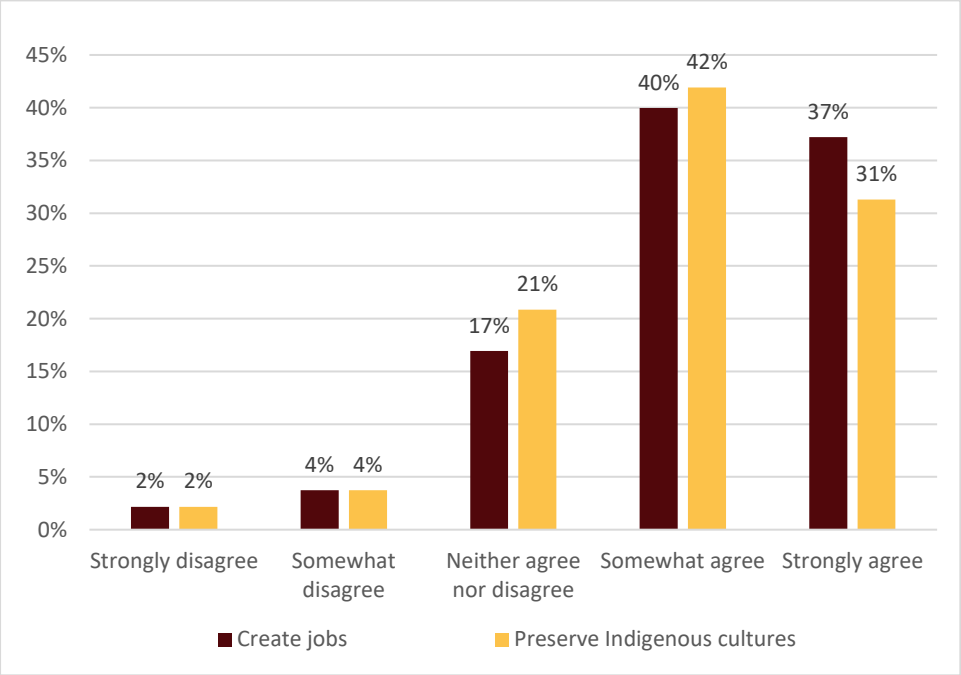
I know that some companies are owned [by Aboriginal and Torres Strait Islander people], but a big part or a big focus is not only working with, but providing resources back to Indigenous Australians. So that's something I would also think about, is, are they working in tandem? Is it sustainable? Who is it really benefiting and is that linked to Indigenous Australians?

Yeah, I have very strong views about that because I'm definitely anti-colonisation and all that stuff. So I feel that for products which claim to be associated with disenfranchised peoples, money should be going to those people, not just like 5% of the profit.

[Indigenous producers] try their best to make sure that they have quite a lot of Indigenous people employed within the business, but also that the profits are going back to the community where they can, because they are still a business. But their real whole moral and purpose of the business is to intentionally showcase Indigenous produce.

Around three quarters of respondents to the online survey indicated that they believed purchasing Indigenous agricultural products helped to create jobs for Aboriginal and Torres Strait Islander people and support the preservation of Aboriginal and Torres Strait Islander cultures (see Figure 9).

Figure 9. Proportion of online survey respondents who believe that purchasing Indigenous agricultural products helps create jobs for Indigenous people and preserve Indigenous cultures



Other features associated with Indigenous agricultural products

Focus group participants mentioned several other features they associated with Indigenous agricultural products. Almost all these features were viewed positively. There was a heavy emphasis on the 'overlap' between Indigenous agricultural products and 'Australian owned and made'. Focus group participants felt that Indigenous agricultural products were by nature Australian made, and that this was a good thing.

> *I think it would have to be produced locally to make and be able to carry the Indigenous label. I don't think it should apply to anything manufactured or produce outside of Australia.*

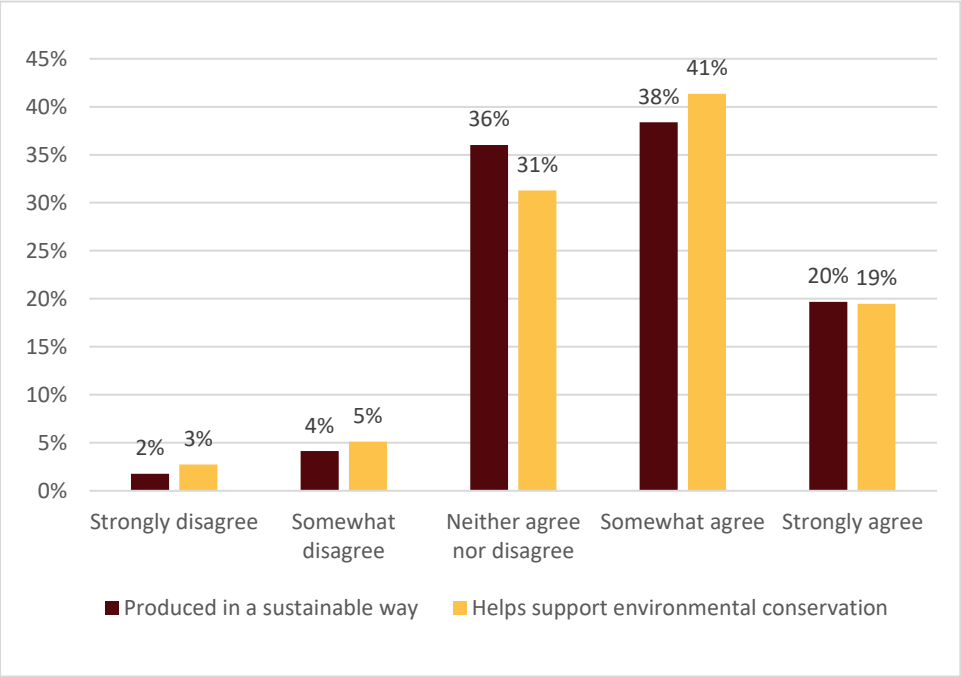
Participants' reasons for the importance of Australian production generally related to environmental concerns, with Australian made products having a lower carbon footprint.

> *I don't wanna support anything that's been made in China for one. Local. You've got to keep the travel miles down.*

> *I would like to see products with reduced food miles. Yeah, with reduced food, miles. From the time it's harvested and grown, and what's involved in growing it as well.*

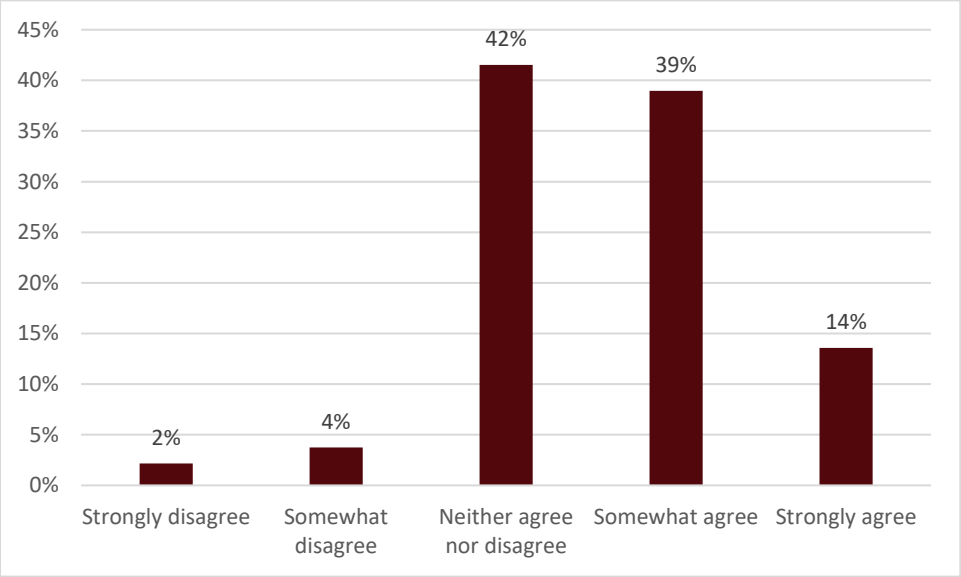
This sentiment was echoed among respondents to the online survey. The majority reported that they agreed that Indigenous agricultural products were produced in an environmentally sustainable way, and that purchasing Indigenous agricultural products helped supported environmental conversation (see Figure 10).

Figure 10. Proportion of online survey respondents who believe Indigenous agricultural products are produced in a sustainable way and that purchasing Indigenous agricultural products helps support environmental conservation



Another reason for preferring Australian made produce was a belief that Australia had higher standards for agricultural produce than other countries. This sentiment was reflected in the online survey, where more than half of respondents (53%) believed Indigenous agricultural products were of high quality (see Figure 11).

Figure 11. Proportion of online survey respondents who believe Indigenous agricultural products are high quality

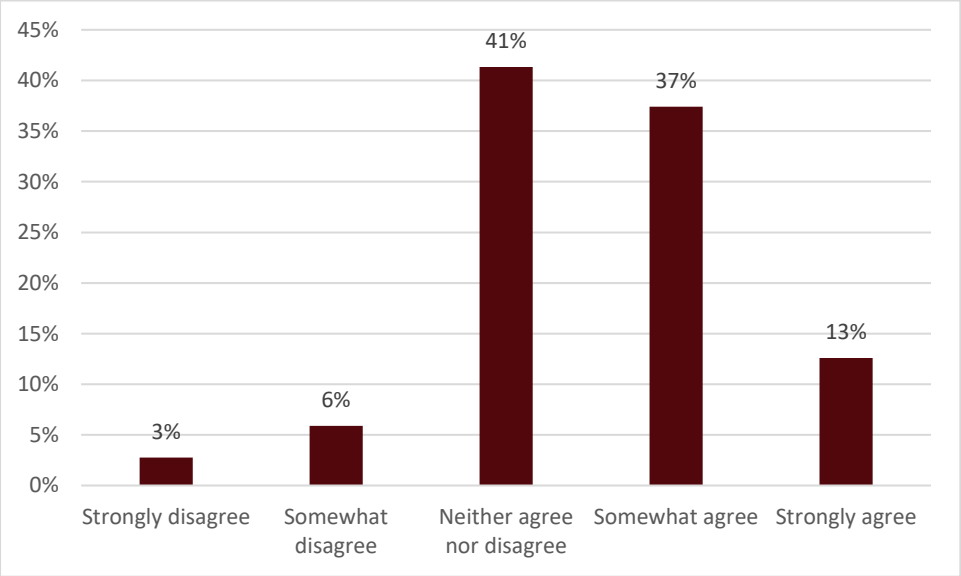


Others focus group participants pointed to Indigenous agricultural products carrying health-related benefits, such as being “organic”, having “high protein content”, “no gene modification”, “high nutritional value”, and an absence of “preservatives, additives or colours”.

> *I would anticipate that there's some sort of health or some sort of benefit associated with [Indigenous agricultural products]. Like I think a lot of the advertising around native products is saying like 'oh you know this is full of antioxidants and like helps with this, it helps with that'. So I think I'd associate that with the Indigenous agricultural product as well.*

Half of all respondents to the online survey indicated they believed Indigenous agricultural products were associated with health benefits.

Figure 12. Proportion of online survey respondents who believe Indigenous agricultural products provide health benefits



Some suggested that they associated Indigenous agricultural products with smaller, more local businesses, which they felt were more ethical.

> *[With Indigenous agricultural products] there's a real kind of local element rather than a big company. Yeah, [they're] more authentic to Aboriginal culture.*

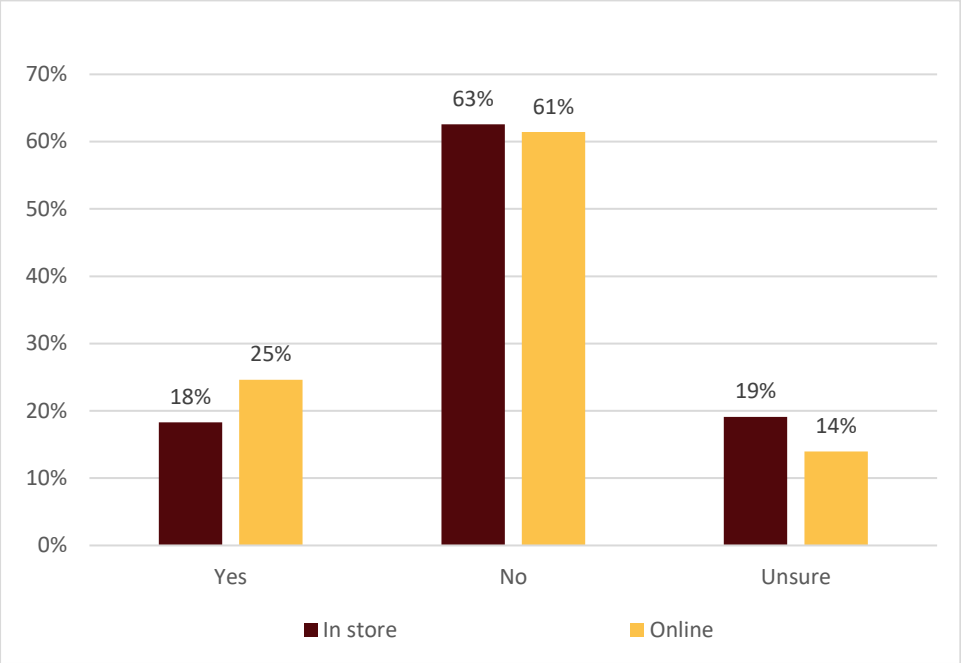
> *If [products were] getting produced in a commercialised setting, like commercialised factories and stuff like that, I would just think it's just another modern-day commercial factory, commercial business, I wouldn't really relate it to Aboriginal owners and that kind of stuff.*

Several pointed to more ethical environmental practices and associated Indigenous agricultural products with "fair trade", which they liked.

Barriers to purchasing Indigenous agricultural products

Retail consumers cited several barriers to purchasing Indigenous agricultural products. The primary barrier was availability. The majority of respondents to the online survey reported that they had not seen Indigenous agricultural products available, either in store (63%) or online (61%, see Figure 13).

Figure 13. Proportion of online survey respondents who reported they had seen Indigenous agricultural products available in their local store or online



Availability tended to vary depending on where focus group participants were based, with those living in cities reporting higher availability and people living in regional and remote locations reporting that they rarely saw products for sale.

> *It can be hard to find depending where you are. I think if you're in major cities, it might be easier. There might be more access, but I'm in Townsville and it's not. Sometimes we really struggle trying to find what you need.*

Availability online was also low. At the end of one focus group one participant said:

> *I just did a quick look through Indigenous products on the Coles app and there were three.*

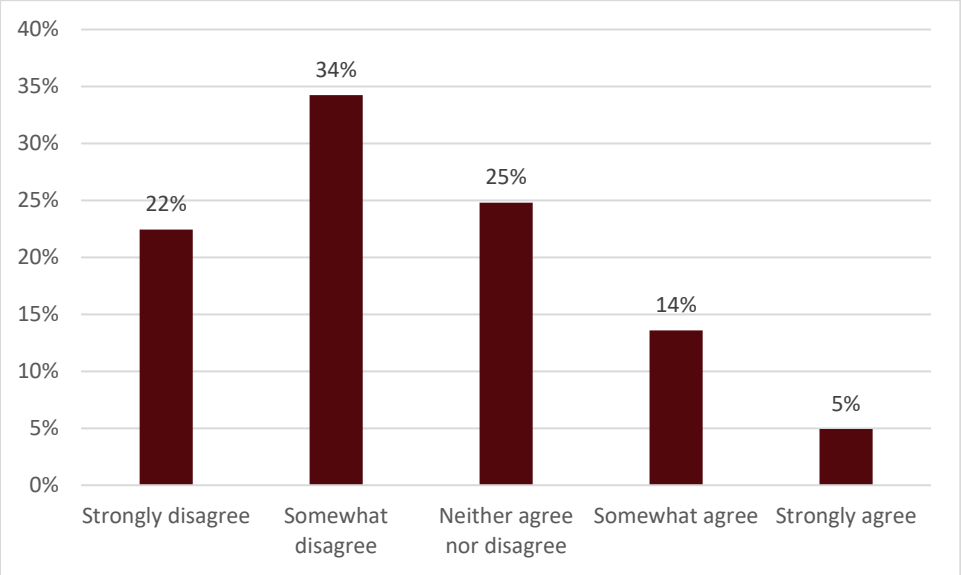
Closely linked with availability was awareness. Focus group participants indicated that the lack of information and marketing around Indigenous agricultural products meant that purchasing Indigenous agricultural products hadn't occurred to them, or they had to have a specific reason for purchasing them. For example, one focus group participant worked as a home economics teacher in a school. One of the classes she taught focused on native Australian produce, which she said was well received by the students but created difficulties for her due to the low and inconsistent availability of products. The participant reported that she preferred to source ingredients that were produced by Aboriginal and Torres Strait Islander people, but that it often wasn't clear when this was the case.

> *I was the one doing all purchasing, so [I was] looking online and finding claims that this is an Aboriginal source but that's a lot of work isn't it? There were so many online but I couldn't find it locally. I think the other schools in the area were all doing the same native programme at the time, cause they ran out of Lemon Myrtle. I found some somewhere else, but it wasn't the best quality. It was a small package for a lot of money. It was quite interesting finding and having problems sourcing what we needed so, but the children really enjoyed it. We made Lemon Myrtle cheese. It was amazing...I often have to look for the individual item that*

> *the teachers want to cook with, and it really is work. I have to go here, there and everywhere and look for it and source it. So if it was readily available, [it would make it easier].*

Information was an important issue for respondents to the online survey as well. More than half reported that they did not receive enough information about Indigenous agricultural products to inform their purchase decisions (see Figure 14).

Figure 14. Proportion of online survey respondents who reported that they receive enough information about Indigenous agricultural products to inform their purchase decisions



Focus group participants had a range of thoughts about increasing general consumer awareness of Indigenous agricultural products. Some suggested that Indigenous agricultural products could be profiled in popular consumer magazines, such as the *Choice* magazine,[10] or in the publications produced by food retailers such as Coles and Woolworths.

> *The Coles and Woolworths magazines sometimes give a background story, like 'oh, we use this grower because of XYZ'. So that would interest me because I do read them, and then you get the source and everything.*

Others suggested that younger demographics might be accessed through popular reality cooking shows (e.g. MasterChef) who could do an 'Indigenous agricultural product challenge'. Others said this group could also be accessed through social media (e.g. Instagram and TikTok).

While most focus group participants had not seen what they considered as Indigenous agricultural products for sale, they did anticipate that cost could be a barrier to their purchase. The higher expected cost was related to the lower economies of scale associated with niche ingredients, smaller businesses and more local production – all of

[10] Choice is an independent consumer advocacy group in Australia which conducts research and testing on popular consumer products.

which were features of Indigenous agricultural products that were valued by retail consumers.

> *It's hard to do for some of these businesses, you know, they've got constraints as well. Anything that's sort of like a specialist kind of food, more effort's gone in to make sure things are more ethical, you'd probably expect it to cost a bit more, because maybe they spent more at their end, to get the processes right.*

> *For some businesses producing stuff on a small scale, it definitely costs more than mass producing certain things. So they would need to ask for more money from the customers just to offset their costs. If we're expecting that they're going to be employing Indigenous families and giving back to the country, then you'd expect to pay a little bit more because you'd want more of that money to go towards that.*

Importance of credential system and labelling

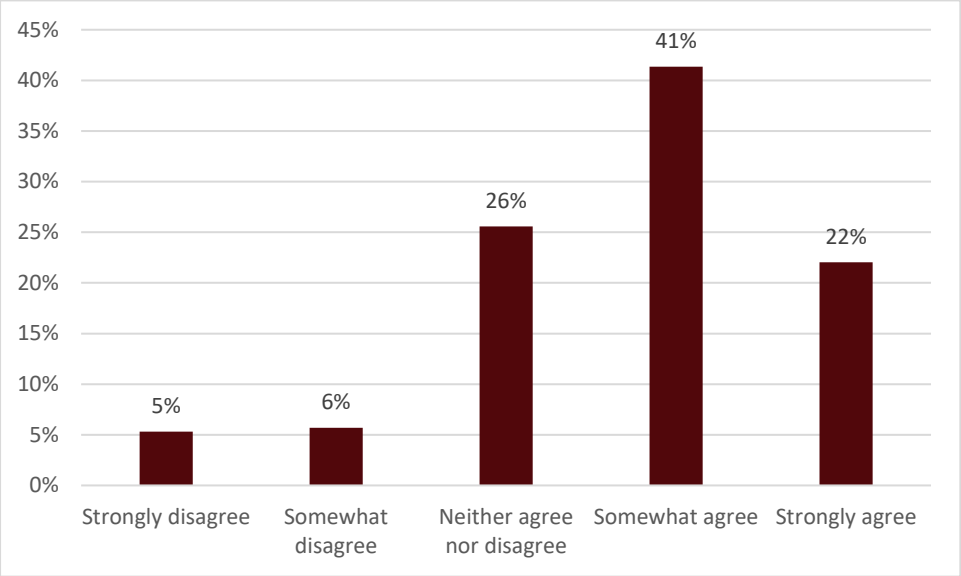
Of all the topics discussed during the focus groups, participants spoke most passionately and extensively about the importance of credential systems and labels they could trust to verify the authenticity of products. Participants volunteered that trademarks or patents may help them distinguish between products that fitted their understanding of Indigenous agricultural products (which primarily related to Aboriginal and Torres Strait Islander ownership) and others that did not (e.g. native produce from non-Indigenous businesses).

> *It's like having a patent on it. You've gotta have it registerable, and have the protection so that the consumer has got the assurance of where it is coming from and where the profits go back to, so to speak.*

> *I think the important part would be transparency for the consumer as well. So they can make informed decisions. So if it's not completely, you know, following Indigenous practices and protocols, then that needs to be made clear to allow us to be respectful of Aboriginal people who are involved.*

The majority of respondents to the online survey (63%) indicated they would be more likely to buy an Indigenous agricultural product if they could be certain of its authenticity (see Figure 15).

Figure 15. Proportion of online survey respondents who reported they would be more likely to buy an Indigenous agricultiral product if they could be certain of its authenticity



Related to the importance of credential systems was scepticism about the value of claims made about some products. Many focus group participants felt they could not trust the veracity of claims made by large and multinational companies, in particular.

> *Big name retail corporations just greenwash the crap out of everything.*

> *There's becoming a more blurred line now too with packaging and big companies marketing Aboriginal artwork. You can get [de-identified confectionary company] boxes now [with Aboriginal artwork], and I would have hoped that there's a percentage of something going back to that community. But really you can just market something like that and obviously the profit is going to a company that has absolutely nothing to do with anything.*

> *I feel like it's almost too easy for companies to get Fair Trade certification at the moment. I've definitely seen some examples where the only thing that a company's done is donate to rainforest efforts. And then they were able to put that sticker on their product to say, 'yeah, we're organically sourced and Fair Trade certified'. I was like well that's not enough, you know, donating a bunch of money to plant one tree when you've cut down 50 just isn't enough. I feel there needs to be more effort from the companies, but [the certification process] also needs to be a lot stricter. There's a bit of scepticism there about what it actually means.*

According to focus group participants, credentials were important to support informed decision making. Others felt that trusted credentials made purchasing products easier because it meant less work for them in determining whether what they were buying was actually authentic.

> *[The credential has] the officialdom and everything like that, you know, the checks and balances. I think that's needed [for Indigenous agricultural products] as well, so you know that it meets certain criteria. You don't necessarily have to know what the criteria is, but it's the established criteria.*

Some focus group participants saw a direct relationship between the characteristics they had previously identified as defining Indigenous agricultural products and the credential system.

> *There has to be certain requirements, maybe like a 10-point checklist or whatever. Maybe like, for example, there has to be over 50% of employment for Indigenous people, perhaps the shareholders have to be over 50% [Aboriginal]. There has to be a certain amount of produce that actually originates from a certain part of that culture. And then once that's satisfied, you get that certification. So then people can be comfortable if it's actually got that certification. Then happy days, it's not gonna be bullshit.*

Closely related to trust in the credential was the body overseeing its use. Some focus group participants believed government had the required authority and credibility to verify Indigenous agricultural products:

> *It needs to be a government registered because then you can actually rely on it, you can trust.*

> *It would help to have more information, more education. I've looked up certain things. You can't trust certain things on Google and stuff that way. But if it's a government registered, I can trust it.*

Others felt that Aboriginal and Torres Strait Islander people needed to have a role in authorising agricultural products as Indigenous or not.

> *I think it should be the Elders giving permission, as well licensing. They have the authority to say when a logo [could be used]. I'm more than happy to pay an extra premium if the item has the government certified logo.*

> *Facilitator: So you're expecting some kind of Aboriginal...?*
> *Participant: Yeah, representative or governance body. Their approval of it.*

Many consumers spoke of the importance of labelling as a way for them to identify Indigenous from non-Indigenous agricultural products. These consumers discussed the role the certifying body had in authorising the use of the label.

> *I would expect there would be a body who authorises [the product] with a stamp or a label on the packaging or something like that. That would tell us that it's authentic.*

> *I would love to have some sort of body that I could trust that says, 'look, this is Indigenously produced and it is an Indigenous product'.*

Some consumers discussed the role the label should play in helping to communicate the product's alignment with the characteristics that define Indigenous agricultural products. For them, the label was a mechanism for communicating the extent to which products met or achieved certain criteria.

> *If you introduce like a labelling program for Indigenous products. There's generally, I'm pretty sure, like a set of guidelines that companies have to meet to be able to put that label on their product. So that might help to clear up what exactly an Indigenous product is.*

For these consumers, the label also acted as a way for consumers to connect with the 'story' of the product. While consumers are generally not looking to tell a story with *all* agricultural products, there was value in being able to tell a story about some products.

> *There's usually a story that's connected with [the product]. So yes, it's a product, but there's a there's a journey that the product has taken to reach us, and there's a continuation to that journey that you're being part of.*

> *[The label should show] Indigenous representation, and also an explanation about the origin of it, a little bit of history that gives a purpose. I can tell the story to any visitors that come over to my house, and things like that.*

Some consumers volunteered the idea of a 'star' type system, common with other product categories, as a way of showing the extent to which products meet the guidelines.

> *For the variations, why don't we have like we have for our electrical appliances with the star system. The higher the more stars, the more Australian it is, you know. [It could be] the Indigenous flag [with the] Australian flag, could be a boomerang, you know, to give it its own identity.*

Many consumers discussed their expectations for the design of the label. These were consistently focused on design elements that consumers associated with being typically 'Indigenous', such as dots, earthy colours and iconography such as boomerangs and kangaroos.

> *I'm looking for earthy colours and I guess the stylistic art that I generally would associate with Indigenous peoples. And then to confirm, I will always check like the description because I think I'd say the majority of Indigenous products will have some sort of description about where the products come from, who's producing it, all that sort of stuff.*

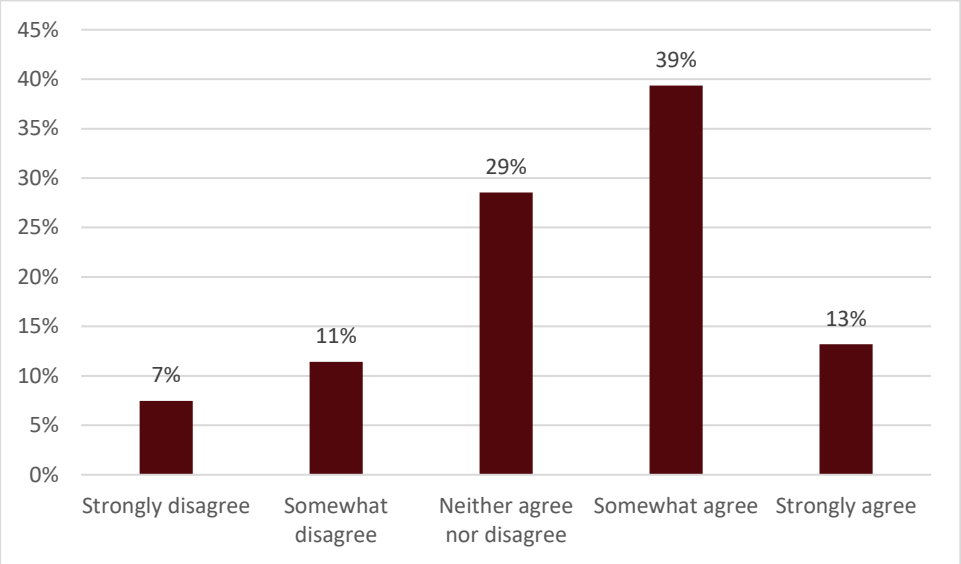
> *Well, the picture, you know, you got like the kangaroos, the boomerangs and those kind of designs. Like on football players in the league with their jerseys, they have their designs and all that. And you can [that it's] Aboriginal.*

> *What I think of is the Aboriginal style label, you know, with the art with like the designs and stuff. So to me that instantly recognisable as Bush Tucker or native plants.*

Purchase behaviour and intention

Respondents to the online survey and focus group participants expressed interest in purchasing Indigenous agricultural products. Figure 16 shows that more than half of respondents to the online survey (53%) reported they were interested in buying Indigenous agricultural products, with a much smaller proportion – around one in five – reporting that they were not interested.

Figure 16. Proportion of online survey respondents who reported they were interested in buying Indigenous agricultural products



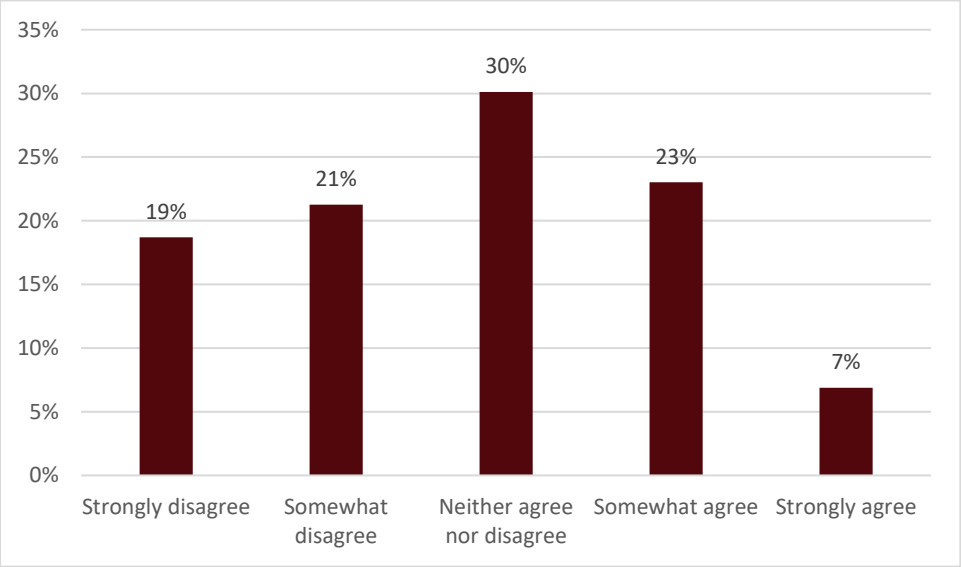
The main hesitation to purchasing Indigenous agricultural products was the perception that they would be more expensive. Almost all focus group participants expressed concern with the current cost of living, which meant they had less disposable income to experiment with unfamiliar products.

> *I think the cost of living does have a big impact as to whether or not you purchase those things [i.e. Indigenous agricultural products].*

> *I definitely wanna [buy Indigenous], but yeah, in in terms of like buying it, it's just not in my sort of price range at the moment.*

While 'cost of living' was cited as a major factor influencing everyday purchase decisions, many respondents to the online survey reported they would pay a premium for Indigenous agricultural products. Figure 17 shows the proportion of online survey respondents who agreed or disagreed that they would be willing to pay a premium for Indigenous agricultural products, and shows that a sizeable minority – 30% – were willing to pay more.

Figure 17. Proportion of online survey respondents who reported they were willing to pay a premium for Indigenous agricultural products



Focus group participants gave greater nuance to this finding, indicating that price premiums were sometimes only acceptable for certain product categories or when a particular feature was particularly important to them. Price premiums tended to be more acceptable for products and product categories that could demonstrate more ethical practice. The fact that Indigenous agricultural products tended to be associated with characteristics that consumers are willing to pay more for – ethical, sustainable and supporting Aboriginal and Torres Strait Islander communities – may partly explain consumers' reported willingness to pay a premium for Indigenous agricultural products.

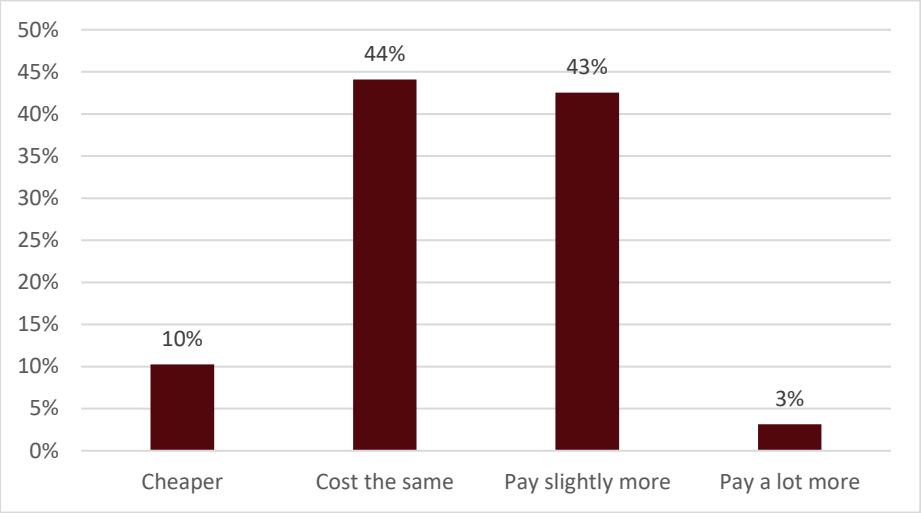
> *If it's within my price range and my budget, I will try and buy ethical and fair trade when I can.*

> *We can't afford to be picky and we can't afford to study every product [in terms of] where they come from, their origins. I just buy what we can afford – what's cheapest. We've got five of us to support on the one income. But I will always buy free range eggs.*

> *It would depend on the price difference for me personally. I can't say blanket statement. I would look at the price difference and whether or not I thought the company was worth supporting and investing in.*

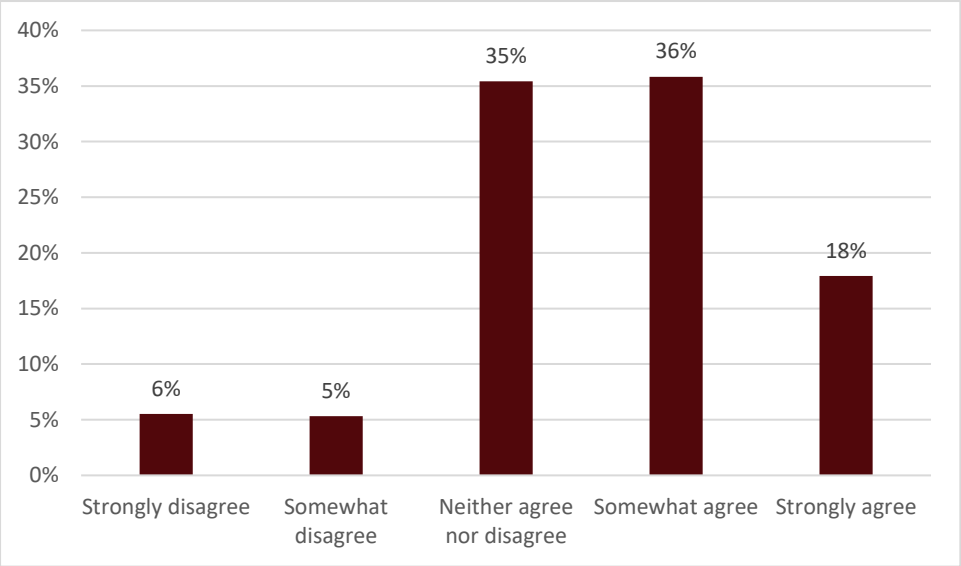
Others reported that price premiums were acceptable, providing they were modest. Respondents to the online survey were asked how much extra they would be prepared to pay for Indigenous agricultural products. Around two in five reported that they would buy Indigenous agricultural products if they cost slightly more than products that were otherwise similar, with a small proportion – 3% – indicating they were prepared to pay a lot more. While 3% of the sample reporting that they would 'pay a lot more' may seem small, it is a fairly remarkable finding among a 'general population' sample – one that may be envied by producers in other 'emerging' markets. The proportion of people willing to pay a lot more would likely be higher among a sample of consumers who more closely represent the 'target market' for Indigenous agricultural products (noting that work to identify and size the target market has not yet been conducted).

Figure 18. Extent to which respondents to online survey are prepared to pay more for Indigenous agricultural products



When asked whether they would preference Indigenous agricultural products if the cost and quality were the same as for non-Indigenous products, the majority indicated they would. Figure 19 shows the proportion of online survey respondents who indicated they would be more likely to buy an Indigenous agricultural product if the cost and quality were the same as a 'like for like' non-Indigenous product. The figure shows that 54% agreed that they would preference an Indigenous agricultural product, with only one in 10 reporting that they would not.

Figure 19. Proportion of online survey respondents who reported they would be more likely to buy an Indigenous agricultural product if the cos and quality were the same as for non-Indigenous products



Together, these results suggest strong support for Indigenous agricultural products. In general, consumers expect to pay more for more 'ethical' purchases, which they perceive Indigenous agricultural products to be. While many consumers are reporting higher than usual price sensitivity as a result of cost of living pressures, there remains a substantial minority who are prepared to pay more for Indigenous agricultural products – even when these products are similar in other ways to others. In these product categories, where there are 'like for like' comparisons, many consumers will preference Indigenous agricultural products and some may be willing to pay more.

3. Economic and community value of Indigenous agricultural products

This section is presented in two parts. The first part, *Sizing the market for Indigenous agricultural products*, presents a summary of economic analysis conducted by specialist consulting firm Polis Partners, which focuses on estimating the current and future value of Indigenous agricultural products. The market sizing shows that estimates for the current and future value of Indigenous agricultural products are highly sensitive to ownership thresholds. An accreditation scheme which include 50/50 partnerships, as opposed to one that was limited to majority 51% ownership, would increase the 'size of the prize' for Indigenous agriculture in Australia and deliver the largest benefit for Aboriginal and Torres Strait Islander producers.

The second part of this section continues the analysis to examine the broader economic impacts of Indigenous agricultural products, including revenue generated by businesses in the Indigenous agriculture supply chain and additional spending arising from wages and income in the Indigenous agriculture sector. The second part of this section also describes the findings from a series of interviews with Aboriginal and Torres Strait Islander producers and examines the more qualitative components of value delivered to and experienced by community.

Sizing the market for Indigenous agricultural products

Background and purpose

The purpose of the economic analysis was to estimate the 'size of the prize' in terms of what the economic value of the sector could be. Measuring economic value in this way is typically performed through a market sizing study. The output of a market sizing provides an indication as to the potential value associated with policies that establish, support or protect the product in the market. In this way, a market sizing is valuable initial information that informs industry participants and government decision makers as to the potential benefit of pursuing the market.

Other forms of economic analysis, such as a cost-benefit analysis associated with implementing an Indigenous agricultural framework, are not in the scope of this study. Analysis of this nature requires greater specificity and definition around policy options, and forms part of the Impact Assessment required to support government decision making later in the process.

The full economic analysis is presented at Appendix A. This section summarises the key findings.

Methods for assessing economic value

The economic value of Indigenous agricultural products was primarily assessed by specialist economics firm Polis Partners. Polis Partners met with the project sponsor team to ensure they had a full understanding of the purpose and potential uses for the economic analysis and provided advice on the types of analyses that may be appropriate given project partners' stated objectives and relative infancy of Indigenous agricultural products.

Estimates for the current and potential economic value of Indigenous agricultural products were assessed by examining current data collected and reported by reputable institutions including the Australian Bureau of Statistics (ABS) and the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES), and through high quality secondary data analysis reported by the University of Melbourne and others.

Initial economic estimates were presented to a team of subject matter experts to 'sense-test' and validate the findings. This process resulted in changes to some of the assumptions underpinning the analyses. Final results were tested again, and the experts confirmed that they made sense given their knowledge of the sector.

In collaboration with representatives from *yamagigu*, Polis Partners also attended interviews with key stakeholders to support the development of case studies highlighting the economic and community value of Indigenous agricultural products (described in more detail below).

Using the definition of Indigenous agricultural products to inform economic estimates

The economic analysis referred to the working definition and product characteristics developed during previous stages of the project to inform the development of scenarios. The scenarios were used to generate economic estimates under different assumptions.

The majority of the characteristics of an Indigenous agricultural product lack the available data that make it straightforward to identify their presence, meaning that the only characteristic available to inform the economic analysis scenario testing was Aboriginal and Torres Strat Islander ownership. Initial analysis also suggested that the potential scope of eligibility could differ substantially depending on whether a 50-50 partnership definition, which is common in the broader agricultural industry was adopted, compared to the 51% ownership requirements usually adopted for Indigenous certification.

As such, these differing ownership assumptions were both used in the scenarios. The following scenarios have been adopted for the market sizing in this report.

- **Scenario 1: 50% Indigenous-owned agriculture**. The total farmgate value of Indigenous agricultural products, with Indigenous agricultural products taken to be any agricultural commodities produced in Australia by businesses with at least 50% Indigenous ownership.[11]

- **Scenario 2: 51% Indigenous-owned agriculture**.[12] The total farmgate value of Indigenous agricultural products, with Indigenous agricultural products taken to be any agricultural commodities produced in Australia by businesses with at least 51% Indigenous ownership.

Market sizing metrics

A typical market sizing framework includes three key metrics that are used to describe and measure the addressable market for a product(s). These are described below in the context of Indigenous agricultural products and this market sizing study:

1. **Total Addressable Market (TAM)**: the value of the total global market that exists for a product, serviced by all global producers. For the purposes of this study, it is the total global value of agricultural products.

2. **Serviceable Addressable Market (SAM)**: the value of the total market serviced by Australian producers. This represents the upper bound of the market for

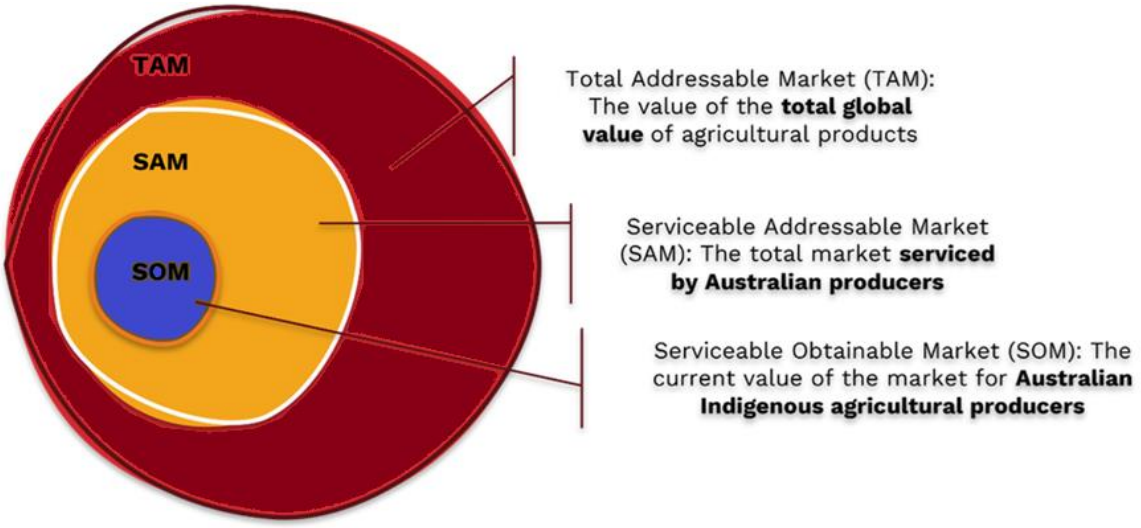
[11] Farmgate refers to the value of the cultivated product when it leaves the farm, after marketing costs have been subtracted (i.e., before additional processing and value-add further down the supply chain).
[12] Note that Scenario 2 is a more restrictive subset of Scenario 1.

Indigenous producers in Australia to target for their Indigenous agricultural products.

3. **Serviceable Obtainable Market (SOM)**: the current value of the market for Aboriginal and Torres Strait Islander producers, reflecting Aboriginal and Torres Strait Islander ownership rates in Australia. The SOM represents the baseline market sizing for Aboriginal and Torres Strait Islander owned and produced agricultural products.

Figure 20, below, shows the relationship between the Serviceable Obtainable Market – the key market of interest for this economic analysis – as a subsector of the Serviceable Addressable and Total Addressable Markets.

Figure 20. Representation of Service Obtainable Market and its relationship with the Serviceable Addressable and Total Addressable Markets as assessed in the economic analysis



The market sizing presented in this report steps through these key metrics as a way of arriving at the current market size of Indigenous agricultural products in Australia. This section builds on the current baseline market sizing by introducing future scenarios for what the market might look like in 2029, as well as estimating a wider economic contribution.

The market for Indigenous agricultural products

The Total Addressable Market (TAM) for Indigenous agriculture is estimated to be $9.5 trillion in $2024.[13] Australia is an active and sizeable player in this market, including Aboriginal and Torres Strait Islander business participants. Any price uplift or demand increase associated with an Indigenous certification of Indigenous agricultural products represents a substantial material opportunity for Aboriginal and Torres Strait Islander businesses.

The Serviceable Addressable Market (SAM) can be taken as the value of all agricultural production in Australia across a variety of commodities including meat and live animals, livestock products, grain and oilseeds and forest products. The total farmgate value of

[13] FAOSTAT and Polis Partners analysis.

agriculture in Australia in 2024/25 is estimated to be $83.6 billion (in $2023/24, excluding forestry and fishing).[14] Including forestry and fishing brings the total value to $89.5 billion.

The more relevant metric – the Serviceable Obtainable Market (SOM) – represents the achievable market for Aboriginal and Torres Strait Islander producers. The SOM for Aboriginal and Torres Strait Islander businesses can therefore be estimated by applying the Aboriginal and Torres Strait Islander business share in the sector to the SAM farmgate value.

Scenario 1: 50% Indigenous-owned agriculture

The University of Melbourne's Indigenous Business and Corporation Snapshot Study provides a valuable starting point for estimating the number of Indigenous businesses in Australia.[15] The study defines an Indigenous business as one with at least 50% Indigenous ownership.

As of 2022, it is estimated that **the total number of Indigenous businesses in agriculture, forestry and fishing in Australia is 1,846**. The estimated breakdown of Indigenous business in agriculture, forestry and fishing by type of business is shown in Table 1.

Table 1. Indigenous business count in agriculture, forestry and fishing in Australia

Business type	% agriculture, forestry, and fishing	Count
Registered businesses and corporations	5%	242
Self-identified sole traders	10%	538
Self-identified partnerships	35%	1,066
Total		**1,846**

Source: Indigenous Business and Corporation Snapshot Study 3.0. The University of Melbourne and ABS Census 2021, SIEMP Status in Employment. Polis Partners analysis.

Using ABS data from the Business Longitudinal Analysis Data Environment (BLADE), a total number of Australian businesses operating in the agriculture, forestry and fishing sector can be obtained. As of 2019, this is 197,516 businesses.[16]

Using the number of Indigenous businesses in Table 1 (n=1,846) and the total number of Australian businesses operating in agriculture, forestry and fishing (n=197,516), the

[14] ABARES Agricultural commodities: June quarter 2024 – Statistical tables.
[15] Evans, M., Polidano, C., Dahmann, S. C., Kalera, Y., Ruiz, M., Moschion, J., Blackman, M. (2024). *Indigenous Business and Corporation Snapshot Study 3.0*. The University of Melbourne https://fbe.unimelb.edu.au/cibl/research. The study combines Indigenous businesses listed on five registries, Indigenous corporations with operating Australian Business Number from the Office of the Registrar of Indigenous Corporations registry and sole traders and partnerships with at least 50% of owners self-identifying as Indigenous in the Australian Census and Centrelink records and that can be linked to businesses in the Business Longitudinal Analysis Data Environment (BLADE).
[16] BLADE Businesses in Australia, 2018-19, *ABS TableBuilder*.

proportion of Indigenous businesses in the agriculture, forestry and fishing industry is therefore estimated to be 0.9%.

Applying this Indigenous business share in the sector to the SAM farmgate value provides a SOM **value of Indigenous agriculture of $633.2 million** (in $2023/24), as shown in Table 2.[17] The table shows that the largest proportion of Indigenous agricultural businesses operating as partnerships (1,066 businesses, or 58% of all Indigenous agricultural businesses and 1.3% of all partnerships in the agricultural sector) produced an estimated $265.1m in $2023/24.

The smallest proportion of Indigenous business by business type – registered businesses and corporations (13% of all Indigenous agricultural businesses and only 0.5% of all registered businesses and corporations in the agricultural sector) – generated the largest proportion of production, at $280.4m, or 44% of all production by Indigenous business in the agriculture, forestry and fishing industry.

Table 2. Australian and Indigenous business count and production in agriculture, forestry and fishing

Business type	Australian businesses	Production (millions)*	Indigenous businesses	% Indigenous businesses	Estimated Indigenous production (millions)
Registered businesses and corporations	50,415	$58,327	242	0.5%	$280.4
Self-identified sole traders	63,056	$10,289	538	0.9%	$87.7
Self-identified partnerships	84,045	$20,902	1,066	1.3%	$265.1
Total	**197,516**	**$89,519**	**1,846**	**0.9%**	**$633.2**

*Production apportioned by business type using average revenue shares in agriculture, forestry and fishing. Source: Polis Partners analysis of BLADE Business data and The University of Melbourne Indigenous Business and Corporation Snapshot Study. Note, total may not sum due to rounding.

Scenario 2: 51% Indigenous-owned agriculture

In order to estimate the number of businesses that are majority Indigenous owned (i.e. 51% or greater Indigenous ownership), two key pieces of information can be used:

[17] Note that the value of $633.2 does not represent 0.9% of total agricultural production ($89,519m), but rather the sum of production values for the three business types. The reason for this is that the different business types have a disproportionate impact on driving production value. For example, while partnerships comprise the largest proportion of business types, they are generally less productive (contribute proportionately less) to total production. Conversely, registered businesses and corporation are more productive and contribute to a greater extent towards total production.

1. the ratio of certified businesses to total businesses in the Supply Nation database.[18] Supply Nation defines a 'certified' business as 51% or more Indigenous owned, managed and controlled. Other 'registered' businesses in the database are at least 50% Indigenous owned. As of financial year ending 2023, 25% of Supply Nation's database was made up of certified suppliers.[19]

2. the number of partnerships that are Indigenous-owned. According to the Melbourne University Indigenous Business Snapshot, 85.8% of partnerships that identified as Indigenous (i.e. at least 50% Indigenous ownership) have exactly 50% Indigenous ownership. This would suggest that the remaining 14.2% partnerships are at least 51% Indigenous owned.[20]

Applying these values to the business counts in Table 1, there are estimated to be **750 Indigenous owned businesses (with 51% or more Indigenous ownership) in the agriculture, forestry and fishing sector**. The breakdown of these businesses can be seen in Table 3, below.

Table 3. Indigenous business count in agriculture, forestry and fishing in Australia by ownership

Business type	At least 50% ownership	Proportion at least 51% ownership	At least 51% ownership
Registered businesses and corporations	242	25.0%*	61
Self-identified sole traders	538	100.0%	538
Self-identified partnerships	1,066	14.2%**	151
Total	**1,846**		**750**

*Source: Supply Nation 2023 Annual Report. p. 12 – 1080 certified suppliers, 3249 registered suppliers. **Source: Indigenous Business and Corporation Snapshot Study 3.0. The University of Melbourne. Note, total may not sum due to rounding.

Majority-owned Indigenous businesses as a proportion of total Australian businesses operating in agriculture, forestry and fishing (n=197,516 from Table 2) is therefore estimated to be 0.4%. Applying the Indigenous business share in the sector to the SAM farmgate value provides a SOM **value of Indigenous agriculture of $195.5 million** (in $2023/24).[21]

Table 4. Australian and majority-owned Indigenous business count in agriculture, forestry and fishing

[18] Supply Nation provides a database of verified Indigenous businesses.
[19] Supply Nation 2023 Annual Report. p. 12 – 1080 certified suppliers, 3249 registered suppliers.
[20] Evans, M., Polidano, C., Dahmann, S. C., Kalera, Y., Ruiz, M., Moschion, J., Blackman, M. (2024). *Indigenous Business and Corporation Snapshot Study 3.0*. The University of Melbourne https://fbe.unimelb.edu.au/cibl/research.
[21] As for Table 2, the total Indigenous production value in Table 3 does not represent 0.4% of the total production value, but rather the sum of production for each business type.

Business type	Australian businesses	Production (millions)*	Indigenous businesses	% Indigenous businesses	Estimated Indigenous production (millions)
Registered businesses and corporations	50,415	$58,327	61	0.1%	$70.1
Self-identified sole traders	63,056	$10,289	538	0.9%	$87.7
Self-identified partnerships	84,045	$20,902	151	0.2%	$37.7
Total	**197,516**	**$89,519**	**750**	**0.4%**	**$195.5**

*Production apportioned by business type using average revenue shares in agriculture, forestry and fishing. Source: Polis Partners analysis of BLADE Businesses data, The University of Melbourne Indigenous Business and Corporation Snapshot Study 3.0 and Supply Nation database. Note, total may not sum due to rounding.

Potential growth of Indigenous agricultural products

When estimating future market size, two scenarios have been adopted. One is a 'Base' scenario which applies the long-run historical growth rate to agricultural production in Australia, while the other is a 'High' scenario which applies the same long-run historical growth rate to production together with an additional volume uplift and price premium associated with certification. Table 5 outlines these growth assumptions.

Table 5. Future market size growth assumptions

Growth	Growth assumptions
Base	Historical long-run average production growth
High	Historical long-run average production growth Additional volume uplift (+5%) Certification price premium (+5%)

Appendix A describes the growth projections in greater detail, though in summary, by 2029 under the high growth model (i.e. assuming historical growth projections, a volume uplift and certification price premium), Indigenous agricultural products could be valued at between $286m (under Scenario 2, majority-owned businesses) to almost $1b (using the less restrictive 50% ownership threshold). Growth under base and high growth assumptions has been summarised in Table 6, below.

Table 6. Summary of estimated market sizing results

Scenario	Current market size ($2023/24, millions)	2029 – Base growth	2029 – High growth
Scenario 1: 50% Indigenous-owned agriculture	$633.2	$737.4	$941.2

Scenario 2: 51% Indigenous-owned agriculture	$195.5	$224.2	$286.1

The economic and community value of Indigenous agricultural products

Engagement method to understand economic and community value

Economic and community value was assessed in two ways. First, the wider economic and employment of Indigenous agricultural products across the supply chain, industries and households was estimated by specialist economic firm Polis Partners. The analysis highlights that although there is a positive and substantial direct farmgate revenue contribution to Indigenous agriculture in Australia, there is additional impact in communities in which Aboriginal and Torres Strait Islander agricultural businesses operate, in terms of both income and employment.

The more qualitative aspects of economic and community value were assessed through a series of seven interviews with Aboriginal and Torres Strait Islander producers. Over the period of two months from June to the end of July 2024, *yamagigu* met with Black Duck Foods, Native Oz Bushfoods, Tiwi Plantation Corporation, NAAKPA, Outback Academy Australia, Tasmanian Aboriginal Seafood Company and Yawuru (Roebuck Plains).

The findings from these interviews have been presented below under a series of thematic headings, and show that Indigenous agricultural practices in Australia are deeply intertwined with the cultural, social, and economic fabric of Indigenous communities. These practices not only seek to sustain the environment but often foster community cohesion, identity, and resilience. Unlike most mainstream agricultural production, the production of Indigenous agricultural products by Aboriginal and Torres Strait Islander communities and businesses have interwoven 'community and cultural' values, alongside economic and financial value.

Appendix B includes a series of case studies illustrating how value is delivered 'on the ground' for those producers and communities. The case studies have been drafted with the consent and input of the producers, who were also provided with a copy of the case study for their own use. The case studies will be presented throughout the Benefits and Gaps Analysis to illustrate key points and highlight the strengths of Aboriginal and Torres Strait Islander producers.

The wider economic impact

Indigenous agricultural products provide flow-on second order effects that can be included when thinking about the *overall* contribution of Indigenous agricultural production. These include the:[22]

- **Industrial effect**, which refers to the receipts generated by businesses in the supply chain that provide intermediate goods and services to agricultural

[22] REMPLAN Economy. Multipliers for Australia.

production. This may include things like the provision of fuel, mechanical services, trucking and tools and equipment. The industrial multiplier effect is 1.84.

- **Consumption effect**, which refers to the receipts received by businesses from the additional consumption spending arising from additional wages and income in the agricultural sector. For example, the farm labourer buying lunch at the local store, or the farmer buying groceries at the supermarket. The industrial + consumption effect multiplier is 2.26.

Incorporating these two effects enables us to apply a multiplier on the farmgate revenue received to estimate a full Indigenous agriculture economic contribution.

The corresponding employment multipliers are:

- Three jobs for every $1 million of economic output
- An additional 1.7 jobs through the Industrial effect
- An additional two jobs counting both the Industrial + Consumption effect.

Even with output generated by Aboriginal and Torres Strait Islander owned businesses, not all direct and flow-on employment in the local economies is going to be Indigenous employment. For the purposes of this analysis, and based on discussions with producers, we have assumed 50% of direct employment is Aboriginal and Torres Strait Islander employment. The flow on effects represent a mix of Aboriginal and Torres Strait Islander and non-Indigenous employment in local economies.

Scenario 1: 50% Indigenous-owned agriculture

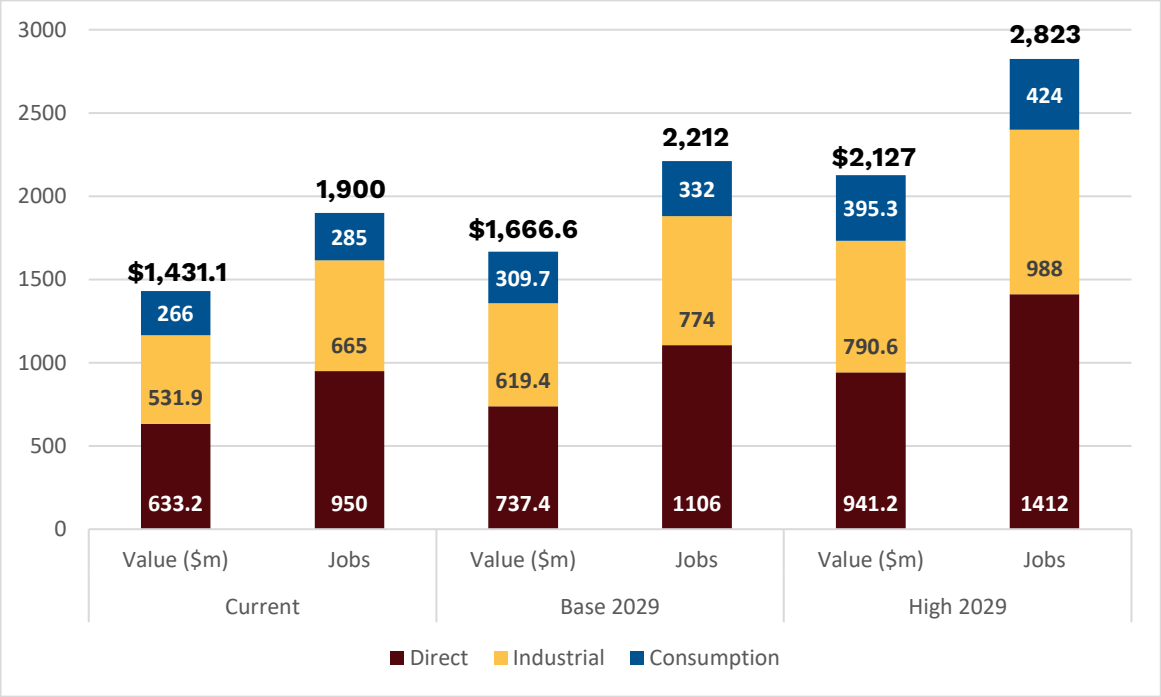
Using the same assumptions as for Scenario 1 above, Panel A in Figure 21 shows the results from the economic output contribution analysis. The figure shows that **the current total economic contribution is estimated to be $1,431 million**. This is associated with an estimated 1,900 jobs across Australia. By FY29, the economic contribution is estimated to have grown to $1,667 million under Base growth and $2,127 million under High growth, supporting an estimated 2,212 and 2,823 jobs respectively.

Scenario 2: 51% Indigenous-owned agriculture

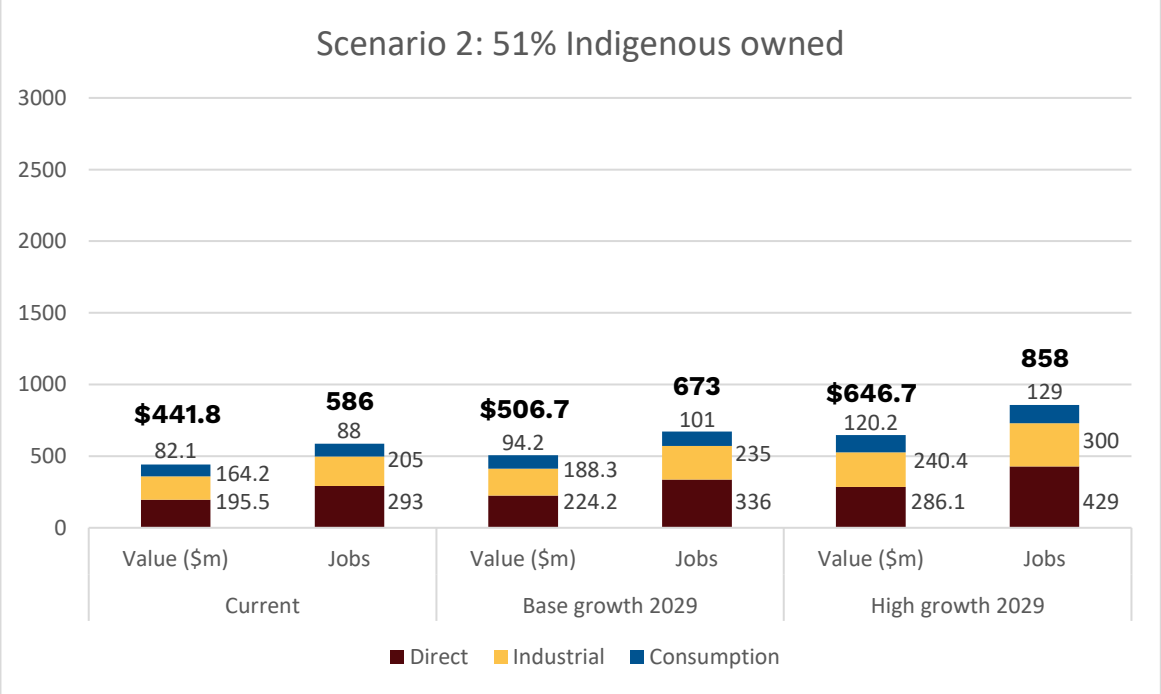
Results from the economic output contribution analysis for Scenario 2 can be seen in Panel B in Figure 21. The **current total economic contribution is estimated to be $442 million, supporting 586 jobs**. By FY29 the economic contribution is estimated to have grown to $507 million under Base growth and $647 million under High growth, supporting an estimated 673 and 858 jobs respectively.

Figure 21. Direct, Industrial and Consumption effects for Scenario 1 and 2 under Base and High growth conditions

PANEL A: Scenario 1, 50% Indigenous owned



PANEL B: Scenario 2, 51% Indigenous owned



Note: Numbers subject to rounding error.

Knowledge transfer, identity and belonging

The transfer of knowledge across generations is a cornerstone of Indigenous agricultural practices, deeply rooted in cultural traditions and community engagement. This process not only preserves invaluable traditional knowledge but also strengthens the social fabric and identity within Aboriginal and Torres Strait Islander communities.

Indigenous agricultural products play a crucial role in facilitating the transfer of knowledge across generations. Consultations highlighted that this process often involves practical, hands-on experiences where Elders and knowledgeable community members take younger generations out onto country to engage directly with the land and its resources. Working on Country allows for comprehensive learning experiences that encompass cultural, spiritual, economic, and entertainment aspects. Harvesting activities are used as opportunities to pass down stories about specific plants while working together. This approach ensures that traditional ecological knowledge is not just taught but lived and experienced firsthand.

Each community has specific flora and fauna that hold cultural significance, often tied to their totems. By cultivating these plants or harvesting wild foods, communities reinforce their connection to their heritage while fostering a collective sense of purpose.

Engaging with Indigenous agricultural products ties individuals back to their ancestral lands and cultural heritage. This connection fosters a strong sense of identity and belonging among community members. Interviews with producers revealed an intrinsic link between Indigenous agricultural practices and maintaining connections to ancestral lands. Elders often take younger community members onto the land to teach them about native plants and their uses, thereby ensuring that traditional knowledge is preserved and passed down. Using keystone species as tools for linking cultural heritage back into modern educational frameworks for young people was also highlighted as essential by stakeholders. These practices ensure that cultural narratives remain vibrant within communities despite external pressures.

Engaging in Indigenous agriculture provides economic benefits which reinforce these traditional practices by enabling community members to earn income while staying connected to their culture. Moreover, involving families holistically—where multiple family members participate—strengthens both familial bonds and economic units within these communities.

> *We go and pick up some of the nephews and nieces... while you're walking, you're telling on this tree does this, you know, you're passing it to them while you're walking to harvest whatever you're looking for.*
>
> *It's a comprehensive experience. And, you know should involve the, you know, the cultural, the spiritual, the economic.*

Community cohesion and health

Promoting social cohesion within Aboriginal and Torres Strait Islander communities through agricultural practices emerged as a significant theme during consultations. The discussions underscored that Indigenous agricultural initiatives play an essential role in fostering community unity and engagement. These practices not only facilitate economic benefits but also serve as a conduit for cultural revitalisation and intergenerational knowledge transfer.

One of the primary ways these initiatives promote social cohesion is by bringing people back onto their ancestral lands, thereby reinforcing connections to Country and culture. This return to land enables community members to engage in traditional harvesting activities, which are often collective efforts involving multiple generations. Such activities

provide opportunities for Elders to share cultural stories, language, and traditional ecological knowledge with younger members of the community, ensuring that this invaluable heritage is preserved and passed down.

> *Each mob has their own trees or own flora and fauna that represents that community, I suppose, and that comes into your totems.*

Agricultural projects also create micro-economic opportunities within remote communities where conventional employment options are limited. By participating in the harvest of native bush foods or other Indigenous crops, community members can earn supplementary income without jeopardising their existing welfare benefits due to hobby income provisions. This financial aspect helps alleviate some economic pressures while simultaneously strengthening communal bonds through shared work experiences.

The practice of working on country also brings significant health benefits. It involves physical labour which promotes wellbeing while providing opportunities for social interaction within the community. This work environment helps combat sedentary lifestyles associated with modern living conditions.

The consultations also highlighted that these initiatives help mitigate some of the socio-cultural challenges faced by Aboriginal and Torres Strait Islander youth today. Engaging young people in culturally relevant agricultural practices provides them with a sense of purpose and belonging while keeping them connected to their heritage amidst modern influences that often lead to cultural disconnection.

Furthermore, these practices contribute economically by enabling communities to generate income from culturally significant products without compromising their values or traditions. The integration of traditional methods with contemporary market demands allows for sustainable development that respects both ecological balance and cultural integrity.

> *We’re trying to create an alumni within the seafood category as well for those young people that wanna come on board.*

In addition to individual benefits, agricultural projects have broader implications for community health and wellbeing by promoting dietary diversity through access to traditional foods. Although specific studies on nutritional impacts were not detailed during consultations, producers noted that reliance on local food sources could potentially improve diet quality and improve food security given the high cost of store-bought food items in remote areas.

Overall, integrating Indigenous agricultural practices into mainstream frameworks offers a pathway towards enhanced social cohesion within Aboriginal and Torres Strait Islander communities by intertwining economic viability with cultural preservation and intergenerational solidarity.

Leadership and empowerment

The consultation processes underscored the pivotal role of Aboriginal and Torres Strait Islander agricultural leaders in community decision-making and empowerment. It became evident that these leaders are instrumental in preserving cultural heritage and fostering community cohesion. Their involvement ensures that traditional knowledge is respected and integrated into modern agricultural practices, creating a bridge between ancestral wisdom and contemporary economic activities.

Consultations also highlighted that effective leadership in Indigenous agricultural initiatives requires an inclusive and participatory approach. Decision-making processes need to be culturally sensitive and involve community members at all levels. This approach ensures

that the needs and aspirations of the community are met, fostering a sense of ownership and commitment to the projects. The establishment of governance structures that include both Aboriginal and Torres Strait Islander and non-Indigenous stakeholders was also emphasised as crucial for ensuring the sustainability and success of these initiatives.

Aboriginal and Torres Strait Islander agricultural leaders play a critical role in empowering their communities through inclusive decision-making processes and the preservation of cultural heritage. Their leadership ensures that agricultural practices are not only economically viable but also culturally enriching, thereby fostering a strong sense of community cohesion and identity.

> *It's a bit of a cascade with the PBC at the top, then the ... board, and then a subsidiary of the ... board is the ... holdings company which is where the station sits...Everyone on the board has more of an agricultural skill set. The law bosses and the PBC get involved in actions on the station where they may have an impact on the environment or Country or culture.*

Benefit for mainstream agriculture

Through extensive consultations, it became clear that the integration of Indigenous agricultural practices with mainstream agriculture offers a multitude of benefits and opportunities. One advantage is the resilience of Indigenous plants, which are often perennial and better adapted to withstand the challenges posed by climate change. Plants such as kangaroo grass can thrive without the heavy reliance on chemical inputs and irrigation, making them economically viable and environmentally sustainable alternatives for mainstream farmers. This adaptability is particularly crucial as farmers face increasing stress from water scarcity and soil degradation.

Indigenous agricultural practices also promote a holistic approach to land management that integrates both agriculture and forestry. This unified perspective can foster greater cooperation between Aboriginal and Torres Strait Islander and non-Indigenous farmers, encouraging knowledge exchange and mutual support. For instance, many mainstream farmers already have Indigenous grasses on their land and can benefit from the traditional knowledge of Aboriginal and Torres Strait Islander communities to enhance soil health and biodiversity.

Mainstream agriculture's integration of Indigenous practices also empowers Aboriginal and Torres Strait Islander communities by providing employment opportunities and fostering economic independence. The model of family involvement in Indigenous farming strengthens community ties and ensures the transmission of cultural knowledge across generations. This integration supports a more inclusive agricultural sector where Aboriginal and Torres Strait Islander voices and expertise are valued and utilised.

However, there are challenges to this integration, such as the need for better governmental support and recognition of Indigenous intellectual property rights. Producers called for practical measures and directed efforts from existing government departments to support Indigenous agricultural initiatives more effectively. They felt that addressing these challenges could pave the way for a more collaborative and enriched agricultural landscape in Australia.

In conclusion, the integration of Indigenous and mainstream agricultural practices holds promise for enhancing sustainability, fostering economic growth, and preserving cultural heritage. By leveraging the strengths of both systems, Australia can create a more resilient and inclusive agricultural sector.

4. The private sector market for Indigenous agricultural products

Engagement method to understand the private sector market

We have heard directly from Aboriginal and Torres Strait Islander agricultural producers that there are a range of barriers that impede their access to capital (debt and equity) and also that existing finance structures are not 'fit for purpose' for the needs of Indigenous agricultural producers and businesses. To understand the finance sector's perspective on the market potential of Indigenous agricultural products and its 'finance-ability', yamagigu engaged a range of government agencies, mainstream lenders and specialist lenders and investors. Our lines of questioning explored:

- Sources of funding and the financial products available
- Investment preferences and restrictions/ barriers
- Supports and incentives for Indigenous agricultural businesses
- Impact of introduction accreditation
- Financial literacy.

We spoke with ANZ, Westpac, Waluwin Foundation, Indigenous Business Australia (IBA), Indigenous Land and Sea Corporation (ILSC), Merricks Capital, Northern Territory Aboriginal Investment Corporation (NTAIC), Regional Investment Corporation (RIC), Australian Banking Association (ABA) and Tenacious Ventures to develop our understanding.

The private sector market's attitudes towards products and credentials

Perceptions of Indigenous agricultural products

The financial sector is increasingly recognising the significant economic potential inherent in investing in Aboriginal and Torres Strait Islander businesses, including in the agricultural sector. The production of Indigenous agricultural products often integrates traditional ecological knowledge with sustainable farming methods and can offer unique opportunities for innovation and market differentiation. Representatives from the finance sector reported that these enterprises can cater to niche markets that value organic, sustainably produced, and culturally significant products. Additionally, Indigenous agriculture is seen to contribute to food security and economic development within Aboriginal and Torres Strait Islander communities by creating jobs and fostering self-sufficiency.

Financial institutions are beginning to see the value in supporting these ventures, not only for their potential returns but also for their broader impact on community resilience and environmental stewardship. By investing in Indigenous agriculture, lenders can tap into a growing sector that promises both economic benefits and positive social outcomes.

> *We [the lender] will take a higher level of risk towards something if there's a defined and deliverable community outcome of employment or other elements*

Certification and its role in lenders' decision making

Sector representatives were asked about their perception of the value of a credential verifying the provenance of Indigenous agricultural products. Interviewees noted that the

introduction of a certification presented both advantages and challenges, particularly in the context of financial lending.

On the positive side, financiers suggested that certification could serve as a powerful endorsement, signalling that a business adhered to specifical cultural, ethical and operational standards.

> *...A product [credential] that is commercially recognisable and branded would be very beneficial. I wonder if [there's a role for the credential to] differentiate between bush foods [generally], and First Nations businesses producing agricultural products or food.*

Funders that yamagigu spoke to indicated that the existence of a credential could enhance the credibility and marketability for Aboriginal and Torres Strait Islander businesses, potentially leading to increased consumer trust and access to niche markets. It was also suggested that certification may attract financiers interested in supporting social responsibility and cultural preservation, aligning with their corporate social responsibility (CSR) goals.

However, a number of drawbacks were also highlighted. Some financiers acknowledges that their own loan approval processes would be unlikely to recognise any specific value in a potential borrower being a certified or credentialled producer.

> *We just assess it on our commercial metrics and it really just comes down to the numbers and how they stack up. I guess it will change from business to business too in terms of that particular product. If we're talking an agricultural product, whether that be beef, whether it be... fishing or something like that, then realistically it just comes down to there to a quality of a products volume or supply.*

Some financiers were concerned that the certification or credentialing process could be resource-intensive, requiring time and an investment that some Aboriginal and Torres Strait Islander businesses may find burdensome. They also noted that the criteria for certification or credentials must be carefully crafted to avoid being overly restrictive or exclusionary so as not to inadvertently limit opportunities for some businesses, especially if the premium associated with the certification or credential did not offset the expense of obtaining it.

> *We would hope that in the market that would get a premium price.*

Overall, while certification could positively impact the perspective of, and support for, Aboriginal and Torres Strait Islander businesses, financiers reported that their current decision processes and lending criteria would not attribute any additional value or material benefit to the certification or credentials.

Barriers to accessing finance

Many Aboriginal and Torres Strait Islander agricultural businesses face significant barriers to accessing capital. These include a lack of financial education (and therefore limited financial literacy), limited access to mainstream funding sources and challenges in using land as collateral.

Barriers to accessing finance

In our previous phase of consultation with Indigenous producers, it was strongly conveyed that there were many barriers for these businesses to access the finance they needed to initially start their businesses, or to expand. Despite the increasing recognition of their

contributions to the economy, many Aboriginal and Torres Strait Islander producers continue to face significant barriers when seeking finance. This was co-operated by some of the financiers consulted who noted an absence or small number of Indigenous producers in their portfolio of clients, and speculated that this could be because Indigenous producers did not apply for loans with them or they applied for 'standard' loan products with non-specialist lenders rather than specialised Agri-finance products provided by industry specialist lenders. Of the financiers engaged through this project, some indicated that traditional lending institutions may have more stringent requirements that do not align with the unique circumstances of Aboriginal and Torres Strait Islander businesses, and that this is then compounded further by the unique complexities of being an agricultural producer.

> *There's plenty of capital in the space, but potentially there might be a little bit of a mismatch between the way people are attempting to access it, or uncertainty around what's available.*

Customer preparedness and financial literacy

Financiers acknowledged that a lack of financial literacy poses significant challenges for many individuals and communities, hindering their ability to manage money effectively and make informed financial decisions, especially when exploring financial opportunities. Without a strong understanding of the principles behind debt, leverage and investment, Indigenous farmers may be less confident to borrow money or take on investors and, if they do, more susceptible to fraud and financial instability. It was indicated that this issue could be particularly pronounced in communities where access to financial education resources may be limited, such as remote locations where Aboriginal and Torres Strait Islander producers may reside.

> *Financial literacy ...we were talking earlier about accessing capital, that becomes I believe the major obstacle in accessing capital. Absolutely, one hundred percent.*

Financiers also indicated that even if an applicant has sound financial literacy, the demands placed on agricultural producers to simultaneously manage their property and business, while also exploring financial solutions or assistance, can impact their ability to respond to requests for information in a timely fashion.

> *The length of time for [financial approval] processes is dependent on the customers preparedness and responsiveness.*

Those interviewed indicated that there was a disconnect between individuals wanting to start in Indigenous agricultural business or expand an existing business, and the ability to develop a suitable business plan, feasibility study or financial forecast that would be required by financiers to provide access to the necessary capital. Some financiers believed that many Indigenous agricultural producers were operating as small businesses which meant they may not have access to the range of expertise required to secure the capital they require to grow.

> *I would think that 95% of the cases that we see are still at that idea stage or hobby stage. There's no real formal documen*tation behind it*... And I guess that can be difficult to build into when you might not have done it before.*

> *I think this is part of the challenge with especially First Nations small businesses is this idea that they need to do everything in the business, and we don't expect any other sort of business to do all the marketing and all the accounting and all the different aspects of the business.*

Low financial literacy, or a lack of understanding of the various forms the complete and importance of the information being requested, can sometimes mean that a loan application is denied in the first instance. Financiers reported that this experience can then act as a deterrent to some businesses trying again. Some of the Indigenous-focused capital providers (e.g. IBA, ILSC and NTAIC) recognise these barriers and provide bespoke support programs and opportunities, in a culturally informed way, to small Aboriginal and Torres Strait Islander businesses. Other lenders (e.g. Westpac) understood the importance of establishing trusted relationships with Aboriginal and Torres Strait Islander communities to better provide financial supports and tailored offerings based on the needs of the community or organisation. This can be achieved through specialised Indigenous Banking Units or teams, and having a physical presence in communities where Indigenous agricultural producers are based.

Utilisation of land

Using land as collateral can be a complex and contentious issue, especially when it comes to land that is held in communal Aboriginal or Torres Strait Islander ownership or where Native Title rights have been recognised. Much of the land that is held in communal ownership (e.g. Aboriginal freehold land under the Aboriginal Land Rights (Northern Territory) Act 1976) cannot be sold or leased freely. Similarly, land that is divested to Aboriginal and Torres Strait Islander groups by ILSC and some other government agencies across the country remains subject to caveats, which also restrict dealings. The finance sector is wary of borrowers mortgaging such land as security for loans, which limits its use as a traditional form of collateral for securing loans and makes it difficult for the landowners to finance activities undertaken on the land.

> *A big barrier to capital... is the utilization of land for financial borrowing purposes because most Aboriginal land is encumbered with caveats.*

The legal and bureaucratic processes involved in recognising and managing Native Title can also be lengthy and complicated, adding another layer of uncertainty for both lenders and borrowers. This situation can stifle economic opportunities for Aboriginal and Torres Strait Islander communities, preventing them from leveraging their land assets to invest in businesses, infrastructure or other development projects.

> *The ability, like any other agricultural producer, would utilise their land base to borrow. And that's a significant barrier for First Nations landholders.*

> *A big barrier to capital, whether it be operating capital or startup capital, is the utilisation of land for financi*al borrowing purposes.

Several financiers commenced that historically the private sector has exhibited hesitancy in lending to Aboriginal and Torres Strait Islander businesses, primarily due to the lack of collateral to support borrowings. Traditional lending models rely heavily on tangible assets, such as real property or capital equipment, to secure loans. For those Aboriginal and Torres Strait Islander businesses and entrepreneurs that have neither (in an unencumbered sense), accessing finance is often challenging. This is because, without collateral, financiers perceived these loans as higher risk, leading to more stringent lending or outright rejection of loan applications. The consequence is that Aboriginal and Torres Strait Islander businesses can struggle to grow, innovate and contribute to their communities' economic prosperity.

Financiers' hesitancy is compounded by a lack of understanding and familiarity with Aboriginal and Torres Strait Islander business models and cultural practices within mainstream financial institutions. These businesses can often operate within unique cultural and community contexts that are not well understood, leading to misaligned expectations and requirements.

Recognising these challenges, some financial institutions and government bodies reported that they were working to develop alternative financing models. These include microfinancing, community development financial institutions, and specialised loan products that do not rely as heavily on collateral. By adopting more culturally sensitive and flexible approaches to lending, they believed they could better support the growth and sustainability of Aboriginal and Torres Strait Islander businesses.

Existing and potential opportunities for greater financial inclusion

Financial products and support

Many financial institutions are increasingly recognising the importance of supporting Aboriginal and Torres Strait Islander enterprises not just as a business opportunity, but as a commitment to social justice and economic inclusion. The growing goodwill of the sector can play a crucial role in fostering the growth and sustainability of Aboriginal and Torres Strait Islander businesses, particularly in sectors like agriculture.

Statutory organisations that participate in this space such as IBA, NTAIC and ILSC primarily focus on providing tailored financial solutions that address the unique needs of Aboriginal and Torres Strait Islander farmers, including grants, and land management support. These organisations reported that they were deeply committed to promoting economic self-sufficiency, cultural preservation and sustainable development within Aboriginal and Torres Strait Islander communities, and prioritise community empowerment and long-term sustainability over immediate financial returns.

On the other hand, private sector institutions like Westpac, ANZ, Merricks Capital and Tenacious Ventures operate with amore traditional profit-oriented and investor-driven approach. While they do offer a range of financial products including term loans, asset finance and equity investment, their lending and investment criteria tend to be more stringent and risk averse. Despite this, some private sector financiers are developing specialised products and partnerships aimed at supporting Aboriginal and Torres Strait Islander enterprises.

> *Private sector involvement is crucial for scaling up Indigenous businesses, but it requires a balanced approach that considers both financial viability and social impact.*

Blended capital approaches

Blended capital approaches are increasingly being recognised by financiers as an effective strategy for supporting Aboriginal and Torres Strait Islander businesses, especially in the agricultural sector. This approach combined different types of capital – such as grants, debt and equity investment – to create a more flexible and supportive financial environment.

> *Blended capital can bridge the gap between traditional financing and the unique needs of Indigenous enterprises.*

By leveraging multiple funding sources, these approaches can mitigate risk and provide tailored financial solutions that align with the specific circumstances of Aboriginal and Torres Strait Islander businesses. The integration of grants with low-interest loans allows some Aboriginal and Torres Strait Islander agricultural producers to access the resources they need without the burden of high debt.

> *We might make a grant of $800,000 to do something, but that is a precursor to having blended debt and or equity.*

This method not only enhances the financial viability of Aboriginal and Torres Strait Islander businesses but also aligns with broader social and environmental goals. For instance, equity investments can bring strategic partners who offer not just capital but also expertise and market access.

> *Equity positions enable investors to contribute more than just money; they bring valuable insights and networks that can accelerate* business growth.

Such blended capital approaches may represent a solution that addresses both financial and non-financial barriers, fostering sustainable economic development within Aboriginal and Torres Strait Islander communities.

Strategic partnerships with financial institutions

Financiers noted that strategic partnerships between Aboriginal and Torres Strait Islander farmers and financial institutions could play a pivotal role in fostering sustainable agricultural development in Australia. These partnerships could extend beyond capital, and could open doors to valuable resources, expertise and networks that Aboriginal and Torres Strait Islander agricultural producers might not otherwise engage with. It was suggested that by collaborating with financial institutions, Aboriginal and Torres Strait Islander agricultural producers could benefit from customised financial products (e.g. low-interest loans, grants and flexible repayment terms) tailored for their unique needs.

> *So as a collective they could be then piloting these initiatives. And I think you've [banks] got to walk the walk first.*

Financial institutions bring a wealth of knowledge in risk management and business planning which can significantly enhance the operational efficiency of Indigenous farming enterprises. Additionally, financial lenders highlighted that these partnerships could facilitate access to new markets and advanced agricultural technologies, driving innovation and growth. When financial institutions invest in Indigenous agriculture, they are also investing in community resilience and long-term sustainability. Through strategic partnerships founded on mutual trust and understanding, financial institutions can help bridge the gap between traditional financing models and the specific requirements of Aboriginal and Torres Strait Islander agricultural producers, ultimately contributing to the economic empowerment and prosperity of Aboriginal and Torres Strait Islander communities.

> *First and foremost, we do [currently] lend and absolutely we would be looking to partner with anyone who is looking to start [an Indigenous] business.*

5: Next steps

The next stage of the project, due to be completed mid-January 2025, is the Benefits and Gap Analysis. We anticipate the Benefits and Gaps Analysis will reflect work done to date including the Regulatory Analysis work (undertaken by Terri Jake and Co) and the contents of this report (Mid Outcome Report 2). The analysis will also be informed by further work to scope up to three potential credential system business model options for Indigenous agricultural products. Prior to the commencement of developing the Benefits and Gaps Analysis, we propose hosting a scoping meeting with all Project Sponsors, to provide clear direction and mutually agreed parameters on the desired outcome by all parties.

As part of these activities, we will continue to prioritise the perspectives of Aboriginal and Torres Strait Islander people. We may re-engage with stakeholders and also remain open to hearing new voices from the sector.

Appendix A: Economic analysis (full report)

Establishment of Indigenous agricultural product credentials

Market sizing

August 2024

POLIS PARTNERS

Contents

Polis Partners would like to pay our respects to our ancestors and elders, past and present who are our knowledge holders. We acknowledge our Aboriginal and Torres Strait Islander young people who are our future leaders.

We acknowledge and pay respect to those who have gone before and recognise their deep and lasting contributions.

Executive Summary

The world's oldest continuous living culture holds traditional knowledge and practices that can, among other things, support sustainable growth across the agriculture industry and deliver significant benefits to communities.

Indigenous agricultural products are an important market for Australia. Designing the policy settings to support ongoing growth and enable First Nations communities to benefit from, and protect, their rich and deep culture is critical for First Nations peoples.

The introduction of an Indigenous agricultural product credential system acknowledges the value that Indigenous traditional knowledge, cultural practices and genetic resources have in the agriculture sector. A credential system would link directly to Closing the Gap Outcome Area 8 (Strong economic participation and development of Aboriginal and Torres Strait Islander people and communities) by providing a framework that can create new opportunities to accelerate existing Indigenous businesses, increasing the ability to attract more capital investment, and ultimately help grow the First Nations economy more broadly.

The current draft criteria for an 'Indigenous agricultural product' for the purposes of a potential credential system has been developed in consultation with, and consensus from, stakeholders, and requires, for example, a 'connection to community benefit'. Revenue obtained for collective community benefit can help create a shared prosperity with long-term, financial sustainability and generational opportunities. This can have a meaningful impact on other Closing the Gap outcomes, particularly those that are worsened by poverty (e.g. health and education).

Measuring the market size of Indigenous agriculture in Australia, and therefore the potential 'size of the prize' when it comes to implementing a credential system, involves firstly identifying the types of products which would qualify under such a scheme, as well as the form of Indigenous ownership. Our analysis involves two core sector definition scenarios, one in which Indigenous ownership is at least 50%, the other in which it is at least 51%, with additional growth outlooks for each of the core results which capture pricing, growth and Indigenous ownership characteristics.

It is estimated that the market for Indigenous owned and produced agricultural products is currently between $195.5 million to $633.2 million per year (see Figure E1 below). The core driver behind this range is not prevailing market conditions but the definition placed around the ownership thresholds that constitute Indigenous production. This needs to be considered in the policy and design of potential certification schemes. In agricultural production, 50-50 partnerships are a common business model and would lead to the potential certification of more Indigenous businesses and thus a larger, $633.2 million per year market. A smaller number of Indigenous

agricultural businesses (included in the $633.2 million market), meet the ownership threshold of at least 51% ownership, leading to servicing a smaller, $195.5 million per year market.

Since 2012, it is estimated that growth in Indigenous agricultural production has been in the order of around 10% year-on-year.[1] This compares to around 4% for agriculture as a whole.[2]

The overall effect on the First Nations economy does not end at the farm gate. As a result of this Indigenous, on-farm production, there are flow-on effects through local Indigenous communities that should also be considered. These include the use of local businesses in the production supply chain, and additional spending because of wages earned. It is estimated that the total economic contribution is $1.4 billion, supporting 1,900 jobs under the 50% ownership scenario, and $442 million supporting 586 jobs under the 51% ownership assumptions. As a proportion of the current First Nations economy, this is 8% and 2% respectively. This analysis is not designed to be a detailed quantification of the economic contribution of the Indigenous agricultural sector, but rather to highlight the relative importance and flow on impact to Australia's First Nations economy. The analysis highlights that in addition to the positive, and substantial, direct farmgate revenue contribution to Indigenous agriculture in Australia, there is additional impact in communities in which Indigenous agricultural businesses operate in that helps to support them, both in terms of income and employment.

Key takeaways

The relevant policy issues identified through this market sizing are summarised below:

Size and importance: The Indigenous agricultural product market is a small but growing component of the broader Australian sector. However, it can have a disproportionally larger impact on the First Nations economy, employment and communities.

Definition: The definition of an 'Indigenous producer' was the most sensitive variable influencing the size of the market. This suggests the importance of consultation and agreement on this definition, and also the care needed in the policy and potential regulatory design of the product framework.

Evidence base: Opportunities exist to strengthen the evidence base to assist both decisions on a product framework, and to support and track the broader growth and evolution of the Indigenous agricultural sector. Establishing this evidence base will be valuable in both evaluating the success of a potential credential system, but also measuring broader impacts that the Indigenous agricultural sector may have in contributing to progress on Closing the Gap targets, and relevant policy making processes.

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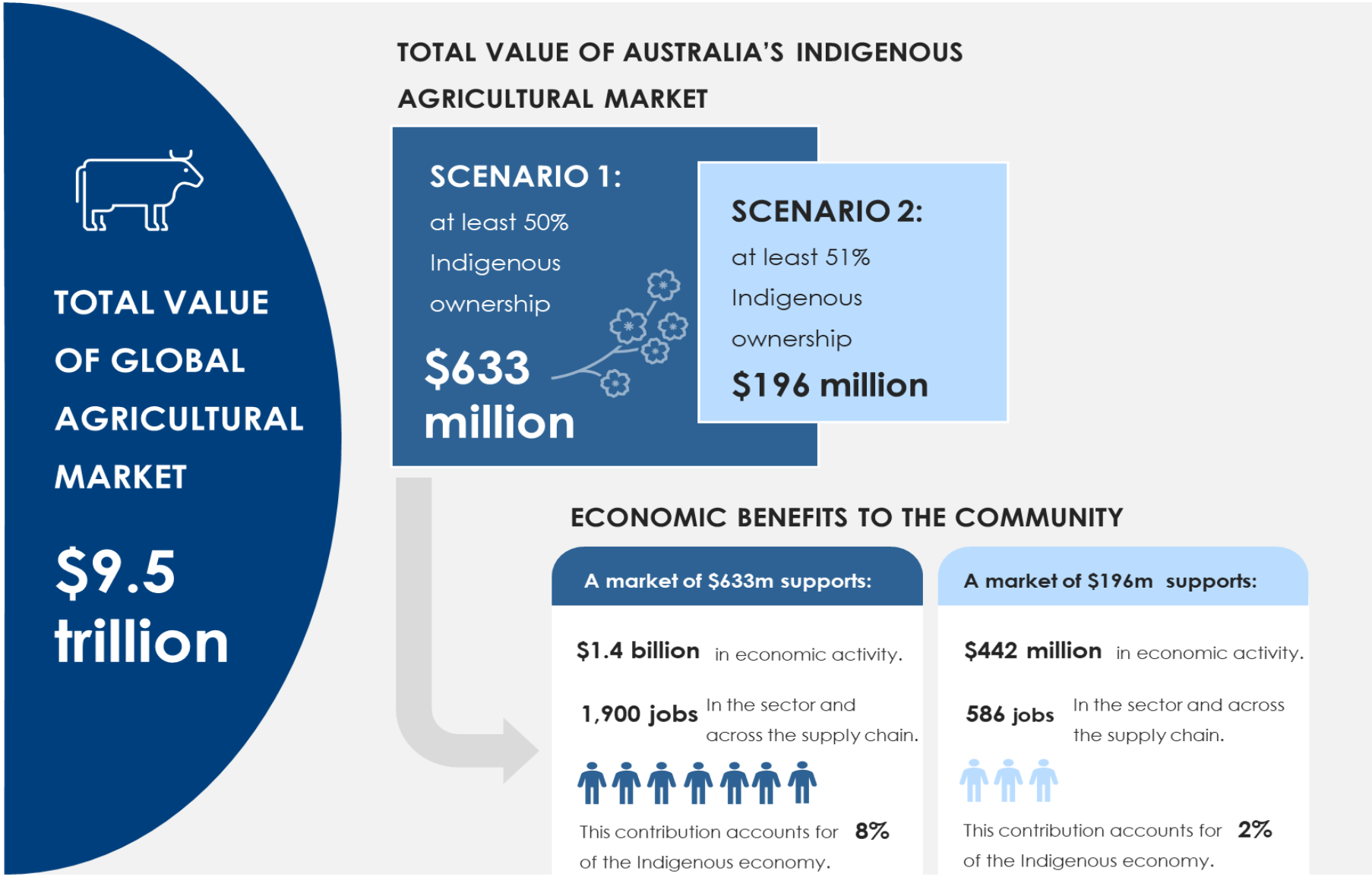
[1] Using the growth of bushfoods as a proxy for the broader Indigenous agriculture sector. The growth in Indigenous sole traders and partnerships over this time has been around 9%

[2] ABARES Agricultural commodities: June quarter 2024 – Statistical tables

Figure E1 – summary of Australia's Indigenouse Agricultural Market



1. Introduction

1.1 Background

In partnership with the Indigenous Land and Sea Corporation (ILSC) and the Department of Agriculture, Fisheries and Forestry (DAFF), the National Farmers Federation (NFF) has contracted PricewaterhouseCoopers Indigenous Consulting (PIC) to develop the evidence base to support and inform the establishment of Indigenous agricultural product credentials. These credentials will help verify the provenance of Indigenous agricultural products and deliver improved economic benefits to Indigenous people.

PricewaterhouseCoopers Indigenous Consulting (PIC) have in turn contracted Polis Partners to estimate the economic value of identified Indigenous Agricultural Products in the current domestic and international market. This is a key element in the larger scope of work, the results of which form the basis of this report.

1.2 Measuring economic value

1.2.1 Market sizing

As part of the evidence base to support and inform the establishment of Indigenous agricultural product credentials, there is a need to first measure the 'size of the prize' in terms of what the economic value of the sector could be.

Measuring economic value in this way is typically performed through a market sizing study. The output of a market sizing provides an indication as to the potential value associated with policies that establish, support or protect the product in the market. In this way, a market sizing is valuable initial information that informs industry participants and government decision makers as to the potential benefit of pursuing the market.

The focus of this study will therefore be on performing a market sizing of the Indigenous agricultural product sector.

In any market sizing, it is prudent to look at a set of scenarios, reflecting future uncertainties and policy design choices. This study adopts two core sector definition scenarios, with an additional growth scenario on top of each of the core results which capture pricing, growth and Indigenous ownership characteristics.

It should be noted that other forms of economic analysis, such as cost-benefit analysis is not in the scope of this study. This analysis requires greater specificity and definition around policy options, and forms part of the Impact Assessment / Regulatory Impact Statement required to support government decision making later in the process.

Gunbalanya Station and Meatworks

***Location**: Gunbalanya, West Arnhem Land, Northern Territory*

Overview

Gunbalanya Meats operates a small abattoir and retail butcher shop in the community of Gunbalanya on West Arnhem Land in the Northern Territory. Cattle grown on Gunbalanya Station are processed through Gunbalanya Meats and sold to a wide range of customers, from local community organisations to meat wholesalers and retailers throughout the Territory. Gunbalanya Station and Meats are a significant source of employment at Gunbalanya and provides an affordable source of red meat for remote Aboriginal communities.

Gunbalanya Station and abattoir is currently operated by ILSC under a Pastoral Land Use Agreement (PLUA) held with NLC, Arnhem Land Aboriginal Land Trust (ALALT) and Gunbalanya Meat Supply Pty Ltd (GMS). ILSC has been subleasing and operating the station and abattoir for the past 15 years, with the intention of the lease arrangement to build capacity of GMS for it to once again operate the meatworks and station operations.

Indigenous training and employment

Gunbalanya Station and Meats provides a valuable source of training and employment for the Indigenous population. This includes Indigenous participants undertaking Certificate II or III level courses in either beef cattle production or meat processing, and station trainees and staff undertake horsemanship and low stress stock handling schools.

Community benefits

Gunbalanya Station and Meats significantly contribute to the local community through dedicated land management and cultural support. The station staff actively engage in land management practices, including the control of Mimosa Pigra, a weed of national significance. These efforts are crucial for protecting and maintaining access to culturally important lands, ensuring that traditional practices and connections to the land are preserved.

Additionally, Gunbalanya Meats plays a vital role in supporting community cohesion by donating beef annually to local cultural events, funerals, and community celebrations, such as the Gunbalanya open day. These contributions not only provide essential resources for these events but also reinforce the station's commitment to the well-being and cultural richness of the community.

2. Defining the Sector

Before undertaking a market sizing and measuring the 'size of the prize', the Indigenous agricultural products sector needs to be defined. NFF, ILSC and DAFF have undertaken consultation and engagement to help define the characteristics of Indigenous products as part of the Indigenous Agricultural Product Framework Project.

Several dimensions were considered as part of this process including:

- Connection to Culture
- Connection to Country
- Sustainability
- Collective Benefit
- Economic Self-determination

Taking these dimensions, the group was able to form a refined working definition of Indigenous agricultural products belonging in the sector. This is outlined in the next section.

2.1 Working definition

The current working definition is set out in Figure 1. It should be noted that this definition is a working definition, and as such, is subject to change as the Indigenous Agricultural Product Framework continues to evolve.

Figure 1 Indigenous agricultural product working definition

An Indigenous Agricultural Product refers to the use of land, air, and waters by Aboriginal and Torres Strait Islander owned organisations to produce primary products while also Caring for Country.
Indigenous agricultural products, both cultivated and wild-harvested, create opportunities for access and benefit sharing with Aboriginal and Torres Strait Islander communities and reflect the cultural connection between the Producers and the product. Characteristics are as follows:

- *Aboriginal and Torres Strait Islander Producers (at the centre)*
- *Connection to Culture*
- *Connection to Country*
- *Caring for Country, and*
- *Access and Benefit Sharing*

Source: PwC Indigenous Consulting

2.2 Sector definition scenarios

For the purposes of undertaking the market sizing of the sector, the Indigenous agricultural product working definition was formalised into specific product and ownership characteristics.

2.2.1 Scenario development process

Initially examining specific segments of the market, such as bushfoods and botanicas, highlighted niche areas of growth, but was insufficient to capture the full market size and potential. It was then deemed appropriate to broaden the definition of an agriculture product to include general agriculture.

Consultation with community and the sector also identified that the definition of ownership was critical. Initial analysis also suggested that the potential scope of eligibility could differ substantially depending on whether a 50% ownership requirements was adopted (which would capture 50-50 partnership structures common in the broader agricultural industry), compared to the 51% ownership requirements usually adopted for Indigenous certification.

As such, these differing ownership assumptions were tested to give all stakeholder and decision makers transparency which will help inform ongoing discussions.

The following scenarios have been adopted for the market sizing in this report.

Scenario 1: greater than 50% Indigenous-owned agriculture

The total farmgate value of Indigenous agricultural products, with Indigenous agricultural products taken to be any agricultural commodities produced in Australia by businesses with* ***at least 50%*** *Indigenous ownership.*

*Note: farmgate refers to the value of the cultivated product when it leaves the farm, after marketing costs have been subtracted. (i.e. before additional processing and value-add further down the supply chain.)

Scenario 2: greater than 51% Indigenous-owned agriculture

The total farmgate value of Indigenous agricultural products, with Indigenous agricultural products taken to be any agricultural commodities produced in Australia by businesses with* ***at least 51%*** *Indigenous ownership. This scenario would therefore represents a smaller subset of businesses already captured in Scenario 1.*

*Note: farmgate refers to the value of the cultivated product when it leaves the farm, after marketing costs have been subtracted. (i.e. before additional processing and value-add further down the supply chain.)

Māori Hua Parakore

***Location**: New Zealand*

***Indigenous Peoples**: Māori*

***Scheme**: Participatory Guarantee System (PGS), Territorial label*

Overview of the Certification Scheme

The Hua Parakore certification scheme represents an indigenous hallmark of excellence for mahinga kai (food and product production) in New Zealand. Initiated and driven by Te Waka Kai Ora (National Māori Organics Authority of Aotearoa), Hua Parakore was officially launched during the Māori New Year in 2011. This certification system focuses on the principles of mātauranga Māori (Māori knowledge), tikanga (cultural practices), and te reo (language), providing a culturally authentic framework for organic and sustainable food production.

Key features of Hua Parakore include:

- **Inclusivity:** The scheme explicitly aims to support Indigenous individuals with less economic capacity, making it accessible to a broader range of Māori producers.
- **Cultural integration:** Standards are set in the Māori language, encoding cultural values and ensuring the certification process respects and preserves Māori traditions.
- **Indigenous knowledge systems:** Hua Parakore is informed by locally owned and managed indigenous knowledge. Māori producers use their cultural practices to define and implement Hua Parakore production methods, tailored to their specific people and place.

Economic Benefits

Although there has been no formal ex-post quantification of the economic benefit of Hua Parakore, early preliminary forecasts have predicted revenue gain of NZD 240 million over five years with continued investment in the scheme.[3] This demonstrates the financial viability and potential of integrating traditional practices with modern market demands. In addition, there was forecast a 10% increase in Māori land being used to produce organic food, with the growth of Māori organics leading to increased employment opportunities for rural Māori.

Impact and Success of the Scheme

The Hua Parakore certification scheme has had several positive impacts:

[3] Carney, G. & Takoko, M. 2010. Te waka kai ora: Hua Parakore verification system (Ministerial Briefing). New Zealand

- **Sustainability**: By promoting organic and sustainable farming practices rooted in Māori traditions, Hua Parakore contributes to environmental conservation and the regeneration of natural resources.
- **Cultural preservation**: The scheme helps preserve Māori cultural practices and knowledge, ensuring they are passed down through generations while remaining relevant in contemporary contexts.
- **Community empowerment**: The certification supports Māori producers in achieving economic independence and enhancing their livelihoods through culturally aligned economic activities.

Several Māori food producers have gained recognition and market access through Hua Parakore certification, highlighting the scheme's role in promoting indigenous entrepreneurship. The certification has not only benefited local markets but has also allowed Māori producers to tap into international markets where there is growing interest in ethically and sustainably produced indigenous foods.

3. The Current Market Size

3.1 Market sizing metrics

A typical market sizing framework includes three key metrics that are used to describe and measure the addressable market for a product(s). These are described below in the context of Indigenous agricultural products and this market sizing study:

- **Total Addressable Market (TAM)** – the value of the total global market that exists for a product, serviced by all global producers. For the purposes of this study, it is the total global value of agricultural products.
- **Serviceable Addressable Market (SAM)** – the value of the total market serviced by Australian producers. This represents the upper bound of the market for Indigenous producers in Australia to target for their Indigenous agricultural products.
- **Serviceable Obtainable Market (SOM)** – the current value of the market for Indigenous Australian producers, reflecting Indigenous ownership rates in Australia. The SOM represents the baseline market sizing for Indigenous owned and produced agricultural products.

This market sizing steps through these key metrics as a way of arriving at the ***current market size of Indigenous agricultural products in Australia***. Chapter 4 builds on this current baseline market sizing by introducing future scenarios for what the market might look like in 2029, as well as estimating a wider economic contribution.

3.2 The Total Addressable Market (TAM)

The TAM globally for Indigenous agriculture is estimated to be $9.5 trillion in $2024.[4] Australia is an active and sizeable player in this market, including Indigenous business participants. Any price uplift or demand increase associated with an Indigenous certification of Indigenous products represents a substantial material opportunity for Indigenous businesses.

3.3 Serviceable Addressable Market (SAM)

The SAM for Indigenous businesses can be taken as the value of all agricultural production in Australia. Agricultural production in Australia is made up of several different commodities, across meat and livestock, broadacre cropping, horticulture and forestry and fishing. These include:

- Meat & live animals

[4] FAOSTAT and Polis Partners analysis

- Livestock products
- Grains & oilseeds
- All other crops
- Fruit & vegetables
- All other horticulture
- Forest products
- Fisheries

The total farmgate value of agriculture in Australia in 2024/25 is estimated to be ***$83.6 billion*** (in $2023/24, excluding forestry and fishing).[5] Including forestry and fishing brings the total value to ***$89.5 billion***. The breakdown of this by commodity grouping can be seen in Table 1 below.

Table 1 The farmgate value of Australian agriculture

Commodity	Value ($2024, billions)	% Contribution	Growth between 2003/04 and 2022/23
Meat & live animals	$25.5	28%	4.1%
Livestock products	$10.0	11%	2.8%
Grains & oilseeds	$22.6	25%	4.0%
All other crops	$8.1	9%	2.5%
Fruit & vegetables	$13.5	15%	5.2%
All other horticulture	$3.9	4%	3.9%
Forest products	$2.3	3%	1.9%
Fisheries	$3.6	4%	2.4%
Total	**$89.5**	**100%**	

Source: ABARES Agricultural commodities: June quarter 2024 – Statistical tables

3.4 Serviceable Obtainable Market (SOM)

Indigenous business share represents a natural limitation on the achievable market for Indigenous producers. The SOM for Indigenous businesses can therefore be estimated by applying the Indigenous business share in the sector to the SAM farmgate value.

3.4.1 Scenario 1: 50% Indigenous-owned agriculture

The University of Melbourne's Indigenous Business and Corporation Snapshot Study provides a valuable starting point for estimating the number of Indigenous businesses in Australia.[6] As of 2022,

[5] ABARES Agricultural commodities: June quarter 2024 – Statistical tables

[6] Evans, M., Polidano, C., Dahmann, S. C., Kalera, Y., Ruiz, M., Moschion, J., Blackman, M. (2024). Indigenous Business and Corporation Snapshot Study 3.0. The University of Melbourne https://fbe.unimelb.edu.au/cibl/research.

there are estimated to be ***13,693*** Indigenous businesses that are active in Australia. The study defines an Indigenous business as one with at least *50% Indigenous ownership*. The breakdown by business type can be seen in Table 2 below.

Table 2 Indigenous business count in Australia

Business type	Count	% split
Registered businesses and corporations	5,270	38%
Sole traders	5,377	39%
Partnerships	3,046	22%
Total	**13,693**	**100%**

Source: Indigenous Business and Corporation Snapshot Study 3.0. The University of Melbourne

The study also provides a breakdown of Indigenous sole traders and partnerships belonging to the agriculture, forestry, and fishing sector:

- Partnerships – 35%
- Sole traders – 10%

This information is used to estimate the number of overall Indigenous partnerships and sole traders that we can attribute to the agricultural sector in Australia. For 'Registered businesses and corporations' we instead use as a proxy the proportion of Indigenous owner-managers that are in the agriculture, forestry and fisheries sector, as a proportion of all Indigenous owner-managers. This number is 5%.[7] Applying these agricultural splits, it is estimated that the total number of Indigenous businesses in agriculture, forestry and fishing in Australia is ***1,846***.

Table 3 Indigenous business count in agriculture, forestry, and fishing in Australia

Business type	% Agriculture, forestry, and fishing	Count
Registered businesses and corporations	5%	242
Sole traders	10%	538
Partnerships	35%	1,066
Total		**1,846**

Source: Indigenous Business and Corporation Snapshot Study 3.0. The University of Melbourne and ABS Census 2021, SIEMP Status in Employment

The study combines Indigenous businesses listed on five registries, Indigenous corporations with operating Australian Business Number from the Office of the Registrar of Indigenous Corporations registry and sole traders and partnerships with at least 50% of owners self-identifying as Indigenous in the Australian Census and Centrelink records and that can be linked to businesses in the Business Longitudinal Analysis Data Environment (BLADE)

[7] ABS Census 2021, SIEMP Status in Employment

Using ABS data from the Business Longitudinal Analysis Data Environment (BLADE), a total number of Australian businesses operating in the agriculture, forestry and fishing sector can be obtained. As of 2019, this is ***197,516*** businesses.[8]

Majority owned Indigenous businesses as a proportion of total Australian businesses operating in agriculture, forestry and fishing is therefore estimated to be ***0.9%***.

Applying this Indigenous business share in the sector to the SAM farmgate value provides a SOM value of Indigenous agriculture of **$633.2 million** (in $2023/24).

Table 4 Australian and Indigenous business count and production in agriculture, forestry, and fishing

Business type	Australian businesses	Production (millions)*	Indigenous businesses	% Indigenous businesses	Estimated Indigenous production (millions)
Registered businesses and corporations	50,415	$58,327	242	0.5%	$280.4
Sole traders	63,056	$10,289	538	0.9%	$87.7
Partnerships	84,045	$20,902	1,066	1.3%	$265.1
Total	**197,516**	**$89,519**	**1,846**	**0.9%**	**$633.2**

*Production apportioned by business type using average revenue shares in agriculture, forestry and fishing
Source: Polis Partners analysis of BLADE Business data and The University of Melbourne Indigenous Business and Corporation Snapshot Study

[8] BLADE *Businesses in Australia, 2018-19, ABS TableBuilder*

Roebuck Plains Station

***Location**: Nyamba Buru Yawuru, Broome, Western Australia*

Overview

Roebuck Plains Station is located at Gumaranganyjal, near Broome. The station covers over 276,000 hectares and includes the Roebuck Export Depot. The station is strategically located for the export market, located on rich marine floodplain 30 kilometres east of Broome, with the capacity to support a herd of 20,000 head of cattle.

The station and the depot were divested back to Yawuru in 2014, recognising Yawuru's traditional ownership of the area, with the ILSC managing the station and the depot via a lease agreement.

In February 2022, building on the legacy of our old people, Yawuru took over the pastoral operations of the station, and will work with the ILSC to transfer operations of the export depot in the future.

Balancing sustainability with commercial outcomes

The station is managed and run as a successful pastoral enterprise and balances Yawuru cultural values in the overlapping Indigenous Protected Area (IPA). Development of new enterprises and technology including pivot irrigation is undertaken collaboratively with Yawuru and the station management to ensure sustainable land use and positive outcomes for the enterprise.

3.4.2 Scenario 2: 51% Indigenous-owned agriculture

In order to estimate the number of businesses that are *majority Indigenous owned* (i.e. 51% or greater Indigenous ownership), we can use two key pieces of information:

- the ratio of certified businesses to total businesses in the Supply Nation database.[9] Supply Nation defines a 'certified' business as 51% or more Indigenous owned, managed and controlled. Other 'registered' businesses in the database are at least 50% Indigenous owned. As of financial year ending 2023, 25% of Supply Nation's database was made up of certified suppliers.[10]
- According to the Melbourne University Indigenous Business Snapshot, 85.8% of partnerships identified as Indigenous (i.e. at least 50% Indigenous ownership) are exactly 50% Indigenous ownership. This would suggest that the remaining 14.2% partnerships are at least 51% Indigenous owned.[11]

Applying these values to the business counts in Table 3, there are estimated to be **750** Indigenous owned businesses (with 51% or more Indigenous ownership) in the agriculture, forestry and fishing sector. The breakdown of these businesses can be seen in Table 5 below.

Table 5 Indigenous business count in agriculture, forestry, and fishing in Australia by ownership

Business type	At least 50% ownership	Proportion at least 51% ownership	At least 51% ownership
Registered businesses and corporations	242	25.0%*	61
Sole traders	538	100.0%	538
Partnerships	1,066	14.2%**	151
Total	**1,846**		**750**

*Source: Supply Nation 2023 Annual Report. p. 12 – 1080 certified suppliers, 3249 registered suppliers
**Source: Indigenous Business and Corporation Snapshot Study 3.0. The University of Melbourne

Majority owned Indigenous businesses as a proportion of total Australian businesses operating in agriculture, forestry and fishing is therefore estimated to be ***0.4%***.

Applying the Indigenous business share in the sector to the SAM farmgate value provides a SOM value of Indigenous agriculture of **$195.5 million** (in $2023/24).

[9] Supply Nation provides a database of verified Indigenous businesses
[10] Supply Nation 2023 Annual Report. p. 12 – 1080 certified suppliers, 3249 registered suppliers
[11] Evans, M., Polidano, C., Dahmann, S. C., Kalera, Y., Ruiz, M., Moschion, J., Blackman, M. (2024). Indigenous Business and Corporation Snapshot Study 3.0. The University of Melbourne https://fbe.unimelb.edu.au/cibl/research

Table 6 Australian and Indigenous business count in agriculture, forestry, and fishing

Business type	Australian businesses	Production (millions)*	Indigenous businesses	% Indigenous businesses	Estimated Indigenous production (millions)
Registered businesses and corporations	50,415	$58,327	61	0.1%	$70.1
Sole traders	63,056	$10,289	538	0.9%	$87.7
Partnerships	84,045	$20,902	151	0.2%	$37.7
Total	**197,516**	**$89,519**	**750**	**0.4%**	**$195.5**

*Production apportioned by business type using average revenue shares in agriculture, forestry and fishing
Source: Polis Partners analysis of BLADE Businesses data, The University of Melbourne Indigenous Business and Corporation Snapshot Study 3.0 and Supply Nation database

Aspirational target – Using proportional Indigenous population representation

One alternate way to think about the potential market size for Indigenous agriculture in Australia is to envisage what it could be with proportional Indigenous population representation in the sector. Under this condition, the full farmgate value could be proportionate to the relative Indigenous population size.

Given that Indigenous representation is 3.8% of the total population, the total potential market size of Indigenous agriculture would be approximately $3.40 billion.*

*If instead we took Indigenous employment representation in the agriculture, forestry and fishing sector, which is 2.4%**, this would result in a potential market size of $2.15 billion.*

The Indigenous business shares identified in Scenarios 1 and 2 of this report are lower than the Indigenous population representation which reflects existing barriers for Indigenous businesses. It also highlights the opportunity for growth in Indigenous business shares in the sector if these barriers were removed. 3.8% business ownership should be viewed as an aspirational growth target.

**ABS Census 2021*

***ABS Census 2021 (including owner/manager and employees)*

Nilgiri Forest Rock Honey – Lastforest

***Location**: Nilgiri Biosphere Reserve, Tamil Nadu, India*

***Indigenous Peoples**: Toda, Paniya, Irula, Kurumba, Kuruchiya, Mullukurumba*

***Scheme**: Participatory Guarantee System (PGS), Territorial label*

Overview of the Certification Scheme

A Participatory Guarantee System (PGS) has been successfully adopted by the Keystone Foundation to support Indigenous Peoples' forest-based activities in the Nilgiri Biosphere Reserve. This system ensures ecological sustainability and fair trade practices, fostering community participation in the certification process. The Last Forest territorial label was established under this scheme, certifying products such as spices, coffee, and honey, thereby enhancing their market value and promoting sustainable livelihoods.

Nilgiri Forest Rock Honey

Forest Rock honey, one of the flagship products certified under the Last Forest label, is a prime example of the scheme's success. This honey is harvested using traditional knowledge and methods, emphasizing ecological conservation and minimal disturbance to the bees.

- **Ecological Conservation**: The honey harvesting process involves breathing into tree cavities where the hives are located, which calms the bees and allows for gentle extraction. This method ensures the bees remain undisturbed, promoting continuous yield and forest regeneration.
- **Traditional Knowledge**: Indigenous communities use age-old techniques passed down through generations, integrating sustainable practices with their cultural heritage.

Economic Benefits and Price Premium

The certification scheme has enabled communities to maintain traditional honey collection practices while benefiting economically from a price premium.

- **2010:** The price of honey in the organic market increased from 261 INR per kg to 327 INR per kg, marking a 25% rise in real terms (i.e. over and above inflation) as the product reached a broader consumer base through internet stores and local markets.
- **2015**: The price further increased in real terms to over 350 INR per kg.

- **Current Market:** A 500g jar of Nilgiri honey is now trading at 535 INR retail, equating to 1,070 INR per kg.

Impact and Success of the Scheme

The Last Forest certification scheme has achieved several key successes:

- **Sustainability and Regeneration**: By promoting traditional harvesting techniques, the scheme supports forest regeneration and ensures the sustainability of honey production.
- **Economic Upliftment**: The price premiums have provided significant economic benefits to Indigenous communities, enhancing their livelihoods and incentivizing the preservation of traditional practices.
- **Market Expansion**: The certification has opened up new market opportunities, allowing Nilgiri Forest Rock honey to reach consumers globally, thereby increasing its demand and value.

The scheme has been recognized for its holistic approach, which balances environmental sustainability with the economic needs of Indigenous communities. The success of Nilgiri Forest Rock honey serves as a model for other forest-based products, demonstrating the potential of certification schemes in promoting sustainable and equitable trade practices.

4. The Future Market Size

This chapter builds on the current market sizing by introducing future growth scenarios.

The current market size for Indigenous agricultural products, as measured in Chapter 3, under each product scenario is summarized in Table 7 below. Using these values as the current baseline, the analysis will consider two future growth scenarios for the future reference year of FY 2028/29. One is ***'Base'*** growth which applies a 'business-as-usual' approach informed by long-run historical growth rates of agricultural production in Australia, while the other is ***'High'*** growth which applies more optimistic volume, price and Indigenous ownership growth assumptions.

Table 7 Current market size under each scenario

Scenario	Description	Current market size ($2024)
Scenario 1: 50% Indigenous-owned agriculture	The total farmgate value of Indigenous agricultural products, with Indigenous agricultural products taken to be any agricultural commodities produced in Australia by businesses with at least **50%** Indigenous ownership.	$633.2 million
Scenario 2: 51% Indigenous-owned agriculture	The total farmgate value of Indigenous agricultural products, with Indigenous agricultural products taken to be any agricultural commodities produced in Australia by businesses with at least **51%** Indigenous ownership.	$195.5 million

Source: Polis Partners

4.1 Growth assumptions

When estimating future market size, two scenarios have been adopted. One is a ***'Base'*** scenario which applies the long-run historical growth rate to agricultural production in Australia, while the other is a ***'High'*** scenario which applies the same long-run historical growth rate to production together with an additional volume uplift and price premium associated with certification. Table 8 outlines these growth assumptions.

Table 8 Future market size growth assumptions

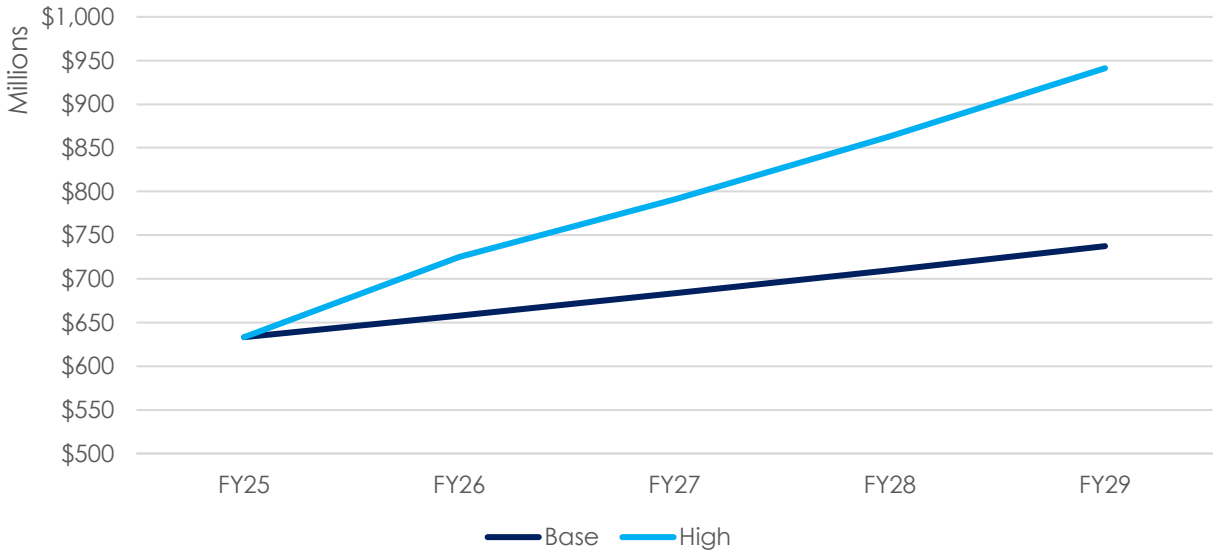
Growth	Growth assumptions
Base	► Historical long-run average production growth (as per Table 1)
High	► Historical long-run average production growth (as per Table 1) ► Additional volume uplift (+5%) ► Certification price premium (+5%)

Source Polis Partners

4.2 Scenario 1: 50% Indigenous-owned agriculture

After applying the growth assumptions as documented in Table 8 to Scenario 1, it is estimated that by FY29 the size of Indigenous agricultural production would be ***$737.4 million*** under Base growth and ***$941.2 million*** under High growth. Figure 2 shows the total Indigenous farmgate production value over time under each growth projection.

Figure 2 Estimated Indigenous agricultural farmgate production in Scenario 1 under Base and High growth (constant $2023/24)



Source: Polis Partners

Tiwi Plantations Corporation

***Location**: Tiwi Islands, 80km north of Darwin, Northern Territory*

Overview

Tiwi Plantations Corporation manages 30,000 hectares on the Tiwi Islands and employs 25-26 Tiwi individuals, accounting for 30-35% of its workforce. Operations are contractually managed by an ASX-listed company, including sales, marketing, harvesting and haulage.

Economic outcomes

With 100% Tiwi ownership, there is the opportunity for some reinvestment of profits into the community. Over time this has seen members of the community eating better and pursuing healthier habits. The employment opportunities have also helped in building the capacity of locals to engage in work and gain experience. Some have even left and gone on to start their own businesses.

Community benefits

Forestry operations on the Islands has led to several important community benefits, including:

- the corporation maintains important transport routes on the Islands which are used by the population to access areas that otherwise wouldn't be accessible.
- operations help to uphold cultural integrity, as five of the eight clan groups have plantations on their land. Social cohesion is further strengthened with all eight clan groups represented on the board working towards a for-profit outcome.
- the nursery program offers significant opportunities for women with children, outside of government programs.

Sustainable practices and future growth

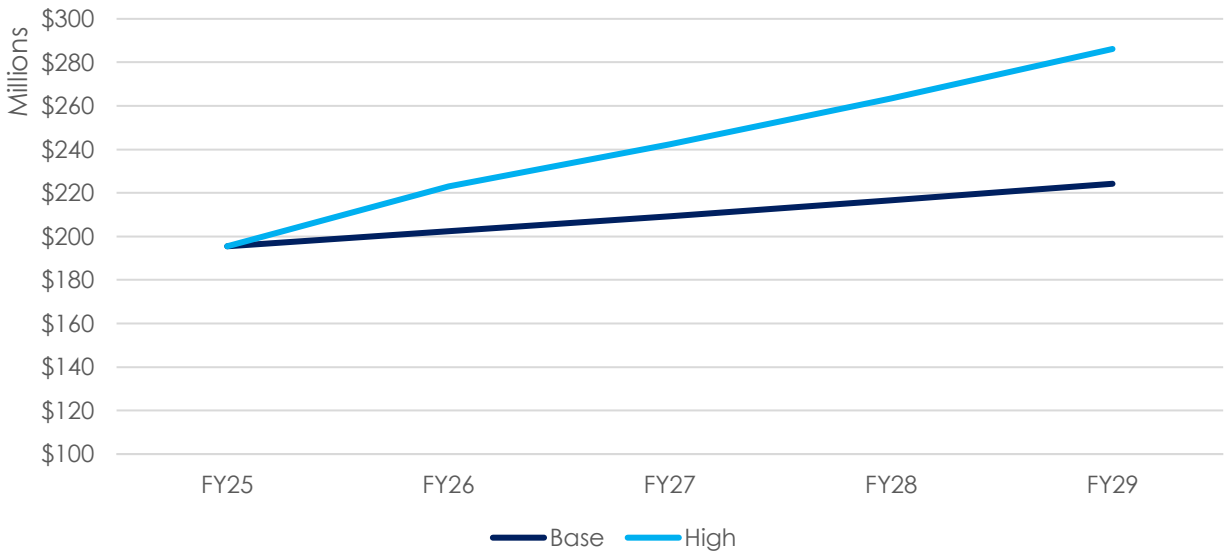
Tiwi Plantations Corporation integrates traditional knowledge into its operations, including burning practices and animal trails. The partnership with an ASX-listed company aims to attract premiums for carbon credits and specialized plantation lines.

Despite limitations in expansion (the 30,000 hectares being fully utilised), future growth is planned through species diversification to increase production. The company also engages with the ADF and US Marines for training, providing additional revenue and exposure. Efforts to use plantation timber for housing aim to reduce costs and address the housing crisis on the islands, leveraging a $4 billion NT housing initiative.

4.3 Scenario 2: 51% Indigenous-owned agriculture

After applying the growth assumptions as documented in Table 8 to Scenario 2, it is estimated that by FY29 the size of Indigenous agricultural production would be ***$224.2 million*** under Base growth and ***$286.1 million*** under High growth. Figure 3 shows the total Indigenous farmgate production value under each growth projection.

Figure 3 Estimated Indigenous agricultural farmgate production in Scenario 2 under Base and High growth (constant $2023/24)



Source: Polis Partners

Kakadu Plum

***Location**: North-western Australia, Northern Territory, Queensland*

***Indigenous Peoples**: Aboriginal*

Overview

The Kakadu Plum is a native Australian fruit with significant traditional and modern applications. Native to Northern Western Australia, Northern Territory, and Queensland, it has been traditionally used as a medicine and food source. Modern uses extend to food, beverages, health supplements, and personal care products, primarily due to its high vitamin C content, which is one of the highest of any natural source globally. The harvesting season varies by region but generally falls between January and July.

Meeting demand

Although seeing strong growth over the past decade well north of 10% per year, supply has not been able to keep up with demand, both in a national and international setting. This is a challenge for the burgeoning industry, one in which has a large payoff if met. The University of Queensland has suggested that wild harvest would have to be increased to "more than 100 tonnes to meet commercial demand"[12]

Figure 4 Stories of demand for Kakadu Plum

Source: Emerging Business Models for the Kakadu Plum Industry, PwC Indigenous Consulting, 2017

[12] Plum award for Australian native food industry collaboration, The University of Queensland. https://www.uq.edu.au/news/article/2017/11/plum-award-australian-native-food-industry-collaboration

There is a considerable and growing interest from international health and cosmetic companies, with strong potential markets in Asia, Europe, and the Americas. Despite this interest, the current supply does not meet international demand, particularly with substantial requests coming from China.

The Northern Australia Aboriginal Kakadu Plum Alliance (NAAKPA)

NAAKPA consists of six Aboriginal Corporations across Northern WA and NT, harvesting and growing Kakadu Plum and other native foods from private leasehold land, Aboriginal homelands, and Indigenous Protected Areas. NAAKPA plays a pivotal role in expanding Indigenous-owned production of Kakadu Plum. By submitting a joint Wildlife Trade Operation (WTO) proposal, NAAKPA is helping to facilitate a centralised and consistent approach to reporting, monitoring, and developing of harvest practices, enhancing the sustainable harvest and export of Kakadu Plum.

NAAKPA members have been harvesting Kakadu Plum for over a decade, with 2022 production of over 10 tonnes. The Kakadu Plum harvest represents one of the economic activities that Aboriginal people can harness from their country, generating substantial community income. The harvest also enables cultural connections and activities on their traditional lands, supporting the livelihood and wellbeing of Traditional Owners.

Risks and Challenges

The Kakadu Plum industry faces several supply chain issues, as it is predominantly wild-harvested with limited commercial farming. This reliance on wild harvests leads to seasonal and weather-dependent fluctuations in supply and a lack of integration within the supply chain.

Regulatory challenges include permits that limit harvest quantities, risking the loss of product development and profits to foreign enterprises.

Additionally, there are significant intellectual property rights and benefit-sharing issues with Indigenous communities, who are essential to the supply chain. Ensuring that benefits from commercialisation are shared with Indigenous communities and preventing their exclusion from commercialisation efforts remains a critical challenge.

5. Total economic contribution

5.1 Market sizing summary

A summary of the market sizing results under each scenario is presented in Table 9 below. These results can be thought of as a 'direct' contribution to the communities that the Indigenous agricultural businesses operate in.

Table 9 Summary of market sizing results

Scenario	Current market size ($2023/24, millions)	2029 – Base growth	2029 – High growth
Scenario 1: 50% Indigenous-owned agriculture	$633.2	$737.4	$941.2
Scenario 2: 51% Indigenous-owned agriculture	$195.5	$224.2	$286.1

Source: Polis Partners

5.2 Community multiplier and wider economic contribution

In addition to the direct contribution captured in the market sizing, there are flow-on second order effects that can be included when thinking about an overall contribution of Indigenous agricultural production. These include:

- **Industrial effect** – the receipts generated by businesses in the supply chain that provide intermediate goods and services to agricultural production. This may include things like the provision of fuel, mechanical services, trucking and tools and equipment.
- **Consumption effect** – the receipts received by businesses from the additional consumption spending arising from additional wages and income in the agricultural sector. For example, the farm labourer buying lunch at the local store, or the farmer buying groceries at the supermarket.

Incorporating these two effects enables us to apply a multiplier on the farmgate revenue received to estimate a full Indigenous agriculture economic contribution. Multipliers for Australia are sourced from REMPLAN:[13]

- Industrial effect multiplier is **1.84**
- Industrial + Consumption effect multiplier is **2.26**

[13] REMPLAN Economy. Multipliers for Australia.

The corresponding employment multipliers are:

- **3 jobs** for every $1 million of economic output
- An additional **1.7 jobs** through the Industrial effect
- An additional **2 jobs** counting both the Industrial + Consumption effect

Even with output generated by Indigenous owned businesses, not all direct and flow-on employment in the local economies is going to be Indigenous employment. For the purposes of this analysis, it is assumed that 50% is Indigenous employment.

5.3 Scenario 1: 50% Indigenous-owned agriculture

Results from the economic output contribution analysis for Scenario 1 can be seen in Table 10 below. The current total economic contribution is estimated to be $1,431 million, supporting 1,900 Indigenous jobs across Australia. In FY29 the economic contribution is estimated to be $1,667 million under Base growth and $2,127 million under High growth, supporting an estimated 2,212 and 2,823 jobs respectively.

Table 10 The total economic contribution of Indigenous agricultural production in Australia under Scenario 1

Scenario	Effect	Value, millions (current)	Jobs (current)	Value, millions (2029)	Jobs (2029)
Base	Direct	$633.2	950	$737.4	1,106
	Industrial	$531.9	665	$619.4	774
	Consumption	$266.0	285	$309.7	332
	Total	**$1,431.1**	**1,900**	**$1,666.6**	**2,212**
High	Direct	$633.2	950	$941.2	1,412
	Industrial	$531.9	665	$790.6	988
	Consumption	$266.0	285	$395.3	424
	Total	**$1,431.1**	**1,900**	**$2,127.0**	**2,823**

Source: Polis Partners. Numbers subject to rounding error.

Zenadth Kes Fisheries

***Location**: Torres Strait Islands*

***Indigenous Peoples**: Torres Strait Islander, Aboriginal*

***Scheme:** Self-certification*

Overview

Zenadth Kes Fisheries Limited is a fully Indigenous-owned and independent commercial fishing company based in the Torres Strait Islands, established in December 2020. The company comprises 25 inaugural members representing the five island clusters of the Torres Strait: Kaiwalagal, Kulkalgal, Maluilgal, Gudamaluilgal, and Kemer Kemer Meriam.

Self-certification

Zenadth Kes has developed a certification label to indicate the authenticity of its products:

"Look for this mark as proof of genuine Zenadth Kes Wild Fishery products".

"True provenance - If you see the Zenadth Kes Wild Fishery provenance mark, you can guarantee that your seafood is caught from our waters."

Figure 5 Zenadth Kes certification label

Source: https://www.zkfisheries.com.au/

Production

The company adheres to traditional fishing techniques and sustainable practices to ensure the health and abundance of marine resources. The harvested products include fresh, chilled, frozen, and live seafood, specialising in:

- Withi coral trout
- Aber sea cucumber
- Kaiar tropical rock lobster

There is significant international demand for the seafood products harvested by Zenadth Kes Fisheries, particularly for high-value items like Tropical Rock Lobster. The company is exploring direct export feasibility and marketing opportunities to meet this demand. The sustainable and robust food safety and quality systems underpin their products, meeting international customer expectations.

Community benefit

Zenadth Kes Fisheries plays a crucial role in enhancing the region's wealth by managing sustainable fishing industries and increasing employment and economic opportunities for Indigenous communities. It exemplifies the potential for Indigenous-led enterprises to thrive in the global seafood market while maintaining cultural heritage and sustainable practices.

The objectives of Zenadth Kes Fisheries include:

- Growing and supporting the workforce
- Maximising local ownership
- Generating wealth for traditional owners
- Preserve and protect local fisheries

Challenges

Key challenges for Zenadth Kes Fisheries include managing the sustainable harvest to ensure long-term viability, navigating regulatory frameworks, and scaling operations to meet increasing global demand.

5.4 Scenario 2: 51% Indigenous-owned agriculture

5.4.1 Economic contribution

Results from the economic output contribution analysis for Scenario 2 can be seen in Table 11 below. The current total economic contribution is estimated to be $442 million, supporting 586 jobs. In FY29 the economic contribution is estimated to be $507 million under Base growth and $647 million under High growth, supporting 673 and 858 jobs respectively.

Table 11 The total economic contribution of Indigenous agricultural production in Australia under Scenario 2

Scenario	Effect	Value, millions (current)	Jobs (current)	Value, millions (2029)	Jobs (2029)
Base	Direct	$195.5	293	$224.2	336
	Industrial	$164.2	205	$188.3	235
	Consumption	$82.1	88	$94.2	101
	Total	**$441.8**	**586**	**$506.7**	**673**
High	Direct	$195.5	293	$286.1	429
	Industrial	$164.2	205	$240.4	300
	Consumption	$82.1	88	$120.2	129
	Total	**$441.8**	**586**	**$646.7**	**858**

Source: Polis Partners. Numbers subject to rounding error.

The analysis highlights that although there is a positive and substantial direct farmgate revenue contribution to Indigenous agriculture in Australia, there is additional impact in communities in which Indigenous agricultural businesses operate in that helps to support them, both in terms of income and employment.

6. Conclusion

6.1 Contribution to the Indigenous economy

It is useful to view the results of the market sizing, and wider economic contribution, in terms of the size of the existing Indigenous economy in Australia. This gives additional perspective to the impact that Indigenous agriculture has, and what may be expected in the event of Indigenous agricultural product certification. Note, the following analysis is not designed to be a detailed quantification of the full economic contribution of the Indigenous agricultural sector. Such a quantification would need to draw in additional factors. Rather, the following analysis is designed to highlight the relative importance and flow on impact to Australia's First Nations economy of the scenarios being considered in the design of an Indigenous Agricultural Product Framework.

For the purposes of comparison, the Indigenous economy is taken to be the total revenue produced by Indigenous-owned businesses in Australia across all sectors. In 2022 this value was estimated at $16 billion.[14] Assuming 6% growth in Indigenous businesses,[15] this value is $18.4 billion in 2024 terms.

Incorporating the wider economic contribution into the market sizing shows the importance of agricultural products to the Indigenous economy overall and the positive effect that product certification can have into the future.

The analysis has also shown that relative to the full Australian agricultural market (and certainly global market), Indigenous agriculture can do better. Removing barriers to entry for Indigenous producers and allowing the Indigenous population to tap into what should be a comparative economic advantage will be important as we transition into the future.

[14] Evans, M., Polidano, C., Dahmann, S. C., Kalera, Y., Ruiz, M., Moschion, J., Blackman, M. (2024). Indigenous Business and Corporation Snapshot Study 3.0. The University of Melbourne https://fbe.unimelb.edu.au/cibl/research
[15] Ibid.

Table 12 Contribution to the Indigenous economy

Scenario	Measure	Value (millions)	As a proportion of the current Indigenous economy
Scenario 1: Indigenous-owned agriculture ***50% ownership***	Current	$633.2	3.4%
	Base growth (FY29)	$737.4	4.0%
	High growth (FY29)	$941.2	5.1%
	Economic contribution (current)	$1431.1	7.8%
Scenario 2: Indigenous-owned agriculture ***51% ownership***	Current	$195.5	1.1%
	Base growth (FY29)	$224.2	1.2%
	High growth (FY29)	$286.1	1.6%
	Economic contribution (current)	$441.8	2.4%
Proportional w.r.t Indigenous population	Aspirational	$4,000	21.50%

Source: Polis Partners

6.2 Implementation planning

A certification system for Indigenous agricultural products can facilitate ongoing growth and support for Indigenous agricultural businesses. However, to ensure the success of any future system, it is essential to assure the process for obtaining the credential is robust yet accessible. The authenticity and credibility of the system will hinge on the approval process, as well as ensuring that enforcement action is taken upon any misuse of the certification.

The market sizing has shown that for Indigenous businesses to reap the biggest benefit under an Indigenous product certification scheme, ownership thresholds are a crucial factor. Expanding a scheme to include 50/50 partnerships, as opposed to just a majority 51% ownership, would increase the 'size of the prize' for Indigenous agriculture in Australia. This, combined with exposing all types of agricultural production, will lead to the largest benefit for Indigenous producers.

Stepping through the analysis has also highlighted the importance that assumptions play in the absence of robust Indigenous agricultural business dataset. As a certification scheme is designed, it will be important to collect improved data that can better inform Indigenous agricultural activity and potential impacts upon it.

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Appendix B: Community value case studies

Case Study: Black Duck Foods

Black Duck Foods, an Aboriginal and Torres Strait Islander -led agricultural business based on Yuin Country, was founded by Bruce Pascoe. The primary mission of this enterprise is to revive and commercialise traditional Indigenous farming practices and products, such as native grains and tubers. By doing so, Black Duck Foods aims to foster community, culture, and sustainability, thereby creating a holistic impact on Aboriginal and Torres Strait Islander communities.

When we we're employing people. Down at Mallacoota, you know, we're we often got the father and the son there. Or the mother and the daughter. And that's what we want. We want those families to prosper. You know, prosper as families, but also prosper as economic units.

One of the significant impacts of Black Duck Foods is its role in enriching the cultural and social fabric of Aboriginal and Torres Strait Islander communities. The reintroduction of traditional farming methods that have been practiced for thousands of years helps communities reconnect with their heritage. These initiatives promote a sense of pride and continuity, strengthening the cultural ties and personal connections to heritage among community members.

Well, it's a long process as you would think that it would be instantaneous, but it's not. Because one of the first things that suffers after dispossession is culture. Your skin is still black. You're still dispossessed, you're still vilified in the community, but you've got no one to transfer the cultural and spiritual knowledge to you.

The transfer of knowledge across generations is another crucial aspect of Black Duck Foods' operations. Through hands-on farming experiences, Elders pass down stories, techniques, and the cultural significance associated with the crops to younger generations. This intergenerational knowledge transfer ensures that traditional farming practices and the associated cultural heritage are preserved and celebrated.

Well, look, it gets us on country. It gets us working together, not sitting down, leaping through pamphlets, but working together and working on the land. With older people, so stories are transferred, it's not just about the growing of the food or even the identification of the food plants, but being on country and hearing the full story of country.

Black Duck Foods also plays a vital role in maintaining a profound connection to ancestral lands and waters. By cultivating native crops and using sustainable methods, the business honours and preserves the land's cultural and historical significance. These agricultural

Black Duck Foods are based on Yuin Country on the south coast of NSW

practices not only strengthen the community's sense of identity and belonging but also contribute to more resilient food sources suited to local climates and ecosystems.

Well it's a no brainer, isn't it? If it grows there and you're eating it, you're eating your country, you're being fully supported by the country, but the knowledge of those plants and how they're used is directly translatable to modern agriculture.

Finally, the social cohesion promoted by Black Duck Foods and their products cannot be overlooked. By involving entire families and communities in its agricultural projects, the business enhances community bonds and collective wellbeing. Collaborative farming activities provide numerous health benefits, including physical activity, nutritious diets, and mental wellbeing through connection to nature. Additionally, by intentionally empowering Aboriginal and Torres Strait Islander women and youth, Black Duck Foods fosters leadership skills and economic independence, further contributing to the overall wellbeing of the community.

Case Study: Native Oz Bushfoods

Native Oz Bushfoods is an Indigenous agricultural business dedicated to cultivating and promoting native Australian bush foods. The business integrates traditional knowledge with modern practices to produce high-quality, culturally significant agricultural products. This integration aims to supply unique products as well as preserve and promote Aboriginal and Torres Strait Islander cultural knowledge.

Each mob has their own trees or own flora and fauna. That represents that [specific] community... and that comes into your totems, and Indigenous people are taught how to look after that...

Indigenous agricultural practices at Native Oz Bushfoods aims to enrich the cultural and social fabric of Aboriginal and Torres Strait Islander communities in the surrounding region. Products are either sourced directly from the community or grown by the producers themselves, adding cultural value as each product carries a story and tradition. This approach ensures that the cultural significance of the products is maintained, fostering a deeper connection between the community and their Aboriginal and Torres Strait Islander heritage.

A cornerstone of Native Oz Bushfoods' operations is the facilitation of knowledge transfer across generations. Hands-on activities like wild harvesting allow elders to teach younger generations about plants and their uses, preserving traditions and educating the youth about their heritage. Additionally, the cultivation of Indigenous agricultural products strengthens the sense of identity and belonging among community members, connecting them to their totems and traditional lands.

If we will harvest, we go and pick up some of the nephews and nieces... while you're walking, you're telling on this tree does this, you know, you're passing it to them while you're walking to harvest whatever you're looking for. You're then telling the story of the quandong to that next generation and then in the hope that that generation then will pick that up. And bake that knowledge and then to pass it on and pass it on.

Agricultural practices at Native Oz Bushfoods help maintain a connection to ancestral lands and waters. By respecting and caring for the country, such as planting trees along water lines, these practices ensure the sustainability of land and water resources. This reinforces the community's bond with their environment and maintains ecological balance.

By respecting and caring for the country, such as planting trees along water lines, these practices ensure the sustainability of land and water resources.

Indigenous agricultural products play a crucial role in the diet and nutrition of the community. Traditional knowledge about the medicinal and nutritional properties of local flora ensures that community members can utilise these plants for health benefits. This not only contributes to overall community wellbeing but also promotes social cohesion by uniting community members around common goals related to land care and harvesting.

Native Oz Bushfoods exemplifies how Indigenous agricultural practices can enrich cultural heritage, improve community health and wellbeing, and offer unique Agricultural products and tourism opportunities to the broader market. With appropriate support and recognition, these practices have the continue to make societal, environmental, and economic impacts to the surrounding community.

Case Study: Tiwi Plantation Corporation

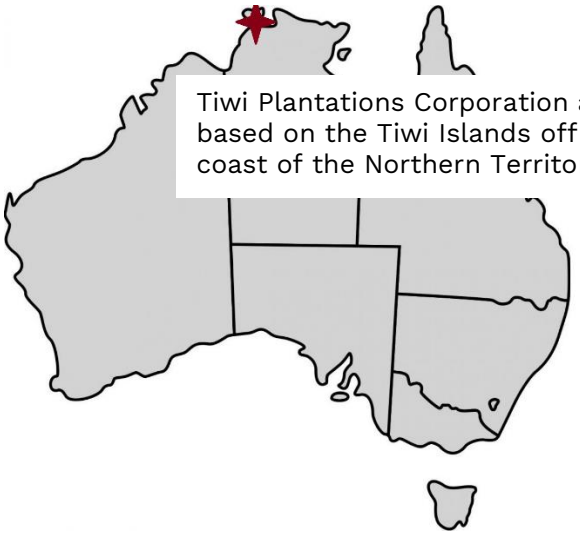
The Tiwi Plantation Corporation (TPC) manages a 30,000-hectare plantation on the Tiwi Islands (Northern Territory), primarily growing *Acacia mangium* for wood chips. Established as a 100% Tiwi-owned entity, TPC aims to integrate economic activities with cultural preservation and employment opportunities for the Tiwi community.

> *The board is 100% Tiwi. In addition to that, all eight clan groups are owners of the company and five clan groups are currently represented on the board, and we're going to increase that to all eight clan groups.*

TPC plays a crucial role in the local Aboriginal and Torres Strait Islander economy by providing employment opportunities and fostering economic development. With an employment rate of approximately 30-45% of Tiwi people in the plantation which offers jobs in plantation management, fire management, and other forestry-related activities. These positions not only provide financial benefits but also offer valuable training and skills development. Despite challenges with market pricing and limited buyers, TPC continues to pursue avenues for sustainable economic growth, including exploring carbon credits and potential premium markets for Indigenous products.

> *We contract midway to take care of the plantation and it's ranged from about 30% up to about 45% Tiwi employment in the plantation business over the last 10 years.*

The plantation's operations help maintain the connection between the Tiwi people and their ancestral lands. By engaging in forestry activities such as weed management, fire protection, and environmental monitoring, community members can stay connected to their land and preserve traditional practices. Additionally, the plantation facilitates the transfer of cultural knowledge across generations, enhancing the cultural fabric of the community. The involvement of Tiwi people in the governance and decision-making processes further strengthens their sense of identity and belonging.



Tiwi Plantations Corporation are based on the Tiwi Islands off the coast of the Northern Territory

> *The social cohesion, I think, comes from outside of a local government or a land council, or those arrangements. It's actually Tiwi people working together for an economic outcome in a for-profit company.*

Engaging with the plantation provides additional health and wellbeing benefits to the Tiwi community. The physical activity involved in plantation work promotes better health outcomes, while the structured environment fosters a sense of purpose and achievement among workers. Furthermore, the flexibility in work arrangements allows individuals to balance cultural responsibilities and employment, contributing to overall mental and emotional wellbeing.

> *The benefits, as regularly described by our chair and Deputy Chair and board members, simply come back to people getting out and working and applying the education and then being able to participate in training.*

The Tiwi Plantation Corporation is a great example of community cohesion, with its board comprising representatives from all clan groups on the island. This inclusive governance model ensures that diverse perspectives are considered in decision-making, self-determination, and community collaboration. Moving forward, TPC aims to expand its impact by increasing Tiwi employment to a minimum of 50% and exploring new business opportunities, such as establishing a nursery for replanting efforts, for the future rotation of the forestry. These initiatives underscore TPC's commitment to sustainable development and the long-term prosperity of the Tiwi community.

> *The fire abatement programs across Arnhem Land and things like that. And I heard just earlier that the spot price is currently at about $31 for an Australian Carbon Credit unit (ACCU) and one of the fire abatement programs they got $39. But that was only on less than 7000 ACCU's being sold. We're trying to generate about 5 million ACCU's across the plantation, and no one wants to pay a premium when it takes the price from 250 million to potentially 400 million.*

Case Study: NAAKPA

The Northern Australia Aboriginal Kakadu Plum Alliance (NAAKPA) is a non-distributive Cooperative (WA) of Aboriginal enterprises, ethically harvesting and processing Kakadu Plum and other bush foods across Northern Australia. This co-op model centres on Indigenous agricultural practices, particularly focusing on bush foods and other native products that are deeply rooted in cultural heritage. By promoting sustainable management of ancestral lands, the project aims to enrich the cultural and social fabric of Aboriginal and Torres Strait Islander communities while fostering economic empowerment.

> *For most of our members, particularly in the NT... it's not about making money. It's all about getting people back out onto country and actually putting money in people's pockets... They see that as really important for community cohesion. The harvest does this, because it gets people out on country and the big issue for a lot of communities is the young people are losing language, they're losing you know they're just getting caught up in, you know, I guess in modern culture so they're losing a lot of that cultural knowledge and a lot of that... Getting people out onto country makes a difference.*

Indigenous agricultural practices undertaken in the growing, propagating, fostering harvesting of Kakadu Plums, significantly contribute to enriching the cultural and social fabric of participating communities and Traditional Owners. By re-engaging community members in traditional activities like harvesting bush foods, the project fosters community cohesion and reinforces cultural ties. These practices help bring people back onto their country, facilitating interactions that strengthen communal bonds and cultural continuity. NAAKPA is governed by representatives from each of its member enterprises, which is made up of:

- Bawinanga Aboriginal Corporation
- Mercedes Cove Aboriginal Corporation
- Gundjeihmi Aboriginal Corporation
- Thamarrur Development Corporation (Including Palngun Wurnangat AC)
- Mamabulanjin Aboriginal Corporation.

An essential aspect of NAAKPA is its role in facilitating the transfer of knowledge across generations. Elders and youth work together in traditional agricultural practices, allowing for the sharing of stories and cultural knowledge related to land and resources. This inter-generational exchange not only strengthens cultural identity but also ensures the preservation of valuable cultural knowledge, making it an integral part of community life.

> *The more you do something, the more you remember it. If you... get people out onto country, looking at foods, understanding them, their names, what their purposes are for, actually strengthens that culture.*

The Indigenous agricultural products cultivated play a crucial role in strengthening the sense of identity and belonging among community members. By tying individuals to their ancestral lands and traditional practices, these agricultural activities enhance their pride and sense of community. The connection to land and tradition is vital for maintaining cultural heritage and fostering a strong sense of identity within their communities.

NAAKPA also promotes social cohesion and economic empowerment. Activities like wild harvests bring community members together for collective efforts, providing both social

and economic benefits. For instance, the Kakadu plum harvest generates significant income for women, which in turn, supports community events and family needs. Additionally, these initiatives empower Aboriginal and Torres Strait Islander leaders by incorporating traditional decision-making processes and respecting cultural custodians' roles.

> *In terms of the wild harvest, for example, with some of our members, it brings people back out into country. So there are only six or seven... traditional owner groups that actually harvested off country this year. But what that does is it gets people all together focused on this activity of harvesting. For Wadeye they have up to about 200 women harvesting and they pay about $145,000. So that makes a big difference to a community of about 3,000 people over a six-week period.*

The organisation also underscores the importance of preserving cultural heritage through traditional land management practices. These practices maintain biodiverse environments that have been sustainably managed over generations. By integrating Indigenous agricultural methods with mainstream agriculture, the project highlights the potential for adopting more environmentally friendly and sustainable farming techniques. This integration can lead to biodiversity conservation and sustainable development, benefiting both Aboriginal and Torres Strait Islander communities and the broader society.

> *We really believe that bush foods preserve cultural heritage because they preserve that manicured landscape that communities have actually been... manicuring and managing for the world before colonisation to manage food production. While it's not as productive in terms of volume like broadacre cropping or intensive horticulture, it is far, far more sustainable in terms of biodiversity because of the management system. And that in itself is a legacy of cultural heritage.*

NAAKPA exemplifies how Indigenous agricultural practices can preserve cultural heritage, promote social cohesion, and foster economic empowerment. With appropriate support and investment, these practices hold immense potential for contributing to sustainable development and biodiversity conservation, offering significant benefits to the Aboriginal and Torres Strait Islander communities involved in the harvesting and production of the Kakadu Plum and other native products.

> *Mainstream agriculture is really keen on the native food space. They're looking for new crops that they can commercialise... I mean, just have to have a look at the size of the macadamia industry.*

By integrating Indigenous agricultural methods with mainstream agriculture, the business highlights the potential for adopting more environmentally friendly and sustainable farming techniques. This integration can lead to biodiversity conservation and sustainable development for Aboriginal and Torres Strait Islander communities and the Country on which they work and live.

Case Study: Outback Academy Australia

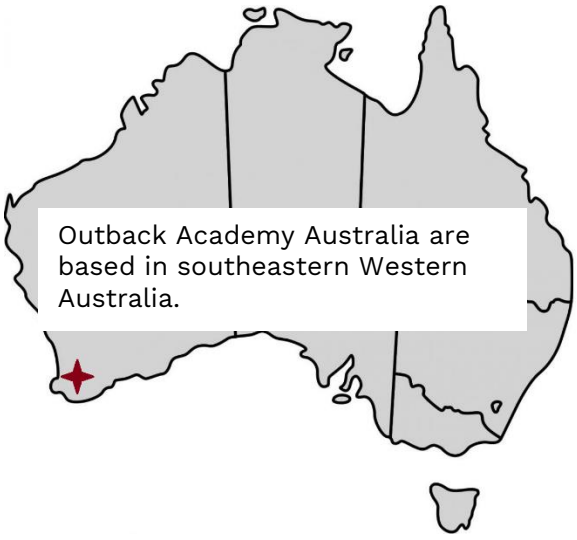
Outback Academy Australia (OAA) is dedicated to promoting Indigenous agricultural practices that not only enrich cultural and social fabrics but also facilitate knowledge transfer across generations and strengthen community identity. Operating across various locations in Australia, OAA focuses on sustainable agricultural methods that respect and integrate traditional knowledge, ensuring the preservation and adaptation of ancestral wisdom in contemporary contexts.

Indigenous agricultural practices undertaken by OAA member organisations, are deeply embedded in the cultural and social fabric of Aboriginal and Torres Strait Islander communities. These practices honour traditional knowledge of the land and promote community cohesion, fostering a sense of pride and continuity. By engaging in traditional farming methods, community members maintain a vital connection to their heritage, which reinforces their role as stewards of the land. This cultural embedding not only strengthens individual and collective identity but also ensures the preservation of cultural heritage for future generations.

One of the core missions of OAA is to facilitate the transfer of knowledge across generations through hands-on learning and storytelling. Elders play a crucial role by sharing traditional farming techniques and cultural practices with youth, ensuring that this ancestral wisdom is preserved and adapted for contemporary use. This inter-generational knowledge transfer is vital for maintaining cultural continuity and empowering younger generations to carry forward their heritage with confidence and pride.

> *But if anything is going to really be accelerated, whether it's economic, social, cultural, it has to embrace the generations coming behind all of us for not only the transfer of traditional knowledge, but new technologies.*

Indigenous agricultural products produced by OAA member organisations, continue to strengthen the sense of identity and belonging among the communities in which they operate. By reconnecting them with traditional ways, these practices reinforce their role as custodians of their country. Engaging in these activities helps community members to recognize their importance in the stewardship of their land and ecosystems, thereby fostering a deeper sense of purpose and commitment to their cultural responsibilities.



> *We should be seen as our own authentic industry sector. That has an interface with government. We are significant.*

These communities are starting to see the positive impact of Indigenous agricultural products on the diet and nutrition of its people. These products provide access to native superfoods and other healthful, traditionally grown produce that enhance dietary diversity and nutritional intake. This not only improves physical health outcomes but also aligns with cultural practices of growing and consuming food, thereby integrating health benefits with cultural preservation. OAA has a strong commitment to the protection of its Indigenous Cultural and Intellectual Property (ICIP), ensuring that traditional knowledge remains in the hands of Aboriginal and Torres Strait Islander people.

Indigenous farming initiatives promoted by OAA enhance social cohesion by bringing community members together to work towards common goals. Collaborative projects and shared successes strengthen communal bonds and foster a supportive environment. Additionally, engaging in these agricultural practices offers numerous health and wellbeing benefits, including physical activity, mental health improvements from being connection to Country, and the consumption of nutrient-rich, locally grown foods. These holistic benefits continue to contribute to the overall wellbeing of the community, making OAA's initiatives central to both cultural and physical health.

> *One of the things, I hate the way in which this country just politicises everything that Aboriginal people have to say, and it just gets clogged up, you know. And yet all we've been saying is to treat us with respect and we'll play a role in all this going forward.*

Case Study: Land and Sea Aboriginal Corporation Tasmania (Tasmanian Aboriginal Seafoods)

Located in southeastern Tasmania, the Tasmanian Aboriginal Seafood Company is a pioneering enterprise focusing on sustainable seafood practices, particularly around abalone. This company integrates cultural heritage, social benefits, and economic value into its operations, creating a unique model that enriches both the environment and the local Aboriginal and Torres Strait Islander community.

The company's commitment to sustainability is evident in their fishing practices. By avoiding fishing during spawning periods, they maintain the integrity of the sea ecology, which aligns with the cultural practices of the local Aboriginal and Torres Strait Islander community. This approach not only preserves critical marine habitats but also reinforces cultural knowledge by respecting traditional ecological knowhow. The low footprint methods they employ are essential to maintaining the delicate balance of the marine ecosystem, showcasing a balanced relationship between modern business practices and ancient cultural wisdom.

Tasmanian Aboriginal Seafoods are based in Hobart, Tasmania.

Knowledge transfer is a cornerstone of the Tasmanian Aboriginal Seafood Company's operations. They have created an alumni system within the seafood industry, where young community members start as deckhands and can progress to become divers and eventually skippers. This structured career path ensures that valuable skills and knowledge are passed down through generations, fostering a sense of continuity and community cohesion. This initiative empowers the youth and provides them with tangible career opportunities, thus reinforcing their connection to their cultural roots, and provides and financial income and skills development.

The use of keystone species like Abalone plays a crucial role in linking cultural heritage back to the community. Through storytelling and sustainable practices, the company strengthens the community's sense of identity and belonging. This is further enhanced by their efforts to maintain a connection to ancestral lands and waters, integrating Aboriginal and Torres Strait Islander knowledge about sea ecology and sustainability into their operations. Such practices not only preserve cultural heritage but also promote environmental stewardship.

> *We don't fish over spawning... it's about sustainability, low footprint, integrity with that. Why we don't fish over spawning? Because abalone itself is a true indicator of what's happening in the sea ecology.*

The Tasmanian Aboriginal Seafood Company also makes significant contributions to the diet and nutrition of the local community. Beyond nutrition, the company's sustainable fishing practices and emphasis on local employment promote physical health and wellbeing within the community. The sense of purpose and connection to cultural heritage also supports mental health, creating a holistic approach to community wellness.

The Tasmanian Aboriginal Seafood Company exemplifies how Indigenous agricultural practices can enrich cultural heritage, promote sustainability, and provide economic benefits. Their innovative model offers valuable insights for integrating Aboriginal and Torres Strait Islander knowledge into mainstream fisheries, ensuring a comprehensive approach to environmental stewardship and community wellbeing. This highlights the importance of aligning modern business strategies with traditional practices to create sustainable and culturally enriching enterprises.

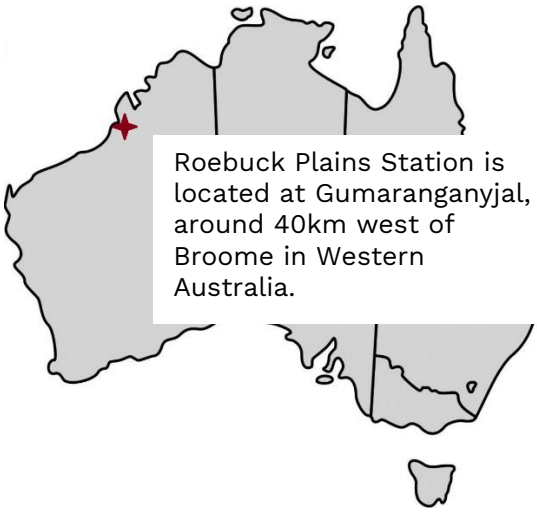
Case Study: Yawuru (Roebuck Plains Pastoral Lease)

Roebuck Plains Station is located at Gumaranganyjal, and is strategically positioned for the export market, on rich marine floodplain, just 30 kilometres east of Broome, with the capacity to support a herd of up to 18,000 head of cattle. The business exemplifies a unique blend of cultural preservation and commercial agriculture. The community's agricultural initiatives are deeply rooted in sustainable land management practices and Aboriginal and Torres Strait Islander-led projects that not only aim for economic benefits but also strive to maintain cultural heritage and promote social cohesion.

Elders and law bosses that all kind of intermixes with how we operate the station and how we protect the country at the same time.

One of the most significant impacts of Yawuru's initiatives is the enrichment of the cultural and social fabric of the community. Employment and training opportunities offered to young Aboriginal people are fundamental in fostering pride and a sense of belonging within the community. Regular community events and gatherings, such as BBQs and meetings held on the station, serve as platforms for bringing people together, enhancing social bonds and communal unity.

There's a lot of pride, I suppose, in the community for the young Aboriginal people that are working on the Station.



Roebuck Plains Station is located at Gumaranganyjal, around 40km west of Broome in Western Australia.

Knowledge transfer across generations is another crucial aspect of Yawuru's agricultural practices. Elders and law bosses play an integral role in preserving and sharing traditional knowledge through conservation and land management activities. This intergenerational exchange ensures that the younger members of the community remain connected to their heritage and uphold traditional practices. The involvement of young Aboriginal people in these agricultural activities further strengthens their cultural identity and fosters a profound sense of pride.

Yawuru's control over the pastoral lease and their integration of conservation practices are vital for protecting significant cultural heritage sites, such as ancient middens. This connection to ancestral lands and waters is essential for the community, providing them with the ability to safeguard their heritage sites and ensure that these places remain untouched by potentially harmful activities. Although the direct impact on diet and nutrition is minimal due to the station's focus on commercial viability, the overall wellbeing of the community is enhanced through access to country and traditional hunting activities.

And it has been shown through both traditional stories and through Western science, to actually be what was once the original coastline thousands of years ago.

The community's governance structure is designed to support inclusive and participatory decision-making, separating cultural heritage management from commercial operations.

This structured approach ensures that cultural and heritage decisions are made by law bosses, while a board with agricultural expertise oversees the operational and commercial aspects. Such a governance model not only protects Yawuru's cultural integrity but also empowers women and youth through targeted training and employment programs. While fewer young women participate compared to men, the community continues to encourage balanced participation.

> *Well, for people to be able to go out on country and have that sort of freedom of access to Country and go out and hunt for a goanna and Bush Turkey and spend time. Cause yeah, it's critical to well-being.*

Yawuru's initiatives at Roebuck Plains Station provide a holistic approach to land management that seamlessly integrates economic, social, and cultural goals. By fostering employment, preserving cultural heritage, and promoting social cohesion, Yawuru sets a commendable example for sustainable and inclusive Indigenous-led agricultural practices. This case study highlights the multifaceted impacts of Yawuru's projects, showcasing their commitment to maintaining cultural integrity while pursuing economic sustainability.

Australian Government
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National Farmers Federation

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Together We Grow, Together We Prosper' artwork by Wakka Wakka artist, David Williams.