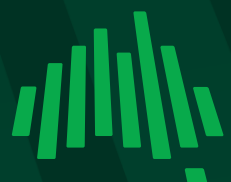


# National Food Security Strategy: Discussion Paper

October 2025



# National Farmers Federation



## The National Farmers' Federation (NFF) is the voice of Australian farmers.

The NFF was established in 1979 as the national peak body representing farmers and more broadly, agriculture across Australia. The NFF's membership comprises all of Australia's major agricultural commodities across the breadth and the length of the supply chain.

Operating under a federated structure, individual farmers join their respective state farm organisation and/or national commodity council. These organisations form the NFF.

The NFF represents Australian agriculture on national and foreign policy issues including workplace relations, trade and natural resource management. Our members complement this work through the delivery of direct 'grass roots' member services as well as state-based policy and commodity-specific interests.

## NFF Member Organisations



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## Executive Summary

The National Farmers' Federation (NFF) welcomes the opportunity to make a submission to the Department of Agriculture, Fisheries & Forestry (DAFF) National Food Security Strategy: Discussion Paper (Discussion Paper).

Global challenges are intensifying. The impacts of climate change on production, increasing trade protectionism and volatility, and changing global food demand profiles all present risks to Australia's food system. Meanwhile, domestic pressures including competition for agricultural land and biosecurity challenges may affect our ability to maintain stable food production into the future.

The NFF has long called for greater policy focus on national food security. Along with our members, we have sought to progress analysis and strategic planning for over a decade. Producers have explicitly called for a strategy to be developed, and as such, welcomed the Government's \$3.5 million commitment to do so (the Strategy).

Agricultural production is core to food security. While a holistic view must be taken of the role of various elements of the supply chain, it is an inalienable fact that without agricultural production, the stable functioning of the entire food system is at risk. The Strategy must reflect this, embedding food production and producers at its heart.

With this as a bedrock of the Strategy, the NFF has used this submission to put forward a set of five targeted positions and recommendations. Informed by deliberations of the NFF Economic Policy and Farm Business (EPFB) Committee, they primarily seek to drive a refined final Strategy, focused on key issues.

The key positions/recommendations are:

1. The NFF supports the development of a National Food Security Strategy (**See section 1**);
2. That domestic agricultural production is recognised as an intrinsic element of food security and reflected as such in the Strategy (see **Section 2**);
3. To the greatest extent possible, the final Strategy narrows its focus on salient matters, namely (see **Section 3**):
  - Supply chain resilience of critical agricultural inputs
  - Biosecurity
  - Indo-Pacific regional stability
  - Natural resource management policy, including environmental development frameworks, water management, and land use conflict policy
4. The NFF supports the establishment of the National Food Council (the Council) to provide strategic oversight of the Strategy (see **Section 4**); and

5. The Government ensures the Council includes representatives with primary production policy expertise and with clear linkages to contemporary producer representatives networks (see **Section 4**).

This submission is structured around these key positions/recommendations, expanding upon each.

The NFF acknowledges the Department for its proactive engagement on this matter, particularly its willingness to meet with both the NFF secretariat and EPFB Committee. The NFF looks forward to continuing to work closely with the Minister and DAFF.

## Section 1: Industry support for a National Food Security Strategy

The Australian agricultural industry supports the development of a National Food Security Strategy. Australia produces enough food to feed 75 million people, but our food system faces mounting pressures that require strategic national planning. Supply chain vulnerabilities, extreme weather events, global and regional geopolitical challenges have highlighted the need for a more coordinated approach to food security.

Global challenges are intensifying. The impacts of climate change on production, increasing trade protectionism and volatility and changing global food demand profiles all present risks to Australia's food system. Meanwhile, domestic pressures including competition for agricultural land and biosecurity challenges may affect our ability to maintain stable food production into the future.

The United Nations Food and Agriculture Organization estimates that by 2030 there will be 360 million food insecure people globally. Despite being a food secure country, more than 30% of Australian households already experience moderate to severe food insecurity.

As Australia navigates complex transitions in energy, land-use conflict, climate policy, regional development and migration, a comprehensive food strategy is needed to strike the right balance between competing priorities.

Industry has consistently called for a greater policy focus on national food security. Along with our members and supply chain partners, we have sought to progress analysis and strategic planning of food security matters for many years.

Such calls have been salient features of NFF strategic plans over past decades. The NFF Blueprint for Australian Agriculture (2013-2020) was led by a clear position that *"a competitive and productive agriculture sector will contribute to the security.....of Australia's food and fibre supply chain"*.

A decade later, this position remained. In 2018, the NFF 2030 \$100 Billion Road Map - via *Action 2.5.1* - explicitly identified the need for a National Food Security Strategy.

In 2022 the NFF was a founding member of the National Food Supply Chain Alliance. This alliance, representing all facets of Australia's food supply chain, was convened with the singular focus of seeking the establishment of a National Food Security Plan.

The House of Representatives' Agriculture Committee 2023 inquiry into food security highlighted the above-mentioned challenges and recommended developing a National Food Security Plan. In discussing its central recommendation, it stated that a Plan was needed to:

*‘deal with the production and distribution of food, supply chain resilience, access to food, good nutrition (diet and health), and the management and disposal of food waste and other waste products. It will address the health implications of the food system. It will also address the national security implications of food security—identifying and addressing vulnerabilities, particularly regarding food system infrastructure and vital inputs’.*

The NFF strongly welcomed this recommendation.

Most recently, in March 2025, the NFF election campaign was headlined by a call for a comprehensive food security strategy. As outlined in the document:

“The [NFF] is seeking a commitment to develop and implement a comprehensive National Food Security Preparedness Strategy that ensures supply chain vulnerabilities are understood and addressed.....

“This would provide a framework for addressing vulnerabilities, coordinating policy responses across government, and ensuring Australia maintains its capacity to feed our population while contributing to global food security”.

**Key point(s)/recommendation(s):**

1. *The NFF supports the development of a National Food Security Strategy.*



## Section 2: The need to embed agricultural production at the core of the Strategy.

Agricultural production is core to food security. While a holistic view must be taken of the role of various elements of the supply chain, it is an inalienable fact that without on-farm agricultural production, the stable functioning of the entire food system is at risk. The Strategy must reflect this, embedding food production and producers at its heart.

The importance of food production to National Food Security is a position supported not just by industry. The House of Representatives' Agriculture Committee 2023 inquiry stated 'A critical factor in food security is the viability of the farm sectors. Farm businesses cannot provide food for the rest of Australia if they are not viable.'

Further, the 2025 National Food Security Preparedness Green Paper by the Australian Strategic Policy Institute (ASPI Green Paper) identifies agricultural production as an element of Australia's food security ecosystem, that is both critical to, but nonetheless separate from, the broader food supply chain.

In the NFF's view, there is opportunity to more explicitly recognise food production as a key priority area in the Strategy. While the proposed 'Key priority areas' in the Discussion Paper speak to issues of agricultural production and productivity, it would be beneficial to have agricultural production more clearly stated as a priority in and of itself.

**Key point(s)/recommendation(s):**

2. *That domestic agricultural production is recognised as an intrinsic element of food security and reflected as such in the Strategy.*

## Section 3: Final Strategy focus areas

The Discussion Paper proposes a Strategy structure based on a number principles, key priority areas and ‘whole-of-system’ considerations. In conjunction to these identified areas, the Discussion Paper also makes reference to a wide suite of other policy areas and Government priorities.

While the NFF is largely agnostic towards the structure of the Strategy, it is imperative that it in attempting to acknowledge the widest breadth of issues, it is not so broad as to risk undermining the effectiveness of the Strategy in delivering genuine outcomes.

In the NFF’s view a more targeted and refined focus will best place the Strategy to drive genuine change both within DAFF, and in broader areas of Government. To this end, we suggest ample consideration be given to the following areas.

### **Vulnerability of critical input supply chains**

The NFF strongly supports the Discussion Paper’s inclusion of critical inputs supply as a priority area. This must be maintained in the final Strategy.

Our food system’s resilience in many respects hinges on our significant reliance on imported inputs. From fertilisers, agricultural chemicals, fuel, processing equipment, and packaging materials, Australian agriculture and food processing depend heavily on international supply chains. While this has created cost efficiencies over previous decades, this dependency creates vulnerabilities when global trade is disrupted by changing geopolitical tensions, pandemics, or other issues.

Australia is highly dependent on international supply chains for its fuel supply, sourcing approximately 90% of the country’s liquid fuel from international markets. Although this has significant cost advantages, the current arrangements for the sourcing and distribution of liquid fuel in Australia leave the agricultural industry vulnerable to a range of supply risks, both on property and pre/post farm gate. Announcements of the Federal Government in recent years relating to Australia’s refining and storage capacity, along with efforts to drive domestic low-carbon liquid fuel production, have gone some way to address some of this vulnerability. However, the level of liquid fuel security in Australia remains inadequate. The NFF has publicly stated that the Australian Government should take substantive action to reduce this vulnerability.

In 2021 supply disruptions saw Australia face an imminent AdBlue shortage. Without Diesel Exhaust Fluid (commonly known as AdBlue) modern tractors, trucks and utility vehicles cannot operate. While the NFF worked closely with the the Government to put in place measures to secure AdBlue supplies, the episode

demonstrated how we must not just rely on reactive measures, and start proactively addressing supply vulnerabilities before they reach crisis point.

The timely availability of fertilisers and seeds is also critical to agricultural production. 90% of urea, the most commonly used fertiliser in agriculture, is sourced from overseas. As previously mentioned, this has no doubt created cost efficiencies over previous decades, moving production to lower cost sources. However estimates indicate that without urea supplies, crop production would fall 30-40%, representing a multi-billion dollar impact. So while a complete supply cut off is very unlikely, what it demonstrates is the sensitivity even partial interruptions may cause to the sector.

Australian farmers are also heavily reliant on imported agricultural and veterinary chemicals including herbicides, pesticides and fungicides. The key elements - active constituent ingredients - for these products are almost exclusively sourced from China. During 2020 there were real fears that the availability of glyphosate would be severely curtailed due to supply chain disruptions in China. Any disruption to glyphosate would have impacted most Australian agricultural commodities and would likely adversely impact other agriculture exporting countries.

In light of these tangible and increasing risks, the Strategy must provide for a holistic plan to address future supply chain disruptions. While each input supply chain carries different risks, and appropriate solutions to mitigate vulnerabilities will vary, a holistic plan as part of the Strategy is required given the significant impacts such disruption can have on agricultural production.

## **Biosecurity**

Australia's biosecurity system is fundamental to the success of our agriculture industries, the health of our natural environment and to our society and economy at large. Given this, it is imperative that Australia's biosecurity system is innovative, adequately resourced and operating effectively. Achieving this should be a shared national priority for governments, both Commonwealth and State/Territory, industry, and the broader community.

With respect to food security, the sector's ability to operate is heavily based upon maintaining a favourable biosecurity status amid increasing pest and disease pressure on our borders. An innovative, adequately funded and well-resourced system, underpinned by the correct policy settings, will be an essential component of industry growth.

Australia has a sophisticated biosecurity system that has kept us free of many of the pests and diseases that are prevalent around the world. However, the system is under pressure, with Australia facing an increasingly complex biosecurity environment. Growth in risk pathways has increased the risk of major biosecurity

threats entering and establishing in Australia, and responses to current incursions have drawn on resources.

There are a multitude of threats currently facing Australia. Lumpy Skin Disease risking our beef industry, Khapra beetle threatening our grains and oilseeds industries, African swine fever our pork producers, citrus greening our horticulture industries, are but a few of the animal and plant diseases threatening our agricultural industries.

In positioning biosecurity as a key element of the Food Security Strategy, consideration should be given to the multitude of recently completed and current biosecurity reviews and processes.

These include, but are not limited to:

- National Biosecurity Strategy (and its current implementation);
- 2024 Intergovernmental Agreement on Biosecurity Review; and
- Senate Standing Committee on Rural and Regional Affairs and Transport inquiry into the Adequacy of Australia's biosecurity measures and response preparedness.

In developing the role of biosecurity in the Strategy, the NFF would encourage the Department to review the recommendations made by industry in areas such as biosecurity funding & investment, biosecurity partnerships, the role of industry among others.

### **Indo-Pacific regional stability**

The NFF strongly encourages the Department to consider matters related to Indo-Pacific regional stability in the final Strategy. While a broad area of inquiry, two particular aspects of this issue have garnered the attention of NFF and its members.

The first relates to the discussion of reliance on critical inputs, outlined earlier in this section. With the Indo-Pacific region being home to the majority of supply routes for most, if not all, of Australia's critical inputs, future regional instability poses a substantive risk to food production.

*As outlined in the ASPI Green Paper:*

*'The Indo-Pacific is now defined by geopolitical competition in which Australia occupies a key strategic position. Our broad northern frontier affords us immediate operational access to both the Pacific and the Indian oceans. We're proximate to the major global trade routes that we rely on to import key inputs required for food production, processing and distribution and to export agricultural products, rural goods, minerals and energy commodities to the world's largest markets'.*

The second relates to the opportunity Australia has to be a partner of choice to help meet the food requirements of our regional neighbours. Many of the countries in our region are net food importers, relying on produce from many countries including Australia. They face challenges feeding their populations, and view their own food security as a core national aspiration. Any failure to meet the needs of their citizens in this respect may pose future challenges to their domestic stability, and in turn, the stability of the region.

Hence, the ability of Australia to produce and export food for the region should be seen not to detract from domestic food security, but rather to support it. Such a view was again supported in the ASPI Green Paper, which noted:

*‘As a safe and reliable supplier of food, Australia has a key role to play in maintaining regional stability. That role is indispensable in addressing food security challenges across the Indo-Pacific, as one in every five people in parts of Southeast Asia and the Pacific are undernourished. A failure to meet those basic regional needs could strain relationships and further destabilise economies at a time when Australia’s support and influence are needed most’.*

Given the above, the Strategy we must dispel the narrative that Australia’s export capacity in some way undermines domestic food security. Rather our exports have a key role to play in underpinning our food security in an increasingly challenged region.

## **Natural resource management**

### Environmental development frameworks

Farmers manage 51% of the Australian landscape. The long-term success of the agriculture industry is dependent on continued access to productive land and water. The sustainable management of natural resources is a critical component of the sector’s ability to produce food now and into the future. It also underpins our growth aspirations.

National environmental law needs to strike an appropriate balance between environmental protection and economic development. Current legislation is complex and inefficient, with approval processes often lengthy and with opaque obligations. Farmers need certainty in the approval and regulatory process to continue both current agricultural activity, and to sustainability develop future opportunities for the sector.

More specifically, there are opportunities to streamline approval processes and better communicate obligations to address issues of dual consent and deliver better outcomes for farmers in line with the recommendations of the *Independent Review of Interactions Between the Environmental Protection and Biodiversity Conservation (EPBC) Act and the Agriculture Sector* and *Second Independent Review of the EPBC Act*.

With current focus on reform of the EPBC Act, a critically important piece of legislation that affects the farm sector, it makes clear sense for the Strategy to consider these matters in the context of how they may impact food security.

Water policy

Commonwealth water policy must balance social, economic, and environmental outcomes to ensure healthy rivers, prosperous industry and strong communities. Maintaining the consumptive water pool is critical to ensuring Australia's food security as less water very often means less agricultural production and economic activity.

To this effect, the NFF has been clear in arguing that water recovery efforts need to consider and assess a broad range of options that limit socio-economic impact on communities and maintain the consumptive pool. This includes infrastructure upgrades, efficiency measures (i.e., through constraint measures), and progressing complementary initiatives ahead of voluntary water purchase.

In the eastern states, while Industry recognises the importance of strong water governance frameworks, the current Murray-Darling Basin Plan disproportionately focuses on water recovery to support environmental outcomes. The purpose of the Basin Plan is to support a sustainable Murray-Darling Basin as well as Basin communities which requires more than just water 'flow'. While flow is important, a more holistic approach towards natural resource management is needed. There is significant scope to improve environmental outcomes through complementary measures that have largely been neglected in the Basin Plan which would provide a valuable investment for Basin communities.

Further, climate change is expected to reduce water availability in Australia, especially in major agricultural regions such as the Murray-Darling. While the agriculture sector has made significant strides in improving water research over the past 30 years, there is more work to be done.

Nonetheless, there exists areas of opportunity whereby sensible water policy can support material growth of the agricultural sector. NFF supports the development of Northern Australia, building on the Government's agenda. Significant research has already been done to assess the capability of agriculture in the north, including the CSIRO Northern Australia Water Resource Assessment. However, there remains an important gap in water research to best support such development of increased food and fibre production in the North.

What is clear is that there exists both challenges and opportunities with respect to the role water policy can play in Australia's food security outlook. As such, it is imperative that the final Strategy gives due consideration to these issues.

Land use conflict

The NFF is of the view that issues of land use conflict and coexistence should be given clear focus in the Strategy. While there are a number of causes of such conflict, such as urban encroachment, the most relevant policy issues are the challenges associated with the roll out of renewable energy infrastructure.

To be clear, the agricultural sector will be a significant contributor to Australia's net zero ambitions and the NFF supports Australia's efforts to address climate change including through transitioning to renewable energy. Renewable energy projects can provide excellent opportunities for farmers to contribute to these important objectives and receive valuable, reliable supplementary off-farm

income. Many farmers across the country already host energy generation or transmission infrastructure and have forged a sensible pathway to realise benefits for both sectors simultaneously.

However, the surge of renewable infrastructure must be appropriately balanced with Australia's sustainable supply of food and fibre. To maintain Australia's domestic food security and important contribution to regional food security, we must avoid any adverse impacts on the long-term operation of farm businesses.

The NFF continues to hear serious and concerning reports that decisions by energy proponents, particularly in Victoria, New South Wales and Tasmania, are unduly alienating agricultural landowners due to inadequate, late and inappropriate engagement efforts. Ignoring adverse impacts to Australia's food and fibre industry will have serious consequences for the sustainability of Australia's production capacity.

Energy infrastructure planning processes continue to ignore what would seem obvious and often avoidable situations whereby particular transmission infrastructure proposal ignore on the ground impacts of farming business. Simultaneously, states' legislated compensation regimes historically and presently fail to consider the full breadth of impacts associated with forcibly hosting long-term energy infrastructure on agricultural land.

**Key point(s)/recommendation(s):**

3. To the greatest extent possible, the final Strategy narrows its focus on salient matters, namely:
  - Supply chain resilience of critical agricultural inputs
  - Biosecurity
  - Indo-Pacific regional stability; and
  - Natural resource management policy, including environmental development frameworks, water management, and land use conflict policy.

## Section 4: National Food Council

The NFF supports the establishment of a National Food Council (the Council) to provide guidance and advice on the development of the Strategy.

The NFF notes that the criteria for applicants for the Council included:

Primary Production and/or Processing: Experience in farming, aquaculture and/or food processing, with practical knowledge of production systems and operational challenges.

In addition to this, the NFF posits that it is important that the Council includes members with experience in agricultural industry policy, and with direct and visible linkages to current industry networks.

This additional set of skills, beyond just farming experience will help ensure DAFF continues to receive input from those organisation involved in implementing and communicating industry-wide policy. This is a separate type of input - beyond practical farming experience - that is required to best support the development, adoption and implementation of the Strategy.

**Key point(s)/recommendation(s):**

1. The NFF supports the establishment of the National Food Council (the Council) to provide strategic oversight of the Strategy.
2. The Government ensure the Council includes representatives with primary production policy expertise and with clear linkages to contemporary primary producer representative networks.



## Conclusion

Industry has welcomed the commitment by the Government to develop a National Food Security Strategy. There is a clear evidence base for greater policy focus on national food security.

Agricultural production, and agricultural producers, are core to food security. The Strategy must embed food production and food producers at its heart.

With respect to the structure of the final Strategy, the NFF has proposed that the Strategy have a strong focus on a set of issues of critical importance.

The first being the need to secure the stable supply of critical inputs into Australian agriculture. Our food system's resilience is challenged by significant reliance on imported inputs. From fertilisers and agricultural chemicals to fuel, processing equipment, and packaging materials, Australian agriculture and food processing depend heavily on international supply chains. While this has created cost efficiencies over previous decades, this dependency creates vulnerabilities when global trade is disrupted by geopolitical tensions, pandemics, or other crises.

Australia's biosecurity system is also fundamental to the success of our agriculture industries, and in turn our food systems. Against a growing number of threats, it must be resourced, innovative and effective to safeguard our food production capabilities.

The strategy must also consider the regional dynamics of the Indo-Pacific and Australia's place in it. As outlined in the submission, consideration must be given to both the potential impacts of regional instability on supply chains as well as the proactive role Australia agriculture can play in helping promote stability in the region.

Finally, the legislative and regulatory frameworks around natural resource management must be balanced to ensure the appropriate protection biodiversity without the stymieing of agricultural production and development. Moreover, the Strategy should consider the genuine policy issues that exist surrounding land use conflict in many agricultural regions.

The NFF again acknowledges DAFF for the opportunity to contribute to this important process, and welcomes further discussion on the matter.



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