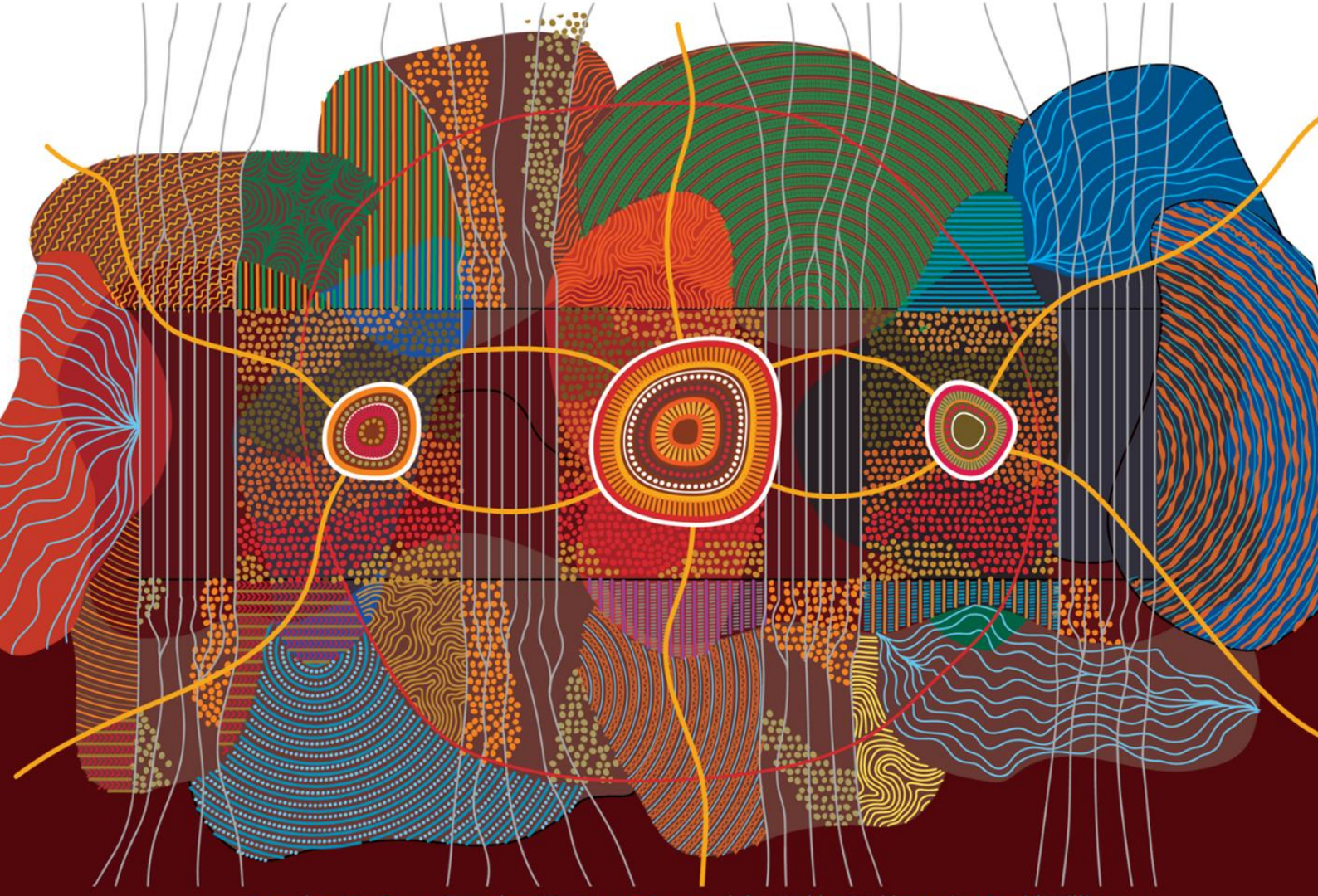
Indigenous Agricultural Product Framework Project

Export Maturity and Opportunities Assessment Report



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.

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Executive summary

This report, The Export Maturity and Opportunities Assessment Report, commissioned by the National Farmers Federation (NFF) in partnership with the Indigenous Land and Sea Corporation (ILSC) and the Department of Agriculture, Fisheries and Forestry (DAFF), provides a robust evidence base and strategic analysis to underpin the long-term development of Indigenous agricultural exports. This assessment is a critical contribution to building an Indigenous Agricultural Product Framework that enables Aboriginal and Torres Strait enterprises to fully participate in global markets while safeguarding cultural integrity.

Indigenous agricultural products are uniquely positioned at the nexus of cultural authenticity, environmental sustainability, and commercial opportunity. These products encapsulate thousands of years of Indigenous custodianship, knowledge systems, and connection to Country. With rising global consumer demand for ethically sourced, provenance-verified, and culturally authentic products, Indigenous Australian enterprises are presented with an unprecedented window of opportunity to enter premium international markets.

However, current market participation remains highly constrained. Less than 1.5% of Aboriginal and Torres Strait businesses are presently engaged in export activities, and even fewer within the agricultural sector. This highlights the critical need for a coordinated, whole-of-sector approach that addresses structural barriers to export readiness.

Key findings and evidence base

The report draws on an extensive body of work, including cost-benefit modelling, consumer research, stakeholder consultations, and case study analysis.

1. **Economic case for credentialing:**
    - Three business models for Indigenous credentials were assessed through independent cost-benefit analysis (CBA): Basic Verification, Enhanced Assurance, and Advanced Traceability.
    - All models demonstrate positive Benefit-Cost Ratios (BCR > 1), with Model 2 (Enhanced Assurance) providing the optimal balance between credibility, commercial return, and accessibility (BCR 3.6; NPV $79.6m).
    - Importantly, non-monetised benefits such as cultural protection, community empowerment, and employment participation underscore the multidimensional value proposition.
2. **Traceability systems maturity:**
    - Traceability is recognised as a core enabler of export market access, building consumer confidence and meeting regulatory expectations.
    - Current Indigenous-led platforms (e.g., Bushtukka and Botanicals Indigenous Enterprise Cooperative Limited [BBIEC], AusTukka, The Northern Australia Aboriginal Kakadu Plum Alliance Cooperative [NAAKPA]) demonstrate strong cultural governance but face scalability and interoperability challenges.
    - Broader alignment with global standards (GS1, AATP) remains limited. Structural investment in digital infrastructure, capacity-building, and co-design processes is essential.
3. **Consumer and market insights:**
    - Australian consumers express high interest in Indigenous products contingent on verified authenticity, environmental credentials, and demonstrated community benefit.
    - Internationally, regional markets exhibit distinct preferences:
        - Europe: Ethical sourcing, sustainability, cultural integrity.

        - North America: Wellness, scientific validation, cause-based marketing.
        - Asia: Health-focused, prestige positioning, provenance storytelling.
    - Credentials are central to unlocking price premiums and buyer trust across all regions.
4. **Export readiness diagnostics:**
    - Many Indigenous agribusinesses remain in early stages of maturity, with capability gaps across production scale, capital access, regulatory compliance, and international marketing.
    - Case studies such as Kakadu Organics highlight the transformative potential of targeted support and market-facing programs (e.g., Austrade Landing Pads, Export Market Development Grants [EMDG]).

Strategic actions and recommendations

Building upon these findings, the report articulates a targeted set of actionable priorities for government, industry, and Indigenous stakeholders:

- **Unlock dedicated finance pathways:** Develop de-risked funding models tailored to the unique capital needs of Indigenous exporters, including seed funding for certification, market development, and traceability implementation.
- **Invest in processing and logistics:** Co-invest in regionally based processing and cold-chain infrastructure to strengthen supply chain reliability and export consistency.
- **Facilitate market access:** Leverage partnerships with Austrade, DFAT, Supply Nation and trade missions to position Indigenous products in premium export markets with tailored branding and provenance marketing.
- **Support product innovation:** Fund R&D for native foods, wellness, nutraceutical and cosmetic applications; ensure Free, Prior and Informed Consent (FPIC) and cultural IP protections are embedded.
- **Embed monitoring and policy accountability:** Establish an Indigenous Export Advisory Group to ensure policy coherence, track outcomes, and drive inclusive program design.

The globalisation of Indigenous agriculture is not simply a trade agenda. It is nation-building. Indigenous producers are uniquely placed to deliver high-value products that regenerate land, create sustainable employment, and assert cultural sovereignty in global markets.

Australia has both the tools and the responsibility to ensure that Aboriginal and Torres Strait enterprises lead this opportunity with distinction. Through structural investment, governance reform, cultural integrity, and global engagement, Indigenous agriculture can become an enduring pillar of Australia's export economy while remaining firmly grounded in Country.

1: Project background

Scope

The Export Maturity and Opportunities Assessment Report (this report) seeks to analyse the economic impact of adopting credentials in Indigenous agricultural industries. It investigates how these credentials can expand market access, boost consumer trust, and drive economic growth for Indigenous communities. The report assesses current Indigenous agricultural practices, identify barriers to credential adoption, and offer actionable recommendations to help Indigenous producers overcome these challenges. The report also evaluates the potential of traceability technology systems to aid the export of Indigenous products, ensuring international compliance and enhancing global reputation.

Additionally, the investigation covers premium value opportunities for Indigenous products from both general and Indigenous perspectives, focusing on how these insights can shape credential development. This involves analysing consumer demand trends, market viability, and the unique attributes that could enable Indigenous products to command higher prices. A thorough assessment of the export maturity of Indigenous agricultural products is included, evaluating their readiness for international markets and suggesting strategies to maximise economic impact. The findings provide crucial insights into effectively positioning Indigenous credentials to benefit producers and consumers both domestically and internationally.

Purpose and structure of this report

The purpose of this report is to deliver a comprehensive, evidence-based assessment that informs the policy, investment and industry interventions required to strengthen the export capability of Indigenous agricultural enterprises. It is designed to guide both government and industry stakeholders in the creation of fit-for-purpose solutions that unlock economic opportunity while ensuring cultural integrity remains central to all stages of market participation.

To achieve this, the report is structured across five integrated components:

1. **Economic Impact Assessment of Credentials:** Leveraging independent cost-benefit analysis, this section evaluates the economic, social, and cultural returns of credential adoption across multiple models. The modelling provides robust financial evidence to support credential design decisions.
2. **Traceability Systems Analysis:** This section examines the maturity, interoperability, and scalability of existing and emerging traceability platforms, with a focus on culturally governed data sovereignty, global compliance standards, and the role of traceability in enabling premium market access.
3. **Premium Market Opportunity Analysis:** Based on detailed consumer insights, trade consultations and international market analysis, this section identifies where, why, and how Indigenous agricultural products can attract price premiums and differentiated market positioning.
4. **Export Readiness Diagnostics:** A practical assessment of current enterprise capability across supply chain scale, compliance, capital access, market development, and export readiness. This diagnostic informs where targeted investment and capacity building efforts should be directed.
5. **Strategic Actions and Government Recommendations:** Synthesising the full analysis, this section presents a series of actionable recommendations and focus areas for government, policymakers, and industry stakeholders to advance the Indigenous export ecosystem.

Informed by extensive consultations with Indigenous business leaders, government, industry experts, and international trade stakeholders, the report represents a whole-of-system approach to building an Indigenous export sector that is commercially viable, culturally grounded, and globally competitive.

1: The economic impact on Indigenous agricultural industries to uptake credentials

Chapter Summary:

- **Economic value of agricultural credentials**: Credentials like Organic Certification, Fairtrade, and Geographical Indications (GIs) drive measurable economic benefits via market access, price premiums, and consumer trust—validated through cost–benefit analyses (CBAs).
- **Evaluation of credential models for Indigenous products**: Three models were analysed—Basic Verification, Enhanced Assurance, and Advanced Traceability—all returned a Benefit–Cost Ratio (BCR) >1.0, with Model 2 (Enhanced Assurance) showing the highest economic efficiency and impact.
- **Non-economic benefits**: Beyond quantifiable returns, Indigenous credentials can foster community empowerment, protect cultural knowledge, boost employment, and enhance wellbeing and social cohesion.
- **Policy implication**: Credential Model 2 (Indigenous Enhanced Assurance) presents a strategic 'sweet spot' for implementation—offering a credible, cost-effective pathway to maximise economic and cultural value for Aboriginal and Torres Strait Islander producers.

This section presents a structured analysis of the economic contributions of established agricultural credentials—specifically Organic Certification, Fairtrade, and Geographical Indications—drawing on cost–benefit analyses to assess their impacts on market access, pricing, and consumer assurance. It begins with individual case studies, synthesised in a comparative table, to distil key lessons around governance, value distribution, and export potential. These precedents inform the subsequent examination of a proposed Indigenous agricultural credential, including a commissioned cost–benefit analysis of three credential models, offering a data-informed foundation for policy and investment decisions.

Economic impacts of agricultural credentials

Products

The implementation of formal agricultural credentials—such as Organic Certification, Fairtrade, and Geographical Indications (GIs)—has been shown to generate measurable economic value through increased market access, price premiums, and strengthened consumer trust. Each of these systems has been underpinned by structured Cost–Benefit Analyses (CBAs), which provide valuable benchmarks for assessing the feasibility of new credentials, including one for Indigenous agricultural products. Understanding these established models is essential to inform the design of an Indigenous credential that can deliver comparable economic returns while reflecting distinct cultural governance and equity considerations.

Organic Certification

Organic certification in Australia and internationally has demonstrated its capacity to attract consumer price premiums and secure high-value export market access. However we acknowledge that Australia does not have a single agreed domestic standard for

organicsDeloitte Access Economics (2021) conducted a CBA on a proposed mandatory domestic organic standard,[1] finding:

- Benefit–Cost Ratios (BCR) ranging from 0.31 to 1.91**,** depending on assumptions, indicating that benefits sometimes outweigh costs (BCR>1.0), whereas in other cases they do not,
- Consumer confidence, fraud mitigation, and international harmonisation were key long-term benefits, particularly for exporters,
- Australian organic products command 8–16% domestic premiums, with export markets (notably China and Vietnam) delivering up to 26% premiums.[2]

Although the central scenario BCR was low at 1.07, the analysis emphasised substantial non-quantified benefits—especially reputational and trade-related—which may justify future investment.

Fairtrade

Fairtrade certification supports ethical trade practices by guaranteeing a minimum price and delivering a social premium for community investment. A CBA conducted on Fairtrade-certified cocoa in Cameroon found:

- Certified farms achieved a BCR above 1.0**,** outperforming non-certified counterparts on profit, internal rate of return, and payback period.[3]

Similar benefits have been observed in other sectors where Fairtrade standards are applied, particularly in coffee and chocolate, which are among the most widely traded Fairtrade commodities.

- The standard Fairtrade pricing structure for coffee includes a US$1.80/lb minimum price and a US$0.20/lb premium**,** protecting producers from market volatility, [4]
- Consumers are willing to pay 35–55% more for Fairtrade-labelled goods [5], translating into more revenue for producers, particularly in coffee and chocolate sectors.

These findings suggest that Fairtrade certification can yield net economic benefits while simultaneously delivering economic resilience and social wellbeing as Fairtrade

[1] Deloitte Access Economics. (2021). *Cost–benefit analysis of domestic regulation of organic products*. Prepared for the Australian Department of Agriculture, Water and the Environment. Retrieved from https://www.agriculture.gov.au/sites/default/files/documents/QID108443_Cost%20benefit%20analysis%20for%20the%20implementation%20of%20a%20mandatory%20domestic%20organic%20standard%20%E2%80%93%20Deloitte%20March%202021.pdf

[2] **Paull, J.** (2008). *Price premiums for organic food from Australia and China*. Poster presented at the Second Scientific Conference of the International Society of Organic Agriculture Research, Modena, Italy. Retrieved from https://orgprints.org/id/eprint/14710/1/AusChinaOrganic.pdf

[3] **Jaza Folefack, A. J., Ngwack, F. S., Muluh, G. A., Geitzenauer, M., & Mathe, S.** (2021). A comparative cost-benefit analysis between Fairtrade certified and non-certified cocoa production in the South-West region of Cameroon. *Journal of Agriculture and Rural Development in the Tropics and Subtropics*, *122*(2), 321–333. https://doi.org/10.17170/kobra-202112035151

[4] Fairtrade International. (2023, March). *Fairtrade Minimum Price and Premium Table – Coffee*. Retrieved from https://www.fairtrade.net/content/dam/fairtrade/fairtrade-international/FP-for-coffee-QA-March-2023.pdf

[5] Fairtrade America. (2023). *Fairtrade & the Sustainable Shopper*. Retrieved from https://www.fairtradeamerica.org/app/uploads/2023/09/2023-Fairtrade-America-Consumer-Insights.pdf

contributes to producers' ability to withstand economic shocks and enhances their overall social conditions.

Geographical Indications (GIs)

Geographical Indications protect products that derive quality and reputation from their region of origin. Although BCR values are less frequently reported in numerical form, multiple EU studies indicate that:

- GI-labelled products in the EU command price premiums averaging 100–185%, particularly in sectors like wine, cheese, and olive oil,
- Total GI product sales equate to around €77 billion, with GI goods comprising 42% of EU agri-food exports, [6]
- GI schemes promote rural development, tourism, and regional branding, with value often accruing to downstream processors unless collective governance is strong. [7]

The combination of high price premiums, export contributions, and regional economic development affirms the viability and long-term value of GI systems, even without explicit BCR reporting.

Table 1 below offers a consolidated comparison of the credentials examined, enabling stakeholders to identify the core mechanisms, economic impacts, and governance considerations that may be applicable when designing an Indigenous agricultural credential.

Table 1: Comparison of existing agricultural credentials

Credential Type	Reported BCR	Consumer Price Premiums	Export Impact	Key Benefits	Governance & Value Distribution
Organic Certification	0.31-1.91 (Base-case: 1.07)	8-16% (AU domestic); up to 26% (export - China/Vietnam)	High-international harmonisation supports export market access	Consumer confidence, fraud reduction, brand trust	Requires compliance certification; value varies by supply chain
Fairtrade	>1	5-10% premium; ~40% more revenue to producers	Moderate-supports access to ethical and niche markets	Income stability, social premium, community investment	Cooperative-based with structured reinvestment in communities

[6] Great Italian Food Trade. (2021, February). *Geographical indications, 75 billion euros in the EU. The database and the protections that are missing*. Retrieved from https://www.greatitalianfoodtrade.it/en/markets/geographical-indications-75-billion-euros-in-the-eu-the-database-and-the-protections-that-are-missing/

[7] Durand, C. (2022). *Geographical Indications as a Tool for Rural and Community-Based Development*. ARISE+ IPR. Retrieved from https://internationalipcooperation.eu/sites/default/files/arise-docs/2022/ARISEplusIPR_jan2022_Claire-Durand_Geographical-Indications-as-a-Tool-for-Rural-and-Community-Based-Development.pdf

Credential Type	Reported BCR	Consumer Price Premiums	Export Impact	Key Benefits	Governance & Value Distribution
Geographical Indications (GIs)	Not numerically reported	100-185% (wine, cheese, olive oil)	Very High-42% of EU agri-food exports from GI products	Regional development, tourism, reputation and authenticity	Dependent on collective governance; risk of downstream value capture

Implications for an Indigenous agricultural credential

These case studies offer clear evidence that credentialed systems—despite varied models, and a variety of produce categories — deliver quantifiable and sustained benefits, including:

- Price differentiation through consumer premiums
- Expanded market access**,** particularly in exports and ethical consumption
- Enhanced traceability and brand trust through standards and verification
- Economic justification via CBA, even when not all benefits are immediately measurable.

In contrast, Aboriginal and Torres Strait Islander agricultural producers currently lack a credential that recognises cultural provenance, governance, and benefit-sharing. Despite earlier economic research to inform this Indigenous Agricultural Product Framework (IAPF) project identifying that Indigenous Agricultural products contribute over $1.4 billion in total economic activity**,** Aboriginal and Torres Strait Islander enterprises remain excluded from the high-value channels unlocked by formal certification.

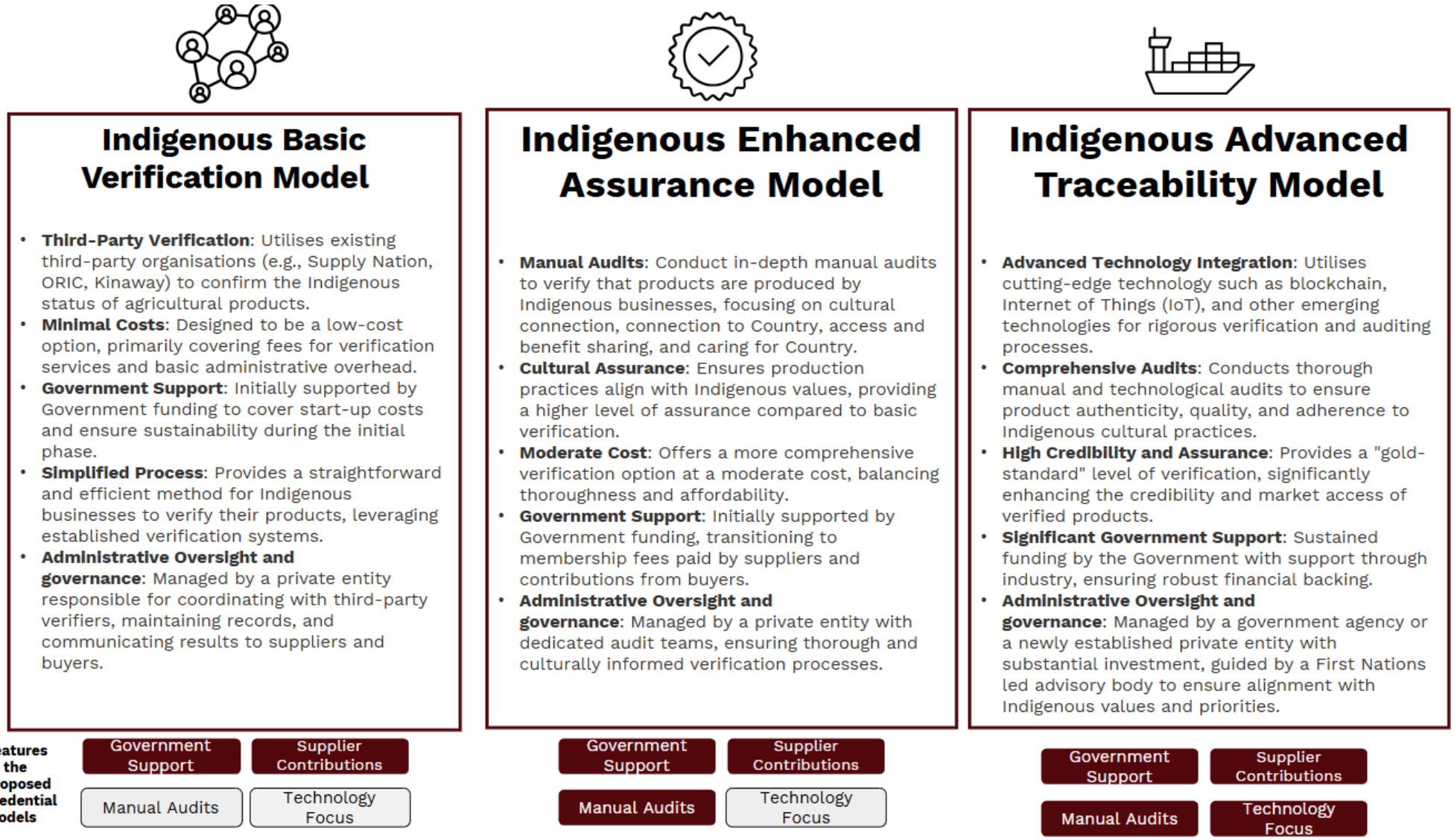
Establishing an Indigenous agricultural credential—governed by cultural authorities and embedded in transparent verification processes—would align with existing successful models in the market, while meeting distinct needs for community equity, identity, and economic empowerment.

The economic impact on Indigenous agricultural industries to uptake credentials

In assessing the potential economic impacts, *yamagigu* engaged Polis Partners to conduct a Cost Benefit Analysis (CBA) that quantified and compared the economic viability of each of the three proposed business model options:

1. Indigenous basic verification, where the credential would use existing third-party providers to certify that the producer was an Aboriginal and Torres Strait Islander person or organisation,
2. Indigenous enhanced assurance, which involves manual audits to verify claims against each of the product's characteristics,
3. Indigenous advanced traceability, which utilises advanced technology such as blockchain for rigorous verification and auditing processes.

Figure 1 - Three proposed business models for the Indigenous Agricultural Product Framework (IAPF)



Each of the models were tested against a 'business as usual' base case whereby Aboriginal and Torres Strait Islander producers continue to sell produce into the market without any recognised credential. The CBA (Full CBA report is included at Appendix A) made several assumptions about the time it would take to establish the credential, the size of the price premium achieved with the credential, and the rate of credential adoption among Aboriginal and Torres Strait Islander producers. Across all scenarios, it is assumed that the price premium follows a ramp-up period as consumers become aware of the credential. These are detailed in Table 2, below.

Table 2: Assumptions used in the Cost Benefits Analysis when testing the three business models against the 'base case' of no recognised credential.

	Model 1: Indigenous basic verification	Model 2: Indigenous enhanced assurance	Model 3: Indigenous advanced traceability
Establishment timing	Quickest to implement; 1-2 years	In-depth manual audit design requires longer set-up; 2-3 years	Traceability technology procurement and implementation requires more time; 4-5 years
Price premium	Lower. Credential does not verify characteristics beyond ownership, resulting in lower consumer willingness to pay.[8]	Moderate. More confidence in the product credential translates to a higher premium.	Higher. Most confidence and highest willingness to pay a premium given full traceability and verification of provenance.
Producer adoption	Higher coverage as businesses only need to register with the relevant existing body. Producer adoption follows a faster ramp-up as businesses quickly become aware of familiar institutions and are willing to participate.	Moderate coverage as manual auditing represents barriers to gaining the credential and limits the number of participants. Producer adoption follows a moderate ramp-up as businesses become more aware and willing to participate.	Lower coverage as higher costs for producers mean less will participate initially. Technology adoption could make adoption easier in the longer term. Producer adoption follows a slower ramp-up as businesses take longer to embrace technological change.

The CBA assumed several benefits associated with the Indigenous agricultural product credential. These included:

[8] See results of additional consumer sentiment analysis in *Chapter 3. Premium value opportunities for Indigenous products*, for support for this assumption.

- Producer surpluses from existing and new production, derived from the increased price and therefore profit, and increased demand (respectively),
- Consumer surplus, derived from wholesale and retail consumers' willingness to pay a premium for certified products,
- Environmental sustainability benefits associated with the assumed reduced carbon footprint of Indigenous farming practices,
- Traditional knowledge and cultural heritage preservation, derived from consumers' willingness to pay for the preservation of Aboriginal and Torres Strait Islander cultural heritage.

The CBA also estimated establishment and ongoing operational costs for each of the business model options. Establishment costs were spread over the indicative establishment timing period (1-2 years for Indigenous basic verification and Indigenous enhanced assurance; 4-5 years for Indigenous advanced traceability), while ongoing operational costs were estimated to be incurred in each of the 30 years in the analysis period.

Table 3 shows the estimated costs, benefits and net results of the CBA for each of the three business models across the 30 years, shown in AUD$ value as of 2025. Costs associated with Indigenous basic verification are lower for both government and producers, given it utilises existing third-party organisations and is quicker to implement. Indigenous enhanced assurance costs are higher with the addition of the manual auditing process, and costs for Indigenous advanced traceability are the highest due to the implementation of a technological solution for providing product assurance. These higher technological costs were borne by both government / third party verifiers and producers.

Despite not having the same level of product assurance as other options, Indigenous basic verification sees benefits flowing sooner (because the model can be implemented more quickly), and therefore still performs strongly with a lower cost. The technological barriers associated with Indigenous advanced traceability mean the higher price premium is not taken advantage of as much as for the other options.

While all three business model options have a BCR higher than 1.0, meaning benefits outweigh costs, there is a 'sweet spot' at business model option 2, Indigenous enhanced assurance, which achieves the highest relative BCR and a net present value of $79.6m.

Table 3: Benefits and estimated costs associated with each of the three business model options

Results Costs	Basic Verification	Enhanced Assurance	Advanced Traceability
Establishment Costs	$3,989,213	$4,012,280	$7,811,015
Operational Costs	$12,073,002	$26,291,782	$17,590,350
Total Costs	$16,062,215	$30,304,062	$25,401,365
Benefits			
Producer surplus (price)	$31,093,394	$82,004,557	$33,058,022
Producer surplus (volume)	$7,773,349	$12,300,684	$3,305,802
Consumer surplus	$4,921,410	$9,374,113	$3,662,657
Environmental sustainability	$1,276,563	$ 2,020,055	$678,611
Traditional knowledge and cultural heritage preservation	$2,226,302	$4,288,881	$7,958,551
Total benefits	$47,291,018	$109,988,290	$48,663,643
Net results			
NPV Costs	$16,062,215	$30,304,062	$25,401,365

NPV Benefits	$47,291,017	$109,988,291	$48,663,644
NPV	**$31,228,803**	**$79,684,229**	**$23,262,279**
BCR	**2.9**	**3.6**	**1.9**

Importantly, the CBA did not capture non-monetised benefits, which are equally important in understanding and demonstrating the potential impacts of Indigenous agricultural products. As outlined in a previous report (Mid-Outcome Report #2) for the IAP Project, these benefits include:

- **Community empowerment and self-determination**: A credential system enables Aboriginal and Torres Strait Islander producers and communities to exercise greater control over how their products are defined, marketed and governed. This supports self-determination by embedding Aboriginal and Torres Strait Islander values within the production process.
- **Protection of Indigenous Cultural and Intellectual Property (ICIP)**: A credential helps safeguard cultural knowledge and practices from misappropriation by ensuring that only products genuinely connected to Aboriginal and Torres Strait Islander producers and traditions carry the credential.
- **Increased employment participation**: By supporting low-barrier, culturally relevant economic activity, the scheme can engage individuals who may be outside the formal labour market. It offers flexible participation suited to local needs, including seasonal or part-time roles, and enables the activation of underutilised labour — particularly among women, young people, and Elders.
- **Social cohesion and wellbeing**: Engagement in credentialed agricultural activity can strengthen social ties and reinforce cultural identity through connection to Country. The work fosters a sense of pride and purpose, contributes to social resilience, and may support improved mental health and wellbeing outcomes across participating communities.

So what does this mean for Aboriginal and Torres Strait Islander producers and the IAPF

The CBA demonstrates that introducing a credential for Indigenous agricultural products is not just viable, but strategically valuable. All three models return benefits greater than costs, confirming the economic rationale for implementation. Model 2 — Indigenous Enhanced Assurance — stands out as the most economically efficient, striking a balance between credibility, cost, and producer uptake.

This suggests that if governments and stakeholders want to maximise both return on investment and meaningful participation by Aboriginal and Torres Strait Islander producers, a moderately rigorous but accessible credential (Model 2) offers the greatest impact. The results also highlight that credential design matters: thoughtful implementation can unlock market value, protect culture, and empower communities.

2: Traceability technology systems for the export of Indigenous products.

Chapter Summary:

- **Emerging Indigenous-led traceability systems** (e.g., BBIEC, AusTukka) are embedding cultural governance, provenance tracking, and data sovereignty but remain early-stage and unevenly adopted—especially in native foods and botanicals.
- **Scalability and adoption** are hindered by high costs, low digital capacity, fragmented government support, and a lack of culturally tailored training and funding mechanisms.
- **Alignment with global standards** (e.g., GS1, AATP) is limited, restricting export readiness; systems like Smart Trade Network show potential but are not fully integrated with national platforms.
- **Innovation in blockchain, Internet of Things (IoT), and isotope tracing** shows promise but requires co-design, affordability, and culturally safe implementation to gain community trust.
- **Data interoperability is weak**, with no national Indigenous data framework, inconsistent protocols, and major concerns over data control, certification, and intellectual property.
- **Cultural integrity and community leadership** are central—traceability systems must uphold Indigenous governance, storytelling, and consent-based data use to be effective and trusted.

Approach to undertaking traceability analysis

A series of consultations was undertaken to explore the role of traceability and digital technologies in strengthening the participation of Aboriginal and Torres Strait Islander communities in Australia's agricultural export sector. Through a focused set of inquiries, the consultation examined how existing traceability programs, and compatibility with global standards, could unlock new economic opportunities for Aboriginal and Torres Strait Islander producers.

As *yamagigu* is part of the Deloitte global network, we leveraged their extensive network to connect with seven (7) individuals globally, each representing diverse perspectives within agriculture. Virtual consultations were scheduled with these seven identified stakeholders across four regions: Australia, the USA, Singapore, and the European Union (EU).

Subsequently we engaged a range of Australian Government agencies (DAFF, DFAT, Austrade, NSW Local Land Service Agency), export sector experts (Export Council of Australia, Australian Chamber of Commerce and Industry), data research specialists (Federation Uni) and agricultural industry leads (Teys Australia, AusTukka), to better shape our understanding of technology and trackability in agriculture. A table of stakeholders consulted during this phase of the project can be found in Table 11 in Appendix B:.

In developing our lines of inquiry, we focused on key areas of interest; including the availability, scalability, and suitability of current traceability systems, particularly their alignment with international export standards and adaptability to diverse Indigenous agricultural products. Stakeholders were asked to reflect on the state of innovation, such as the use of blockchain and Internet of Things (IoT) technologies, and the barriers impeding widespread adoption—ranging from cost and technical complexity to a lack of digital infrastructure and skills.

The consultation also investigated the support mechanisms necessary for enabling growth and advancing traceability maturity across Aboriginal and Torres Strait Islander industries. This included analysis of government policies, capacity-building initiatives, funding pathways, and cross-sector partnerships.

Strategic Insight:
A central concern conveyed by stakeholders, was the extent to which cultural values and community priorities would be integrated into the design and deployment of traceability systems.

Finally, the consultation explored the interoperability of traceability systems across Indigenous supply chains, with attention to data standards, system integration, and challenges in data sharing. Questions were designed to elicit insights into how technology can support seamless and secure data exchange between producers, processors, and other supply chain actors—while respecting Indigenous data sovereignty.

Overall, the consultation provided a comprehensive understanding of the opportunities and challenges associated with digital traceability in Indigenous agriculture and identified opportunities for inclusive and culturally-aligned industry development.

Availability and potential of traceability technology systems

Traceability systems currently in use, or under development, in Indigenous agricultural exports are limited but evolving. The most prominent examples include beta-stage platforms led by Aboriginal and Torres Strait Islander -controlled organisations such as BBIEC, which integrates cultural authority, geographic origin, and product-level identification. Another notable example is the isotopic soil tracing technology used by Commonwealth Scientific and Industrial Research Organisation (CSIRO) and the Australian Nuclear Science and Technology Organisation (ANSTO) to authenticate produce origin through unique soil markers, as trialled with Kakadu Plum producers. These systems aim to capture minimal but critical data, such as business identity, geographic location, cultural authority, product type, and processing details.

The current landscape of traceability technology in Australian agriculture is marked by a mix of mature systems in established sectors and emerging solutions in less formalised markets. In livestock and meat production, technologies such as Radio-Frequency Identification (RFID) tagging (e.g. via the National Livestock Identification System), property identification codes (PIC numbers), and integrated geospatial databases enable highly traceable supply chains. Similarly, QR (Quick-Response) codes and barcoding are employed in seafood and horticulture, while advanced methods like isotopic soil markers are being piloted for products like cherries and Kakadu Plum (as noted above) to verify origin. Traceability in these sectors supports regulatory compliance, environmental audits, and premium market access—particularly in high-value exports, like Wagyu beef, where provenance and storytelling are core to branding. Meanwhile, blockchain and Internet of Things (IoT) technologies are being tested with projects such as the Australian Agricultural Traceability Platform (AATP). Standards developed by working groups help to guide future system interoperability.

However, the adoption of traceability technology remains uneven and highly dependent on the sector and scale of the producer.

Strategic Insight:
Native foods, honey, and botanicals—typically produced by smaller enterprises—are at a nascent stage, with minimal integration of traceability tools due to cost, complexity, and lack of clear financial return.

While global demand for traceability is increasing—particularly in jurisdictions such as the EU and Indonesia—many markets still accept provenance declarations based on Australia's regulatory credibility. As a result, traceability remains primarily a value-adding feature rather than a mandatory export requirement. Stakeholders noted that unless systems are affordable, adaptable, and supported by clear benefit pathways, uptake will be limited, especially among smaller Aboriginal and Torres Strait Islander producers.

Scalability of existing systems is contingent on sustained funding and support infrastructure. As demonstrated by BBIEC's Smart Trade Network partnership, a system must handle multiple product types (e.g., leaf, fruit, seafood) while embedding Indigenous governance. The adaptability of traceability platforms remains unproven at scale, though modular design and customisation potential show promise. However, some Aboriginal and Torres Strait Islander producers still rely on informal, unstructured supply chains, presenting unique adaptation challenges.

Current Indigenous traceability efforts face gaps in aligning with international standards. While platforms like Smart Trade Network can scale outward and meet foreign market traceability expectations, broader compatibility with protocols such as Global Standards 1 (GS1) or Australian Agricultural Traceability Protocol (AATP) remains patchy. There is limited awareness and uptake of recognised standards, and regulatory recognition (e.g., for novel foods in the EU) continues to be a barrier.

Emerging technologies under consideration include blockchain, GS1-enabled platforms, isotopic analysis, and RFID-linked barcoding. Some producers and tech providers are exploring product attribute-based tracking (e.g., using hyperspectral analysis or image recognition), but such innovations remain too costly or complex for widespread use. Blockchain's transparency and immutable records are appreciated in principle, though full deployments remain sparse.

Common barriers reported included high setup costs, limited technical capacity, fragmented government support, and mistrust over data security and intellectual property misuse. Aboriginal and Torres Strait Islander producers reported they often operate as sole traders or cooperatives without the resources to evaluate, or implement, traceability systems. The cultural need for control over information, particularly around Indigenous Cultural and Intellectual Knowledge, adds further complexity.

To consolidate and summarise the key insights described above, the following table (Table 4) presents thematic findings on the current state, scalability, standards alignment, and innovation potential of traceability technology systems in Indigenous agriculture.

Table 4: Insights on traceability systems

Theme	Insight
Current Technology Landscape	• Aboriginal and Torres Strait Islander-led platforms (e.g. BBIEC, Bushtukka) in early stages with cultural and geographic traceability features,

Theme	Insight
	• CSIRO and ANSTOs' isotopic soil tracing verifies origin through unique soil signatures (e.g., Kakadu Plum), • Mature sectors (e.g., livestock, meat, seafood) use RFID, PICs, QR/barcodes, and geospatial systems, • Blockchain, IoT, and interoperability standards (e.g., AATP) under development, • Uneven adoption: native foods and botanicals lack integration due to cost, complexity, and unclear ROI, • Traceability mostly value-adding, not mandatory, with demand rising in EU/Indonesia.
Scalability Adaptability	• Scalability hinges on funding and infrastructure, • BBIEC's Smart Trade Network illustrates multi-product scalability with Indigenous governance, • Modularity offers customisation but remains untested at scale, • Informal supply chains of some producers challenge adaptability.
Integration with Global Standards and	• Current efforts only partially align with GS1 and AATP, • Smart Trade Network shows potential for export compliance, • General low awareness and use of international protocols, • Regulatory issues persist, especially in EU markets for novel food categories.
Innovation and Emerging Technologies	• Technologies in development: blockchain, GS1 platforms, isotopic tracing, RFID-linked barcodes, • Experimental tools include hyperspectral analysis and image recognition for attribute tracking, • Blockchain praised for transparency, but real-world usage limited, • High cost and complexity hinder broad adoption of new tools.
Barriers to Adoption	• High setup and maintenance costs, • Limited technical literacy and capacity in smaller Aboriginal and Torres Strait Islander enterprises, • Disconnected or insufficient government support, • Concerns over data privacy, misuse, and cultural IP control, • Many producers are sole traders/co-ops lacking capacity for system evaluation and adoption.

Support mechanisms for growth and traceability maturity in Indigenous industries

The rising interest in Indigenous agricultural traceability underscores the need for strategic alignment among government agencies to effectively harness existing efforts and investments. The current landscape presents a fragmented approach due to overlapping initiatives from entities like DAFF, Austrade, and DFAT. These efforts indicate a commendable intent but lack coordination, which is pivotal for creating impactful traceability pathways specifically designed for Indigenous agriculture.

The Agriculture Ministers' Meeting (AMM), Chaired by the then Commonwealth Minister for Agriculture, Fisheries and Forestry, Senator the Hon Murray Watt, highlighted progress in addressing this disjointed approach. The convening of Commonwealth, State, and Territory Agriculture Ministers in 2023 and 2024, promised greater alignment and more coordinated

action between agencies and among jurisdictions. Their discussion centred on the development of a National Statement on First Nations in Agriculture, Fisheries and Forestry, to be led by a collaborative taskforce comprising representatives from each jurisdiction. By focusing on self-determination, the proposed National Statement would aim to empower Aboriginal and Torres Strait communities, enabling them to lead discussions and decisions impacting their agricultural practices and traceability standards.

Training remains limited. While the Export Council of Australia has hosted capability-building workshops (e.g., Export Ready sessions), there is no centralised curriculum for traceability skills. BBIEC is developing offline data management tools and training for internal governance and story-sharing protocols. Programs such as Austrade's "Go Global Toolkit" offer foundational guidance but lack cultural specificity.

Most funding to date has been project-based and insufficient for full system implementation. While some grant opportunities exist (e.g., Export Market Development Grants (EMDG), IP Australia's Yarn Line), there is no dedicated traceability technology fund tailored to Aboriginal and Torres Strait Islander agricultural producers. The reliance on co-investment with Aboriginal and Torres Strait Islander organisations raises concerns over equity and sustainability. The Joint Ministers' 2023 Statement, emphasised that whole-of-supply-chain traceability must include Aboriginal and Torres Strait products.[9] This is being realised through the delivery of a suite of Agricultural Traceability Grants[10] – exemplified by flagship projects such as the 'National Beehive Traceability System Feasibility' (being delivered by AgriFutures Australia), the 'Export Readiness Pilot for First Nations Agriculture' traceability grant (delivered by the Noongar Land Enterprises) as well as this project, the Indigenous Agricultural Product Framework (delivered by the National Farmers Federation).

Several promising collaborations are emerging such as BBIEC's work with Smart Trade Networks, which demonstrates strategic alliances. However, wider partnerships with universities, tech providers, and buyers remain underutilised. There is potential for broader engagement with cooperative-led models and supply chain buyers to embed traceability expectations upstream.

Aboriginal and Torres Strait Islander-led traceability systems (notably BBIEC's) are setting benchmarks by embedding cultural authority approval, country provenance, and offline data sovereignty. These systems incorporate storytelling and restrict access to sacred knowledge unless signed off by traditional custodians.

[9] Department of Agriculture, Fisheries and Forestry. (2023, July 13). *Agriculture Ministers' Meeting Communiqué*. https://www.agriculture.gov.au/about/news/stay-informed/communiques/ag-ministers-forum-july-2023 Agriculture Fisheries Forestry+2Agriculture Fisheries Forestry+2Agriculture Fisheries Forestry+2

[10] Department of Agriculture, Fisheries and Forestry (https://www.agriculture.gov.au/biosecurity-trade/market-access-trade/national-traceability/agricultural-traceability-projects#indigenous-agricultural-product-framework)

Strategic Insight:
Cultural scaffolding in traceability is vital to avoiding extractive or tokenistic approaches. Broader systems must adopt similar governance principles to gain community trust and participation.

The following table (Table 5) summarises the key enablers, gaps, and cultural considerations influencing the maturity and growth of traceability systems within Indigenous agricultural industries.

Table 5: Insights on traceability maturity in Indigenous Industries

Theme	Insight
Government and Policy Support	• Rising government interest, but poor inter-agency coordination (DAFF, Austrade, DFAT), • Funding is fragmented, • No cohesive national policy or mandate for Indigenous traceability, • Strategic alignment across government bodies is lacking.
Capacity Building and Training	• Training offerings are ad hoc and decentralised, • Export Council of Australia runs general workshops (e.g., Export Ready), but no Aboriginal and Torres Strait Islander-specific curriculum, • BBIEC developing governance-focused training and offline data tools, • Austrade's "Go Global Toolkit" is generic, not tailored for cultural needs or specific traceability systems.
Funding and Investment	• Predominantly project-based, piecemeal funding with no long-term strategy, • Grants like EMDG and Yarn Line are available but not tailored to traceability tech, • No Aboriginal and Torres Strait Islander-specific funding pool for traceability systems, • Co-investment requirements raise equity concerns, • Recent projects (e.g., Noongar Land Enterprises grant) reflect emerging recognition.
Partnerships and Collaborations	• BBIEC–Smart Trade Network collaboration is a strong model, • Limited collaboration with universities, tech providers, and large buyers, • Cooperative and buyer-led partnerships hold untapped potential, • More cross-sector partnerships are needed to scale and embed traceability upstream.
Cultural and Community Engagement	• BBIEC sets a strong precedent with embedded cultural governance, provenance validation, and data sovereignty, • Access controls require traditional custodian approval, respecting sacred knowledge, • Storytelling is integrated into traceability systems, • Culturally respectful, community-led models are critical for acceptance and trust in broader systems.

Data interoperability across Indigenous supply chains

Data standards are inconsistent across Indigenous supply chains. Few producers adhere to globally harmonised standards like GS1, and terminology (e.g., "agriculture" vs. "caring for country") remains contested. BBIEC is developing internal taxonomies tied to cultural and geographic identifiers, but no national framework for Indigenous agricultural data exists.

Full integration between producer-level traceability tools and export compliance systems is rare. While models such as Smart Trade Network support plug-in data forms and unique product identifiers, they remain siloed from wider platforms (e.g., National Livestock Identification System (NLIS), AATP).

Key obstacles include limited digital infrastructure in regional areas, fragmented databases, and concerns over data ownership. Producers require control over what data is shared and to whom. Without secure, culturally-aligned platforms, uptake remains low. Organisational inconsistencies (e.g., differing views on certification, story usage) compound the problem.

Technologies like application programming interface (APIs), decentralised ledgers, and cloud-based data hubs offer promise for linking systems. Smart Trade Network, for example, is developing modular data architecture that supports international deployment and cross-system interoperability. However, broader adoption will require co-design processes and standardisation incentives.

Strategic Insight:
Indigenous agricultural traceability is an emerging field with transformative potential. While foundational work is being done by Aboriginal and Torres Strait Islander organisations and policy advocates, structural investment, policy harmonisation, and culturally grounded frameworks are essential. Technology alone is insufficient; trust, training, governance, and long-term partnerships must underpin any successful traceability system in Indigenous contexts.

The table below (table 6 distils the major insights related to interoperability challenges and opportunities across Indigenous supply chains, highlighting where technical innovation must intersect with cultural, infrastructural, and governance considerations.

Table 6: Interoperability insights

Theme	Insight
Data Standards and Protocols	• No unified national framework for Indigenous agricultural data, • Inconsistent adherence to global standards like GS1, • Cultural terminology varies (e.g., "agriculture" vs. "caring for country"), • BBIEC is creating internal taxonomies based on cultural and geographic markers.
System Integration	• Producer-level traceability tools are rarely integrated with national/export systems, • Smart Trade Network enables modular, product-specific data but remains isolated from platforms like NLIS or AATP, • Indigenous Agricultural Credential Framework is under development to guide future integration.

Theme	Insight
Challenges in Data Sharing	• Limited digital infrastructure in remote areas, • Fragmented databases and unclear data ownership protocols, • Producers need culturally safe, secure data-sharing platforms, • Disagreements over certification standards and story-sharing practices further hinder system cohesion.
Role of Technology in Enhancing Interoperability	• Promising tools: APIs, decentralised ledgers, and cloud-based data hubs, • Smart Trade Network is pioneering modular data systems for interoperability and international use, • Adoption depends on standardisation, co-design, and incentivisation across the sector.
Conclusion / Cross-Cutting Insight	• Indigenous traceability holds high potential but is still emerging, • Success requires more than technology—must include policy support, cultural governance, trust, and long-term investment, • Efforts by Aboriginal and Torres Strait Islander organisations and advocates are foundational but need structural reinforcement and collaboration.

Case studies in Indigenous agricultural traceability

Building traceability systems for Indigenous agricultural products requires more than just technical functionality—it demands deep cultural respect and understanding, Indigenous governance, and protection of Traditional Knowledge. As Aboriginal and Torres Strait producers emphasise, storytelling, cultural data, and stewardship practices are intrinsic to proving provenance. Systems must reflect these values, not override them.

For example, traceability technologies designed to meet the needs of Aboriginal and Torres Strait Islander producers should enable communities to demonstrate how they care for Country, such as through traditional burning regimes or seasonal harvesting cycles, and allow cultural knowledge to be documented and controlled. This is not just about data capture, but about digital storytelling and protocol-based permissions that uphold Indigenous data sovereignty. While traceability technologies in the agricultural sector are still in their early stages, the field is evolving, with several front runners beginning to set benchmarks for the industry. These early adopters demonstrate the potential for traceability tools to support ethical sourcing, quality assurance, and consumer trust, paving the way for broader adoption across the sector. A University of Queensland (UQ) led cooperative governance project is developing frameworks where blockchain traceability is governed by community-defined access rules, ensuring that ICIP—like totemic affiliations or harvesting songs—is not exposed without consent.

Importantly, traceability must not only support compliance and market access, but also cultural continuity and economic fairness. Co-designing apps in Indigenous languages, using open data standards, and embedding benefit-sharing mechanisms (like smart contracts) ensures that Aboriginal and Torres Strait Islander communities retain control of their value chains. It also enables participation in premium markets—where proof of authenticity, sustainability, and cultural provenance commands higher value.

The following case studies illustrate how these principles are being put into practice across different projects and contexts:

Case study: AusTukka – ARC training centre for uniquely Australian foods

AusTukka is a culturally responsive mobile traceability application co-developed with Aboriginal and Torres Strait Islander communities under the leadership of Professor Yasmina Sultanbawa at the University of Queensland. Developed through the ARC Training Centre for Uniquely Australian Foods, the app is built on blockchain-inspired ledger technology that allows Aboriginal and Torres Strait Islander harvesters to log detailed data on native food products—such as harvest date, GPS location, and processing steps.

By providing a tamper-resistant record of provenance, AusTukka enables producers, even in remote areas, to verify authenticity and showcase the quality of bush foods. This transparency is especially important in export markets where buyers demand verifiable sourcing and ethical practices.

Importantly, AusTukka is also a platform for cultural preservation. It supports the inclusion of traditional ecological knowledge and custodianship stories into product metadata, embedding Indigenous narratives into supply chains. The app has been piloted with products such as pink-fruited lime berries and wattle berries, and it is envisioned to scale across a broader range of native foods. AusTukka's transparent records also provide communities with better bargaining power during price negotiations with buyers and aggregators.

Case Study: First Nations Bush Foods & Botanical Alliance

Chaired by Central Australian bush food entrepreneur Rayleen Brown, the First Nations Bush Foods & Botanical Alliance advocates for Aboriginal and Torres Strait Islander control, ethical standards, and informed consent in native food systems. The Alliance supports the integration of digital traceability systems—such as blockchain or isotope fingerprinting—with cultural and ethical safeguards to protect traditional knowledge, intellectual property, and Aboriginal and Torres Strait Islander women's historical role as custodians of wild food systems.

The Alliance actively contributes to national consultations, advocating for traceability frameworks that:

- Recognise First Nations custodianship,
- Ensure data use only with free, prior, and informed consent, and
- Prevent exploitation or misuse of cultural data, such as medicinal knowledge or harvesting protocols.

Beyond advocacy, the Alliance supports its member enterprises in evaluating and adopting traceability tools that align with cultural protocols and business goals. These efforts seek to create pathways for technology use that uphold Indigenous rights while strengthening commercial capacity.

Case Study: Northern Australia Aboriginal Kakadu Plum Alliance (NAAKPA)

NAAKPA is a collaborative of eight Aboriginal corporations across the Northern Territory and Western Australia that coordinate the sustainable harvest, processing, and export of Kakadu plum and other bush foods. At peak harvest, NAAKPA-coordinated producers

manage and aggregate up to 40–45% of Australia's Kakadu plum harvest, primarily through wild harvesting, with some emerging interest in orchard-style or managed bushland production.

The alliance employs a cooperatively governed supply chain model, where member corporations retain control of their operations while participating in shared systems for quality assurance, logistics, and marketing. NAAKPA has implemented centralized reporting mechanisms that document batch-level data, harvest origins, and permit status—supporting compliance with environmental regulations, food safety standards, and export protocols.

These traceability systems are not only about regulatory compliance. By capturing transparent, verifiable data, NAAKPA strengthens communities' ability to demonstrate sustainability, legitimacy, and cultural stewardship to international buyers. Supported by partners such as ANSTO, the alliance is also exploring isotopic fingerprinting technologies to further authenticate provenance. This model illustrates how Aboriginal and Torres Strait Islander cooperatives can build ethical, transparent, and economically empowering supply chains grounded in custodianship and sovereignty.

Case Study: Wool eBale – Australian Wool Exchange (AWEX)

While not specific to Indigenous producers, the Wool eBale initiative by the Australian Wool Exchange (AWEX) showcases how traceability can transform agricultural value chains. Through government innovation funding, the system attaches a QR code and embedded RFID chip to every Australian wool pack. Wool classers and growers use the WoolClip mobile app to scan and record data, creating a digital record that follows the bale through processing, warehousing, and sale.

This traceability framework provides benefits to growers by enabling:

- Proof of adherence to quality and sustainability standards,
- Early detection of biosecurity risks, and
- Improved visibility into how their wool performs commercially.

For Aboriginal and Torres Strait Islander and native food enterprises, Wool eBale presents a replicable model of digital tracking—where crates, packaging, or shipments could carry digital IDs linked to cultural provenance, environmental compliance, and community branding. The workflow and user interface offer inspiration for developing culturally adapted, mobile-friendly systems that embed both scientific and cultural data into supply chains.

These examples demonstrate that traceability is not just a technical solution—it is a platform for cultural expression, legal protection, and economic empowerment. By combining emerging technologies like blockchain, GPS, and QR coding with Indigenous governance and cultural protocols, it is possible to create systems that meet global standards without compromising cultural integrity.

Government initiatives such as the Indigenous Agricultural Product Framework and DAFF's traceability plan are laying the groundwork. But success depends on sustained investment in co-design, education, and interoperable standards that embed Indigenous rights at every stage. With these principles upheld, Indigenous agricultural products can reach global markets with their full story—and full value—intact.

3. Premium value opportunities for Indigenous products

Chapter Summary:

- **Trust, Authenticity & Certification Drive Consumer Preference**: Australian and international consumers are more likely to purchase Indigenous agricultural products—and pay a premium—if they are assured of the product's authenticity through credible credentials verifying Aboriginal and Torres Strait Islander ownership, sustainable production, and ethical sourcing.
- **Environmental, Social & Health Benefits Boost Appeal**: Products perceived as environmentally sustainable (e.g., "Caring for Country"), contributing to Aboriginal employment and wellbeing, or offering health benefits attract greater consumer interest and willingness to pay a premium across domestic and export markets.
- **Indigenous Identity & Cultural Storytelling Are Key Differentiators**: Embedding cultural narratives, traditional knowledge, and a connection to Country enhances consumer engagement and brand value, especially in Europe and North America where authenticity and heritage are strongly valued.
- **Global Market Alignment Requires Regional Tailoring**: Effective export strategies vary by region—Europe values sustainability and ethical sourcing, North America prioritises health benefits and cause marketing, while Asia favours safety, wellness claims, and prestige. Packaging, storytelling, and certifications must align with these local preferences.
- **Strategic Credentials & Direct Engagement Enable Export Success**: Success in international markets depends on building robust verification systems, adopting global sustainability and ESG standards, leveraging digital traceability tools, and engaging directly with buyers through immersive experiences, storytelling, and co-branded initiatives.

This section describes the premium value opportunities for Indigenous agricultural products that may inform the development of Indigenous credentials in both domestic and international markets. The content for this section has been developed through a series of consultations, a review of grey literature, as a re-examination of the consumer survey and focus groups conducted to inform Mid-Outcome Report #2.

Australian consumers place a premium on agricultural products that they can trust

As outlined in a previous report (Mid-Outcome Report #2), research with Australian consumers revealed widespread support for the defining characteristics of Indigenous agricultural products. Specifically, consumers agreed that Indigenous agricultural products should be produced by Aboriginal and Torres Strait Islander people, reflect a deep connection to Country and culture, promote care for the environment (caring for Country), and generate tangible benefits for Aboriginal and Torres Strait Islander peoples, organisations, and communities.

In addition to these core characteristics, consumers also expressed several concerns and expectations. Over half (57%) of survey respondents indicated that they needed more information about Indigenous agricultural products to help guide their purchasing decisions. A majority also reported limited visibility of these products, with 63% saying they had not seen them in local stores and 61% stating they had not come across them online. Only 20% said they found it convenient to purchase such products. Trust also emerged as a critical factor, with 63% of respondents stating they would be more likely to purchase Indigenous agricultural products if they could be certain of the product's authenticity.

When asked about their likelihood of purchasing, 53% of consumers indicated an interest in buying Indigenous agricultural products. However, only 30% reported a willingness to pay a premium.

Strategic Insight:
Importantly, 54% of consumers said they would choose an Indigenous agricultural product over another if the price and quality were comparable.

Predicting interest in purchasing Indigenous agricultural products

To gain deeper insight into the factors that influence consumer interest and willingness to pay a premium, *yamagigu* conducted further analysis on data from an online survey with a representative sample of Australian. The analysis can help reveal 'what matters most' to Australian consumers, and therefore aspects of Indigenous agricultural products that might be marketed to support or increase market share.

Key findings from the analysis showed that:

- There was no relationship between demographic factors (age, gender, remoteness and Aboriginal and Torres Strait Islander status) and interest in purchasing Indigenous agricultural products, suggesting that purchase interest is not confined to a particular demographic group.
- Characteristics of Indigenous agricultural products were associated with purchase interest. Specifically, consumers were more likely to be interested in purchasing agricultural products and more willing to pay a premium if they:
    - perceived that the product was produced in an environmentally sustainable way ('caring for Country'), and
    - believed that their purchase would help create jobs for Aboriginal and Torres Strait Islander people ('Access and benefits sharing').
- In addition to characteristics of Indigenous agricultural products, purchase interest was also associated with:
    - recognition that Indigenous agricultural products were diverse and not contained only to native produce,
    - a perception of Indigenous agricultural products having health benefits, and
    - value in a credential that could authenticate claims being made about the product.

There are several implications of these findings. First, consumers are likely to be more interested in purchasing Indigenous agricultural products if they perceive that the product conveys environmental and socials benefits for Aboriginal and Torres Strait Islander peoples, and if they believe there may be health benefits associated with its use. Research that demonstrates the health benefits of Indigenous agricultural products would therefore be well placed.

Second, the positive association with product diversity (native and non-native produce) is likely to be encouraging for Aboriginal and Torres Strait Islander producers working in 'mainstream' agriculture, such as beef cattle. This result suggests that consumers' interest in purchasing Indigenous agricultural products is not limited to 'niche' native industries.

Finally, consumers are much more likely to be interested in purchasing Indigenous agricultural products if they can be certain of the product's authenticity. This provides

very encouraging support for the importance of a credential for supporting consumers' purchase decisions.

Predicting willingness to pay a premium

Key findings from the analysis showed that consumers were more likely to indicate they were willing to pay a premium for Indigenous agricultural products if they:

- placed a value on the product being produced by Aboriginal and Torres Strait Islander producers
- perceived that the product was produced in an environmentally sustainable way ('caring for Country')
- believed that Indigenous agricultural products were diverse and not contained only to native produce
- perceived that Indigenous agricultural products conferred health benefits, and
- valued a credential that could authenticate claims being made about the product.
- believed that they had enough information about Indigenous agricultural products.

These results suggest that educating consumers about Indigenous agricultural products – and specifically, educating them about the ways the products support environmental conservation, their potential health benefits and the Aboriginal and Torres Strait Islander producers – may positively influence consumers' willingness to pay.

Strategic Insight:
As for purchase interest, willingness to pay a premium was strongly associated with the presence of a trusted credential.

Together, the results provide strong support for the importance of a credential in verifying claims of Aboriginal and Torres Strait Islander ownership, caring for Country and Access and benefits sharing. Future research may consider including a measure for Connection to Country, which was not included in this study due to when the survey was developed (i.e. before the product characteristics had been refined). Based on the current findings, we suspect that there would be similar associations between Connection to Country and interest in purchasing and a willingness to pay a premium for Indigenous agricultural products as was found for the other characteristics.

Alignment of export market preferences to Indigenous agricultural products characteristics

This section examines global and regional preferences for Indigenous agricultural products, focusing on five defining characteristics that enhance their marketability: Connection to Culture**,** Connection to Country**,** Caring for Country**,** Access and Benefit Sharing**,** with Aboriginal and Torres Strait Islander Producers at the Centre**.** These attributes resonate across key markets—Europe, North America, and Asia—by aligning with consumer values around sustainability, authenticity, and ethical trade.

Five Indigenous product characteristics

1. *Connection to Culture*
   Indigenous products gain value by incorporating traditional knowledge, cultural expressions, and heritage practices. Examples include marketing health benefits derived from traditional uses (e.g. native grains and jarrah honey) and embedding storytelling, art, or Indigenous language into branding. These cultural elements deepen consumer engagement and trust.
2. *Connection to Country*
   Provenance is increasingly important. Products traceable to specific Indigenous lands or ecosystems are perceived as authentic and premium. This aligns with geographical indication preferences in European markets and enhances the perceived integrity of the product in all regions.
3. *Caring for Country*
   Environmental stewardship is a global expectation, with Indigenous agricultural practices—such as wild harvesting or regenerative farming—offering strong alignment. Brands that promote their low ecological footprint and support for biodiversity tap into the growing green economy and consumer demand for sustainable goods.
4. *Access and Benefit Sharing*
   Equitable benefit-sharing with Aboriginal and Torres Strait Islander communities enhances appeal, particularly in Europe and North America, where ethical sourcing is highly valued. Compliance with frameworks like the Nagoya Protocol[11] and transparent community partnerships are critical.
5. *Aboriginal and Torres Strait Islander Producers at the Centre*
   Products should clearly demonstrate Aboriginal and Torres Strait Islander ownership or management. Authenticity and social impact are compelling selling points—consumers are willing to pay 10–15% more[12] for verified Aboriginal and Torres Strait Islander-led goods. Certifications and endorsements that verify Aboriginal and Torres Strait Islander leadership help build market trust.

These characteristics correspond with international ethical standards such as the Union for Ethical BioTrade (UEBT) Standard[13] and align with Environmental, Social and Governance (ESG) -driven procurement policies worldwide.

The table below (Table 7) links the key characteristics identified as part of the Indigenous Agricultural Product Framework (IAPF) and connects them to insights that appeal to consumers in three major export markets: Europe, North America, and Asia. It highlights regional differences in how consumers engage with themes such as cultural connection, provenance, environmental care, ethical sourcing, and Aboriginal and Torres Strait Islander leadership. These insights are essential for aligning product development, marketing, and certification with international expectations. Further detail on the implications of these

[11] The Nagoya Protocol - Convention on Biological Diversity - DCCEEW

[12] Pilbara Development Commission. (2024, February 29). Real or fake? Study finds consumers willing to pay more for authentic Aboriginal merchandise but don't know how much is fake. https://www.pdc.wa.gov.au/news/real-or-fake-study-finds-consumers-willing-to-pay-more-for-authentic-aboriginal-merchandise-but-dont-know-how-much-is-fake/10010

[13] https://uebt.org/setting-the-standard

characteristics for Aboriginal and Torres Strait Islander producers in each region is provided in the sections that follow.

Table 7: IAPF Characteristics appeal by geographical region

IAPF Characteristic	Europe	North America	Asia
Connection to Culture	Values authenticity and Indigenous heritage. Brands should feature cultural stories, artists' designs, and language. Community benefit adds appeal.	Seeks novelty and authenticity; willing to pay a premium (10–15%). [14] Cultural stories and community leadership build trust.	Views Australian products as "natural" and "healthy." [15] Cultural narratives are novel selling points in tourism and premium sectors.
Connection to Country	Provenance matters. Prefers origin labelling (e.g. GI schemes). [16] "Australian Outback" or regional storytelling aligns with terroir interests.	"Product of Australia" is a trust marker. Highlight preserved landscapes, pristine environments, and seasonal qualities.	Strong clean/green perception. Emphasise Australia's ecosystem, wilderness, and harvesting on Country (e.g. through video storytelling).
Caring for Country	Favors sustainability, organic/regenerative practices. Eco-certifications and Aboriginal and Torres Strait Islander land care practices resonate with EU Green Deal ethos. [17]	Growing eco-awareness. "Organic" and "sustainable" labels appeal. [18]Indigenous stewardship and environmental justice matter, especially in regions with more progressive social and environmental values.	Sustainability awareness increasing. Highlight low pesticide use, biodiversity, and wild harvesting to appeal to conscious consumers. [19]
Access & Benefit Sharing	Ethical sourcing expected. Compliance with Nagoya Protocol, royalty transparency, and fair-trade labels	Many consumers value fair trade and equitable supply chains. Certifications (Fair Trade USA, B Corp) and Indigenous partnerships	Less regulation, but consumers value human-interest and community-benefit stories. Buyers paying a premium expect

[14] Pilbara Development Commission. (2022, September 1). *Real or fake? Study finds consumers willing to pay more for authentic Aboriginal merchandise but don't know how much is fake*. https://www.pdc.wa.gov.au/news/real-or-fake-study-finds-consumers-willing-to-pay-more-for-authentic-aboriginal-merchandise-but-dont-know-how-much-is-fake/10010

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[18] Whelan, T., & Kronthal-Sacco, R. (2023, September). *Research: Consumers' sustainability demands are rising*. Harvard Business Review. Retrieved from https://hbr.org/2023/09/research-consumers-sustainability-demands-are-rising

[19] Bain & Company. (2023, August 22). *Unpacking Asia-Pacific consumers' new love affair with sustainability*. https://www.bain.com/insights/unpacking-asia-pacific-consumers-new-love-affair-with-sustainability/

IAPF Characteristic	Europe	North America	Asia
	(e.g. Fair for Life) build credibility. [20]	(e.g. dual branding) are persuasive. [21]	benefit-sharing evidence.
Producers at Centre	Aboriginal and Torres Strait Islander ownership (≥51%) is a strong trust signal. EU buyers want traceability and participation. Cultural imports may soon require Aboriginal and Torres Strait Islander input. [22]	Indigenous brands are respected. Labels like "Made by Indigenous Peoples" are effective. Local involvement by Traditional Owners builds appeal.	Emphasise brand founder stories and pioneering status. Strong endorsements and social-good alignment (e.g. cause marketing) matter in markets such as Japan [23] and South Korea [24].

Global trends & regional insights

The global trends and regional insights presented in this section are based on a comprehensive review of market research, consumer behaviour analyses, and international trade dynamics. Our understanding was shaped by synthesising data from publicly available market reports, industry consultations, and real-time observations from trade and export activity. We focused on identifying patterns in consumer demand, certification requirements, and brand positioning strategies across key global regions. Special attention was paid to how themes such as sustainability, cultural authenticity, health consciousness, and ethical sourcing are influencing premium food markets. This informed our assessment of strategic opportunities for Aboriginal and Torres Strait Islander producers across Europe, North America, and Asia.

Global trends

- **Sustainability & ethical sourcing**:
  Consumers globally expect transparency in supply chains. Products must uphold environmental care and support Indigenous rights. Native foods are increasingly popular due to their low input demands and ecological benefits.
- **Authenticity & provenance:**
  Verified origin is a major asset. Market studies reveal consumers across the UK, US, China, and Australia will pay more for certified authentic Indigenous products. Clear storytelling, traceable labelling, and cultural narratives create premium differentiation.

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[20] Dragon Sourcing. (2023, April 17). *Ethical sourcing in Europe: Best practices for responsible procurement*. https://www.dragonsourcing.com/ethical-sourcing-in-europe/
[21] B Lab U.S. & Canada. (n.d.). *How Fair Trade USA and B Corp certification help businesses amplify justice and positive impact*. Retrieved from https://usca.bcorporation.net/zbtcz10z20/how-fair-trade-usa-and-b-corp-certification-help-businesses-amplify-justice-and-positive-impact/
[22] RepuLinks. (2023, October 2). *Building trust through inclusive branding: Why cultural authenticity matters*. https://www.repulinks.com/blog/building-trust-through-inclusive-branding
[23] UBS. (2021). *Japan ESG Consumer: New values & social impact importance spread among Japanese consumers*. UBS Global. Retrieved from
[24] Goedertier, F., Weijters, B., & Van den Bergh, J. (2024). *South Korea and Singapore top the world in willingness to pay for sustainable, inclusive brands*. Vlerick Business School.

- **Health & "Clean" image:**
  Australian goods, especially bushfoods like Kakadu plum, are seen as natural and/or healthy. Asian markets, in particular, trust Australian food safety and associate products with purity and nutritional benefits.
- **Culinary innovation:**
  Global interest in bushfoods is growing due to media, fine dining, and wellness trends. Markets such as Europe and North America are incorporating Indigenous ingredients into gourmet cooking, while Asia is receptive to native superfoods and natural health products.

Europe

Market positioning: Eco-conscious, provenance-centric, ethically discerning

European markets are showing growing demand for ethically produced[25], environmentally sustainable products[26] with authentic cultural narratives. These trends intersect strongly with Indigenous Agricultural products that can demonstrate:

- Regenerative harvesting, biodiversity contributions, and carbon neutrality, aligning with policies such as the European Green Deal, European Union's Biodiversity Strategy and Farm to Fork Strategy.
- Compliance with emerging regulatory frameworks such as the Corporate Sustainability Due Diligence Directive (CSDDD) [27] and the Nagoya Protocol[28], which increasingly mandate transparent documentation of origin, community consent, and benefit-sharing. [29]
- Verified cultural storytelling rooted in community-led narratives, language, and heritage. Authenticity is highly valued, while the risk of cultural misappropriation is closely scrutinised by consumers.

While still a niche market segment, Indigenous Agricultural foods are gaining visibility through:

- High-end grocers, specialty health food stores, and online platforms.
- Growing chef-driven demand for ingredients such as lemon myrtle, wattleseed, pepperberry, and Kakadu plum.
- Expansion into wellness and nutraceutical[30] categories, leveraging native superfood positioning.

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[25] Forrester Research. (2021). *European consumers drive the sustainability demand*. Retrieved from https://www.forrester.com/blogs/european-consumers-drive-the-sustainability-demand/

[26] PwC. (2024, May 15). *Consumers willing to pay 9.7% sustainability premium, even as cost-of-living and inflationary concerns weigh: PwC 2024 Voice of the Consumer Survey*. PwC. https://www.pwc.com/gx/en/news-room/press-releases/2024/pwc-2024-voice-of-consumer-survey.html

[27] *Corporate sustainability due diligence*. Retrieved from https://commission.europa.eu/business-economy-euro/doing-business-eu/sustainability-due-diligence-responsible-business/corporate-sustainability-due-diligence_en

[28] European Commission. (n.d.). *Sharing nature's genetic resources*. https://environment.ec.europa.eu/topics/nature-and-biodiversity/sharing-natures-genetic-resources_en

[29] *The EU Corporate Sustainability Due Diligence Directive and Indigenous Peoples' Rights*. Business & Human Rights Resource Centre. Retrieved from https://www.business-humanrights.org/documents/40390/CSDDD_Indigenous_Peoples_Rights.pdf

[30] "a food or part of a food that provides medical or health benefits, including the prevention and/or treatment of a disease." Kalra, E. K. (2003). Nutraceutical—Definition and introduction. *AAPS PharmSci*, *5*(3), 27–28. https://doi.org/10.1208/ps050325

Cultural storytelling also plays a powerful role in product differentiation. European audiences are drawn to rich narratives—particularly those rooted in community, language, and heritage. Products that incorporate Aboriginal and Torres Strait Islander designs, stories, or names may help access premium markets, provided that these elements are authentic and community-sanctioned. The risk of cultural misappropriation remains high, and consumers are quick to disengage with brands that appear to exploit or commercialise identity without consent. As such, brand integrity would benefit from being grounded in verified, community-led expression.[31]

Strategic Insight:
To navigate this opportunity successfully, Aboriginal and Torres Strait Islander exporters could pursue organic certification and clearly communicate their product's ecological footprint. Labelling that links the harvest to Country—for example, "Harvested on [Tribe Name] Country"—can enhance authenticity and traceability.

North America (USA & Canada)

Market positioning: Wellness-driven, socially conscious, innovation-embracing

North America presents growing opportunities for Indigenous Agricultural products across wellness, social impact, and functional food categories. [32] These opportunities are being driven by:

- Strong consumer demand for functional foods with scientifically validated health benefits, particularly among Millennials and Gen Z.
- Preference for non-GMO, gluten-free, and clean-label products supported by credible nutritional data and transparent ingredient sourcing. [33]
- Growing alignment with brands that demonstrate Aboriginal and Torres Strait Islander ownership, profit-sharing, and community leadership in production.

While still emerging, distribution opportunities are increasingly available through:

- Health-oriented retailers such as Whole Foods, Sprouts Farmers Market, and Trader Joe's that prioritise organic, fair-trade, and certified products.
- Fine-dining and modern fusion restaurants actively sourcing unique and culturally significant ingredients. [34]

[31] Provenance. (2023). *Ethical consumption trends*. https://www.provenance.org/news-insights/ethical-consumption-trends
[32] Data Bridge Market Research. (2024). *North America health and wellness food market*. https://www.databridgemarketresearch.com/reports/north-america-health-and-wellness-food-market
[33] Non-GMO Report. (2025, April 6). *Survey shows younger, health-conscious consumers are embracing organic*. https://non-gmoreport.com/survey-shows-younger-health-conscious-consumers-are-embracing-organic/
[34] Nutrition and Wellness. (2024). *Kakadu plum: Remarkable health benefits*. https://www.nutrition-and-wellness.com/blog/kakadu-plum-the-australian-superfruit-with-remarkable-health-benefits/

- E-commerce platforms (e.g. Thrive Market) that serve health-conscious and ethically motivated consumer segments.

Certification plays a pivotal role in market access and brand trust:

- Seals such as USDA Organic, Fair Trade USA, and B Corp certification are important market signals.
- Indigenous-led certification models, such as Canada's "Proudly Indigenous" seal, may serve as reference models for culturally credible verification systems.

Ethical consumption continues to drive brand loyalty. Younger consumers in particular respond to businesses that demonstrate social purpose and cultural responsibility. Brands that clearly communicate Indigenous ownership, profit-sharing, and community leadership in production are well-positioned to build trust. Co-branded campaigns with Indigenous organisations or land councils have the potential to not only enhance authenticity, but also meet the growing demand for cause-based marketing. This strategy creates emotional resonance and commercial differentiation, especially when it demonstrates that the benefits of trade flow directly to the communities of origin.

Certification remains a critical trust mechanism. Seals such as USDA Organic, Fair Trade USA, and B Corp play a pivotal role in validating product quality and ethical supply chain credentials. Canadian and US-based Indigenous communities have also developed proprietary verification systems, such as the "Proudly Indigenous" seal, offering a model that Australian exporters could adopt or partner with to enhance legitimacy in North American markets.[35] To maximise success, exporters should frame messaging around scientific integrity and traceability—emphasising claims like "100x the Vitamin C of oranges" or "harvested pesticide-free on Indigenous land."

Strategic Insight:
Storytelling formats that include documentary-style videos and on-Country imagery can strengthen consumer connection to the cultural and ecological origins of the product. Opportunities also exist in forming partnerships with Aboriginal and Torres Strait Islander-owned enterprises, and attending key industry trade shows, where health-conscious and cause-driven buyers are actively scouting new offerings.

Asia (China, Japan, Southeast Asia)

Market positioning: Health-focused, prestige-oriented, culturally curious

Asia's diverse and fast-growing markets present significant opportunities for Indigenous Agricultural products that can meet rising consumer expectations for health, safety, and authentic origin.[36] These opportunities are being driven by:

[35] Proudly Indigenous Crafts & Designs. (n.d.). *Proudly Indigenous*. Retrieved May 30, 2025, from https://proudlyindigenouscrafts.com/proudly-indigenous/
[36] Future Market Insights. (2025). *Asia's functional foods: Prospects and hurdles*. https://www.futuremarketinsights.com/blogs/functional-foods-market

- Heightened demand for immune-boosting, functional foods and nutraceuticals following the COVID-19 pandemic. [37]
- Australia's reputation for "clean, green, and safe" food production offering a strong platform for market entry. [38]
- Consumer preference in North and East Asia for novel, high-status products backed by government endorsement and scientific validation.

Emerging growth segments include:

- Southeast Asia's growing middle class driving demand for specialty grains, health supplements, and herbal teas. [39]
- E-commerce platforms in China (e.g. JD.com, Tmall) which require strong brand positioning around food safety, health claims, and traceability.
- Japanese and Korean retail markets where detailed provenance, cultural information, and local regulatory compliance (e.g. Japan Agricultural Standards) [40] are critical.
- Expanded opportunities through Halal certification to serve Muslim-majority countries such as Malaysia and Indonesia.

Cultural awareness of Aboriginal and Torres Strait Islanders remains limited but is growing across the region:

- Brand storytelling that incorporates education about Country, traditional uses, and Aboriginal and Torres Strait Islander community connections is increasingly important.
- Packaging innovations such as QR codes linking to short films or producer interviews help build consumer understanding and trust.
- Partnerships with local influencers, importers, and organisations such as Supply Nation may assist in bridging cultural and linguistic gaps.

While awareness of Aboriginal and Torres Strait Islander culture remains relatively low across the region, there is a growing sense of curiosity and openness to learning. To capitalise on this, product packaging and brand campaigns may benefit from integrating educational elements sharing information about Country, traditional uses, and Aboriginal and Torres Strait Islander community connections. Visual assets such as QR codes linking to short films or interviews with producers can humanise the supply chain and enrich consumer understanding. Certifications from organisations like Supply Nation may further enhance cultural credibility, while partnerships with local influencers and trusted importers may help bridge cultural and linguistic gaps.

Forming pilot partnerships with experienced Asian food distributors and retailers may help to refining product-market fit and establishing brand presence in culturally complex and

[37] Intralink Group. (2023). *Quest for wellness: Japan's growing appetite for functional foods*. https://www.intralinkgroup.com/en-GB/Latest/Intralink-Insights/August-2023/Quest-for-wellness-Japans-growing-appetite-for-fun
[38] Source of Asia. (2024). *Food supplements industry in Southeast Asia 2024 – 2025*. https://www.sourceofasia.com/food-supplements-industry-in-southeast-asia-2024-2025/
[39] Retail Asia. (2025). *Consumers drive demand for bold flavours, functional foods*. https://retailasia.com/news/consumers-drive-demand-bold-flavours-functional-foods
[40] Japanese Agricultural Standards (JAS): MAFF

fast-moving marketplaces. Translated packaging that caters to local literacy and norms, combined with digitally accessible origin stories, adds depth and trust.

Strategic Insight:
To succeed in these markets, exporters should foreground scientific credentials, such as antioxidant levels or traditional medicinal uses, and explore crossover potential with the beauty and wellness sectors through products like bushfood-infused cosmetics and teas.

Tailor branding and communication to each export region

To effectively position Indigenous products in international markets, strategies should be tailored to regional consumer preferences, retail norms, and cultural sensitivities. The table below (Table 8) outlines key market entry considerations for Europe, North America, and Asia, focusing on certification requirements, storytelling techniques, packaging cues, and preferred distribution channels.

Table 8: Regional Positioning Strategies for Indigenous Australian Products

Region	Key Strategy Areas	Details
Europe	Certifications	Prioritise EU Organic, Fair for Life, and Ethical Biotrade standards.
	Geo-labelling	Apply Protected Geographical Indications (PGIs) to highlight origin (e.g. *"Wild Kakadu Plum of Arnhem Land"*).
	Cultural Storytelling	Collaborate with artists, language speakers, and Elders; include traditional names on packaging.
	Packaging Design	Use minimalist, eco-themed branding with native imagery; feature terms like *"EU Climate Positive"* and *"Fair Sourced."*
North America (USA & Canada)	Nutritional Positioning	Integrate scientific data (e.g. antioxidants, vitamin levels) into marketing and point-of-sale displays.
	Retail & Media Partnerships	Co-brand with Indigenous influencers (chefs, wellness coaches); pitch to health blogs and magazines (e.g. *MindBodyGreen*, *Clean Eating*).
	Cause Marketing	Implement campaigns like "Buy One, Give One" or "5% to Country" to attract socially conscious consumers.
Asia (China, Japan, Southeast Asia)	Health & Safety Assurance	Emphasise purity with labels like *"100% Natural from Australia"*, *"Certified Pesticide-Free"*, *"Lab-Tested."* Include Halal (for Southeast Asia) and JAS (Japan) certifications.
	Health Product Crossover	Position products like Kakadu plum powder or teas within beauty and wellness sectors (e.g. collagen boosters, detox teas).
	Educational Storytelling	Use in-store posters, WeChat mini-programs, and bilingual packaging. Include videos explaining Country, community, and use.

By taking a tailored approach to regional preferences, Aboriginal and Torres Strait Islander producers can position themselves competitively across global value chains. Success depends on combining authentic provenance and cultural narratives with rigorous quality assurance, ethical sourcing, and market-savvy branding.

Responding to global market expectations: A strategic pathway for Indigenous agricultural exports

As international markets become increasingly focused on ethical sourcing, sustainability, and provenance, Aboriginal and Torres Strait Islander agricultural producers must adopt practices that meet these evolving expectations. This includes establishing recognised credentials, aligning with global environmental and social values, tailoring messaging for diverse export regions, and proactively building relationships with buyers. These measures are not only critical for accessing premium markets but also for ensuring long-term competitiveness and recognition in global trade systems.

Meeting demand for authentic credentials and certification

Global buyers and consumers are demanding verified authenticity—particularly for Indigenous-branded products. To satisfy this demand, producers must implement systems that verify cultural governance, ethical sourcing, and community legitimacy. Digital traceability tools such as GS1 barcoding, blockchain solutions, and QR-coded provenance tags enable international consumers to validate a product's origin, harvesting methods, and the Traditional Owner community behind it.

To gain access to ethically minded premium buyers, endorsements from third-party certification bodies such as the UEBT, Fair Trade International, Fair for Life, and B Corp are increasingly essential. These marks provide credible external validation that aligns with procurement policies in many global retail and hospitality sectors. Collaboration with government entities like DFAT and Austrade can further elevate market presence, particularly through trade promotions such as Taste of Australia[41] and diplomatic delegations.

Aligning with global sustainability and ESG criteria

International markets are placing growing emphasis on environmental sustainability, regenerative agriculture, and climate impact.[42] To remain competitive in these sectors, Aboriginal and Torres Strait Islander producers must explicitly position their products within these narratives. This includes adopting targeted eco-labelling such as "Wild harvested by Traditional Owners," "Regeneratively Grown on Country," or "Carbon Positive," to signal compliance with global eco-preferences.

Measurable environmental outcomes—such as increased soil carbon, restored biodiversity, and emissions reductions—should be captured and communicated using lifecycle analysis

[41] Australian Trade and Investment Commission (2023) *Austrade and Coles taking a taste of Australia to Thailand* https://www.austrade.gov.au/en/news-and-analysis/media-centre/media-releases/austrade-and-coles-taking-a-taste-of-australia-to-thailand

[42] MarketsandMarkets (2022). *Regenerative agriculture market by practice (aquaculture, agroecology, agroforestry, biochar, holistic planned grazing), application (carbon sequestration, nutrition management), and region – Global forecast to 2027*. Retrieved from https://www.marketsandmarkets.com/Market-Reports/regenerative-agriculture-market-52420159.html

and ecological metrics. This supports procurement by ESG-conscious organisations and appeals to green-certified distributors. Multimedia storytelling, such as short videos, infographics, and visual documentation of traditional land care, can be powerful in visually demonstrating these environmental credentials.

In addition, referencing alignment with international frameworks—such as the UN Sustainable Development Goals[43] (SDG 15: Life on Land[44] and SDG 12: Responsible Consumption and Production[45])—helps connect Indigenous products to globally recognised sustainability agendas. Participation in forums such as the Global Alliance for the Future of Food or Regeneration International can further position Indigenous agriculture as a model for climate-smart and regenerative food systems.

Building buyer confidence through direct engagement

International buyers increasingly expect transparency, direct relationships, and authentic brand engagement. Aboriginal and Torres Strait Islander producers can respond to this by offering immersive buyer experiences that go beyond transactional exchanges. These can include virtual or in-person visits to production sites, “Meet the Grower” Zoom sessions with Traditional Owners, and branded video tours that showcase harvesting and Country.

Providing premium sample kits—complete with story cards, recipe guides, and cultural information—caters to distributors, chefs, and specialty retailers who are looking for unique offerings with traceable origins. Partnerships with embassies, diaspora networks, and bilateral trade councils can create new pathways to export markets and offer curated platforms for showcasing Indigenous brands at high-impact events.

Buyers also seek social proof. Sharing case studies of successful Aboriginal and Torres Strait Islander exporters—such as the NAAKPA Kakadu Plum Alliance—and publishing endorsements from chefs, retailers, or respected community voices can bolster credibility and trust.

Staying ahead of regulatory and consumer trends

To sustain long-term export success, Aboriginal and Torres Strait Islander producers must remain agile and informed. Markets are evolving rapidly, with regulatory changes such as the EU’s deforestation-free compliance laws, tightening of Asian labelling and health claims standards, and shifting Halal certification requirements. Staying ahead of these developments is vital for avoiding compliance risks and capitalising on new opportunities.

Investing in consumer insight—through targeted surveys and e-commerce performance analysis—helps producers understand shifting preferences and fine-tune offerings. Forming partnerships with global ethical trade organisations such as the World Fair Trade Organization (WFTO) or Slow Food International provides both reputational benefits and access to aligned buyer networks.

Finally, continuous product innovation is key to maintaining relevance in export markets. Working with research bodies such as CSIRO and universities to test new product formats

[43] Sustainable Development Goals (SDGs) | UN Office for Sustainable Development
[44] Goal 15: Life on land - The Global Goals
[45] Goal 12: Responsible consumption and production - The Global Goals

(e.g. snack bars, health supplements, spice blends) ensures that Indigenous foods remain contemporary while preserving cultural integrity.

These strategies enable Aboriginal and Torres Strait Islander agricultural producers to thrive in international markets by aligning product attributes with the values, expectations, and regulations of each region. By investing in certification, sustainability storytelling, cultural authenticity, and direct buyer engagement, Aboriginal and Torres Strait enterprises can build premium, high-trust brands that stand out on the world stage—delivering economic, cultural, and ecological value.

4: Export maturity insights

Chapter Summary:

- **Export readiness remains low** among Aboriginal and Torres Strait Islander agribusinesses, with most in early stages due to small scale, limited infrastructure, and capability gaps in production, compliance, and marketing.
- **Cultural integrity and community benefit** are central to Indigenous export strategies, requiring approaches that balance commercial goals with respect for Country, traditional knowledge, and Indigenous governance.
- **Significant barriers** include access to capital, skills in international trade, logistical challenges, and regulatory complexity—underscoring the need for phased growth beginning with domestic consolidation.
- **Targeted support programs** (e.g. Austrade, IBA, ILSC, DFAT) play a crucial role in export development by offering capital, training, mentorship, and pathways for certification and market access.
- **Successful case studies like Kakadu Organics** demonstrate the power of combining cultural authenticity, strategic planning, and institutional support to achieve export success and community-led growth.

Growing global markets for Indigenous agricultural products

This section explores the concept of “export maturity” — the organisational readiness required to succeed in global markets. Through detailed criteria, case study analysis, and a gap-based diagnostic, we assess where Aboriginal and Torres Strait Islander agribusinesses currently stand and what is needed to bridge the divide between potential and performance.

Indigenous Agricultural Products — cultivated or wild-harvested goods produced on Country by Aboriginal and Torres Strait Islander organisations — carry cultural and commercial value. These products represent more than commodities: they are extensions of Country, knowledge systems, and custodianship that span millennia.

Today, Aboriginal and Torres Strait Islander agribusinesses are stepping onto the global stage, building on a legacy of trade, resilience, and innovation. International demand for ethically sourced, sustainable, and authentic goods is growing. Government and industry increasingly recognise that enabling Aboriginal and Torres Strait exporters is not just an economic opportunity — it is also an important act of cultural empowerment and regional development.

Export readiness for Aboriginal and Torres Strait Islander businesses

Export readiness refers to a business’s ability to reliably, competitively, and sustainably deliver products to international markets. For Aboriginal and Torres Strait Islander enterprises, this journey involves not only aligning with technical and commercial export requirements but also embedding cultural integrity, protecting intellectual property, and ensuring that community benefit-sharing is central to their global engagement.

Allocating resources like time, funding, and leadership is critical to ensure purposeful market entry. Operational capability is crucial for meeting international demand, necessitating investments in techniques, equipment, and partnerships that preserve cultural authenticity and traceability to Country.

Compliance with certifications and regulations, including food safety, organic standards, and intellectual property rights, is essential. Frameworks like the Indigenous Agricultural Product credential help safeguard provenance. A robust supply chain ensures product integrity, focusing on storage, packaging, and logistics to meet premium market demands for transparency and ethical sourcing. Financially, exporting involves significant costs, requiring capital reserves and cash flow management. Support programs like Austrade's EMDG can mitigate these expenses.

Skill development in trade policy, consumer trends, and negotiation is vital. Aboriginal and Torres Strait Islander businesses can leverage tools like Austrade's Go Global Toolkit for training and mentoring, and Supply Nations 'Export Nation' program[46], specifically for Aboriginal and Torres Strait Businesses. Export readiness extends beyond compliance; it integrates vision, cultural leadership, and international awareness to unlock markets while preserving community stories and connection to Country. Despite available support, many Aboriginal and Torres Strait Islander agribusinesses remain in early stages, facing challenges in production scale, compliance, and marketing. A phased approach—focusing first on domestic growth—is recommended before exploring global opportunities.

External support from government, financial, and Aboriginal and Torres Strait Islander-led organisations is crucial. These entities provide assistance in export strategy, capital access, compliance, and integrating cultural considerations into trade policies.

A wide range of institutions offer targeted support to assist Aboriginal and Torres Strait Islander businesses in building export capability and navigating international markets.

Strategic Insight:
While the components outlined above are essential for export readiness, our consultation and research suggest that most Aboriginal and Torres Strait Islander agribusinesses are still in the early stages of this journey. The majority of businesses are small, locally focused, and face significant capability constraints in areas like production scale, regulatory compliance, and international marketing. Many respondents emphasised the need to first secure and grow within domestic markets before pursuing export.

Furthermore, issues of consistent supply, access to capital, and technical know-how remain prevalent. These challenges underscore the importance of a phased approach—starting with domestic market consolidation and capability-building—before scaling to international opportunities. Supply Nation reports that of their sample, currently only 1.5% of Aboriginal and Torres Strait businesses export goods (not Agriculture specific), and export sales represent a small portion of total sales for most Aboriginal and Torres Strait exporters studied.[47] Notably this will be even smaller for Aboriginal and Torres Strait Islander agricultural producers.

Navigating the complex path to export requires not only internal capability but also access to targeted external support. A range of institutions spanning government agencies, financial providers, trade facilitators, and Aboriginal and Torres Strait Islander-led

[46] Export Nation - Supply Nation

[47] Department of Foreign Affairs and Trade, and Supply Nation (2024), *First Nations businesses succeeding internationally* - first-nations-businesses-succeeding-internationally (3).pdf

organisations play a crucial role in helping Aboriginal and Torres Strait businesses engage with global markets. These entities offer tailored assistance in areas such as export strategy development, access to capital, documentation and compliance, capability building, and integration of cultural considerations into trade policy. The table below (table 9) summarises the key organisations and programs that actively support Aboriginal and Torres Strait Islander businesses in their export readiness journey, highlighting their respective roles and areas of impact.

Table 9: Organisations supporting Indigenous Exports

Organisation	Role and Support Provided
Austrade	Offers training via the *Go Global Toolkit*, financial support through the *Export Market Development Grants (EMDG)*, and exposure through *Landing Pads* and *trade missions*. Collaborates with DFAT and Supply Nation to promote Aboriginal and Torres Strait trade opportunities globally.
Export Development Funding	*Agri-Business Expansion Initiative (ABEI)* and *Agricultural Traceability Grants*, provided capital for market access, traceability, and export readiness. Notable projects that have received funding include the Noongar Land Enterprise pilot and ILSC's credential framework.
Indigenous Business Australia (IBA)	Provides financial products, business coaching, and grants to Aboriginal and Torres Strait Islander businesses. IBA supports Indigenous entrepreneurs and is positioned to further enhance support specifically for export preparedness.
Indigenous Land and Sea Corporation (ILSC)	Co-invests in Aboriginal and Torres Strait Islander agribusinesses to build capability, infrastructure, and long-term sustainability, with a focus on land-based agricultural enterprises.
Policy and Trade Integration (DFAT)	Through the *First Nations Trade and Investment Unit*, embeds Indigenous interests in trade policy and international agreements, ensuring inclusive participation in foreign markets.
Australian Chamber of Commerce and Industry (ACCI)	ACCI assists exporters by providing key documents required for international trade. These include: *Certificates of Origin,* to certify that goods are manufactured or processed in Australia; *ATA Carnets*, temporary admission documents that allow goods to enter multiple countries without paying duties, ideal for trade shows or exhibitions; *Legalisation of Documents* which authenticates documents to satisfy the legal requirements of foreign governments; *Free Trade Agreement Documentation*, where ACCI helps businesses navigate and utilise FTAs to ensure compliance and benefit from tariff reductions.

The value of these support mechanisms is best illustrated through real-world examples of Aboriginal and Torres Strait Islander businesses leveraging them to achieve export success. The following case study of *Kakadu Organics* demonstrates how strategic planning, cultural authenticity, and access to targeted government programs can enable meaningful international growth while remaining grounded in community and Country.

Case Study: Kakadu Organics – Taking Culture Global

A business rooted in Country

Founded by **Kylie-Lee Bradford**, a Murrumburr woman from Kakadu, **Kakadu Organics** began with a vision to share the wisdom of native botanicals — such as Kakadu plum, lemon myrtle, and bush spices — through a modern wellness and food brand. The company prioritised wild-harvested, culturally significant ingredients and invested in supporting Aboriginal and Torres Strait Islander women through enterprise and leadership.

Before looking outward, Kakadu Organics focused on domestic success, building a strong local following and product line that included native teas, dukkah, jams, and skincare. By establishing this foundation first, the business was well-positioned to pursue export with confidence.

Strategic expansion via Austrade's landing pad

In 2023, Kakadu Organics was selected for Austrade's **Singapore Landing Pad**, a program designed to prepare First Nations businesses for international growth. Over three days, the program delivered training in brand positioning, market entry strategies, and introduced participants to buyers and retailers including Ryan's Grocery[48] (a Singapore based gourmet food store which stocks a wide selection of top quality organic, gluten-, allergen- and preservative-free specialty produce imported mainly from Australia).

This encounter became a turning point. Kakadu Organics signed its first overseas deal and launched a product range into six Singaporean stores. Revenue increased by approximately 30% as a result of increased demand of from the Singaporean market, and Kylie-Lee began exploratory efforts in Malaysia and the UK.

Scaling with support and shared success

Beyond financial gain, Kakadu Organics' journey reflects a broader social mission. The business remains committed to community development and Aboriginal and Torres Strait Islander mentorship. It continues to engage with programs like the **Future Food Global Accelerator** and **DFAT's WIPO Bushfoods Pilot**, seeking to refine its IP protections and market offerings.

This case study illustrates the value of structured support, cultural authenticity, and market-facing strategy. It provides a template for other Aboriginal and Torres Strait Islander enterprises ready to embark on an export journey — one that balances commercial growth with cultural integrity.

Barriers to export readiness for Indigenous agribusinesses

The previous section outlined the characteristics and capabilities required for businesses to be export-ready. In this section, we assess the current state of Aboriginal and Torres Strait Islander agribusinesses in relation to these criteria. Drawing on consultations, case studies, and policy reviews, we identify the primary barriers that hinder many Aboriginal and Torres Strait Islander businesses from achieving export readiness—highlighting the

[48] Our Organic Story | Ryan's Grocery

gap between aspiration and practical readiness. Despite producing high-value products rooted in traditional knowledge and sustainability, these businesses face significant structural challenges. Geographical isolation, limited resource access, and a fragmented support ecosystem exacerbate the difficulties of entering international markets.

A key constraint is production scale. Many Aboriginal and Torres Strait Islander producers operate on a small scale in remote locations, impeding their ability to meet export market demand. In sectors like bushfood, seasonal cycles and fragmented supply chains disrupt consistent availability. Additionally, inadequate infrastructure—such as local processing facilities and mechanised equipment—restricts capacity while preserving cultural and environmental values.

Access to capital presents another major barrier. Exporting requires considerable upfront investment in product development, certifications, and market entry. Many Aboriginal and Torres Strait Islander businesses struggle to secure financing, particularly as traditional lenders often undervalue communal land or lack understanding of Indigenous governance. While institutions like Indigenous Business Australia offer financial support, they don't always address export-specific needs.

Skills and knowledge gaps further limit export potential. Despite strong entrepreneurial drive, many Aboriginal and Torres Strait Islander businesses lack expertise in international regulations, market analysis, and certification management. There's a pressing need for long-term, culturally responsive training, mentoring, and peer learning to navigate the export landscape.

Infrastructure limitations also pose challenges. Poor transport networks, insufficient cold-chain storage, and unreliable internet inflate logistics costs and jeopardise product integrity. For instance, transporting bush plums over long distances for processing creates inefficiencies affecting profitability and quality.

Regulatory compliance is complex, with costs and challenges linked to organic certification, halal accreditation, export licences, and phytosanitary clearance. Aboriginal and Torres Strait Islander producers often need in-community assistance to understand these obligations, as non-compliance risks exclusion from markets prioritising traceability and safety.

Finally, market visibility is limited. Although there's increasing global demand for authentic, sustainably produced Indigenous goods, many businesses struggle to effectively communicate their narratives. Success in international markets requires compelling branding, storytelling, and insights into premium buyer expectations, alongside access to promotional networks and media channels.

Strategic Insight:
Despite the challenges mentioned above, as well as ongoing barriers identified throughout this project – including size and maturity of Aboriginal and Torres Strait Islander businesses, we see a growing number of support programs and partnerships emerging. As the ecosystem evolves, targeted and culturally appropriate interventions will be key to unlocking export success and ensuring that growth is both commercially viable and community led.

Realising a culturally grounded export future

Aboriginal and Torres Strait Islander agribusinesses across Australia are uniquely positioned to bring to global markets products that are culturally rich, environmentally

sustainable, and deeply rooted in Country. As international interest in ethical and authentic goods continues to rise, there is a significant opportunity to elevate Indigenous agricultural products as premium offerings on the world stage.

However, unlocking this potential requires a deliberate and well-supported approach – due to the niche-market they supply to. From tailored financing mechanisms and culturally responsive training to improved logistics and regulatory support, the success of Indigenous exports depends on a coordinated effort across government, industry, and community.

The journey of businesses such as Kakadu Organics demonstrates what is possible when strong cultural foundations, strategic planning, and institutional support align. This case study provides a blueprint for how Aboriginal and Torres Strait Islander-led enterprises can grow into global markets while staying true to local values and community priorities.

As Australia looks to diversify its export economy, investing in Indigenous agricultural exports is not just a growth area — it is a nation-building opportunity. By fostering an ecosystem that champions both commercial excellence and cultural integrity, it paves the way for economic empowerment and financial independence among Aboriginal and Torres Strait Islander communities.

This approach supports self-determination by enabling Aboriginal and Torres Strait Islander enterprises to thrive in global markets on their own terms, thereby contributing to broader targets such as in Closing the Gap. By integrating cultural narratives into commercial ventures, we ensure that economic growth is not only measured by profitability but also by its ability to sustain and enrich cultural identity, therefore creating a holistic impact that strengthens both community ties and economic foundations.

5: Uplifting the Indigenous agricultural sector to be export ready

Chapter Summary:

- **Barriers and Strategic Focus**: The report identifies structural barriers hindering Indigenous participation in export markets and outlines five key focus areas to strengthen Aboriginal and Torres Strait Islander agribusinesses: finance, infrastructure, market access, innovation, and monitoring
- **Finance and Support Access**: Tailored financial instruments (grants, loans, EMDG support) are proposed to reduce entry barriers and improve cash flow, enabling businesses to better prepare for international trade
- **Infrastructure and Supply Chains**: Strategic investment in regional processing, cold-chain logistics, and digital connectivity aims to enhance product quality and reliability for global buyers
- **Branding, IP, and Innovation**: Emphasis is placed on storytelling, product R&D (e.g., bushfoods), intellectual property protections, and ethical co-design principles to add value and protect cultural integrity
- **Inclusion and Long-Term Impact**: The report calls for dedicated monitoring frameworks, data collection, and Indigenous leadership in trade policy to ensure long-term, culturally grounded economic inclusion and success.

This section summarises a range of our key findings following our engagement with the Australian Export sector. By understanding the barriers for producers, as well as the service offerings and supports currently on offer to the Agriculture Sector, we have been able to simplify a short list of focus areas, uplift activities and potential outcomes – which is outlined below in table 10, for Government and potential co-investment partners to consider. These may assist with the strategic uplift of the sector and see a potential growth in First Nations Export and Trade. The focus areas below are the result of extensive engagement, research synthesis, and sector analysis undertaken as part of the Indigenous Agricultural Product Framework Project.

They build upon:

- Case studies of Aboriginal and Torres Strait agribusinesses, such as *Kakadu Organics* and the *Northern Australia Aboriginal Kakadu Plum Alliance (NAAKPA)*, which highlight both success and systemic challenges in achieving export maturity.
- Analysis of export readiness frameworks, including Austrade's *Go Global Toolkit*, *Export Market Development Grants (EMDG)* eligibility, and Agriculture Victoria's *Export Readiness Quiz*.
- Consultations with Aboriginal and Torres Strait Islander business leaders, policy experts, and trade advisors including representatives from DFAT, Austrade, IBA, Supply Nation, and IP Australia.
- Review of government initiatives such as the Agri-Business Expansion Initiative, WIPO Indigenous Knowledge discussions, and pilot projects including the Noongar Land Enterprise traceability trial.

These focus areas and uplift activities are not speculative. They are grounded in lived experience, supported by national programs**,** and aligned with international best practice in Indigenous trade development. Based on the reality that it is a whole of sector effort from producers to government departments and all stakeholders to support the continued development of the Indigenous agricultural sector.

Table 10 - Suggested focus areas to increase Indigenous Agricultural participation in export markets.

Focus Area	Uplift Activates	Outcome
Unlock Dedicated Finance Pathways	• Develop de-risked, culturally tailored grants and loans, • Offer seed funding for export preparation (certification, samples, marketing), • Simplify access to EMDG with targeted Indigenous support.	Stronger cash flow and reduced barriers for Aboriginal and Torres Strait Islander businesses to enter international markets.
Invest in Processing and Logistics	• Co-invest in mobile/regional processing facilities, • Expand cold-chain and storage infrastructure in remote areas, • Improve digital connectivity for remote producers.	Enables consistent, high-quality supply chains from Country to global buyers.
Facilitate Market Access	• Partner with Austrade, DFAT & Supply Nation for curated trade access, and targeted marketing campaigns, • Fund storytelling, branding, and provenance marketing, • Expand participation in Landing Pads and trade delegations.	Opens doors to premium global markets and amplifies Indigenous brand stories.
Support Product Innovation	• Fund R&D into native teas, bushfoods, nutraceuticals, cosmetics, • Ensure Free, Prior and Informed Consent (FPIC), co-design, and benefit-sharing, • Work with IP Australia on Indigenous IP protection, • Align with WIPO treaties and global Traditional Knowledge protocols.	Drives value-added innovation while protecting cultural knowledge and ensuring ethical development.
Monitoring and Evaluation	• Establish an Indigenous Export Advisory Group, • Collect data to inform inclusive policy and program design, • Embed Aboriginal and Torres Strait Islander exporters in national trade strategies and SME supports.	Ensures long-term inclusion, policy accountability, and visibility of Aboriginal and Torres Strait Islander exporters.

Note: Expanding market access and increasing production volumes for Indigenous producers carries inherent risks to Indigenous Cultural and Intellectual Property (ICIP). Without careful safeguards, greater exposure can lead to misappropriation, loss of control, and exploitation of cultural knowledge and expressions. It is therefore essential that any uplift or expansion efforts occur in lockstep with strengthened ICIP protections, ensuring that Indigenous communities retain ownership, agency, and benefit from the use of their cultural heritage in ways that align with their values and protocols.

Conclusion: A global future, grounded in Country

Aboriginal and Torres Strait Islander agribusinesses are at the threshold of global opportunity. Yet too many businesses remain held back by systemic constraints. The ‘Uplift Activities’ outlined above (table 10) are designed to enhance export capabilities, supporting Aboriginal and Torres Strait Islander exports across the board. These

recommendations are crafted to foster a supportive environment for Indigenous products in the global market, operating independently from recommendations made in our Final Report. The latter will specifically address the implementation of the Indigenous Agricultural Product Framework. While both sets of activities/recommendations aim to boost Aboriginal and Torres Strait Islander economic participation, this report's suggestions broadly enhance export readiness, whereas the Final Report's guidance is finely tuned to ensure the Framework's successful execution.

Australia has the tools — and the responsibility — to ensure that Aboriginal and Torres Strait Islander producers are not just included in the national export narrative, but that they lead with distinction. By lowering structural barriers, investing in readiness, and celebrating Indigenous innovation, we elevate a sector capable of delivering high-value products while also regenerating land, supporting communities, and honouring heritage.

This comprehensive approach ensures that economic benefits flow directly to the rightful owners of this heritage, preventing external entities from exploiting their contributions. It empowers Aboriginal and Torres Strait Islander communities to thrive in a manner that is both sustainable and authentic, reinforcing their cultural identity and economic independence. By doing so, we not only foster a more equitable economy but also enhance the resilience and vitality of Aboriginal and Torres Strait Islander communities, ensuring their stories and innovations continue to shape and enrich our shared future.

Exporting Indigenous products is more than trade — it is cultural diplomacy, economic inclusion, and a commitment to Country.

Appendix A: Polis Partners Cost Benefit Analysis Report

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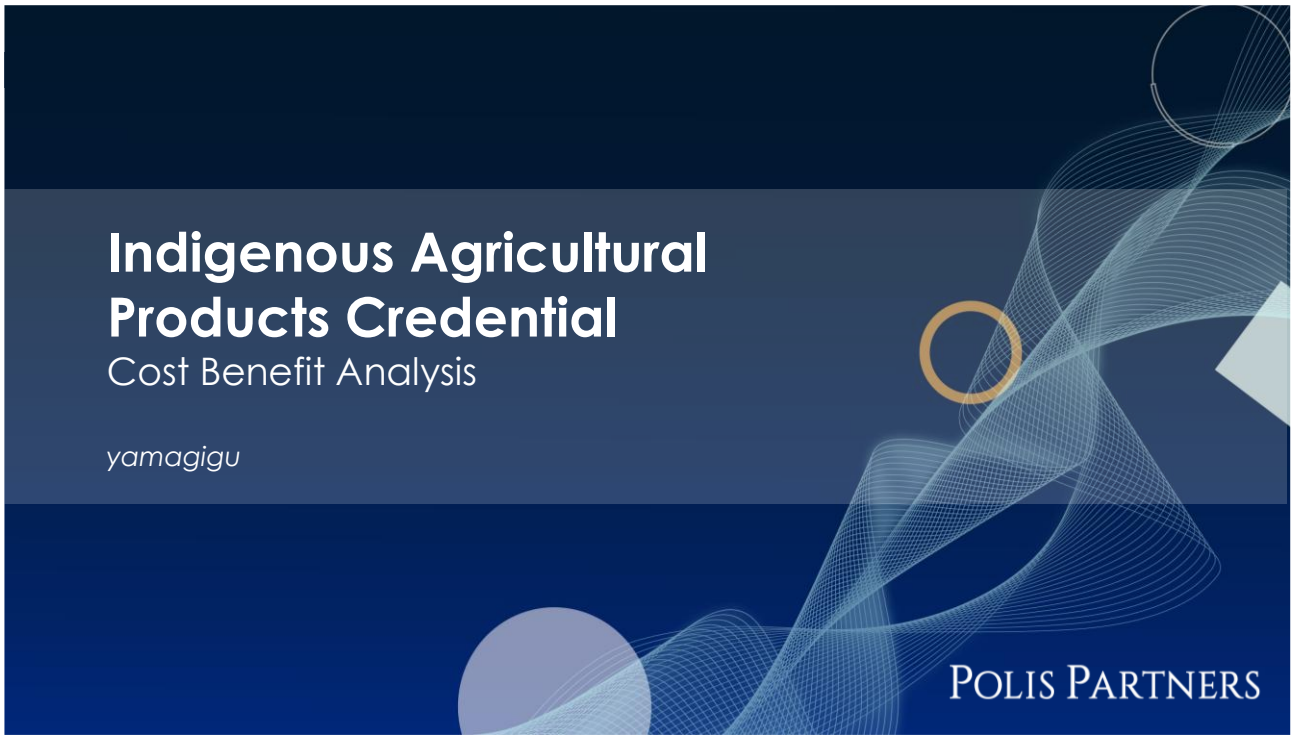


Indigenous Agricultural Products Credential

Cost Benefit Analysis

yamagigu

POLIS PARTNERS

Project Overview

An Indigenous Agricultural Products Credential provides a mechanism for verifying the authenticity and provenance of Indigenous agricultural products – helping to address unmet demand in the market and generating economic benefits.

The Indigenous Agricultural Product Framework (IAPF) project, a collaboration of the Indigenous Land and Sea Corporation (ILSC), the Department of Agriculture, Fisheries and Forestry (DAFF), and the National Farmers Federation (NFF), aims to establish a credential system for Indigenous Agricultural Products. Recognising the multifaceted benefits of Indigenous agriculture, the initiative seeks to verify the authenticity of these products, enhancing economic self-determination for Aboriginal and Torres Strait Islander communities through premiums on verified products, business ownership and employment opportunities.

Indigenous agricultural products are in high demand and can attract premium prices due to their cultural roots and provenance. For Indigenous producers, this creates opportunities for stronger financial returns. Importantly, the cultivation and sale of these products also supports community cohesion, increases intergenerational knowledge sharing, and enhance local economic participation.

Introducing a credential system would strengthen trust in the authenticity of Indigenous products. By embedding clear verification and traceability processes, such a system can protect cultural legitimacy and provide assurance that products originate from Indigenous producers. This visibility helps address consumer skepticism and reinforces the integrity of the supply chain.

Three options have been proposed for the credential - basic verification, enhanced assurance, and advanced traceability. Each option contains differing verification techniques, cost, timing and potential market coverage and economic benefits.

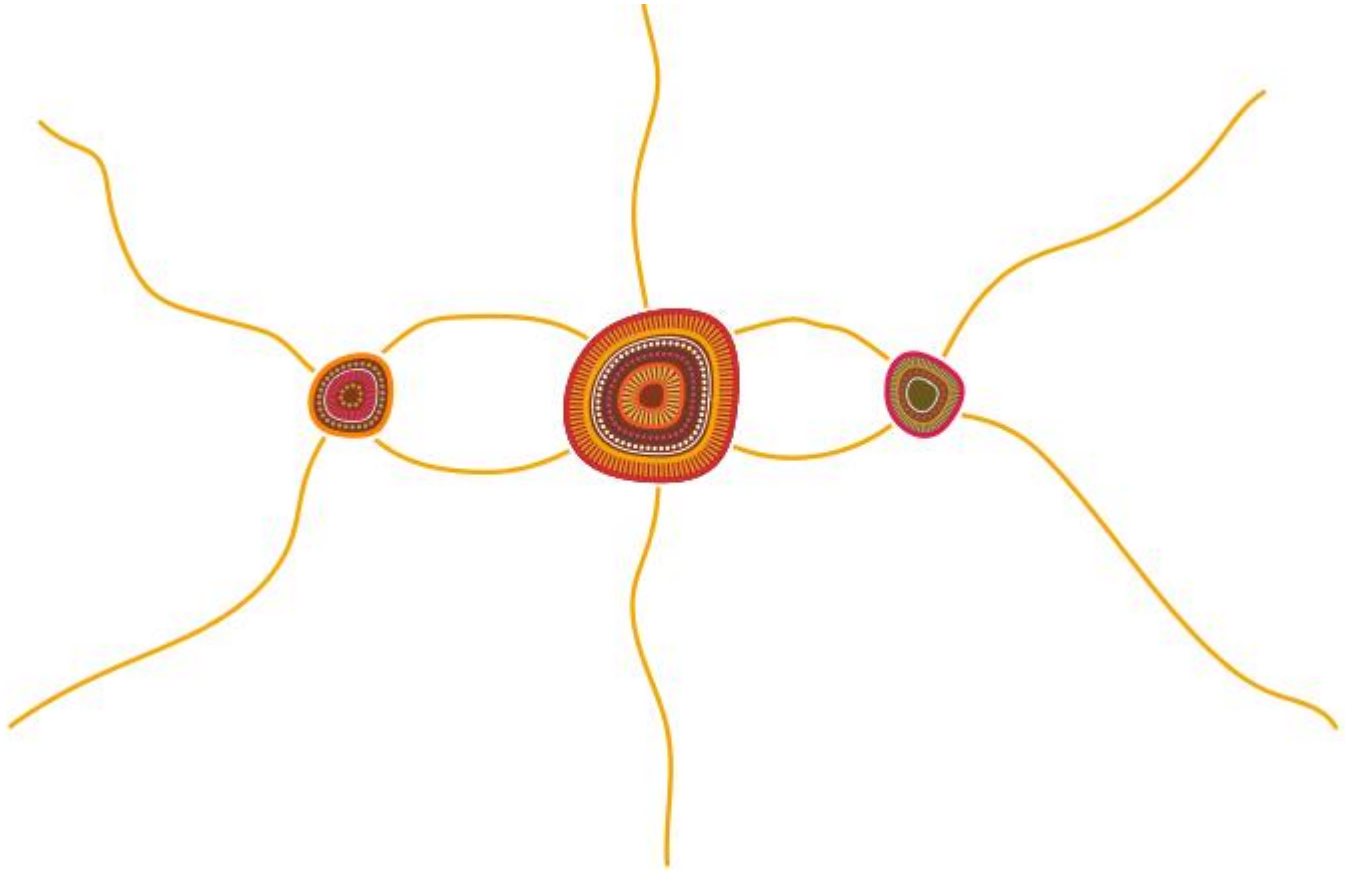
Yamagigu have engaged Polis Partners to undertake an economic cost-benefit analysis (CBA) that quantifies and compares the economic viability of each of the three proposed options.

The purpose of this report is to summarise the key results and assumptions of the economic CBA for the Indigenous Agricultural Products Credential.

The Economic Process

An economic CBA is undertaken to determine the economic efficiency of the Indigenous Agricultural Products Credential. The CBA compares costs of the credential with its benefits to producers, consumers and wider society.

Given the early stage of the credential process, the results of the economic analysis should inform the relative merits of the different credential implementation approaches, as opposed to definitively selecting a 'preferred option' to pursue. Results will provide insights that can inform the option design.



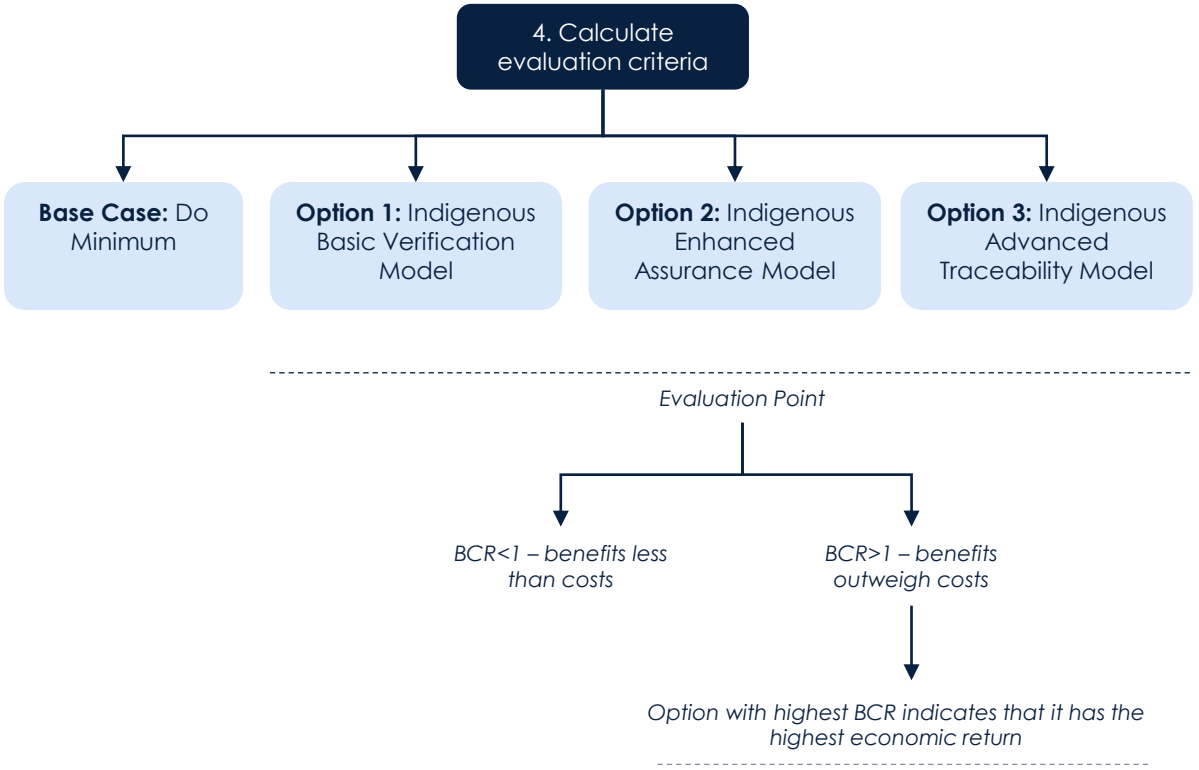
'Together We Grow, Together We Prosper' artwork by David Williams of Gilimbaa.

3

Steps in undertaking a CBA

The key steps applied within the economic process include:

1. **Defining objectives, base and project case options** – Defining the objectives in addition to the base case and project case for comparison.
2. **Identification of benefits and costs** – All benefits and costs are identified and quantified where possible. These are the costs and benefits that may be expected due to the move from the base case to the project case.
3. **Discount future costs and benefits** – All values are discounted to present value terms applying rates specified by relevant NSW Government guidelines.
4. **Calculate evaluation criteria** – The selected measure/s of net economic worth are calculated and interpreted. This report considers both the Net Present Value (NPV) and Benefit Cost Ratio (BCR) measures.
5. **Sensitivity analysis** – Where appropriate, decision criteria are calculated with a range of input values to present the sensitivity of the output values to inputs.
6. **Summarise and report economic findings** – The best performing option is determined from the relevant decision criteria and a report prepared to summarise findings.



Project Options

The economic analysis evaluates the three potential options for the Indigenous Agricultural Products Credential. All are evaluated versus a 'business as usual' base case whereby Indigenous producers continue to sell produce into the market without any recognised credential.

Models	Option 1 – Indigenous Basic Verification	Option 2 – Indigenous Enhanced Assurance	Option 3 – Indigenous Advanced Traceability
Description	Utilises existing third-party organisations to verify the Indigenous status of agricultural businesses producing these products.	In-depth manual audits are performed to verify that products are produced by Indigenous businesses, focusing on cultural connection, connection to country, access and benefit sharing, and caring for country	Utilises cutting-edge technology such as blockchain, Internet of things (IoT), and other emerging technologies for rigorous verification and auditing processes to ensure product authenticity, qualiy and adherence to Indigenous cultural practices.
Establishment Timing	► Quickest to implement. ► 1 – 2 years	► In-depth manual auditing design requiring longer setup. ► 1 – 2 years setup + 1 year for initial manual audit	► Traceability technology procurement and implementation requires more time. ► 4 – 5 years
Price premium	► ***Lower*** – products only based on ownership, not necessarily other Indigenous characteristics, lower consumer willingness to pay. ► Price premium follows a ramp-up period as buyers / consumers become aware of the credential	► ***Moderate*** – more confidence in the product credential means higher premium (willingness to pay). ► Price premium follows a ramp-up period as buyers / consumers become aware of the credential.	► ***Higher*** – most confidence and willingness to pay given full-traceability of provenance etc. ► Price premium follows a ramp-up period as buyers / consumers become aware of the credential.
Producer adoption	► ***Higher*** coverage as businesses only need to register with the relevant existing body. ► Producer adoption follows a ***faster*** ramp-up as businesses quickly become aware of familiar institutions and are willing to participate.	► ***Moderate*** coverage as manual auditing means higher barrier to gaining the credential and limits the number of participants. ► Producer adoption follows a ***moderate*** ramp-up as businesses become more aware and willing to participate.	► ***Lower*** coverage as higher costs for producers mean less will participate initially. Technology adoption could make easier longer term. ► Producer adoption follows a ***slower*** ramp-up as businesses take longer to embrace technology change.

Benefits Framework

The benefits framework outlines both the monetised and non-monetised benefits associated with the Indigenous Agricultural Products Credential. Monetised benefits include:

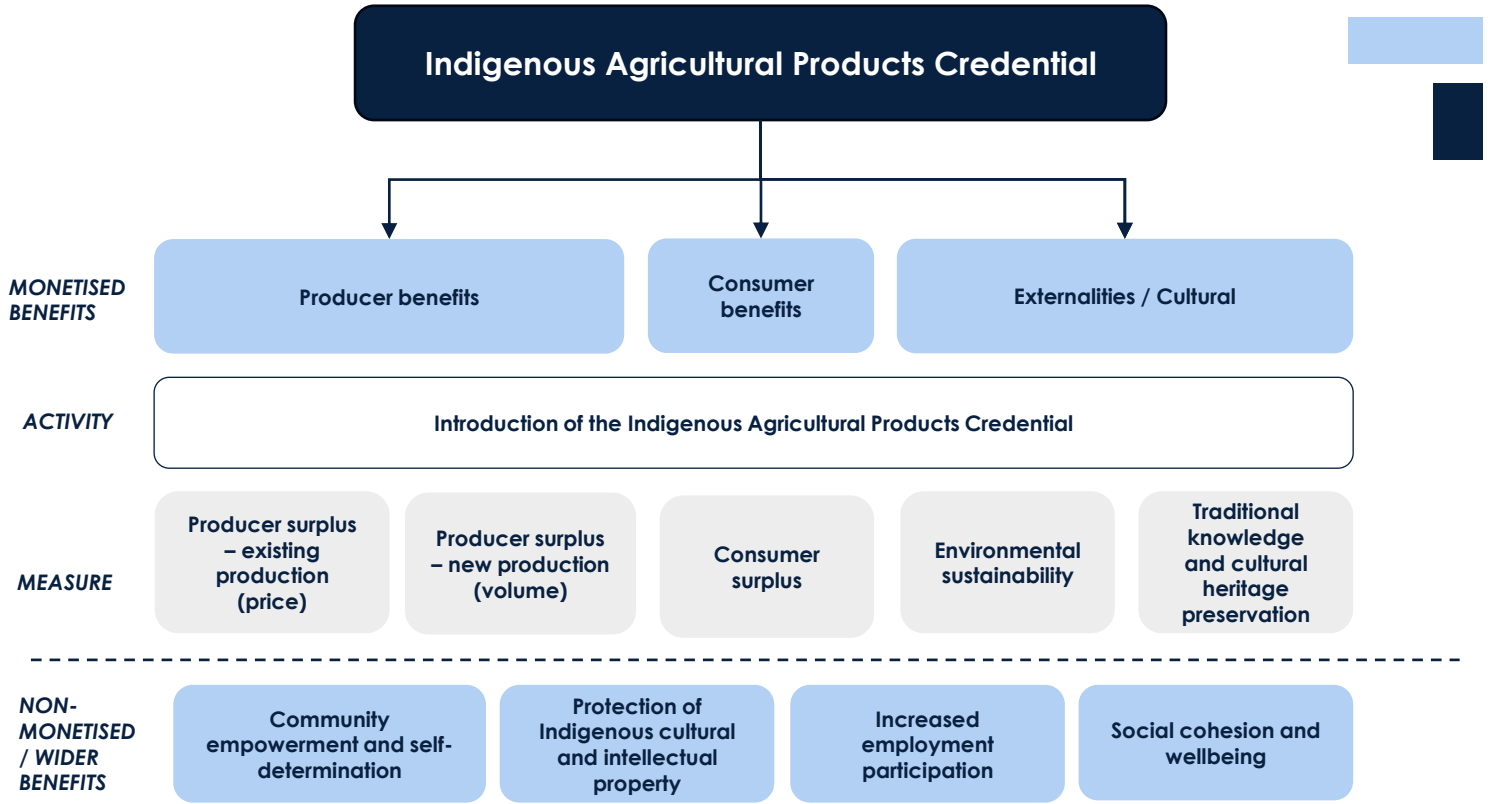
Producer surplus – existing production (price): The price premium associated with the credential increases the revenue received by existing producers, over and above their cost of production (profit). The difference between the new and old price received (price premium wedge) for all quantity sold is the benefit.

Producer surplus – new production (volume): Additional production is expected to come to market to service demand for certified agricultural products and take advantage of a price premium.

Consumer surplus: A subset of consumers are willing to pay over and above the new equilibrium market price for the certified indigenous agricultural production. This includes both wholesale and retail consumers. The increased willingness to pay for the certified production is an economic benefit.

Environmental sustainability: Farming practices associated with Indigenous production are assumed to have a lower environmental footprint relative to non-Indigenous farming in Australia. Carbon reduction as a result of this lower footprint can be taken as an economic benefit of the credential scheme (insofar that it is a substitute for non-Indigenous farming).

Traditional knowledge and cultural heritage preservation: The establishment of a certified market for Indigenous agricultural products will encourage the preservation of cultural heritage and practices. The Australian population has a willingness to pay for the preservation of Indigenous cultural heritage, which can be taken as an economic benefit.



Refer to the Appendices for a full list of economic and financial assumptions

Credential Costs

A high-level costing assessment has been performed to estimate the total costs associated with implementing each of the Indigenous Agricultural Credential Product Credential options.

Given the early stage of the proposed credential, these costs are indicative and should be treated as directional rather than precise. The level of confidence could be considered P50, with a process and use equivalent to a First Pass or Strategic Business Case.

Both ***establishment*** and ***ongoing operational*** costs have been estimated, falling to both government / third-party organisations and producers themselves. Establishment costs are spread over the indicative establishment timing period, while ongoing operational costs are incurred in each of the 30 years in the analysis period.

Costs associated with Option 1 are lower for both government and producers, given the lighter touch nature of the approach and that it is quicker to implement.

Option 2 costs are higher with the addition of the manual auding process. Option 3 costs are the highest due to the implementation of a technological solution for providing product assurance. These higher technological costs are borne by both government / third party verifiers and producers.

All options assume the scheme will be implemented and managed by an existing organisations.

Estimated establishment costs*

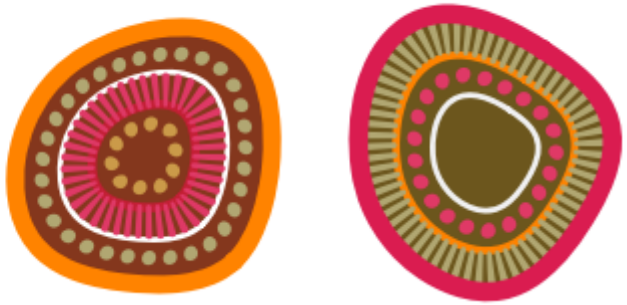
	Units	Option1 (Real $2025)	Option 2 (Real $2025)	Option 3 (Real $2025)
Government / third-party organisations				
Administrative setup	$	$825,000	$900,000	$1,500,000
Frameworks / guides / legal costs	$	$50,000	$200,000	$800,000
Awareness and Marketing	$	$60,000	$60,000	$60,000
Technology / IT	$	$0	$200,000	$5,000,000
Total	***$***	***$935,000***	***$1,360,000***	***$7,360,000***
Producers				
Design & marketing costs	$ / producer	$5,000	$5,000	$5,000
Application time and effort	$ / producer	$128	$170	$170
Technology / IT	$ / producer	$0	$0	$3,000
Production adaptation	$ / producer	$0	$750	$1,000
Total	***$ / producer***	***$5,128***	***$5,920***	***$9,170***

Estimated ongoing operational costs*

	Units	Option1 (Real $2025)	Option 2 (Real $2025)	Option 3 (Real $2025)
Government / third-party organisations				
Verification cost	$ per producer verified	$680	$2,040	$1,360
Ongoing administrative and compliance	$ per year	$675,000	$750,000	$900,000
Awareness and Marketing	$ per year	$12,000	$12,000	$12,000
Technology / IT	$ per year	$0	$4,000	$100,000
Producers				
Compliance	$ per producer per year	$170	$2,040	$1,700
Technology / IT	$ per producer per year	$0	$0	$600

*See Slides 21 and 22 of Appendix B for cost assumptions. Note – all costs should be verified with stakeholders during detailed scheme design.

Economic and Financial Results



'Together We Grow, Together We Prosper' artwork by David Williams of Gilimbaa.

Economic Analysis Results

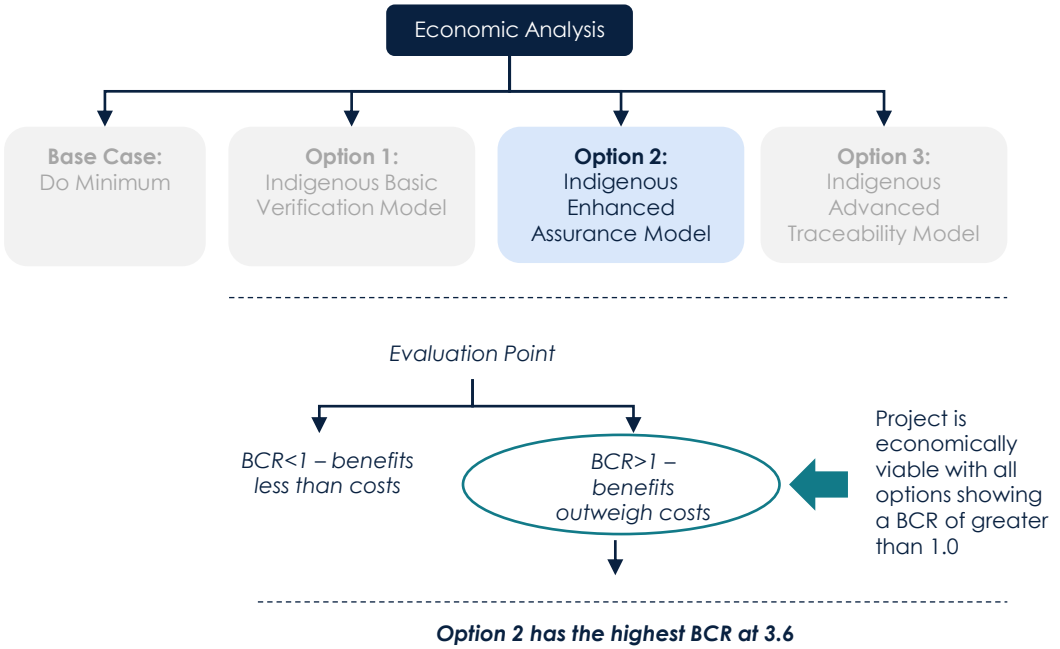
The following table outlines the results of the Cost Benefit Analysis (CBA). Key findings include:

- Speed of implementation is important – despite not having the same level of product assurance as other options, Option 1 sees benefits flowing sooner and therefore still performs strongly with a lower cost.
- Barriers to entry are critical - technological barriers are high for Option 3, meaning the higher price premium is not taken advantage of as much as for the other options. Reducing barriers at the same time as preserving product assurance is important.

Economic results (5% discount rate, 30-year analysis, $2025 present value terms)

Results	Option 1	Option 2	Option 3
Costs			
Establishment Costs	$3,989,213	$4,012,280	$7,811,015
Operational Costs	$12,073,002	$26,291,782	$17,590,350
Total Costs	**$16,062,215**	**$30,304,062**	**$25,401,365**
Benefits			
Producer surplus (price)	$31,093,394	$82,004,557	$33,058,022
Producer surplus (volume)	$7,773,349	$12,300,684	$3,305,802
Consumer surplus	$4,921,410	$9,374,113	$3,662,657
Environmental sustainability	$1,276,563	$2,020,055	$678,611
Traditional knowledge and cultural heritage preservation	$2,226,302	$4,288,881	$7,958,551
Total benefits	**$47,291,017**	**$109,988,291**	**$48,663,644**
Net results			
NPV Costs	$16,062,215	$30,304,062	$25,401,365
NPV Benefits	$47,291,017	$109,988,291	$48,663,644
NPV	**$31,228,803**	**$79,684,229**	**$23,262,279**
BCR	**2.9**	**3.6**	**1.9**

- The benefits of higher product assurance appear to outweigh the costs of higher assurance, producing a 'sweet spot' whereby producer buy-in is maximized to take advantage of it. After which there is likely to be diminishing returns.
- Option 2 appears to achieve this sweet spot, producing the highest economic return with a Benefit-Cost Ratio (BCR) of 3.6 and NPV of $79.7 million.



Option 2 has the highest BCR at 3.6

Economic Analysis Results

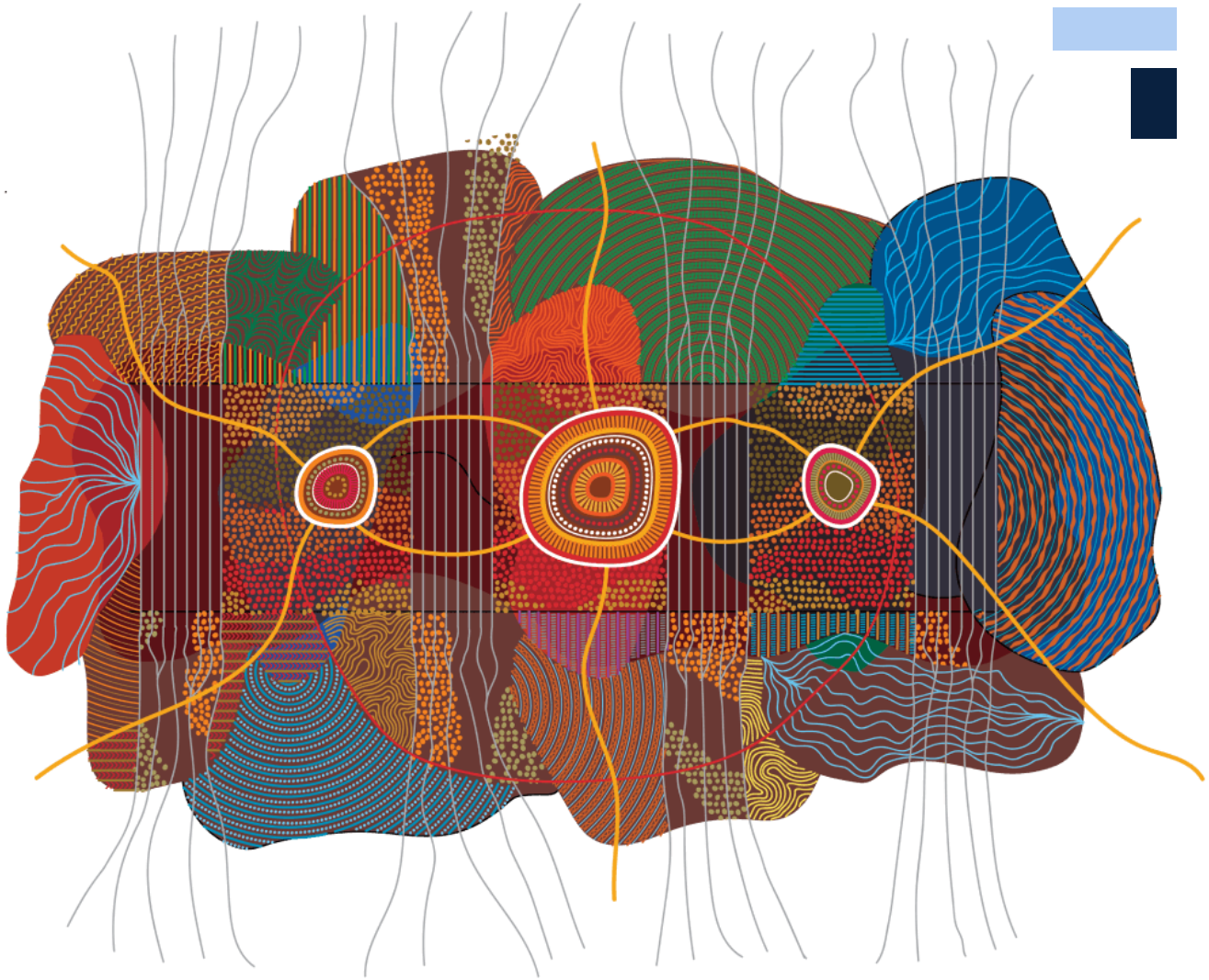
Non-Monetised benefits

Community empowerment and self-determination: A credential system enables Indigenous producers and communities to exercise greater control over how their products are defined, marketed, and governed. This supports self-determination by embedding Indigenous values within the production process.

Protection of Indigenous cultural and intellectual property: A credential helps safeguard cultural knowledge and practices from misappropriation by ensuring that only products genuinely connected to Indigenous producers and traditions carry the credential.

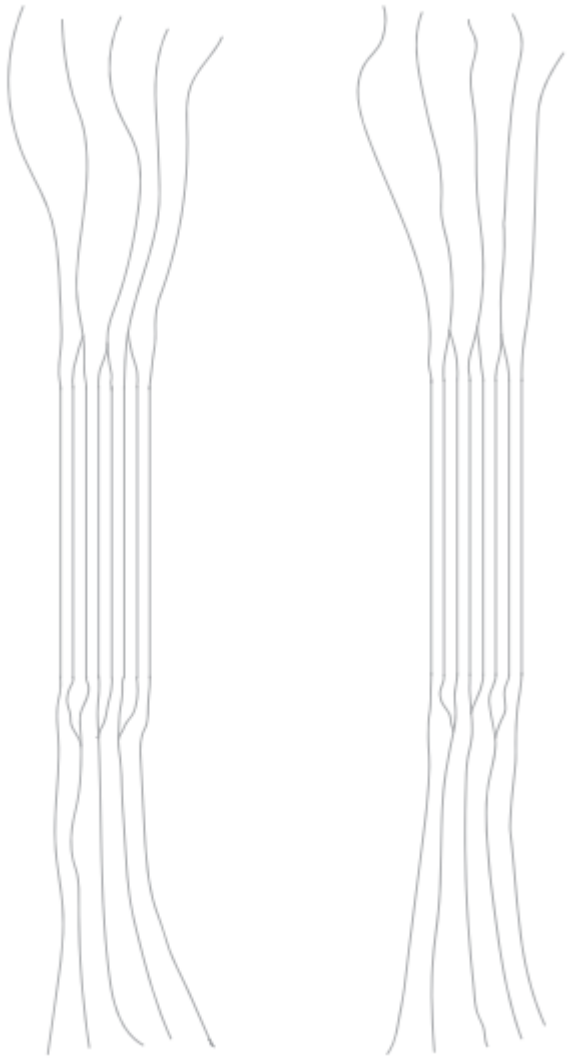
Increased employment participation: By supporting low-barrier, culturally relevant economic activity, the scheme can engage individuals who may be outside the formal labour market. It offers flexible participation suited to local needs, including seasonal or part-time roles, and enables the activation of underutilised labour — particularly women, young people, and Elders.

Social cohesion and wellbeing: Engagement in credentialed agricultural activity can strengthen social ties and reinforce cultural identity through connection to Country. The work fosters a sense of pride and purpose, contributes to social resilience, and may support improved mental health and wellbeing outcomes across participating communities.



'Together We Grow, Together We Prosper' artwork by David Williams of Gilimbaa.

APPENDICES



'Together We Grow, Together We Prosper' artwork by David Williams of Gilimbaa.

Appendix A: Economic sensitivity analysis results

The table summarises the BCR results from the sensitivity analysis. This analysis evaluates the BCR under various scenarios, including changes to discount rates, the price premium, producer adoption, capital costs, total costs, and benefits.

Under all sensitivities the BCR remains positive, demonstrating the economic robustness of each of the options. In particular, all options under a lower price premium or lower producer adoption retain economic viability.

Sensitivity results (BCR values, 5% discount rate, 30-year analysis, $2025)

Results (BCR)	Option 1	Option 2	Option 3
Discount rate			
5%	2.9	3.6	1.9
3%	3.2	3.8	2.1
7%	2.7	3.4	1.7
10%	2.4	3.1	1.4
Price Premium			
10% lower	2.7	2.9	1.6
20% lower	2.5	2.6	1.5
10% higher	3.2	3.4	1.9
20% higher	3.4	3.6	2.0
Producer adoption			
10% lower	2.9	3.2	1.8
20% lower	2.7	3.1	1.7
10% higher	3.3	3.5	2.0
20% higher	3.4	3.6	2.1
Establishment Cost			
40%	2.7	3.4	1.7
20%	2.8	3.5	1.8
-20%	3.1	3.7	2.0
-40%	3.3	3.8	2.2
Total Costs			
40%	2.1	2.6	1.4
20%	2.5	3.0	1.6
-20%	3.7	4.5	2.4
-40%	4.9	6.0	3.2
Benefits			
40%	4.1	5.1	2.7
20%	3.5	4.4	2.3
-20%	2.4	2.9	1.5
-40%	1.8	2.2	1.1

Appendix B: Economic and Financial Assumptions

The following table outlines the general economic assumptions used within this analysis.

Economic and financial assumptions	Unit	Option 1	Option 2	Option 3	Source
Model start year	year	2025	2025	2025	*Economic analysis assumptions*
Project commencement	year	2025	2025	2025	*Economic analysis assumptions*
Establishment period	year	2025 - 2026	2025 - 2027	2025 - 2029	*Economic analysis assumptions*
First year of operations	year	2027	2028	2030	*Economic analysis assumptions*
Evaluation period	years	30	30	30	*TPG23-08 NSW Government Guide to Cost-Benefit Analysis*
Discount rate	%	5.0	5.0	5.0	*TPG23-08 NSW Government Guide to Cost-Benefit Analysis, Economic analysis assumptions*

Benefits Assumptions

Producer surplus – existing production (price)

The price premium associated with the credential increases the revenue received by existing producers, over and above their cost of production (profit). The difference between the new and old price received (price premium) for quantity sold by the 750 existing Indigenous businesses is the benefit. The estimated price premium is between 2% and 7% which is somewhat on the conservative side as compared with that achieved with other credential schemes. Assumptions are outlined in the table below, with the participating business profile outlined on Slide 19.

Producer surplus – existing production (price) assumptions	Unit	Option 1	Option 2	Option 3	Source
Indigenous production (51% ownership)	$ per year	195,480,990			*NFF Market Sizing*
Majority Indigenous owned agricultural businesses	No.	750			*NFF Market Sizing – based on 51% Indigenous ownership*
Output per business	$ per year	260,641			*Derived based on Indigenous production and business number from NFF Market Sizing*
Price premium	%	2	6	8	*Project Assumption*
Producer adoption	%	65	60	20	*Project Assumption*

Benefits Assumptions

Producer surplus – new production (volume)

Additional production is expected to come to market to service demand for certified agricultural products. This could be through existing producers expanding production, or new entrants entering the market. The new production receives half of the price premium.* Assumptions are outlined in the table below, with the new production profile outlined on Slide 20.

Producer surplus – new production (volume) assumptions	Unit	Option 1	Option 2	Option 3	Source
Indigenous production (51% ownership)	$ per year	195,480,990			*NFF Market Sizing*
Output per business	$ per year	260,641			*Derived based on Indigenous production and business number from NFF Market Sizing*
Price premium	%	2	6	8	*Project Assumption*
Producer adoption – new production**	%	50	30	20	*Project Assumption*

*half the price premium reflects the upward sloping nature of the supply curve. That is, price needs to increase to induce more production from suppliers, with some suppliers receiving a price over and above what they would be willing to come to market with, up until the marginal producer where they receive exactly the price they are willing to produce at. Division by 2 approximates the benefit to the average producer.
Similarly, the downward sloping nature of the demand curve reflects that some consumers would be willing to pay above equilibrium price, up until the marginal consumer who is willing to pay exactly the equilibrium price. Division by 2 approximates the benefit to the average consumer.
**percent of existing production

Benefits Assumptions

Consumer surplus

A subset of consumers are willing to pay over and above the new equilibrium market price for the certified indigenous agricultural production. This includes both wholesale and retail consumers.* For the purposes of quantifying this benefit, it is assumed that 10% of the market is subject to a higher willingness to pay, with the average consumer in this segment prepared to pay between 2% and 7% above market price. Assumptions are outlined in the table below.

Consumer surplus assumptions	Unit	Option 1	Option 2	Option 3	Source
Amount of market in which consumers are willing to pay above equilibrium price**	%		10		*Project Assumption*
Willingness to pay over and above equilibrium (average consumer)***	%	2	5	7	*Project Assumption*

*the analysis is agnostic as to the distribution of the benefit between wholesalers and retailers (i.e. what price is passed on from the farmgate to the end consumer of the product).
**this can be thought of as 10% of consumers willing to pay above the market price. In reality, all consumers up until the marginal consumer would be willing to pay something above market price, with the marginal consumer willing to pay the exact market price (i.e. no consumer surplus). Taking 10% of consumers is a conservative estimate.
***this is the average willingness to pay over and above the equilibrium price. Some consumers are willing to pay more, and some consumers less, up until the marginal consumer who is willing to pay exactly market price.

Benefits Assumptions

Environmental sustainability

Farming practices associated with Indigenous agricultural production is assumed to be less carbon intensive relative to non-Indigenous farming in Australia, on average. Carbon reduction as a result of this lower footprint can be taken as an economic benefit of the credential scheme (insofar that it is a substitute for other non-Indigenous farming).

It is assumed that Indigenous farming practices are between 1% and 5% less carbon intensive, based on the option. This reduction is applied to the current rate of 1.2 kg per dollar of agricultural output in Australia to calculate the reduction in carbon for dollar of output. This reduction is applied to the new Indigenous output that comes to market as a result of the credential, with this amount being a proxy for what otherwise would be produced by non-Indigenous farmers.

Assumptions are outlined in the table below, with the new production profile outlined on Slide 20.

Environmental sustainability assumptions	Unit	Option 1	Option 2	Option 3	Source
CO2 per $ of output	Kg per $	1.2			*Estimate 0f 1.2 for agricultural sector. 85 million tonnes of CO2 per $71B of output: https://www.climatechangeauthority.gov.au/sites/default/files/documents/2024-09/2024SectorPathwaysReviewAgricultureandLand.pdf*
Carbon price	$ per tonne	$130			*Transport for NSW Economic Parameter Values - Table 6.1 Carbon emissions value per tonne for core analysis ($/tonne CO2-e)*
Carbon reduction per $ of certified production	%	1.0	3.0	5.0	*Project assumption*

Benefits Assumptions

Traditional knowledge and cultural heritage preservation

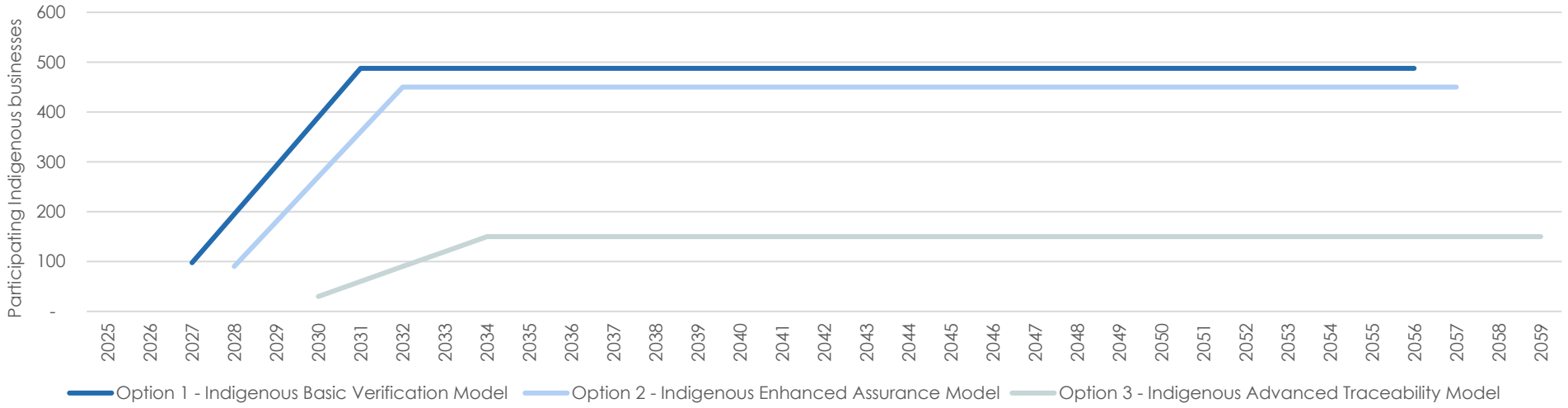
The establishment of a certified market for Indigenous agricultural products will encourage the preservation of cultural heritage and practices. The Australian population has a willingness to pay for this preservation, which can be taken as an economic benefit.

It is assumed that each of the 10.5 million Australian households are willing to pay $5 per year on average to preserve Indigenous traditional knowledge and cultural heritage, which is at the lower end of limited research estimates that aim to establish this willingness to pay. The contribution of the credential in preserving traditional knowledge and cultural heritage (i.e., the increased probability of preservation attributed to the credential alone) is conservatively taken to be between 0.3% and 1.0%.

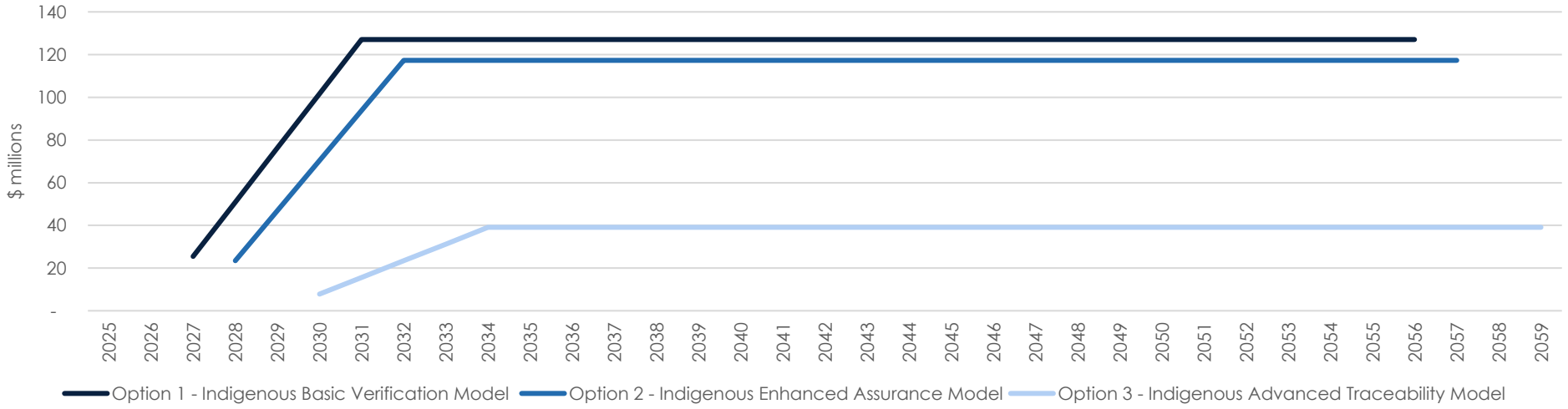
Cultural heritage preservation assumptions	Unit	Option 1	Option 2	Option 3	Source
Willingness to pay for cultural heritage preservation	$ per household per year	5			*Conservative estimate. WTP for Indigenous land management has been found to be closer to $100 per household in one study: https://journals.plos.org/plosone/article?id=10.1371/journal.pone.0023154*
Households in Australia	No.	10,457,121			*ABS household and family projections (2021 values escalated using Series III CAGR)*
CAGR Households	%	1.1			*ABS household and family projections – Series III*
Cultural preservation factor (contribution of the credential)	%	0.3	0.5	1.0	*Project Assumption*

Production Profiles (1/2)

Existing businesses who participate in the credential

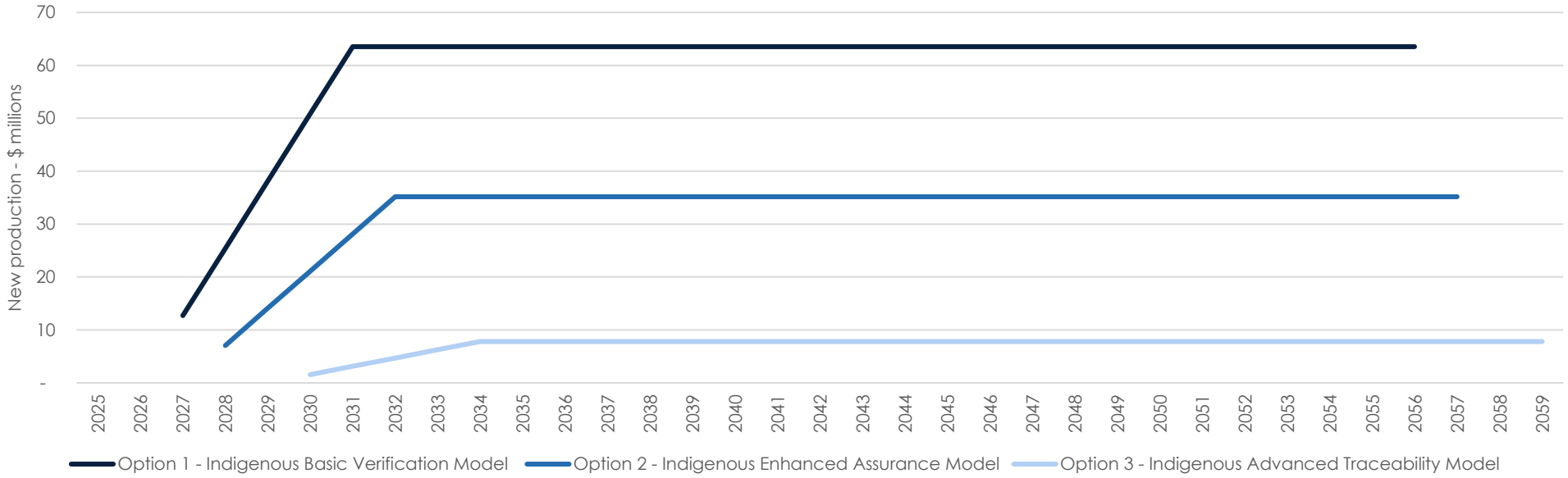


Existing production from businesses which participate in the credential



Production Profiles (2/2)

New production entering the market with the credential



Establishment Cost Assumptions

Cost Assumptions	Units	Option1 (Real $2025)	Option 2 (Real $2025)	Option 3 (Real $2025)	Assumptions
Government / third-party organisations					
Administrative setup	$	$825,000	$900,000	$1,500,000	*5.5 FTE for option 1, 6 FTE for Option 2 and 10 FTE for Option 3*
Frameworks / guides / legal costs	$	$50,000	$200,000	$800,000	*Option 2 (1 FTE) and Option 3 (5 FTE) - establishing frameworks for the audits, including consultation and review. Legal, expert and misc. costs ($50,000)*
Awareness and Marketing	$	$60,000	$60,000	$60,000	*Website design ($20,000), online comms strategies ($20,000), branding and logo design ($20,000)*
Technology / IT	$	$0	$200,000	$5,000,000	*Project assumption*
Total - Government / third-party organisations	***$***	***$935,000***	***$1,360,000***	***$7,360,000***	
Producers					
Design & marketing costs	$ / producer	$5,000	$5,000	$5,000	*Assumed cost of $5,000 to add logo/branding on to the packaging for each of the businesses*
Application time and effort	$ / producer	$128	$170	$170	*1.5h per application for Option 1, 2 hours per application for both Option 2 and 3*
Technology / IT	$ / producer	$0	$0	$3,000	*Project assumption*
Production adaptation	$ / producer	$0	$750	$1,000	*Project assumption*
Total - Producers	***$ / producer***	***$5,128***	***$5,920***	***$9,170***	

Note: *all costs should be verified with stakeholders during detailed scheme design.*

Establishment cost timing assumptions	2025	2026	2027	2028	2029
Option 1	15.0%	85.0%			
Option 2	5.0%	85.0%	10.0%		
Option 3	5.0%	20.0%	40.0%	25.0%	10.0%

Ongoing Operational Cost Assumptions

Cost Assumptions	Units	Option1 (Real $2025)	Option 2 (Real $2025)	Option 3 (Real $2025)	Assumptions
Government / third-party organisations					
Verification cost	$ per producer verified	$680	$2,040	$1,360	*8h per verification for Option 1, 24 hours per verification for Option 2 and 16 hours for Option 3*
Ongoing administrative and compliance	$ per year	$675,000	$750,000	$900,000	*Assume 4.5 of an FTE for option 1, 5 FTE's for option 2 and 6 FTEs for Option 3*
Awareness and Marketing	$ per year	$12,000	$12,000	$12,000	*20% of the marketing establishment costs ongoing*
Technology / IT	$ per year	$0	$4,000	$100,000	*2% of technology establishment costs*
Producers					
Compliance	$ per producer per year	$170	$2,040	$1,700	*Assume 2 hours for option 1, 24 hours for option 2 and 20 hours for Option 3*
Technology / IT	$ per producer per year	$0	$0	$600	*20% of technology establishment costs*

Note: *all costs should be verified with stakeholders during detailed scheme design.*

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Appendix B: List of Stakeholders

Table 10 - Table of Agri-Tech, Traceability and Export SME stakeholders engaged for this report

List of external stakeholders engaged for the development of this report:
DAFF – Department of Agriculture, Fisheries and Forestry
DFAT – Department of Foreign Affairs and Trade
Austrade
NSW Govt – Local Land Service Agency
Export Council of Australia
Australian Chamber of Commerce and Industry
University of Queensland
Federation University
Teys Australia
AusTukka
Supply Nation
Deloitte SMEs engaged by global region:
Deloitte Australia
Deloitte Singapore
Deloitte USA
Deloitte EU

Australian Government
Department of Agriculture, Fisheries and Forestry

Australian Government
Indigenous Land and Sea Corporation

The ILSC GROUP

National Farmers Federation

PEOPLE. COUNTRY. OPPORTUNITY.

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