



**National  
Farmers  
Federation**

**Horticulture  
Council**

# **Feeding Australia: National Food Security Strategy**

**Submission**

**October 2025**

## Table of Contents

About the NFF Horticulture Council .....	3
Introduction .....	3
Recommendations .....	4
Scope, principles and ownership .....	5
Key priority areas .....	7
Whole-of-system considerations.....	12
Conclusion .....	17

## About the NFF Horticulture Council

The Council is the recognised peak body for forming policy and advocating on behalf of the national horticulture industry. Established in 2017, it now comprises 19 national commodity and state-based horticulture bodies, who together represent the full breadth of an incredibly diverse industry, including growers of all sizes and products including fruits, vegetables, nuts, ornamental plants and turf.

The Council develops policy positions on common issues of national importance to the horticulture industry such as trade, workforce, biosecurity, farm business, climate change and sustainability, markets and competition, R&D, telecommunications and infrastructure.

## Introduction

Australia stands at a critical juncture in its food system. In its 2025 election platform *Feast or Famine*, the Council called for a comprehensive national food strategy to safeguard the future of fresh produce supply and ensure equitable access to nutritious food for all Australians. The Council subsequently welcomed a commitment from the Albanese Government to developing the *Feeding Australia* strategy as a long-overdue step toward recognising food security as a national priority.

We have as part of our election platform highlighted the urgent need for coordinated action across government, industry, and communities to address vulnerabilities in labour supply, biosecurity, market fairness, and regulatory burden—issues that directly impact the availability and affordability of fruits, vegetables, and nuts.

The *Feast or Famine* platform urged government to move beyond fragmented policy responses and commit to a whole-of-system approach that integrates food production with health, environment, infrastructure, and trade.

This submission builds on that vision, offering practical recommendations to ensure the *Feeding Australia* strategy delivers lasting outcomes for growers, consumers, and the nation.

## Recommendations

The following is a summary of the main recommendations made in this submission, offered to inform and shape the thinking of Government as it develops *Feeding Australia*, a new national food security strategy.

- **Reform supermarket power dynamics**  
Fully implement the ACCC Supermarket Inquiry recommendations to address the monopsony power of major retailers, ensure fairer trading conditions for fresh produce suppliers, and support the long-term viability of horticultural businesses.
- **Rebalance R&D and extension investment**  
Increase dedicated funding for extension services to ensure that innovations developed through R&D are effectively adopted by growers, particularly in regional and labour-intensive horticultural systems.
- **Strengthen supply chain resilience**  
Invest in regional freight infrastructure, cold chain capacity, and digital logistics platforms, and explore with near neighbours in the Pacific and Southeast Asia opportunities for the mutual reassurance of food security through reciprocal flows of labour and fresh produce.
- **Support climate adaptation through profitability**  
Prioritise policies that enable growers to remain profitable so they can invest in climate adaptation. Avoid arbitrary emissions targets and instead support efficient, practical emissions reduction opportunities such as waste reduction and input efficiency.
- **Secure a skilled and supported workforce**  
Migration and workforce policy must reflect the diversity of horticultural production systems and regional contexts, supporting a mix of labour supply options—including WHM and PALM schemes—and allowing for industry-specific solutions that balance flexibility, reliability, and worker protections.
- **Expand trade and market access**  
Increase the capacity of DAFF and trading partners to progress market access priorities, reduce reliance on domestic markets, and unlock new export opportunities for horticultural products.
- **Promote health through fresh produce**  
Launch a national behavioural change campaign to increase consumption of fresh Australian-grown fruits, vegetables, and nuts, and invest in public education and greenspace initiatives to improve health outcomes.
- **Leverage labour mobility for regional diplomacy**  
Recognise the PALM scheme as a strategic tool for regional development and economic resilience and explore similar labour mobility partnerships with Southeast Asian neighbours to strengthen mutual food security.

## Scope, principles and ownership

The Council broadly supports the definition of food security adopted in the discussion paper from the Food and Agriculture Organization of the United Nations (FAO), including concepts of access, availability and utilisation.

We would however highlight the agency dimension of food security as especially important, assuring that individuals or groups having the capacity to act independently to make choices about what they eat, the foods they produce, how that food is produced, processed, and distributed, and to engage in policy processes that shape food systems.

Actors along food supply chain have sought, in pursuit of their own commercial interests, to disconnect the public and consumers from the origins of their food and constrained or confused their choices about what they eat.

It is important then, in taking a collaborative approach to developing and implementing a new national food security strategy, that it is owned and has actions for not just government, primary industries and other supply chain partners, but also the public.

Through a series of inquiries into the trading practices of major supermarkets in Australia over the past few years, it became clear, despite being in the middle of what has been commonly described as a cost-of-living crisis, the Australian public were still deeply concerned that farmers were getting a fair return for their produce, even though this might have meant the prices they pay at the checkout might go up.

The Australian public values food that is grown, harvested, delivered and traded in an ethical manner, that respects the rights and dignity of those directly engaged in the supply chain. For this reason, they value knowing where their food was grown and prefer to support Australian producers.

The discussion paper makes the claim Australia is currently a food secure nation, identifying our food system, rightly, as a national asset, as a source of not just food but also of wealth and job creation.

Underpinning the development of a new national food security strategy then is the assumption that the status quo, of food security, cannot be counted on to continue without intervention.

Government interventions to improve food security, as compared to those made by industry or others, can be powerful tools that can address the food system as a whole, for supporting supply, enhancing access, and promoting public health.

Consideration should be given to designing interventions to address the unique needs of the diverse industries across agriculture. These industries might for example be best considered as belonging to broad food groups. The needs of the horticulture industry, and fruit, vegetables and nut food groups are distinct from extensive agriculture industries, such as red meat and grains, with significant surpluses after domestic demand is satisfied, that are directed toward export markets.

Government interventions, critical to the success of any food security strategy, will come at a cost that should not be underestimated.

The Council recommends the Government communicates early with the Australian public about the benefits of increasing food security, not just as agricultural or a welfare issue, but as a matter of national resilience, public health, and economic stability. Also, that the Government actively engages directly with the public during upcoming phases of consultation.

This will build trust and ownership of the strategy and its actions, and support for the costs Government may need to incur in pursuit of agreed outcomes.

Designing appropriate governance to support the implementation of the National Food Security Strategy is essential to ensure that the strategy is not only visionary but also actionable. Food security is inherently cross-sectoral—it touches agriculture, health, environment, infrastructure, education, trade, and social services. Without a mechanism to bring these domains together, even the most well-intentioned strategy risks fragmentation, duplication, or inertia.

Effective governance must enable collective and coordinated effort across agencies and jurisdictions. This means moving beyond siloed departmental responsibilities and establishing a structure that can drive whole-of-government action. One option is the creation of a dedicated national agency for food systems, with a mandate to oversee strategy implementation, monitor progress, and coordinate policy across sectors. Such an agency could serve as a central hub for data collection, stakeholder engagement, and program delivery.

Alternatively, the government could appoint a Minister for Food Systems or Food Security, with clear responsibilities and authority to convene relevant departments and lead cross-cutting initiatives. This would elevate food security to a Cabinet-level priority and ensure political accountability. A third option is the establishment of a Cabinet subcommittee on food security, chaired by a senior minister and supported by a secretariat. This model would embed food security within existing governance structures while enabling high-level coordination and oversight. In terms of timeframes, the Council recommends that actions be identified over each of the short, medium and long term. Shifting the food system toward being more secure, as the discussion paper notes, is a tricky undertaking, where acting in one part of the system can have ramifications elsewhere, sometimes in unpredictable ways. So, to minimise risks and costs, action should be taken slowly and cautiously but not delayed.

Establishing clear metrics and thresholds is essential for guiding government decision-making around food security interventions. Without measurable indicators—such as levels of household food insecurity, supply chain disruptions, or nutritional deficiencies—policy responses risk being reactive, inconsistent, or misaligned with actual need.

Running scenarios based on these metrics adds a critical layer of foresight. Scenario modelling allows policymakers to anticipate how different shocks—such as climate events, geopolitical tensions, or labour shortages—might impact food availability and access. It helps identify vulnerabilities in the system and test the resilience of proposed interventions before they are needed.

## Key priority areas

### Competition

Council welcomes the recognition of competition dynamics within Australia's food system, particularly the role of supermarket concentration and its impact on fresh produce suppliers, as significant in terms of our national food security.

Better balancing bargaining power between supermarkets and their suppliers is of foremost importance in bolstering the nation's food security. Today, many horticultural businesses lack resilience due to their vulnerability to supermarket bargaining tactics. These businesses are often unable to retain sufficient reserves to reinvest in their operations and unlock productivity gains, adopt new technologies, or implement sustainable practices. As a result, they are less equipped to withstand shocks such as natural disasters, biosecurity incursions, or supply chain disruptions. A food system built on fragile producer foundations cannot be considered secure.

The Council notes the discussion paper's acknowledgement that Coles and Woolworths function as an oligopoly in the retail sector, with significant monopsony power over fresh produce suppliers. This dynamic has long been a concern for horticultural producers, who face downward pressure on prices, limited bargaining power, and opaque procurement practices. While the introduction of a mandatory Food and Grocery Code is a positive step, further reform is needed to ensure transparency, fairness, and sustainability in supplier-retailer relationships.

Fresh produce supply chains are uniquely vulnerable to market concentration due to the perishable nature of goods, seasonal variability, and limited alternative market channels. The Council urges the Strategy to consider mechanisms that support greater diversity in retail outlets, including independent grocers, farmers markets, and direct-to-consumer models. These alternatives not only improve competition but also enhance consumer access to fresh, nutritious food—particularly in regional and remote areas where supermarket dominance is most pronounced.

The Council strongly supports the full and timely implementation of the recommendations of the ACCC Supermarket Inquiry. The Inquiry's findings confirm that the exercise of monopsony power by major supermarkets has undermined the ability of fresh produce suppliers to make informed investment decisions, threatening the long-term sustainability of the sector. The ACCC's conclusion that the viability of Australia's horticulture industry is at risk without reform must be treated with urgency.

While the Government's agreement in principle to the ACCC's recommendations and its commitment of \$2.9 million in funding for supplier education are welcome, the Council emphasises that the most critical outcome is the delivery of tangible improvements in the fairness of daily trade between supermarkets and their suppliers. This includes clearer, more prescriptive Code provisions, support for collective bargaining, and protections for nursery product suppliers currently outside the scope of existing codes.

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The Council also recommends that the Strategy include targeted support for small and medium horticultural enterprises to engage in value-adding, cooperative marketing, and digital retail platforms. These initiatives can help producers capture more value, reduce reliance on dominant retailers, and contribute to regional economic resilience. Addressing competition in the fresh produce sector is not only a matter of fairness—it is essential to ensuring long-term food security, affordability, and sustainability.

### Productivity, innovation and economic growth

The Council supports the Strategy's emphasis on productivity and innovation as central pillars of food security. However, we urge that this be approached with a nuanced understanding of the horticulture sector's unique characteristics. Unlike broadacre agriculture, horticulture is labour-intensive, regionally dispersed, and highly variable in its production cycles. These factors make productivity gains more difficult to achieve without targeted support.

Recent analysis commissioned by Hort Innovation and undertaken by the Centre for International Economics (CIE) confirms that horticulture productivity has likely grown at between 0.5% and 1.5% annually over the past three decades. The report identifies four key innovation domains that can drive future productivity growth:

1. **Production cost analysis** – building enterprise capability to understand cost drivers and profitability, enabling more efficient resource allocation.
2. **Automated farm data collection** – using digital tools to inform real-time decision-making and improve operational efficiency.
3. **Machine learning and artificial intelligence (ML/AI)** – applying advanced analytics to optimise agronomic practices and resource use.
4. **Mechanisation and automation** – deploying physical technologies to reduce labour reliance and improve consistency in production and post-harvest handling.

The modelling framework developed in the report shows that under a high adoption scenario, these innovations could lift horticulture industry value added from \$8 billion in 2025 to \$22 billion by 2040—representing a 78% increase compared to a baseline without innovation. Even modest improvements in adoption could deliver an additional \$10 billion in value. These findings underscore the importance of supporting innovation adoption through targeted investment, extension services, and enabling policy settings.

While these potential headline farm gate value improvements are encouraging, it needs repeating farm-level profitability is a critical, yet often overlooked, metric of resilience and food security. In the horticulture sector especially, the imbalance of bargaining power between producers and supermarkets means that most



productivity gains have not translated into better margins for growers—they have instead been absorbed by retailers and passed on to shareholders. This dynamic undermines the long-term viability of farming enterprises and weakens the foundation of the food system.

A resilient and productive food system depends not only on the generation of new knowledge through research and development (R&D), but also on the effective diffusion of that knowledge through extension. In Australia, while total investment in agricultural R&D remains substantial—estimated at nearly \$3 billion annually—there is growing concern that extension is underfunded and structurally constrained. Recent analyses by AgriFutures and the CSIRO have highlighted that the national extension system lacks the capacity and coordination required to support widespread innovation adoption, particularly in horticulture.

Extension practitioners face challenges in both capability and capacity. Many lack the time, resources, and professional development pathways needed to engage effectively with growers. Extension is often treated as an afterthought in R&D projects, rather than being embedded from the outset. This limits the reach and impact of innovation, particularly in regional and remote areas where support is most needed.

The imbalance between R&D and extension investment is increasingly recognised as a barrier to productivity growth. Research from the Australian National University shows that while R&D has a demonstrable impact on agricultural productivity, its full potential is only realised when extension is adequately resourced. Without sufficient investment in extension, innovations remain confined to research institutions and early adopters, failing to reach the broader industry.

In horticulture, where production systems are diverse and often labour-intensive, the need for tailored extension is especially acute. The National Horticulture RD&E Strategy identifies information delivery and extension as strategic priorities, yet funding and coordination remain fragmented. The result is a system where growers struggle to access the support needed to adopt new technologies, improve practices, and respond to emerging challenges.

To safeguard Australia's food security, the Strategy must address this imbalance. Extension should be recognised not as a secondary function, but as a critical enabler of innovation. This requires dedicated funding, structured career pathways for extension professionals, and integration of extension into national innovation frameworks. Only by strengthening the bridge between research and practice can Australia ensure that its investments in R&D translate into tangible improvements in productivity, sustainability, and resilience across the food system.

In Australia, the growing burden of red tape and compliance requirements is contributing to productivity losses across the horticulture sector and prompting many growers to exit the industry altogether—developments that pose serious risks to national food security. Regulatory complexity, duplicative reporting, and inconsistent enforcement not only consume time and resources but also erode the viability of farming enterprises, particularly smaller and family-run operations. When growers are forced to divert attention from production to paperwork, or when compliance costs outpace returns, the result is diminished output, reduced innovation, and a shrinking base of domestic food producers.

The Council recommends that the Strategy prioritise:

- **Investment in enabling technologies** tailored to horticulture.
- **Support for benchmarking and cost analysis tools** to help growers identify and act on productivity opportunities.
- **Funding for skills development and digital literacy**, particularly in regional areas.
- **Regulatory reform** to remove barriers to innovation (e.g. drone use, autonomous vehicles).
- **Cross-industry collaboration** to accelerate diffusion of successful innovations.

### Resilient supply chains

The Council agrees that resilient supply chains are foundational to national food security. Horticulture supply chains are particularly exposed to disruption due to the perishability of produce, seasonal labour requirements, and reliance on just-in-time logistics. Recent events—from extreme weather to pandemic-related transport bottlenecks—have highlighted the fragility of these systems.

To strengthen resilience, the Strategy must address structural vulnerabilities in horticulture logistics. This includes investment in regional freight infrastructure, cold chain capacity, and digital coordination platforms. The Council also recommends a review of labour mobility settings to ensure timely access to seasonal workers, including through the PALM Scheme, and support for workforce housing and transport in regional areas.

Australia's food security is increasingly shaped by the dynamics of global trade and domestic production capacity. According to the *Australian Horticulture Statistics Handbook*, imports of fresh produce continue to play a significant role in meeting consumer demand, particularly for products that are seasonal, niche, or not grown at scale domestically. However, there is a growing trend among retailers to source shelf-stable alternatives—such as canned, frozen, and preserved fruits, vegetables, and nuts—from overseas. In 2024 alone, Australia imported over 232,000 tonnes of frozen vegetables, a 20 percent increase from the previous year, with much of this volume comprising low-cost potato products. These imports are often cheaper and produced under less stringent regulatory conditions, undermining the competitiveness of Australian growers and processors.

Compounding this issue is the decline in domestic food manufacturing capacity, which has been driven by high input costs, fragmented policy support, and a shift toward offshore processing. Although food manufacturing remains the largest employer in the sector, with over 200,000 jobs, many businesses are small and vulnerable to market pressures. The erosion of local processing infrastructure means that Australia is increasingly reliant on imported ingredients and finished goods, weakening its ability to respond to supply chain disruptions and reducing the value-added potential of its agricultural output. Together, these trends pose a serious challenge to long-term food security, as they diminish national self-

sufficiency, reduce transparency in sourcing, and expose consumers to risks associated with global volatility.

Pollination services are a foundational input to horticultural production, underpinning the yield and quality of a wide range of crops including berries, nuts, apples, melons, and stone fruits. The unfolding varroa mite infestation in Australia poses a serious and largely predictable threat to food security, as it compromises the health and viability of managed honeybee populations—the primary pollinators for many commercial crops. A decline in pollination capacity would directly reduce crop productivity and increase reliance on imports, weakening Australia’s food system resilience and exposing consumers to higher prices and reduced availability of fresh produce.

Access to safe, affordable, and effective agricultural chemistry is vital to the productivity and sustainability of Australia’s horticulture sector. Australia is heavily dependent on overseas supply chains for new chemistry, and regulatory delays or market withdrawals can leave growers without viable alternatives. This reliance, coupled with rising costs and limited domestic innovation, exposes the sector to vulnerabilities that directly impact food security. Without timely access to effective inputs, growers face reduced productivity, increased crop losses, and higher production costs—factors that can lead to supply shortages, price volatility, and diminished resilience in the national food system.

Biosecurity remains a critical concern. The Council supports enhanced surveillance and rapid response capacity, particularly in northern Australia and high-risk production zones. However, resilience also depends on economic viability. Horticultural businesses must be able to retain sufficient margins to reinvest in risk mitigation and recovery. As noted in our response to the competition section, supermarket bargaining power currently undermines this capacity. Without fairer trading conditions, producers will remain vulnerable to shocks and unable to build the reserves needed to withstand future disruptions.

## Whole-of-system considerations

### Climate and sustainability

The Council welcomes recognition in the discussion paper of climate change as a critical whole-of-system consideration for food security. Horticulture is uniquely positioned to contribute to climate resilience and sustainability, offering high nutritional value foods with a comparatively low emissions profile. However, the sector also faces distinct vulnerabilities that must be addressed through targeted and fit-for-purpose policy responses.

Climate change is already impacting horticultural production through increased frequency and severity of extreme weather events, shifting rainfall patterns, and rising pest and disease pressures. These impacts are felt both directly on farm and indirectly through disruptions to supply chains. Many horticultural crops are highly sensitive to temperature, water availability, and seasonal conditions. Perennial tree crops, in particular, face long-term structural risks, such as declining winter chill hours, which threaten the viability of entire growing regions.

Adaptation to these risks requires that horticultural businesses are first and foremost profitable. Without the financial capacity to invest in new technologies, infrastructure, and practices, growers cannot respond effectively to climate challenges. Public and private investment must therefore be directed toward enabling adaptation, not imposing mandates. This includes funding for research that delivers practical tools for growers, extension systems that support adoption, and training programs that build capacity across the sector.

Food security is closely tied to the capacity of the horticulture industry to recover from natural disasters and prolonged droughts. Unlike broadacre agriculture, horticulture involves high-value, perishable crops that require intensive inputs and seasonal labour, making recovery more complex and time-sensitive. When disaster strikes, the ability of growers to replant, restore infrastructure, and resume operations quickly is essential not only for their livelihoods but for maintaining the continuity of fresh produce supply to Australian consumers.

Recent amendments to the Disaster Recovery Funding Arrangements (DRFA) in Queensland exemplify the importance of tailoring support to horticulture's unique needs. For the first time, flood-affected growers can access grants of up to \$75,000 specifically for replanting, fertilising, and restoring crops—recognising that recovery in plant industries requires more than rebuilding fences or replacing machinery.

To ensure such support is effective and equitable, cost-shared funding guidelines must be designed to accommodate the specific characteristics of horticulture. The DRFA framework allows states and territories to activate assistance measures and receive up to 75% reimbursement from the Commonwealth, but flexibility in how these measures are applied is crucial. Similarly, the Australian Government Drought Plan acknowledges that drought impacts vary across regions and industries, and that recovery must be staged and responsive to local conditions. By embedding horticulture-specific provisions into disaster and drought recovery frameworks, governments can strengthen the resilience of the food system and

ensure that growers are supported not just to survive, but to continue feeding the nation.

The Council supports a strategic approach to climate policy that recognises the essential role of horticulture in human and planetary health. Emissions from the sector are relatively small and difficult to abate due to the nature of production systems. Rather than setting arbitrary emissions targets, the Strategy should focus on identifying and supporting the most efficient and profitable opportunities to reduce emissions—such as reducing waste, improving input efficiency, and enabling value-adding.

Climate responses must also be equitable. Horticultural businesses vary widely in size, location, and capability. Programs must be designed to accommodate this diversity, ensuring that all growers have access to the tools, information, and support they need to adapt. Collaboration between government, industry bodies, and research institutions will be essential to deliver tailored solutions and accelerate adoption.

In summary, the Strategy must recognise that horticulture is both exposed to climate risks and integral to climate solutions. A resilient horticulture sector is a cornerstone of national food security, and climate policy must empower growers to adapt, innovate, and thrive in a changing environment.

## People

The Council welcomes recognition of people as a central pillar of food security. Horticulture is a major employer and economic driver in many regional towns across Australia. It supports thousands of jobs directly on farms and indirectly through supply chains, logistics, and processing. In many communities, horticulture is not only the backbone of the local economy but also a source of identity, pride, and opportunity.

The Council is committed to ensuring that horticulture continues to offer rewarding, safe, and fair careers for Australians. Our priority is to engage more Australians in horticultural work by improving job quality, investing in skills and training, and promoting the diverse career pathways the industry offers—from science and technology to logistics, marketing, and farm management. We recognise that attracting and retaining a skilled workforce is essential to the sector's long-term viability and to the resilience of Australia's food system.

Creating safe and fair workplaces is fundamental to this goal. The Council supports strong standards for worker welfare and compliance, and we continue to work with government and industry partners to improve transparency, accountability, and best practice across the sector. We also acknowledge the important role of migrant workers in meeting seasonal labour needs and are committed to ensuring that all workers—regardless of background—are treated with dignity and respect.

To unlock the full potential of regional communities, the Strategy must address the broader infrastructure and service needs that underpin workforce participation. This includes access to housing, childcare, education, and healthcare. Without these supports, regional employers—including horticultural

businesses—will continue to face barriers in attracting and retaining the people they need.

In summary, people are at the heart of horticulture. A secure, skilled, and supported workforce is essential to food security, and the Strategy must ensure that policy settings enable horticulture to remain a source of opportunity, prosperity, and wellbeing in regional Australia.

The Council recommends that the Strategy prioritise:

- Migration and workforce policy must reflect the diversity of horticultural production systems and regional contexts, supporting a mix of labour supply options—including WHM and PALM schemes—and allowing for industry-specific solutions that balance flexibility, reliability, and worker protections.
- The Government should undertake urgent research into the nature and extent of labour market failures in horticulture, particularly those currently addressed by the Working Holiday Maker (WHM) program, to inform future workforce and migration policy.
- The Federal Government should invest in a well-designed national labour hire licensing scheme, supported by a robust and well-resourced monitoring and enforcement regime, to ensure safe and fair working conditions across the horticulture sector and to level the playing field for compliant employers.
- Require clear, measurable productivity gains as a prerequisite for introducing workplace relations reforms, ensuring that any changes to employment law or modern awards deliver tangible economic benefits without undermining business sustainability or competitiveness.
- Invest through training in the development of core skills and human capital, essential if horticulture is to continue to adapt, innovate and improve its productivity.

## Health and nutrition

The Council strongly supports recognition in the discussion paper of health and nutrition as core dimensions of food security. Fresh fruits, vegetables, and nuts are essential components of a healthy diet, and the horticulture industry plays a central role in ensuring Australians have access to these foods. Yet despite this, many Australians are not meeting their recommended daily intake. In 2022, less than half of adults consumed the recommended two serves of fruit per day, and even fewer met the five serves of vegetables or 30 grams of nuts advised by the Australian Dietary Guidelines.

This dietary gap has serious consequences. Diet-related diseases—including obesity, type 2 diabetes, coronary heart disease, stroke, and bowel cancer—are among the leading contributors to Australia's disease burden. The economic cost is staggering, with obesity and related conditions estimated to claim over 7,000 lives annually and cost the health system and wider economy more than \$37



billion each year. Addressing these challenges requires a coordinated national effort to promote healthier eating habits and improve access to nutritious food.

The Council believes that investing in horticulture is a direct investment in public health. Increasing the availability, affordability, and appeal of fresh produce must be a national priority. This includes supporting growers to remain viable and competitive, ensuring supply chains are efficient and resilient, and promoting horticultural products through public health campaigns and education initiatives.

Beyond food, horticulture contributes to health and wellbeing through the creation of green spaces. Plants and turf products supplied by the nursery industry help build liveable cities and thriving regional communities. Access to natural environments has proven benefits for mental health, physical activity, and social cohesion. A national strategy to increase greenspace—particularly in urban areas—should be pursued alongside efforts to improve nutrition.

The Council calls for a national program of behavioural change to increase consumption of fresh Australian-grown fruits, vegetables, and nuts. This should be complemented by education initiatives that promote gardening, growing food, and engaging with nature. These actions will not only improve dietary outcomes but also foster a deeper connection between people and the food they eat.

In summary, horticulture is integral to Australia's health and nutrition outcomes. The Strategy must recognise and support the sector's role in delivering fresh, nutritious food and building environments that promote wellbeing. A healthier Australia depends on a thriving horticulture industry.

### Trade and market access

The Council welcomes the focus on trade and market access as critical components of national and global food security. While Australia is a food-secure nation, the sustainability of its horticulture sector depends on access to diverse and competitive markets. For many commodities, domestic markets are no longer delivering appropriate returns to growers. Retail concentration, limited price transparency, and suppressed farmgate prices have eroded profitability, leaving producers with little capacity to reinvest, innovate, or expand.

Expanding trade is essential to reducing this dependence and unlocking new opportunities for growth. Access to overseas markets provides growers with alternative channels to sell their produce, improves price discovery, and supports investment in quality, sustainability, and innovation. It also strengthens Australia's role as a reliable supplier of safe, high-quality food to the region and the world.

However, market access is not automatic. It requires sustained diplomatic engagement, technical negotiation, and regulatory alignment. The Council urges the Federal Government to increase the capacity of the Department of Agriculture, Fisheries and Forestry (DAFF) to progress market access priorities. This includes resourcing DAFF to lead negotiations, respond to phytosanitary requirements, and support exporters in meeting compliance standards. It also requires investment in building the capacity of trading partners to engage with Australia's systems and standards, particularly in emerging markets.

The Council further recommends that trade and agriculture portfolios work collaboratively to identify and pursue high-value market opportunities. This includes prioritising commodities with limited domestic market options and supporting industry-led efforts to diversify export pathways. Trade policy must be responsive to the realities of horticulture, where perishability, seasonal production, and phytosanitary complexity demand tailored solutions.

In summary, trade is not just an economic opportunity—it is a strategic imperative for food security. The Strategy must recognise the importance of market access to the viability of horticulture and commit to the resources and partnerships needed to expand Australia’s reach in global food systems.

### National and regional security

The Council supports the recognition of food security as a strategic issue with implications for national and regional stability. Australia’s horticulture sector is not only vital to domestic food supply but also plays an important role in supporting regional development and economic resilience across the Indo-Pacific.

The Pacific Australia Labour Mobility (PALM) scheme is a cornerstone of this contribution. By facilitating temporary labour migration from Pacific Island nations and Timor-Leste, the scheme delivers significant remittance flows that support families, communities, and national economies. These remittances are among the most direct and impactful forms of economic support Australia provides to its regional neighbours. They strengthen livelihoods, build financial resilience, and foster deeper ties between Australia and participating countries.

The Council believes similar opportunities exist with our neighbours in Southeast Asia. Expanding labour mobility arrangements would not only help meet Australia’s seasonal workforce needs but also provide mutual reassurance of food security through reciprocal flows of labour and fresh produce. These partnerships can support regional stability, deepen diplomatic and economic relationships, and contribute to a more integrated and resilient food system across the region.

To realise these opportunities, the Strategy must support the development of migration pathways that are fair, flexible, and fit-for-purpose. This includes ensuring that labour mobility schemes are designed to meet the needs of horticultural employers while safeguarding the rights and wellbeing of workers. It also requires investment in bilateral engagement, capacity building, and systems that facilitate safe, efficient, and ethical migration.

In summary, food security is not only about supply—it is about relationships. The PALM scheme and future labour mobility partnerships offer a powerful mechanism for Australia to support regional development, strengthen strategic ties, and build a more secure and resilient food system across the Indo-Pacific.



## Conclusion

The Council welcomes the opportunity to contribute to the development of the National Food Security Strategy and commends the Government's recognition of food security as a matter of national resilience, public health, and economic stability. The Council's submission outlines key areas requiring targeted intervention—competition, productivity, supply chain resilience, climate adaptation, workforce development, nutrition, and trade—each of which is critical to ensuring a secure and sustainable food system for all Australians.

The Council acknowledges that the complexity of Australia's food system demands a whole-of-government and whole-of-society approach. As such, we strongly support continued consultation with industry, communities, and consumers to refine and implement the Strategy. We urge the Government to maintain transparency, foster public ownership, and ensure that policy actions are informed by lived experience and practical realities across the horticulture sector.

Delivering on the promise of a National Food Security Strategy will require more than policy ambition—it demands robust governance that enables collective and coordinated action across sectors and jurisdictions. The complexity of Australia's food system, and the diversity of actors within it, means that ownership must be shared—not only between levels of government and industry, but also with communities and consumers. Fragmented responsibilities and siloed decision-making have long hindered progress in food policy. To overcome this, the Strategy must establish clear mechanisms for coordination, whether through a dedicated agency, a ministerial portfolio, or a Cabinet subcommittee. These structures must be empowered to convene stakeholders, align efforts, and ensure accountability. Only through integrated governance can Australia build a food system that is resilient, inclusive, and responsive to the challenges ahead.

The Council remains committed to ongoing engagement with the Government and other stakeholders throughout the Strategy's development and implementation phases. We will continue to contribute evidence-based recommendations, support collaborative policy design, and advocate for solutions that deliver tangible benefits to growers, consumers, and regional communities. Together, we can build a food system that is fair, resilient, and future-ready.