



PRIMARY INDUSTRIES AND RESOURCES COMMITTEE

Members present:

Mr SA Bennett MP—Chair
Mr RI Katter MP
Mr GR Kelly MP
Mrs D Kirkland MP
Mr JR Martin MP
Mrs J Poole MP
Mr TJ Smith MP

Staff present:

Dr A Ward—Committee Secretary
Dr K Kowol—Assistant Committee Secretary

PUBLIC BRIEFING—DEPARTMENT OF PRIMARY INDUSTRIES AND RED MEAT INDUSTRY STAKEHOLDERS

TRANSCRIPT OF PROCEEDINGS

Wednesday, 2 April 2025

Brisbane

WEDNESDAY, 2 APRIL 2025

The committee met at 10.14 am.

CHAIR: Good morning. I declare open this public briefing. My name is Steve Bennett. I am the member for Burnett and chair of the committee. With me today are James Martin, the member for Stretton and deputy chair; Robbie Katter, the member for Traeger; Glen Kelly, the member for Mirani; Tom Smith, the member for Bundaberg; and Donna Kirkland, the member for Rockhampton. Donna will be with us for the first part of the hearing and then Janelle Poole, the member for Mundingburra, will join us as a substitute.

Today we will receive briefings on Queensland's red meat industry from industry stakeholders and officers from the Department of Primary Industries. We will also discuss the From Method to Market initiative. These briefings are aimed at deepening the committee's understanding of this portfolio as a key initiative in the sector. I begin by thanking the director-general and representatives from the Queensland meat industry for making themselves available as well as the leadership teams that are here. Today we will receive briefings from Cattle Australia, AgForce Queensland, the Australian Meat Industry Council, the Australasian Meat Industry Employees Union and the Department of Primary Industries.

This briefing is a proceeding of the Queensland parliament and is subject to the parliament's standing rules and orders. Only the committee and invited witnesses may participate in the proceedings. Witnesses are not required to give evidence under oath or affirmation, but I remind witnesses that intentionally misleading the committee is a serious offence. I also remind members of the public that they may be excluded from the briefing at the discretion of the committee. I remind committee members that officers are here to provide factual and technical information. Any questions seeking an opinion about policy should be directed to the minister or left to debate on the floor of the House.

These proceedings are being recorded and broadcast live on the parliament's website. Media may be present and are subject to the committee's media rules and the chair's direction at all times. You may be filmed or photographed during the proceedings and images may also appear on the parliament's website or social media pages. I remind everyone of the protocol for mobile phones. If you deal with those appropriately that would be wonderful.

EDWARDS, Mr Garry, Chair, Cattle Australia

CHAIR: Garry, I invite you to brief the committee. Committee members may then have some questions for you. Please remember to turn your microphone on and announce yourself when you start to speak and switch your mic off when you have finished.

Mr Edwards: Thank you, Chair and members of the committee. It is a privilege to be here today as the Chair of Cattle Australia. There is a very profound significance to the Queensland cattle industry and our national industry. Queensland is the beating heart of our cattle industry. The success of Queensland really drives a lot of the success that we have in this very significant sector, which is the largest livestock and agricultural contributing sector that exists not only in our state but also in a very significant capacity nationally.

Firstly, I acknowledge and pass on our deepest sympathies to those graziers and communities in Western Queensland that are dealing with some very significant weather events and the flow-on impacts of that. It is highly profound. Unless you have been in one of those events and experienced what is occurring out there, it is very hard to imagine waking up at night with metres of water surrounding you, particularly with little to no forecast. We need to understand that the issue, which is not necessarily just a Queensland issue but is one for regional Australia, is how we help improve the infrastructure and those early warning signals to get information to people when these significant unexpected events occur. It is a challenge and those people and those communities are going to need a lot of support. To be fair, that is not the token support of sending food and clothes, but actually investing back into the communities and what that means because buying things locally is part of creating the economic stimulus which is critical to that outcome.

I acknowledge the Crisafulli government's long-term plan for growing primary industries' prosperity here in Queensland. That is a tremendous initiative and it is great to see. Developing a 25-year blueprint is a significant component of leadership. From the cattle industry perspective, we are very pleased to be actively involved and want to be part of that because we would hope to be a significant part of that success right throughout Queensland and, as I said, the impact that has on Australia is a very critical component. I also acknowledge Minister Perrett's commitment around refocusing the department and focusing on future-facing initiatives. I commend Minister Perrett's commitment around transparency and engagement with industry. That is a significant step forward in how we tackle some of the significant things that I am going to briefly touch on here today.

Today, Cattle Australia, as I am sure you are aware, has the privilege of representing all 52,000 levy payers in Australia. It is a very different structure to what it was some three years ago. I am very privileged to sit here as an independently elected producer/director and elected chair of that board.

The significant components from a Cattle Australia perspective and the cattle industry's perspective are really around how we focus on a number of issues that are critical such as the buffel grass debate that is occurring at the moment. It seems highly illogical to me that anything that generates millions of dollars of wealth and underpins billions of dollars of property value for our national economy would ultimately be considered a weed, simply because it is very good at covering bare dirt, mitigating erosion and improving the productivity of our regions. I am not sure that I have said anything that normally correlates to a weed because a weed normally has costs, impacts and a detrimental impact to productivity.

It is imperative that here in Queensland and also nationally we focus on rationalising this debate around matters of significance because if we are going to attempt to treat buffel grass as a weed then we will literally destroy the economic value that underpins not just Queensland and not just regional Australia but the billions upon billions of dollars of land value that underpins our banking industry. This is not a small thing. This is not something that is just a small issue for a few producers. This is an issue of national significance. I am not sure that the proponents around that have understood the significance of what they have started here.

Incorporated within that is obviously the ongoing commitment we need and the challenges we face around biosecurity. Everything we do around agriculture and food production starts and stops with biosecurity. We are an exporting state. We are an exporting nation. We export more than 70 per cent of what we produce. It is seen as premium product right around the globe. In every market we go into, our high-quality products demand a premium. As I travel around the world as part of my business and as part of the Cattle Australia organisation, it is a privilege to see product from Australia and from Queensland on the shelves in those countries. It really demonstrates the significance of this industry and what it means. That is a pretty proud moment.

Underpinning that also is the significance of supporting the ongoing live export industry relating to cattle. You only have to go and spend time in Indonesia to see what it means to their food security. As a near neighbour with circa 280 million people, I think it is paramount that we understand our responsibility in providing high-quality protein to the people of Indonesia and Asia more broadly through a highly successful, highly sophisticated integrated live export industry that leads the world in animal welfare, performance and also quality.

It has been a privilege to see recently that some of our live exported product has found its way to the domestic retail supermarket shelves of Indonesia as a high-quality domestic value-added product—something that is not discussed here when we think about the conventional historic elements that have been discussed around this industry. The commitment and alignment between our producers, our growers, our state and our nation and the country of Indonesia is significant and something that we should not undervalue. That is why, at a national level, Cattle Australia is calling for the re-establishment of the red meat cattle partnership between Australia and Indonesia, and that is a critical component to this.

CHAIR: Garry, I am sorry to interrupt, but could you wrap up your opening statement? I am sure that committee members would like to ask you some questions.

Mr Edwards: I can. The other significant component is how we manage emissions and carbon in our environment. Carbon is agriculture's friend. We simply cannot grow the food that we need to produce for the population domestically or internationally unless we convert carbon dioxide to oxygen through photosynthesis and the growth of plants. Agriculture is the only industry in the entire world that has the ability to take carbon out of the atmosphere and convert it into something that is useable and something that is consumable by human society. I think it is high time that we stopped focusing solely on emissions and we started talking about carbon as a cycle and what that means. I thank the committee for this opportunity. I look forward to your questions.

CHAIR: I will pass to the member for Stretton for the first question. Can we keep it tight, please?

Mr MARTIN: Mr Edwards, in your opening statement you said that Cattle Australia is very different to what it was three years ago. You mentioned that the organisation has changed a lot. I think you might have been referring to some legal challenges that the organisation went through. For the benefit of the committee, how have you addressed those concerns to ensure you represent all the diverse voices in the industry?

Mr Edwards: The change that has occurred is that the structure of the cattle industry is no longer by nominated elected individuals from state farming organisations. It is a truly independently elected board these days. Every levy paying producer has the opportunity to participate. As you have alluded to, at the time there was a legal challenge to those constitutional changes. That was the first action that I as the then deputy chair of this organisation, with our chair Mr David Foote, had the opportunity to resolve with those counterparties. I am pleased to say that those individuals who were supporting, if you like, the legal challenge are now fully fledged and engaged members of Cattle Australia. In fact, the individual proponent of that lawsuit is actually part of our regional consultative committee. Probably the most profound demonstration we can show as to the progress that has been made in this is the engagement of all parties.

Mrs KIRKLAND: I have a question around the recent weather events. I acknowledge that 10 per cent of our exports come out of the flood-affected area. I am curious as to how we are going to protect ourselves from the impact to the rest of the world and also to Australia, including the more localised and domestic markets? Is that a strategy that you put in place or is it something that you are reactive to?

Mr Edwards: We are very fortunate within the cattle industry to have a product that is in high demand and of a competitive nature. There are lots of countries that are actively seeking to expand the volume that they get to take out of our industry. The challenge that we have at the moment with the weather events is how we get those people back on their feet and how we get them stocked again. If we learn from the events of 2019, one of the most profound acts was the grant of \$75,000 provided to producers for immediate relief to get them up and running, to start building fences and get back operating again. As you can imagine, when you are faced with such a catastrophic event like this, it is hard to actually calm everything that is coming at you and get back to moving forward.

The opportunity within our great state is one of high resilience. The productive potential is enormous, but we have to encourage people to reinvest back into their assets and to improve what it is that they are doing. We are going to see a very different issue for those affected properties that grow sheep and goats as opposed to cattle. Cattle have a much better chance of getting up and out of the water as compared to, particularly, the wool sheep breeds and goats. It is a significant tragedy that we are dealing with, but it does impact market segments differently.

We are very fortunate though that we have a highly resilient market that is seeking more product from here. The potential is to increase that and the prices that attach to that. There is a lot of opportunity here. We have to remember that this weather event will be exceptionally beneficial for the majority of people who have experienced it. There is a small number for whom it is a catastrophic outcome. For the remainder, it will be an unbelievable break in weather that will create immense opportunity for growth, profitability and sustainability. That is a significant opportunity.

CHAIR: Thank you, Mr Edwards. Regretfully, we only have a short time together this morning. We thank you very much for your participation. I encourage you to read the speech on buffel grass that the member for Mirani made last night, which I know you will be really interested in. I am sure we will be in touch, Mr Edwards, in future.

COUNSELL, Mr Daniel, Director, Cattle Policy, AgForce Queensland

HICK, Mr Lloyd, President, Cattle Board, AgForce Queensland

CHAIR: I invite you to make an opening statement and then we will go to questions from the committee.

Mr Hick: I thank the committee for allowing me to speak this morning. The cattle industry is in a positive position at the moment. This is on the back of a run of good seasons, a high supply of cattle in Queensland and generally a global shortage—mainly in the USA. As always, there are some bumps in the road for the cattle industry. This is no more clearly shown than with the floods in South-West Queensland at the moment. Our thoughts are with them.

To make the most of the position that we are in, key barriers need fixing. The biggest issue for us is uncertainty. Producers are being forced to split their attention between production and external pressures, regulatory changes, logistical issues and market signals that remain unclear. The future is not necessarily negative; it is just uncertain.

The first major issue is the growing gap between environmental regulations and consumer demand. The current proposal, as was spoken about before, to list buffel grass as a national weed of significance has generated significant concern particularly in Queensland where buffel grass underpins grazing systems across millions of hectares. More broadly, regulation is getting ahead of consumer sentiment. Our research does not support assumptions that consumers will pay premiums to fund this transition. Rising cost-of-living pressures make it even less likely. That leaves Queensland producers trapped, being expected to comply with increasing environmental requirements without market returns to support the shift. It also highlights the need for stronger investment in adoption. Much of the research has been done but we need to get adoption on to the ground now and to get on with putting it into practise.

The second major issue for us is the uncertainty around live exports. Live export is the major market for Northern Australia and it underpins the southern market when it softens. The uncertainty in the live export area is really hampering the ability for producers and industry to invest in that trade. It is more just the uncertainty of where it may end up. From a Queensland perspective, two critical bottlenecks persist—the vet shortage for pre-export pregnancy testing and adequate export infrastructure. Firstly, AgForce Cattle are working to amend the veterinary act to allow accredited pregnancy testers to operate under strict standards. This would relieve immediate workforce shortages. Secondly, expanded access to port infrastructure is essential to support throughput and competitiveness in our market. We live on an island, so the need to protect our biosecurity is of utmost importance. It is getting harder and harder to protect at the moment. It is a real concern for cattle. Northern Queensland is very close to our northern neighbours, so we need to have some protection there.

The condition of the rural road network is poor and needs an injection of funds to help access to markets. Cattle are Queensland's largest renewable exporter. They just keep renewing. It is something we need to focus on. Access to freight infrastructure is very necessary to continue this growth. There is great potential in the north of Australia. It is a high-rainfall area, it is underdeveloped and it is probably the biggest contributor to the 25-year plan and the target to reach \$30 billion by 2030.

If we address these issues and get to work, the cattle industry will deliver. We will work with government to address these issues. We are very keen to make sure that the communication between government and producers is strong. We also require assistance with educating the public on the importance of national food security and the importance of Queensland beef which underpins this. Thank you very much for allowing me to address you.

CHAIR: Thank you. It is great to have you here.

Mr SMITH: You mentioned the strength of the beef industry and that you are ready to go in terms of the 25-year plan and the output goal of \$30 billion. How many more billions of dollars or hundreds of millions of dollars do you think the beef industry can grow by 2030?

Mr Hick: To be honest, I do not really have a figure. It is about removing green and red tape to allow the industry to grow. I think we will be very surprised in the growth of industry if it is allowed to operate as we know it can.

Mr Counsell: There is no rough figure in terms of what that end figure might be. Based on the current projections of live exports, they are expecting a 23 per cent increase alone. This is across the north. Obviously Queensland makes up a significant portion of that. That portion of the beef industry

alone is expected to hit a 23 per cent increase in growth for this last financial year and an additional 10 per cent next financial year. That is with the current background. As a small snapshot, the cattle industry is worth about a total of a billion dollars nationally. As a proportion of that, that is a pretty good indicator of what can be achieved particularly if we can get these barriers removed and get the industry roaring at full speed.

Mr G KELLY: Lloyd, one question of concern that comes across my desk quite a bit is: how have renewable energy projects impacted your members? That is something that has been a flag to me of late. I am a beef cattle producer. In the LPA accreditation there is a question: do livestock have access to electric transforming, hydraulic equipment, solar panels, wind turbines, gas or coalmines? To me, there is a problem with solar and wind projects being mass produced across regional Queensland, let alone Australia. That is a flag to me. Is that suggesting that we have issues with renewable projects happening in vast areas of such good prime agricultural land when it comes to run-off?

Mr Hick: I think it is a real issue going forward. I think there is certainly a lot more work that needs to be done on how we coexist. It is a really hard one for an organisation to have input into because it comes down to a commercial decision made by producers. They are able to make the best commercial decision for them. The real issue for me is the next door neighbour—the person who is not getting anything from the renewables but is suffering from the consequences of them being in their area. At the moment, there is no protection for those people, and I think that really needs to be looked at.

Mr KATTER: This sounds like a silly question, but would there be an alternative use for your large-scale pastoral leases and grazing areas? There are these risks with the industry. Thornton is your home station in North-West Queensland. If buffel grass gets outlawed and live exports collapse and everything viable goes out the window, what is the alternative use of Thornton or pastoral leases in North-West Queensland? I would argue that it is nothing. It becomes national park.

Mr Hick: It does not have an alternative use. The danger of a property being locked up, like you suggested, leads to all sorts of biosecurity risks and a lack of money back into the community.

Mr KATTER: You perform weed maintenance and pest control. You contribute everything to biosecurity right now free of charge to the government.

Mr Hick: We do. That is part of our ongoing management to operate a property at a high standard. We all have a plan for managing weeds.

Mr KATTER: The committee was briefed by the department a couple of sitting weeks ago saying that biosecurity was not raising any alarms. They were not saying that it was good but they certainly were not saying that it was bad. I would argue that the biosecurity efforts being made by the government and the department at the moment are very bad when it comes to funding and resources. What has been your experience on the ground in addressing biosecurity issues such as prickly acacia, mimosa or whatever?

Mr Hick: There is very little help. I know that producers have an obligation to do their own biosecurity. Some of these pests are out of control beyond what a producer can control themselves, so they need some help.

Mr KATTER: How did the announcement about buffel grass—the risk of buffel grass being included as a national weed of significance—make you feel when you have no assistance with biosecurity?

Mr Hick: It is unfathomable to think that buffel grass is going to be put on this list. It proves that the nomination process is broken because there is no way that you can say anything positive about a weed. We have hundreds of weeds that are detrimental to our industry that we are not able to control. Let's focus on them and get them cleaned up first.

Mrs KIRKLAND: As you know, I am from the beef capital of Australia. Arguably, I am sure there are some people who would say that is not so.

CHAIR: Nice speech last night too!

Mrs KIRKLAND: Thank you. We host a couple of great events in Rockhampton, helping the younger generation to become interested in being the next generation of graziers. We have seen the closing of the agriculture schools. The Emerald and Longreach pastoral colleges have been closed. We have the Belmont Research Station in Rockhampton but it is not necessarily doing much. Are there plans to reinstate these types of schools in the regions? We really want to groom the next generation. As was rightfully said by our previous witness, we need sustainability in taking protein to the world. What are your plans?

Mr Hick: Certainly, the young people are our future. I think we have to take a step back further than the young producers. I think we need to go right back to the curriculum in schools. There is education in there at the moment, but we do not have a system in place where we train our teachers to teach agriculture. That is the gap we are missing. Our teachers do not have the understanding to teach agriculture to the younger generation, so we are really finding a gap there. There are so many opportunities in agriculture. We need to sell it better than we do. It is not about riding a horse and chasing a cow; there are hundreds of opportunities in the professional world within agriculture. We need to sell it better. Certainly, as AgForce Cattle board, it is one of our priorities to get education not only to the young kids but also to producers to be proud of what they do.

Mrs KIRKLAND: Would you suggest that in the universities that teaching the teachers to teach is still a gap?

Mr Hick: One hundred per cent—that is where we lose control, at the university stage. They probably get fed some very different views, and that is okay, but they are lacking the understanding of what agriculture is.

CHAIR: Thank you, Mr Hick. With that, our time has come to a close. Thank you very much for your input here this morning. We really appreciate it.

Mr Hick: Thank you very much for allowing us to talk.

RYAN, Mr Tim, Chief Executive Officer, Australian Meat Industry Council (via videoconference)

CHAIR: I invite you to brief the committee briefly, after which we will have some questions for you.

Mr Ryan: Thank you for the invitation to speak to the committee this morning. Our members comprise the post farm gate meat supply chain. Our membership comprises processors, small goods manufacturers, retail butchers, as well as wholesalers and exporters. In Queensland, we have 288 members. They employ tens of thousands of people particularly in some of the more remote and rural towns. They are often the key employer and really form the lifeblood of some of those communities. Queensland is a key part of our industry, obviously for the beef sector particularly. It is really the powerhouse of Australia.

There are a few priorities that I would flag with the committee, but I am happy to talk to anything of concern. For us, there are some issues of note and areas where we are focused currently. In recent years probably No. 1 is workforce. Right throughout the supply chain, workforce is a critical area in terms of skills and overall shortages. Looking at ways we can bolster the capability of the Australian workforce is a major focus for our organisation, as well as supply chain partners, but also finding and building attractive pathways for Australians to enter the industry and find particularly young people coming out of school and getting them interested and into our industry is a major priority. While we will always prefer to employ Aussies, the migrant-led pathways and that functioning effectively will remain a major need for us. There simply is not the workforce at the moment available to underpin our needs, so we are utilising some of those migrant labour schemes as well.

Another major focus for us is animal welfare. It has been a major initiative of AMIC over the last decade. We have established and driven an industry-led animal welfare standard for livestock processing. That is voluntary, but has been widely adopted by the industry. For cattle, for instance, nationally, over 95 per cent of the kill would be certified under this program. That said, though, we are also working with government, particularly led by Queensland, to develop a minimum standard that would form a harmonised national baseline for all processing as well. For us, we see that as another major need for industry to really harmonise and set the tone of what industry standards are when it comes to animal welfare.

Probably a focus where we work particularly throughout the supply chain—I know there are some producer bodies in the room as well—is that we operate in a climate that has inbuilt volatility in the supply chain. We see that in the market. We go through wet years and dry years, and my sympathies are with those in the parts of Queensland which are inundated with flooding at the moment. It is largely outside of our control. For us, looking at ways where we can smooth and add shock absorbers into the supply chain to try to navigate some of that inbuilt volatility is important. Particularly for Queensland, the feedlot sector is really good—a case study of one way we can try to smooth out those huge fluctuations in supply based off grass availability as well. For me, I think that is something, as a supply chain, we can all continue to focus on, particularly to smooth out some of those peaks and troughs you can see in the livestock market based on that underpinning seasonal volatility.

Lastly, in Queensland, but also nationally, open access to export markets is key for us. We produce far more than we can consume domestically, and maintaining our export markets and a healthy diversified portfolio of export markets is a critical focus for AMIC and our members, and particularly for the likes of Queensland where we export a lot of our beef produce to many markets around the world. Maintaining access to that is another key focus of our organisation. They are a few areas of immediate concern and focus for us. I am happy to discuss any of those or any other matters the committee has.

CHAIR: Thank you very much, Mr Ryan. With regard to the impact on beef exports into China, what have the exporters, processors and industry bodies learned from that restriction?

Mr Ryan: No. 1, we have always had a fairly diversified export portfolio. Currently, we export to about 100 different markets around the world. We maximise value when we can sell the individual cart that will get the best return in that specific market. That said, we have always remained a pretty healthy portfolio of markets. We are never overly reliant on one, but we have seen the impact of those overall premiums you can get when certain markets are disrupted.

In terms of the lessons learnt, we have always wanted to do business with everyone and as many markets as we can. I think we have navigated the last few years reasonably well. Ultimately, we are able to adapt and pivot to those second-tier and third-tier markets when probably our first

choice was not available for some establishments. It emphasises the need for us to have as many options available to us as we can, because you never know when one of those markets could get disrupted.

Mr MARTIN: I am interested in your workforce. You mentioned it briefly in your opening statement. In particular, do you have information on how many of your overall workforce are migrant workers? Do you know what that break-up is? What types of visas are they on? Are they here on visas that lead towards permanent residency, or are they on the temporary visas where they come and do the job and then go back to their country of residence? If you could explain that to the committee, that would be helpful?

Mr Ryan: I have some national numbers in mind, but I suppose it would be similar for Queensland as well. The workforce composition really depends on a plant-by-plant basis. For our retail and small goods manufacturing members, they largely depend on a domestic workforce. There are some migrant labour pathways they access, but when we see the utilisation of these programs, it is highly evident in the processing sector. It depends on a plant-by-plant basis. Some might be 10 per cent migrant labour, some could be 50 per cent; it all depends on the local availability of workforce and their ultimate needs. PALM has emerged as a major pathway for the industry. That is largely unskilled labour, and that does not necessarily have a pathway to permanent residency. With regard to the last numbers I saw, there were approximately 10,000 PALM employees in the meat industry in Australia at the start of the year.

The other major pathway is for skilled labour and the MILA—the Meat Industry Labour Agreement—and the visas that form under that. They do offer pathways to permanent residency as part of those, and the ability to keep them for a longer period. I do not have numbers on that program. I imagine it will be in a similar realm as PALM, so probably around the 10,000 mark across Australia as well, but I will have to get some updated figures for that particular program.

CHAIR: Mr Ryan, can we ask you to respond to that on notice and send that information to the committee by 16 April if that is appropriate?

Mr Ryan: Yes.

Mr G KELLY: What do you think are the biggest strengths of Queensland's red meat industry, and how can the industry build on them?

Mr Ryan: Queensland is a state that can produce a wide variety of products for a wide variety of markets. From the north to the south, you can produce the full gamut of *Bos indicus* cattle—namely, for the live export supply chain—all the way through to full-blood Wagyu in the south or even in Central Queensland as well, but all the way through to Wagyu on feed for a long-fed ration program. You can have the ability to hit the market and produce to a wide variety of global customers, as well as Australian customers. I think the quality and quantity depends on the product of the market you are selling into, but the quality of Queensland beef is world renowned. Queensland and brand Australia has done a very good job at selling itself.

I think probably the ability to almost cater to any customer's needs is a huge strength. Being able to do that, though, will depend on us navigating the current change in the global landscape when it comes to trade. We can never eat the amount of beef that we produce, so continuing to access as many of those export markets will be critical for maximising and getting the returns on our beef exports that the Australian supply chain and Australian producers deserve.

Mr SMITH: With regard to small-scale farmers and being able to access commercial abattoirs, there is a growing push amongst small-scale farmers that, due to contracts with the large supermarkets, they are not able to get in and get their livestock accepted by the abattoirs, and that then is having a flow-on effect obviously not only for themselves but also for their regional towns. Has the industry taken much scope or do you have a view towards changing regulation without on-farm processing?

Mr Ryan: We are not opposed to any particular business model, and there will be some niches where these on-farm supply chains and local processing for a local market make sense with that particular customer base. However, we do support the same standard and same outcome being applied to the entire supply chain. We cannot compromise on food safety or animal welfare when it comes to business models and we have two tiers of requirements, really. We all need to follow the same benchmark. The challenge for some of these smaller or novel businesses is how they can continue to meet those standards. For some of them, it is not possible, but we are not necessarily opposed to them having a crack and seeing if they can find a customer base. For a lot of them, we really do not support any kind of watering down of standards because the broader reputational issues, if someone gets it wrong, are too great for the entire industry to be concerned about.

Mrs KIRKLAND: A question that has come out of the regions and specifically out of our abattoirs: are there any onerous regulatory industry welfare standard practice requirements that are inhibiting productivity and inhibiting profitability? I will give you an example. If a beast bellows five times during transition, the entire load is compromised.

Mr Ryan: I am not entirely familiar with that specific standard, sorry. The observation from the entire industry though is welfare is something we do not necessarily want to compromise on. We have seen the broader reputational issues if the business gets it wrong. I think industry has seen a need to self-regulate in this area and that has been done through our industry-led standard. You see the vast majority of the Queensland processing sector embrace that standard and it is now a widely utilised commercial requirement for doing business by the major corporates. It has not necessarily been viewed as a cost of doing business; it is a business-critical need, I suppose, that we need to underpin and build in. It is not necessarily animal welfare versus profitability, the two can go hand in hand, particularly when it is built into commercial contracts. You can be financially rewarded for making those investments as well.

That said, there are those businesses that cannot meet our industry standard. It is considered best practice so we still need a baseline requirement for the processing sector to clearly highlight and articulate what their requirements of processing are in Queensland but also across Australia. Having a harmonised approach to how that is regulated would be highly desirable from our perspective.

Mr KATTER: I am in Mount Isa. I have a concern that the market seems to demand flat backs. There are a lot of people taking the Brahman content out which, as you play that forward, is not good for live export and not good for the northern cattle industry. What is the industry's approach to that? If it is just these vague market forces running everything there needs to be some strategic acknowledgement of that as an issue.

Mr Ryan: It is not our role to tell farmers how to farm. All we can do is send the right signals to tell them what the market wants and they can make those decisions. I am happy to take that on notice and consider the broader implications and consult my supply chain partners as well. I am not aware of any strategic priorities or work being done to consider the longer term implications of changing the genetics of the northern herd.

Mr KATTER: I wanted to get the question out to the other witnesses but I only had you left so I have asked you to get it on record.

CHAIR: You should have jumped in and asked it. If you could take that on notice, Mr Ryan, and have the answer to us by 16 April, if you would be so kind. Thank you for your attendance here at our public inquiry.

JOURNEAUX, Mr Matthew, Federal Secretary, Australasian Meat Industry Employees Union

CHAIR: Could you give us a brief introduction, after which I am sure we will have some questions for you.

Mr Journeaux: I have kept it quite short because I was not sure of the terms of reference. Firstly, I would like to thank the committee for giving me the opportunity to attend today and talk about my industry. I have been involved in the meat industry for nearly 40 years and my union represents members across all parts of the processing sector. This includes beef processing, lamb processing, pork processing, poultry, small goods and retail. The industry across these sectors employs approximately 37,000 people directly and employs nearly 500,000 people across the whole supply chain. The meat processing sector contributes \$18.2 billion nationally to the economy and is an important, and often the largest, employer in the regional communities that it operates in. I am happy to answer any questions that the committee has.

Mr MARTIN: I have a question about the migrant workforce. I asked it of the Meat Industry Council. I was wondering if the union could share with the committee if it had any concerns that it has come up against with migrant workers. People over here on visas, do they have any different issues? Are they put under different types of pressures because they are here as a migrant worker?

Mr Journeaux: There are significantly different challenges for migrant workers within the processing sector. There are a variety of visas that they come over on. The 417 visa, or the Working Holiday visa, varies between six months and three years. If they do their 88 days in a regional area they continue to get another 12 months and then if they do 176 there is another 12 months. They enter the industry as typically unskilled or semiskilled workers. Those workers then generally do their 88 days in a regional area. There are not too many beef processing facilities in Queen Street. They fit that criteria so they are generally here for three years as a stream of low or semiskilled workers. Generally, they come in through a labour hire agency. Before 'same job, same pay', and obviously those applications have to filter through the process, they could be paid significantly less than the local workforce get paid. Under our enterprise agreements, typically we are paid 20 to 30 per cent higher than the award and the only obligation on labour hire companies is normally the award coverage that covers those employees. That is one visa.

PALM workers come into our sector as well. They are not short-term, PALMs, so they are here for a four-year period. They are generally low or semiskilled. Prior to the recent changes to the PALM deed, which was July last year, they too could get paid significantly less than the local workforce because they were brought in under labour hire as well. Obviously, the PALM deed changes have improved that situation and they are now paid the same as the regular workforce. Obviously, accommodation is the biggest challenge in regional areas and the appropriateness of the accommodation for people who are here for a four-year period. It is not that they are here for six weeks picking fruit that is rotting on the trees and being able to get that out, they are here as a permanent workforce for that period of time. Then there is the 482 visa which is the MILA—the Meat Industry Labour Agreement. They are the skilled workforce—the boners, slicers, slaughtermen. As Tim said, there is a pathway to permanency, but that is contingent on employer sponsorship. If the employer likes them they will sponsor them. Some of those workers have been here for 16 years and still have not got sponsorship.

Mr MARTIN: Sixteen years is a long time.

Mr Journeaux: Yes.

Mr MARTIN: And it is totally up to the employer?

Mr Journeaux: Yes. We advocate for self-nomination, but that has not happened as yet.

Mrs KIRKLAND: My question is a little similar, but probably honed in a little bit more around the variety between small and family run companies. Obviously, that varies enormously. We have large multinationals as well. How does the size of the operation impact the meatworkers?

Mr Journeaux: There are not too many small processing facilities left. They have been rationalised and generally it is dominated by the big three, if you like—Nippon, JBS and Teys brothers. They operate a fair chunk of the meat processing industry across the whole of Queensland. There are some smaller operators, family-owned businesses—

Mrs KIRKLAND: Some boutique ones, yes.

Mr Journeaux:—like Menegazzo's out at Grantham and so forth, but they are few and far between. Obviously the buying capacity of the larger players would, just by economies of scale, mean they would be able to run their businesses more efficiently. Generally, the larger operators have more sophisticated HR and you can deal with HR issues more effectively and efficiently through those processes. Some of the smaller operators really do struggle with dealing with those sorts of problems.

Mrs KIRKLAND: Is it wage wise?

Mr Journeaux: It is a variety of things. It could be unfair dismissals, the way those workers have been treated, underpayment of wages, interpretation of legislation and so forth.

Mr SMITH: I am wondering about the union's position on migrant work in terms of is it something that the union sees as necessary because the positions are there to be filled or is the union concerned that the industry is looking at ways to try to go through labour hire and therefore pay workers at a lower rate than what would be agreed under an EBA?

Mr Journeaux: Whatever we are doing is not working. We have had a temporary skills shortage within our industry. It used to be a TSS visa, it is now a Skills in Demand. They have changed the name. We have had a temporary skills shortage in our industry for two decades. Whatever we are doing we are not plugging the gaps. Typically, people used to enter the industry as labour or a semiskilled worker and then they would show a bit of promise and advance into a higher skilled position—the boner, slicer, slaughterman. If you cut that end off and backfill it with 417 visas and PALM workers, it stops people advancing into those higher skilled roles and then if you plug the other gap with 482 visas, it really does stop that career progression and career opportunities within our sector.

Mr G KELLY: Is there anything that the meat processors could be doing to make jobs in the meat processing area more enticing?

Mr Journeaux: Yes, definitely. They could pay more. Attraction, retention and mentoring is a big part. If you walk into a processing facility and you are a 16-year-old kid it is quite confronting. Having a system where those people are guided, spoken to on a regular basis—put your arm around them, if you like, a little and try to bring them through the first three months. Typically, that is when there is a large turnover of staff—it is in that first three-month period. If you can get over that hurdle, generally they will hang around. The meat processing industry used to be a very attractive industry in regional Australia—the days were short, the pay was good. People left school and if they did not go to university they went into the meat processing sector. Since about 2000, when tallies were stripped from awards, that has changed significantly.

Mr KATTER: Did those training centres that we were talking about earlier that were closed down play a role? Were they ever handy in bringing people through?

Mr Journeaux: Not really. The processing sector is a certificate III level; it is not a trade qualification. As part of this role, I sit on an advisory group in relation to agricultural apprenticeships and a few other bits and pieces. Bringing those qualifications to a trade level probably is not appropriate in our sector, but certainly that certificate III level is where they sit.

Mr KATTER: Where would they do that normally? Do they do that internally?

Mr Journeaux: It is done by a private RTA. Validation of those qualifications is the biggest challenge within regional Australia, where people are actually coming out and validating that those people have the skills. I think there is a big role for TAFE to play, and government-funded institutions, that will be able to have reliable validation and probably in certain sectors and certain industries that might be running at a bit of a loss because of the distances and the rural nature of where we do our business.

CHAIR: Thank you everyone. Thank you, Matt, for your contribution. We really appreciate it. I thank Donna Kirkland, the member for Rockhampton, for stepping in for that session. I really appreciate you giving us your time. I welcome Janelle Poole, the member for Mundingburra, who will now join us.

BACON, Mr Ashley, Acting Deputy Director-General, Agriculture, Department of Primary Industries

BOLTON, Mr Graeme, Director-General, Department of Primary Industries

GOSWAMI, Ms Sarah, Chief Economist and Director of Economic Policy and Analytics, Department of Primary Industries

HALL, Dr Wayne, Executive Director, Agri-Science Queensland, Department of Primary Industries

MILLER, Mr Elton, Executive Director, Agribusiness and Policy, Department of Primary Industries

CHAIR: I welcome officials from the Department of Primary Industries. Director-General, I invite you to provide a statement to the committee and then we will proceed with questions.

Mr Bolton: Thank you. Before we start, I would also like to express my thoughts, sympathies and condolences for our primary producers right across the state at the moment. We are in the middle of a major, unprecedented flooding event in the South-West but we have also had significant flooding and other challenges in South-East Queensland and in the Far North recently. Certainly the department's support and commitment to working with primary producers in the recovery is ongoing.

I would like to start by thanking the Primary Industries and Resources Committee for giving the Department of Primary Industries this opportunity today. I will be providing a briefing on the status and future of the red meat industry in Queensland, including the findings and outcomes of the From Method to Market program. Before I start, I will introduce the other departmental representatives here. On my left, I have Mr Ashley Bacon, who is the Acting Deputy Director-General for Agriculture. On my right, I have Mr Elton Miller, Executive Director of Agribusiness and Policy. On the far end is Dr Wayne Hall, Executive Director of Agri-Science Queensland. To my far left is Ms Sarah Goswami, our Chief Economist and Director of Economic Policy and Analytics.

The Queensland government is committed to delivering a fresh start for primary industries and there is no doubt that Queensland is open for business. Queensland's primary industries are the backbone of our regions and contributed \$22.6 billion in agricultural production in 2023-24. The red meat sector alone, which is comprised cattle, carves, goat, sheep, lamb and meat processing, had a gross value of production of \$8.77 billion in 2023-24. We are forecasting an agriculture industry worth \$24.48 billion in 2024-25, with the red meat sector projected to reach over \$10.4 billion. We are certain Queensland will continue to lead Australia's red meat sector, cementing our position as a national leader in food and fibre production.

Queensland continues to ensure strict biosecurity frameworks are in place to protect our red meat industry from serious biosecurity threats. Australia is in the enviable position of being free from significant diseases such as foot-and-mouth disease and lumpy skin disease. We want to keep it that way. The Queensland government is bolstering the biosecurity front line in the state by investing \$50 million in 100 additional biosecurity officers, who will be critical in an emergency animal disease outbreak.

The department is working with the red meat industry, universities and technology companies to deliver research, development and extension to improve the adoption of new technologies that support greater productivity, greater profitability and long-term sustainability. DPI has invested over \$22 million in the RD&E program over the past two years to develop, test and demonstrate technology to the industry across Queensland. Our dedicated programs, such as Future Beef and Leading Sheep, were delivered with key partners to provide direct and online engagement with industry to improve the adoption of technology.

In 2020, the Australian red meat industry committed to a target of carbon neutrality by 2030, the most ambitious red meat climate target set worldwide. At that time, more than \$2.5 billion of Australian and Queensland government funds had been committed to payments for ecosystem services via carbon and natural carbon markets. The four-year From Method to Market project, running across September 2019 to July 2024, sought to help overcome barriers to graziers participating in these markets while continuing livestock production. The project found that changes in environmental markets would be required to increase landholder participation. It also found that

soil carbon opportunities and extensive grazing lands are likely to be modest, that emission reduction pathways should include both economic and sustainable objectives and that the current emissions reduction abatement pathways for on-farm were unlikely to completely negate emissions.

The project also identified that a network of regional champions and extension teams is needed to help graziers successfully navigate environmental markets. The department has since established a carbon extension and outreach program and is progressing other initiatives aligned to the project's findings, including through the Zero Net Emissions Agriculture Cooperative Research Centre.

Supply chains, financial institutions and international markets are increasingly asking agribusinesses to prove that they meet a range of environmental, social and governance—ESG—requirements. Deforestation is a requirement that is currently most relevant to the Queensland red meat sector. Other requirements include biodiversity, modern slavery, chemical use and animal welfare. The department is working collaboratively with the beef industry to support their land stewardship efforts to meet community demands for sustainable food and fibre and construction products for our country's, and the world's, needs.

Under the Right Plan for Queensland's Future, the Queensland government has made a commitment to boost skilled agricultural workers, with more training opportunities through our regions. We anticipate that, by 2029, more than 40 per cent of jobs in the agricultural value chain will be transformed through the impact of automation and emerging technologies, with modelling predicting that one in three of these jobs created in primary industries will be technology related. The department will continue to work with the red meat industry and higher education to drive the future skill requirements to build Queensland's agricultural workforce, including training for the agtech jobs of the future and its supply chain.

The state's red meat sector continues to grow and will be a significant contributor to achieving the Queensland government's ambitious target of growing GDP to \$30 billion by 2030. Our vision for Queensland is simple: we are here to deliver a stronger, more resilient, more productive, more profitable and more innovative agricultural sector that benefits everyone in Queensland, in Australia and across the world. I would like to thank the committee for its ongoing interest in the status and future of Queensland's red meat industry. We would be happy to answer any questions that you might have.

Mr KATTER: Thank you, Mr Bolton. Training has come up a couple of times, and you just mentioned it in your introduction. I am still bewildered that we are talking about training when we had a private investor group looking to keep the Longreach ag college going and take it off the government's hands, but it was sold. I am still trying to work out how that happened and how the community benefit was measured in that process. Here we are talking about training and we had a fully functional training college that probably needed some improvements but a private investor was prepared to come in and do that for us. It begs the question: why did that happen?

CHAIR: It was the previous government's decision, and you are really asking for an opinion on a policy position, member for Traeger, with due respect. If you are comfortable, Director-General, you may answer.

Mr Bolton: I will start by answering that that was a decision of the former government and I cannot speak to the reasons behind that. What I can speak to is the commitment of the department and this government to increase investment in skills, support and training for the agricultural sector, the primary production sector. You are probably aware that, over the past years, we have invested \$8 million per year in various agricultural training programs. That is in partnership with industry groups such as AgForce, Queensland Farmers' Federation and eastAUSmilk. We will be looking to continue those opportunities as we move forward.

Mr G KELLY: I have had a lot of constituents raise concerns about the use of Bovaer in cattle, with many dairy and beef producers saying they do not use Bovaer due to the concerns of consumers about its use. What is the department doing to help consumers identify the use of Bovaer to ensure they are not unwillingly consuming it?

Mr Bolton: We are working collaboratively with industry to help them work out which breeds they might take on and what products they might produce, such as beef, milk or other products. I am happy to provide a little more detail but there is probably not much more I can offer at this point in time around Bovaer in particular.

Mr MARTIN: You mentioned earlier that deforestation is one of the most important issues facing the red meat industry. Could you expand on that for the committee? Which overseas markets are bringing these rules in? I assume that is the reason we have to make the regulations. Also, has the department looked at any risks if we do not meet these new rules?

Mr Bolton: That is a great question. The European Union have brought in what they call deforestation regulations, commonly known as EUDR. Basically, countries that export to the European Union are required to provide a certification that those products have come from properties which are free from deforestation. We are currently working with the Commonwealth government on a number of issues, in particular their definition of 'primary production' and how it relates particularly to Queensland and especially the beef industry when mulga and other wooded vegetation are being used as fodder, particularly in times of drought.

In terms of economic impact, Queensland exported \$69.8 million worth of beef products to the EU in 2023-24, which is about one per cent of our total export of \$6.73 billion. At the moment, we are consulting with the Australian government on those impacts and we are working actively with AgForce, the Australian Meat Industry Council and the Australian Meat Processor Corporation through an ESG working group. The ESG working group is being led by us and we will be working with the Commonwealth to negotiate on where we can actually get better outcomes for Queensland producers.

Mrs POOLE: Director-General, thank you for your report. In your report, you spoke about the new biosecurity officers who will be coming on board. Can you just give us an update on when they are due to start—or, excitedly, if they have already started—and where they will actually be placed?

Mr Bolton: That is a great question. We started advertising for three regional director roles—senior leadership roles—across the state prior to Christmas. Those roles have been finalised. We are in the process of onboarding those particular senior leaders. Those leaders will now work with our various Regional Organisations of Councils—ROCs. That grouping of councils will work region by region to understand the biosecurity priorities within a region and determine where the balance of the 100 FTEs will be placed according to their findings. We are looking to work collaboratively with local government, understand the priorities in that region and align resources and other programs within the department to respond to that.

Mr SMITH: In your introduction, you mentioned the projected output for 2024-25 will be \$24 billion; is that correct?

Mr Bolton: Yes.

Mr SMITH: Does the department have a goal to increase that by the 2025-26 financial year?

Mr Bolton: The goal that we are working towards is to grow GDP to \$30 billion by 2030. Over the past 20 years, we have grown, on average, about three per cent. We will need to grow about 5.8 per cent over the coming five years. We are looking to do things very differently. You would have heard that, on 26 February, we had a whole-of-portfolio planning day where we worked with industry to co-design a 25-year vision, which very much encompasses and embraces that five-year goal. The next step is to work with our industry partners through regional action plans to understand what are the priorities and opportunities within the regions so we can work towards that interim five-year goal of \$30 billion by 2030.

Mr SMITH: When we say '2030', do we mean the financial year 2029-30 or 2030-31?

Mr Bolton: I might just confer with my economic colleagues. I will ask Ms Sarah Goswami to answer that.

Ms Goswami: We are referring to 2029-30.

CHAIR: I want to ask the panel about invasive species, particularly feral pigs. What are the impacts on cattle producers and what are some of the initiatives that have been rolled out?

Mr Bolton: I have been in this role for 10 months now, and the first six months of that was really getting out and talking to stakeholders on the ground, talking to primary producers. A common theme came up. Whether I was meeting with cane producers in the far north at Mossman and Cooktown, strawberry growers on the Granite Belt or primary producers and cattle producers out west, feral pigs were up in the top one or two of the issues raised. In this department, the minister has provided a lot of support to do things differently. At the National Feral Pig Conference on the Gold Coast a couple of weeks ago the minister announced that we are going to start working with the feral pig coordinators—there are five in Queensland—to again work through the regional entities and stakeholders to collaboratively co-design action plans and strategies that have a real, meaningful impact on the ground. There are a lot of people doing a lot of work in this space, including our department, local government and landowners, but it is all done disparately at the moment and we know that it is not all that effective at times. The intent is that we are going to bring it all together under a common framework so we are getting consistent and coordinated delivery of impacts and hopefully a greater economy of scale through that pooled funding so we are getting real outcomes on the ground, which is less pigs.

Mr KATTER: In terms of deforestation, does the department see that it has a role in terms of advocating for the industry? From my perspective, there is a lot of misinformation. Those overseas could be making assumptions that we are knocking over prickly acacia or there is a gidgee encroachment. Then we get into the whole vegetation management debate where there is no measurement of regrowth. Does the department see its role as advocating for the beef industry to counter some of this push?

Mr Bolton: I would say advocacy to a certain extent, but more education. We are closely working with our Commonwealth counterparts, who are the lead in these negotiations, to inform and educate the policymakers over in the European Union about the unintended consequences of some of the framework of their regulations, including the definition, and how that applies to what we do here in Queensland. You could call it advocacy, but it certainly is very much around better educating the key policymakers and influencers across the other side of the world. I might also request Mr Elton Miller to add further to that.

Mr Miller: As Graeme said, we are working with some of the key industry stakeholders, including Cattle Australia, AgForce, the NFF and then through the feds, but it is very much showing how we can meet their requirements as well. There is a lot of work being done around what the definition actually means. The EU extended their timeline from last December to December 2025, but we feel that Queensland producers can meet those requirements in a lot of situations. We are certainly working very closely with the federal government and industry stakeholders on it.

Mr KATTER: I made a criticism earlier. We had a briefing with you the other week and there was not really anything sounding alarm bells on biosecurity. Up in the gulf we have weeds and pests. I could be out of line, but are you raising alarm bells with the feds? Funding and resourcing for pigs is hopelessly inadequate. As far as I can tell, it is about \$2 million or whatever. You can have plans in place, but you need resources for prickly acacia, calotrope, bellyache bush, blue sedge and grader grass and so on, and the resources are not there. I do not think anyone is going to try and hide that. Do you see your role as advocating to the feds? We are not getting the message here that you are short of resources. Do you see your role as calling out there is a problem here?

Mr Bolton: Biosecurity is an ever growing issue and it is a significant issue that we turn a lot of our effort to. If we look over the last 10 years, there has been quite a significant increase in the number of responses we attend to every given year, and that is not likely to drop off any time soon. In terms of how we approach that, everyone has an obligation under the Biosecurity Act or the general biosecurity obligation to address their own biosecurity risks on their property. How that is executed by various landowners can be a bit hit and miss at times. One of the key roles of this department can be around the better coordination of those activities and better education. Absolutely, compliance and enforcement takes one part of that, but we know from experience that if you take a big stick it has limited impact and limited effect. The better way of doing that is through joined up activity and better education, so we are getting everyone working in concert towards that.

The other key point I would make is that every region is different, so what is a biosecurity priority for one region may be very different to another. In the south-west, cactus is one of the big issues; in the north-west it is prickly acacia. For most places along the coastline it is going to be feral pigs. It is very different depending on where you are. Some of the 100 FTEs who have been announced will work on a regional basis to understand what those regional priorities are and then get a more coordinated, joint approach to how we all collectively execute our general biosecurity obligation.

CHAIR: The investment in those 100 extra positions has been appreciated, so thank you for that, Director-General.

Mr G KELLY: The department engages regularly with stakeholders. Do you find that other departments are not working in conjunction with DPI to achieve mutually beneficial outcomes? I think you fellows are the neck. You have a lot of strengths. Are they being very supportive?

Mr Bolton: You are quite right; when we look at the challenges in front of us and the opportunities to reach our target of \$30 billion by 2030, a lot of those opportunities do not sit directly within our department. They are influenced by other portfolios, whether it is water, electricity, planning in the local government space or even manufacturing. We had a portfolio planning day on 26 February where we got the whole ecosystem together. That was right across government, so all the agencies were there. Three levels of government were also present at the time. There is a very strong commitment from my fellow directors-general to support each other in the achievement of their various portfolio targets and outcomes. Through my engagement so far there is a willingness, particularly from the energy department and the water department, to be in lock-step with us looking at the opportunities and trying to resolve some of the barriers there might be to grow our GDP.

Mr MARTIN: Following on from the question from the member for Bundaberg and your goals on growth, you mentioned increasing it from three per cent per year to 5.8 per cent per year. We heard from other organisations that a lot of the focus is on increasing capacity in the north. Where is that growth going to come from and how much of that is linked to increasing live cattle exports?

Mr Bolton: We will be working right across each individual region to understand the opportunities and potential for that region. The reason we are looking at a regional approach is that you could very much take a sectoral base, so we could very much focus on beef as an example. That loses a lot of the other opportunities that might be presented for growth. For example, a lot of the growth in the beef sector has come out of intensive livestock activities, which are very closely aligned with our grain-growing areas and then processing, logistic and supply chain connections into our export gateways. By looking at a region, we are now starting to look at how it comes together as an ecosystem and what those opportunities are. Some of the future opportunities are around advanced manufacturing and value-add through the supply chain. We might look at multiple different commodities all feeding into a particular type of process. The other opportunities are things like super economies, where you might have a particular industry that, on its own does not have enough waste product to look at things like waste to energy, but if you look at the aggregated opportunities through that region it might be a very different story in terms of the potential for waste-to-energy type solutions.

CHAIR: One of the main reasons we started this inquiry—a lot of members obviously have interests in the sector—was to talk more about the From Method to Market project. Would you be able to explain that to the committee?

Mr Bolton: I will give a brief overview and then I will hand across to Dr Wayne Hall, who has been leading that particular project within the department. As I mentioned before, the Australian red meat industry has a very strong commitment around ESG, environmental social governance, and the livestock production system has enormous potential to really play within this area, particularly around the sustainable meat production area. The From Method to Market project, which ran from 29 September into July 2024, sought to identify and overcome technical and economic barriers for grazer participation in these markets while they also ran the day-to-day business of livestock production. This project brought together a host of expertise required to address this complex situation, including grazing business productivity, landscape management, stored carbon, biodiversity, environmental markets, remote sensing and social assessments. It included a collaboration between the then department of agriculture and fisheries—now DPI—the former department of environment, science and innovation, Cibolabs, Integrity Ag, the University of Queensland, Agri Escondo, Bush Agribusiness, Boobook Ecological Consulting, MLA Donor company and nine Queensland grazing businesses. I might ask Dr Hall if there is anything he would like to add to that.

Dr Hall: The key element was the fact that we worked with these nine grazing businesses to explore the questions, challenges and bottlenecks they were facing in terms of looking at these opportunities. We have been able to document that process and the findings and we have been able to take those findings and recommendations and start to deliver them to the broader industry through our carbon outreach team. It is about knowing or explaining to producers what is driving this from an international level. Deforestation has been asked about, so what does that actually mean? From a national level, what are the key policies and strategies that are impacting or potentially impacting them and what are the pros and cons. People are hearing a lot about selling ACCUs and so forth, so what are the pros and cons of doing that? We upskill people so they can make informed decisions about what might be the best thing for their business.

One of the key questions we get is: if I do go into a carbon scheme, be it a vegetation or a soil carbon type one, do I sell the credits I get or do I inset them? At the moment, we are not recommending either one. We are just trying to make people aware of what the benefits could be of either approach. We believe that supply chains will inevitably be looking at reduced or efficient beef being put into the supply chain. If you sold your credits, it is pretty hard to deliver that sort of low-intensity greenhouse gas beef into your supply chain if that is what they are looking for.

CHAIR: Is there support for small producers to match it in that market?

Dr Hall: Scale is the key issue. A lot of the carbon providers do do a job of aggregating smaller producers, but you need to understand what you are getting into, what you are committing to and what might be some of the things that are coming down the track in terms of supply chain requirements.

Mr SMITH: Mr Bolton, in an answer to the member for Stretton's question you said that you are going to look at regions instead of necessarily sectors within the industry. Are those regions based on council regions, sociocultural regions? What way are we mapping regions when we take that into account?

Mr Bolton: A lot of the key opportunities are around regional infrastructure availability and future potential for that. The preliminary thinking, which we are about to go out to consultation on, is looking at our regional infrastructure plan boundaries as a potential starting point, but certainly it has not been decided yet. We will be embarking on consultation in the not-too-distant future across the broader industry and community about what that might look and feel like.

Mr SMITH: As you said, it is not necessarily locked in, but do you have a projection or an estimate of which of these regions are providing the bulk of the current \$24 billion in GDP each year?

Mr Bolton: There are a number of opportunities right up and down the coastline. If I look in South-West Queensland it is very much off the back of our livestock industry, whether it is beef, sheep or goat. On the coast it is very much around sugar cane and what that potential opportunity might be. We know that we have some challenges in the far north around Mossman in particular. Part of this future planning is not to wait until we have a future shock to one of our sectors but to work with that sector now. Whether it is a commercial sugar grower or miller, what does the future look like in 25 years time, how do we get there, what might those opportunities be and how do we transition into that. In terms of opportunities, beef, our horticulture, grains in particular, are big opportunities and certainly there are massive opportunities in our regional or coastal communities.

Mr SMITH: With the regions not yet selected and with not necessarily targeting sectors either, has the department modelled for the projection each financial year of how you will hit \$30 billion?

Mr Bolton: Absolutely. We are very clear what we need to be able to achieve over the coming five years to reach \$30 billion. How are we going to do that? We are going to do that in partnership with our key portfolio providers, whether it is within agriculture, forestry or fisheries.

Mr SMITH: Has there actually been economic modelling done showing how each sector will grow that five point something per cent each year? Has the department actually got an economic modelling document that demonstrates how they will achieve this record growth year on year on year?

Mr Bolton: We have done economic modelling on each of the opportunities for each sector. Is it in a document that has been published? No, it is not.

Mr SMITH: When will it be published?

CHAIR: Excuse me, we might move on. We will come back to you in a minute, member. You had five in a row. Member for Mundingburra, do you have a question?

Mrs POOLE: My question is to the director-general. Thank you so very much for the information about the From Method to Market program. I just wanted a little bit more information around that. Obviously it ran from 2019 to 2024. You touched on some key findings. In relation to those key findings, were any recommendations made? Were any policies then developed out of those key findings and recommendations? If so, are you able to share some of those with us?

Mr Bolton: I might hand over to my colleague Dr Wayne Hall to answer that.

Dr Hall: Yes. No researchers write a final report without making recommendations. There were seven key recommendations. It is fair to say that we started from the department implementing the key finding around the extension work before the project was actually finished because we knew that was one of the key findings. The final report, which I have a copy of with me, has only just recently been approved for release by Meat & Livestock Australia. When available, we would be happy to provide a copy to the committee once we get a final approved version, which should be today or tomorrow as such. There are some key recommendations in there. Those recommendations are for industry, they are for supply chains and they are for government basically. They are not all necessarily for the Queensland government and they are certainly not all departmental recommendations.

CHAIR: Member for Stretton, I just remind you about the line of questioning. We need to keep it within the standing orders. Keep it tight.

Mr MARTIN: I want to ask a follow-on question from the member for Bundaberg's question about the document.

CHAIR: That is my warning to you. We had this at the last meeting as well. You are asking for a departmental document.

Mr SMITH: No. We are just asking when it is going to be published.

CHAIR: Please do not argue. I am talking to the deputy chair.

Mr MARTIN: I was just going to ask when—

CHAIR: You ask it and then I will rule on it.

Mr MARTIN: You seemed to have flagged that you might—

CHAIR: No.

Mr MARTIN: I will move on. I do not think it is a big issue asking for a document. Does the department know when this document is going to be published?

Mr Bolton: The key documents that we are going to be publishing are, first and foremost, the 25-year vision that was co-designed with industry. That will set out what the aspiration is for that 25-year period. Off the back of that, we will then work with industry using the modelling we have done to date as a starting point to understand what the regional opportunities and priorities are for each of the action plans. Those action plans will be developed and they will articulate the aspirations for that region.

Mr MARTIN: So the action plans are going to be published?

Mr Bolton: They will be published, yes.

CHAIR: Member for Mirani, do you have a question?

Mr G KELLY: Director-General, we have just gone through a massive weather event in the west. As a farmer myself, one of the biggest issues we have when we do have the likes of a flood or even a fire is the lack of fodder out there. We have had the flood—we have had the event—but what about the ongoing issues? There is going to be a massive outbreak—I think in three days—of disease, with the dead animal carcasses that the farmers cannot get to, whether it be to accumulate them to bury them or what have you. Is there an action plan in place for that?

Mr Bolton: Yes. We absolutely leaned in from day one. The minister and I are part of the Queensland Disaster Management Committee, or QDMC. We are meeting daily and have met daily for the past week on this particular issue. We are working ahead of what we anticipate the issues are. As of Thursday last week, we absolutely understood that fodder was going to be a big issue and also how we get fodder out to the stranded livestock. We moved very quickly. By Saturday morning, when we were in a position that we could actually start to move equipment, we already had transport contracted, we had hay purchased—we were utilising local hay—and we had an aviation contractor underway to be engaged on our books such that by Sunday we were actually up and flying and distributing fodder to where it was needed. So far to date we have acquired over 1,000 bales of hay out to three of our key centres. They have been flown further out west using helicopter lifts that we have actually coordinated and, in many instances, procured as well.

To give you an indication of some of the impacts that are happening out there, we have disaster impact surveys. That is done through a dashboard on the department's website that our primary producers can fill in. As of three o'clock yesterday, we had 94 disaster impact surveys. It is a small number compared to the overall total number of people. Of those 94 surveys, it has been reported that there are over 144,000 missing or deceased livestock. That is about 69,000 cattle, about 69,000 sheep and about 7,800 goats and other livestock.

Through those surveys we also know that there is about 3,500 kilometres of fencing impacted and about 4,500 kilometres of local roads impacted. We will be working with our LDMGs in managing, coordinating and providing support, particularly around the clean-up and the disposal of deceased animals and carcass disposals which can become an environmental or human health issue. We are also working very closely with the Department of Health around provisional mental health support for our people on the ground, whether they are graziers, ringers, council workers or our own staff in responding to this particular distressing event.

Mr KATTER: This is probably a rehash of an earlier question on the trend away from Brahman cattle in the northern herd. Live exports are a backstop for the industry. This could be an emerging trend. I do not know, but it seems to be an emerging trend. Everyone can say, 'That's the market,' or 'It's not up to us to tell a producer what to breed.' Strategically we could have a problem in five years time when all the market will tolerate is flat backs and they are not really suitable. It is not the best production capacity of the northern cattle herd. Are you aware of that as a problem? I have only become aware of this recently as an emerging issue. The real question is: do you see a role for the department to try to guide the industry strategically so that we are not exposed in that space?

Mr Bolton: We do very much look at what those international trends are folding out across the globe, whether it is consumer preference, whether it is trade issues or opportunities. We work closely with our partners around trying to forecast what that might mean. We do not guide or direct producers

what they should do. That is very much a commercial decision for them, but we will provide them with as much information as we can so they can make an informed decision about what the market conditions are now but, more importantly, what market conditions are likely to be in a couple of years time or even in 10 years time so that when they make investments they make an informed decision.

Mr KATTER: What about advising the minister then? At some point someone should be aware. If we all just leave it to the market, it does not always land us in the strategic position we want to be in in five or 10 years time. Someone has to play a role here somewhere.

Mr Bolton: Very much so. That is part of the role of this new 25-year blueprint. It is for the department to provide that leadership role. What will industry look like in 25 years time when we have very much a changing climate with incredibly diverse weather events happening? What does that mean in terms of our production, whether it is cattle or grain or other agricultural activities? There is changing ESG. We know that we have having major impacts from countries like the EU, but we are also seeing animal welfare having impacts on purchasing policies by our big major supermarkets—for example, with our poultry industry around cage-free poultry. We work with industry to understand what those changes are in natural events, what those changes in consumer demands are and how we get in front of that. We lead that change rather than having that change impacted on us. I might quickly hand over to Dr Hall.

Dr Hall: It is a very good question. With our extension officers, when we engage with producers, when we look at where the business is and what the business objectives are, the first question you ask is: what environment are we operating in? What heat or humidity do we have? What sort of paddock set up do we have? Do we have long walking distances? What sort of pasture quality do we have? The second question is: what are the markets we are looking to target in terms of our turn off? That really should be determining the sorts of breeds that you can run and should be running in any given environment. It is a combination. There is always that tension between what the environment may dictate might be the best thing for the production system and what the producer may want to be targeting in terms of their production. Mention was made of wagyu cattle before. Wagyu cattle are going into some really different areas at the moment. We have them in the Territory. We have them in Central Queensland. We have them in parts of North Queensland as well.

Mr KATTER: Just to be clear, I have no investment in a Brahman herd either.

Mr Bolton: Through the chair, I might ask Mr Miller to add to that.

Mr Miller: Just following on from that then, Robbie, we do the research and what Graeme was saying around providing all the information. Through the Drought and Climate Adaptation Program, we work with other collaborative partners around things like heat stress indexes and the chill index. That was the main concern, the main impact, in 2019, but it was not as much of a case this time around. We do that research and then provide the information so that producers can make informed decisions.

CHAIR: In relation to the disaster that is unfolding in the west, can we hear more about the department's response and capacity to provide some relief for those producers, particularly cattle producers?

Mr Bolton: The department has, as I have said, a dedicated team. We have stood up a local coordination committee that is working hand in glove with the local disaster management groups to ensure that councils and the communities are getting exactly what they need. In addition to the support that I have outlined around fodder and hay lifts and helicopter lifts, we are working very carefully with them around what does it mean in terms of the next stage, which is going to be around carcass disposal and euthanising distressed animals that will not survive.

We have already provided information out through the LDMGs about the responsible disposal of carcasses, particularly so we do not end up with a health issue. We have provided advice around PPE. In these sort of events, there are always significant diseases. We have seen diseases lead to fatalities in the Far North. Leptospirosis is going to be a big one out west as well. It is about making sure that our people and community are safe through the clean-up. We also have an agriculture disaster task force that meets daily, where we have key members from AgForce and other industry representatives at the table who provide direct advice to us about what is happening on the ground and how we can tailor that.

A big focus moving forward is going to be around exclusion fencing. Over the last four years the Queensland government has supported more than \$92 million worth of investment in this fencing. It is to prevent wild dogs or basically to exclude wild dogs from our production areas to reduce predation. A key focus on that is to really understand, identify and survey what has been the impact on that fencing infrastructure and to look at what funding packages can be provided to support the

re-establishment of that. The next stage after that we will looking to work with the landowners while they restock and try to get cattle, sheep and goats back on their property so they can get back up and running.

CHAIR: Is there any feedback from, say, the wild dog commissioner if there are any problems emerging?

Mr Bolton: Not directly from the wild dog commissioner. There have been some anecdotal concerns raised by some of the mayors through the LDMGs that they are worried about potential predation from wild dogs and that the fences have been compromised. We are working very closely with the LDMGs. We will be exploring and providing a range of support including potential targeted baiting upon request or providing baits to landowners if they want to do their own baiting. We are very much aware that the fences are compromised and the stock is dispersed, and that stock can include working dogs. There is a social media report this morning where one of the graziers or property owners actually found their working dogs a long distance away from their property. The last thing we want to do is indiscriminately drop baits which have an unintended consequence on particularly our working dogs, which are highly valuable and also prized members of our grazing family.

CHAIR: Member for Bundaberg, I think we are back to you.

Mr SMITH: Mr Bolton, again with the idea of growing the industry to \$30 billion, through your interactions with key industry stakeholders, what current regulations are industry stakeholders saying are their largest inhibitors to growing output within their sector?

Mr Bolton: In response to looking at those barriers, the minister has recently written to key stakeholders across the portfolio asking that very question. We will be collating all the responses from that to understand what they believe some of the regulatory barriers might be and the opportunities there are to positively regulate for better productivity and output.

Mr SMITH: I think you were saying that the action plans are still being formulated, so the targeted growth year on year will be put out after that consultation and formulation of those actions plans, is that correct, or has the targeted growth already started in terms of being able to increase the industry?

Mr Bolton: We do all that we can every year to continue to grow our industry. We now have a very bold target of \$30 billion by 2030. We will be working with industry to set those targets both for the 25-year vision and the five-year action plans. To correct the record: I believe that the letter has not yet been sent from the minister.

Mr SMITH: Each year that targeted growth is missed means that the next year's targeted growth must be bigger year-on-year; is that right? We cannot afford to have a missed target year leading to 2029, can we?

CHAIR: I will allow you some latitude. It is a hypothetical question.

Mr SMITH: It is maths.

Mr Bolton: I will hand across to my colleague in a minute, but \$30 billion by 2030 is an aspirational goal. We are confident that we can hit it and if we miss it, it will not be by much. The reality is, our growth over the next five years will be a lot greater than what we are currently doing at three per cent. It will be a positive, no matter what we do over that period.

Mr Miller: The growth of the agriculture sector is not an exact science. Depending on seasonal conditions, world prices—a whole range of factors—production and values can go up and down but it is the trend that we are after. We are confident that we can meet the target \$30 billion by 2030 but it would be very difficult to set yearly targets and to try to meet those because of the vagaries of the climate and the agricultural sector.

Mrs POOLE: I will bring us back to the disaster event that we are sadly seeing at the moment. Firstly, I thank the DPI for your response to all of our producers out there. I commend you for the support that you intend to provide for our producers and our workers post-event. Obviously we know this is not going to get better, so thank you very much for that. You spoke about the LDMGs and the information that you are providing through the LDMGs. What does that support look like? Do you have a seat at the table through the LDMG, or do you just have a person at the local disaster coordination centre who acts as a conduit to provide that information back to council?

Mr Bolton: It is actually both. We have people at the LDCC and we also have people embedded within the LDMG. A lot of the coordination is happening through the LDMGs mainly because the councils that obviously chair and run that know firsthand what the community needs, where that community is and how to best respond to that, so we have staff embedded in those.

Mr KATTER: It is pretty hard to decouple the growth in the northern cattle industry from irrigation and its potential. There is still very little off the Flinders River or the Etheridge River at Einasleigh; there is a conflict there between the environment departments and what have you. Any time any proposal is put up, there is a lot of advocacy from environment departments who say, 'We are an environment department, here are all the problems,' but I do not see a lot of counter from the primary industries department to speak of the benefit to the industry. I think there is a lot of unlocked potential in the north in that respect. I do not necessarily mean it as a criticism at this point; it is more of an invitation. Do you see a role for the department in that? That has been absent as I see it.

Mr Bolton: You are absolutely correct. There is a need for other parts of government to work with us around that and so part of the action plan is embedding other departmental officers within that working group to understand what are the opportunities are and how to unlock them. In terms of the specific issues like water and the need for water, absolutely, growth cannot happen without water. The government has committed to reviewing all of the water plans across the state. We are working very closely with the Department of Local Government, Water and Volunteers around those reviews, but they are not the only opportunities. Certainly if you are looking at things like climate change and climate variability, we have just come out of a period of fairly significant drought. Thankfully, until recently, there were no drought declarations across the state. We now have major floods. The next drought is only around the corner, so it is really about working with producers on how we better use scarce resources such as water more efficiently so that we are making the best use out of what we have, along with trying to find more water through the various reviews and other opportunities.

Mr KATTER: They are saying climate change reviews will downscale water, and that is a pretty hard sell at the moment. What about advocacy in buffel grass? It is the same thing. Jenny Milton was on the radio the other day saying there are issues with buffel grass but that has to be weighed up against productivity. It is probably the same question again but in respect of buffel.

Mr Bolton: I know there has been quite a few questions around buffel grass today, so I might provide an update on what is happening in that area. The consideration of buffel grass—*Cenchrus ciliaris*—underneath the National Established Weed Priorities Framework is a contentious issue, particularly for grazing industries. The national framework is approved by the Environment and Invasives Committee, which is led by the Commonwealth government Department of Agriculture, Fisheries and Forestry. It is a Commonwealth initiative. Under that framework, there is a review to look at the declared weeds underneath.

At the moment, buffel grass is not declared as prohibited or restricted under the Queensland Biosecurity Act. The listing of a weed as a weed of national significance—should the Commonwealth decide to include buffel grass—does not automatically mean that the Queensland government has to introduce or amend regulation to reflect the same thing. We know that buffel grass has a very strong economic role around our grazing industry and is important, but it also has the potential to have fairly significant environmental impacts in sensitive areas. The management of that, moving forward, has to be done with a fit for purpose approach and it has to be done with a high degree of balance so that we are protecting the economic activity that relies on buffel grass but we are managing it in such a way that it does not become an economic threat to other parts of our sensitive environment.

Mr KATTER: That is a comprehensive answer but to me it misses the mark because there will be 10 people in the room advocating for biosecurity and following the science, but Jenny Milton expressed the concern—who will quantify the threat to productivity? You would perhaps be the only government department that would make the counterargument: you can focus on the environment, we are focused on productivity and the impact it will have. Is that how you see your role? You are saying the department has to balance both sides, but I think it would be unbalanced already with all the science coming in. It will fall heavily on the side of anti-buffel but I would see you guys as being counter to the argument.

Mr Bolton: I will hand across to Dr Hall in a moment, but, yes, absolutely the department has a role in promoting and supporting the agriculture portfolio in its pursuits. The government as a whole has to balance those risks.

Mr KATTER: The government but not your department?

Dr Hall: The department has already engaged with AgForce. It has provided them with some of the technical information around what we see as being important to the beef industry in Queensland. It is critical. Buffel grass is a critical underpinning of the beef production industry, particularly in Central Queensland. We are certainly very happy to provide that information. We have been liaising with AgForce around that.

Mr G KELLY: Director-General, in the last three months we have had major wet weather events and catastrophic flooding in the west. Last year we had a major outbreak of ticks in one of our regional saleyards. We have the tick line. Personally, I can see big issues coming in that area with the breeding of softer cattle where there should be more Brahman northern-type cattle. There are precautions we will have to take moving forward with the big bodies of grass because there is an opportunity for ticks to fester. We have cattle coming out of tick-infested country into cleared country. How are we going to hit the ground running because we are going to have to move pretty quickly?

Mr Bolton: We have worked very closely with the community around the Roma saleyards with regard to the most recent tick incursion there. The key for us is continued education; to make sure landowners are doing the right thing. It appears the ticks have been there for some time and obviously someone has moved cattle that have been infested or not treated in an appropriate way, and that has not been managed. There is also activity going on around compliance and tracing to understand where it came from and how it got there so that we learn from those past issues and that we, hopefully, do not have a repeat of that.

The next step is to work with graziers to try to get this under control. I was speaking to a grazier earlier today. They were telling me that they had an outbreak of ticks on their property. They are behind the tick line. It took them a little while to get it done, but they were able to achieve the eradication of ticks off their property. It is absolutely feasible and for us it is about working with graziers, working with peak industries and working with councils to try to come up with a coordinated approach so that everyone knows what they need to do to, again, try to get these properties declared tick free.

Mr MARTIN: I have a question about the tariffs that might be imposed by the United States. How much Queensland beef is exported to the USA and has the department done any modelling about what impact tariffs might have?

Mr Bolton: Queensland is a very large beef producer. We produce about 47 per cent of the national herd of beef, so it is a fairly significant contributor to Australian beef. Of that, 67 per cent of our herd is exported. That has an export value at about \$7.72 billion per year. Our biggest export market is the USA; it is worth \$1.67 billion per year. South Korea is our second at \$1.52 billion and Japan is \$1.47 billion. We are looking at that very closely. I might hand across to Ms Sarah Goswami to provide more detail in terms of some of the economic modelling. We work very closely with Department of Foreign Affairs and Trade and the Australian Department of Agriculture, Fisheries and Forestry on a national level who lead those trade negotiations. We also work very closely with Trade and Investment Queensland because whenever there is disruption to trade there is an impact but there are always opportunities as well. Whatever comes out of the announcements over the coming 24 hours, we will be not only looking at how we ensure or safeguard against the impact but also, more importantly, identifying what some of those opportunities might be and be ready to move to take advantage of those.

Ms Goswami: The United States is a key trading partner for Queensland agriculture and for our meat sector as well. The consequences for the sector remain uncertain at this point in time. Queensland's \$2.15 billion in agricultural exports to the USA are unlikely to face direct consequences. Let's see what happens. However, exporters are adept at changing and meeting different market needs. We expect there will be some short-term changes, which will then resolve themselves over that medium to longer term as producers realign. Retaliatory tariffs from other countries may present opportunities for Queensland's beef exporters. We expect there to be a bit of a rebalancing into a new sort of situation. The good news is Queensland's beef is, as we have heard before, a product of choice for our global markets. We expect that we are well placed to weather whatever is ahead.

Mr G KELLY: How many red meat producers have directly engaged with DPI moving in towards a percentage of net zero? It is 2025. They are pushing us.

Mr Bolton: It is a good question. It is one that we probably have not come prepared for and I do not know whether it is one we can find an answer for in one minute.

CHAIR: We will take that question on notice for reply by 16 April, thank you very much. That concludes the briefing and these proceedings. Thank you for the information you provided today. I thank Hansard, the broadcast staff and the committee secretariat. A transcript of these proceedings will be available on the committee's webpage in due course. Thank you very much everyone.

The committee adjourned at 12.15 pm.