Purpose of this document

This AgriFutures Australia Annual Operational Plan presents the organisation’s planned research and development (R&D) investments and corporate expenditure in 2020-21.

Responsible Ministers

The Hon. David Littleproud MP Minister for Agriculture, Drought and Emergency Management and Senator the Hon. Jonathon Duniam Assistant Minister for Forestry and Fisheries and Assistant Minister to the Minister for Agriculture.

Enabling legislation

AgriFutures Australia’s enabling legislation is the Primary Industries Research and Development Act 1989 (Commonwealth Government of Australia) (the PIRD Act).

Outcome

Increased knowledge that fosters sustainable, productive and profitable new and existing rural industries and furthers understanding of national rural issues through research and development in government-industry partnership.

Our vision

To grow the long term prosperity of Australian rural industries

People and Leadership

Goal

To support the people driving the future prosperity of Australian rural industries and regional communities by providing them with learning opportunities and experiences.

Priorities

Attracting capable people into careers in agriculture.
Building the capability of future rural leaders.

National Challenges and Opportunities

Goal

To identify and nurture research and innovation opportunities that are synergetic across rural industries.

Priorities

Informing debate on issues of importance to rural industries.
Adapting new technologies for use across rural industries.
Working collaboratively on issues common across rural industries.

Growing Profitability

Goal

To enhance the profitability and sustainability of our levied rural industries. Regional communities and the broader Australian economy depend on profitable farms.

Priorities

Engaging industry participants in determining R&D&E priorities.
Investing in innovation that assists levied industries to be more profitable.
Delivering outcomes to maximise industry uptake and adoption.

Emerging Industries

Goal

To support new and emerging rural industries.

Priorities

Supporting the early stage establishment of high potential rural industries.

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Listening and influencing

Delivering results

Partnerships and collaborations

Performance culture

Efficient business practices

Purpose

Through research and development, increase knowledge and understanding that fosters innovation, adaptive and valuable rural industries.

Values

Connected / Positive / Real / Future-thinking
Innovative / Quality / Approachable / Networked / Confident
Professional / Commercially savvy

Outcome

Challenges and opportunities that are common across rural industries are identified and addressed.
Industry participants are confident that their levy investment is delivering value.
High-potential emerging rural industries established.

Rural industries are equipped with skilled people and the leadership to grow and prosper.

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High-potential emerging rural industries established.

Rural industries are equipped with skilled people and the leadership to grow and prosper.
AgriFutures Australia has a clear vision to grow the long-term prosperity of Australian agriculture to create thriving rural industries and vibrant regional communities. Our objective is to remain focused on our core tasks of research, development and extension (RD&E) to help our rural industries thrive and prosper.

Our world has changed forever as a result of COVID-19. More than ever the importance of agriculture and food security is front of mind for everyone, and the need to innovate is paramount as we all work together to revive the economy.

Diversity is our great strength and this is seen in the way we add value, connections and the way we partner with our farmers, our rural industries, and our research partners to innovate. Through events like evokeAg, these connections are increasingly global.

Innovation takes many forms. Development of traceability in the Australian tea tree oil industry will continue. One of the biggest challenges for this industry is adulteration of the product, the fraudulent dilution of 100% pure tea tree oil with other products. AgriFutures Australia’s funded research with Geora and the Australian Tea Tree Industry Association will provide traceability along the full length of the supply chain from farm gate to consumer product. This project will be based upon a blockchain type technology and we’ll be working with growers to ensure the uptake of this technology.

In our largest industry, Chicken Meat, we will continue to fund research into chicken welfare. For example, one project applies imaging technology with artificial intelligence to measure subtle patterns in bird behaviours. This research is the first of its kind in Australia.

In the Pasture Seeds industry, innovative design modifications to a clover seed harvester is the first step in bringing subterranean clover and annual medic harvesting methods into the 21st century. AgriFutures Australia’s funded research brings together diverse teams with a range of academic disciplines to develop this new harvesting approach.

Our Emerging Industries will continue to lead research into new and exciting rural industries. This year we will continue investment in various industries such as: sesame, coffee, industrial hemp and native foods. Our commitment to the Industrial Hemp industry will see the further development of a business case to implement a national variety trial program. More broadly, AgriFutures Australia will partner with many industry representatives to assist in formalising research, development and extension plans that will focus on increasing production capacities and build value across Emerging Industries supply chains.

We also invest in the people who work in our Levied Industries with the new Levied Industry Capacity Building Program, launched in 2019. It provides a range of opportunities: from the Australian Institute Company of Directors (AICD) courses, mentoring and other specific activities developed in consultation with our farmers.

Everything we do is driven by the AgriFutures Australia Strategic R&D Plan, our roadmap. This Annual Operational Plan profiles our priorities, programs and activities for the coming year. They represent our broad commitment in delivering on the needs of our levied industries and the Australian Government.

I am privileged to work alongside so many amazing people, across a diverse range of industries and communities. Together we will continue to build thriving rural industries that contribute to the essential fabric of the broader Australian community.

Mr John Harvey
Managing Director
AgriFutures Australia
### AgriFutures Australia’s investment portfolio

**RD&E programs as of 1 July 2020**

#### Arenas

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<th>Outcome</th>
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<td></td>
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<td>• evokedAG. 2022</td>
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#### Programs

**A balanced research portfolio**

AgriFutures Australia’s investment in RD&E is driven by the needs of its stakeholders. To deliver against the strategic priorities, AgriFutures Australia is guided by two overarching factors:

- Strong stakeholder engagement
- Applying a life-cycle approach to target investment

AgriFutures Australia allocates its expenditure using a range of measures that ensure a balanced, financially responsible approach to its investment of both industry and core funds.

**Industry participants are confident that their levy investment is delivering value.**

Rice
- Chicken Meat
- Export Fodder
- Honey Bee & Pollination
- Thoroughbred Horses
- Ginger
- Tea Tree Oil
- Pasture Seeds

**Small levied industries:**

- Goat fibre
- Buffalo
- Kangaroos

**Deep and narrow industries:**

- Deer
- Ratite

**New and emerging rural industries**

2020-21

#### Annual Operational Plan

The life-cycle approach provides clarity around the appropriate levels of intervention and investment in industries as they progress from new to emerging and established. The life-cycle approach ensures the RD&E investment is fit for purpose and targeted to the industry’s developmental stage.

AgriFutures Australia’s project management system enables the portfolio of investments to be viewed through various perspectives including:

- Government research priorities
- Program objectives
- Project length
- Levels of risk, return and leverage

AgriFutures Australia allocates its expenditure using a range of measures that ensure a balanced, financially responsible approach to its investment of both industry and core funds.
Four distinct arenas define our Strategic R&D Plan and represent the organisation’s broad commitments to deliver the priorities of the Australian Government, its stakeholders and its ultimate goal to create thriving rural industries and vibrant regional communities.

Our arenas

1 People and Leadership

Goal
To support the people driving the future prosperity of Australian rural industries and regional communities by providing them with learning opportunities and experiences.

To build prosperous and sustainable rural industries, we need rural leaders with the skills and knowledge to make informed decisions about the future of their enterprises and industries.

We believe that human capacity to drive improvements in competitiveness through the adoption of RD&E outcomes and innovation is just as important as the research itself.

While new technologies, systems, processes and business models are important, people are the critical element in ensuring the growth of Australian rural industries.

As such, AgriFutures Australia is committed to supporting rural people through the continued investment in leadership, capacity and skills development programs, like the Rural Women’s Award, Horizon Scholarship and the Ignite Network.

Priorities
Attracting capable people into careers in agriculture.

Currently the supply of people into agricultural careers is not keeping up with the demand created by an ageing workforce. In fact, most categories of agricultural occupations are undersupplied and action is required now to ensure the future of the sector.

Additionally, with the explosion of new technologies emerging from digital disruption, agriculture also needs more highly skilled people with a diverse range of academic, technical and practical backgrounds.

Introducing agricultural careers pathways in schools is critical and agricultural careers need to be promoted as a successful and respectable career path, not just for students from a family farming background.

Rural industries need to reflect and promote innovation, diversity, forward-thinking and the positive lifestyle that agriculture and farming offers.

AgriFutures Australia will collaborate with the other RDCs, government departments, the private sector and not-for-profit organisations to highlight to young people the opportunities a career in agriculture has to offer through programs like Horizon Scholarship, startup.business and Country to Canberra.

Outcome
Rural industries are equipped with skilled people and the leadership to grow and prosper.

Investment budget for 2020-21
$2,225,000
Our arenas

2 National Challenges and Opportunities

Goal

To identify and nurture research and innovation opportunities that are synergistic across rural industries.

Australian rural industries are faced with challenges and opportunities that are both industry-specific and common across rural sectors. Beyond the commodity level, our rural industries require leadership to identify and respond to national rural issues and enhance shared benefits.

Unlike other RDCs that represent one or a few similar industries, AgriFutures Australia manages RD&E for a diverse portfolio of plant and animal industries. As such it is uniquely placed to assist Australian rural industries to prioritise and drive cross-sectoral RD&E.

AgriFutures Australia will broker partnerships, facilitate priority setting and provide advice to strengthen the national agricultural research and innovation effort.

It will also complement individual industry RD&E by investing in research of cross-sectoral value, in areas such as climate change, natural resource management, and safety and welfare.

Priorities

Activity 1: Informing debates on issues of importance to rural industries and Australia’s food and agriculture sectors.

There are many complex opportunities and challenges confronting Australia’s rural sector that require careful research and analysis before informed, meaningful policy can be developed and debated by industry and government.

This priority is about delivering research and analysis on contemporary, cross-cutting issues. Research investments under this Activity are designed to support the early identification and response to cross-industry opportunities and challenges as well as react quickly to information needs arising from changes in industry and government circumstances. The outputs will ultimately provide advice to strengthen the national agricultural research and innovation effort.

In 2020-21, upwards of 10-15 projects will be delivered on contemporary cross-industry issues. Examples of projects to be delivered include understanding the capital investment required to grow the sector; the scale and industry responses to product/fraud, preparedness and response options for natural disaster management; and the opportunities for space technologies to enhance agricultural productivity. A large Horizon Scanning exercise will also be undertaken to understand those critical opportunities and challenges for the sector over a 10 to 15 year horizon.

Activity 2: Innovative agrifood technologies.

Emerging technologies are changing the way agricultural products are sourced, marketed and transported. Advances in genetics, sensory systems, the Internet of Things, device connectivity and remote sensing, automation, and food traceability will all disrupt the supply chain. Likewise, new synthetic food and fibre products will disrupt demand.

This priority is about collaborating with other RDCs, research partners, government and the private sector to realise the benefits these new technologies present.

Examples include: growAG the global gateway to agrifood innovation created in Australia. It enables research and development corporations, other research organisations and inventors to list their current research projects, technologies and commercialisation-ready opportunities. growAG is designed to provide transparency of Australia’s agricultural research, encourage collaboration, attract investment and find commercial partners from within Australia and around the world.

The evokeAG Network connects the agrifood tech community across the region and around the world. The evokeAG Network is farmers sharing their experiences, startups pitching their potential, scientists showcasing their discoveries, global business leaders sharing their insights, industry experts debating their options, innovative news and views from around the world. The evokeAG Network is collaborative thinking to change the future occurring in real time, building momentum for evokeAG 2022 in Perth.

evokeAG 2022 is the region’s premier agrifood tech event and will be held in Perth, Western Australia on 15-16 February 2022. Planning and implementation for this event has commenced.

Farmers2Founders is a program designed to support farmers, fishers and foresters to develop business ideas beyond the user of technology. Partnerships will help deliver enhanced knowledge and adoption of technology for the rural sector.

Activity 3: Transformative industry action.

Recent research has provoked discussion on a number of challenges and opportunities that are likely to shape the future of the agrifood sector in the coming decade. Critically, many of the issues identified are both industry-specific and common across rural sectors. AgriFutures Australia is uniquely placed to coordinate action on cross-industry issues and challenges. This Activity is a transition from providing underpinning advice in Activity 1, to deliver on-ground impact in Activity 3, by making program investments that will drive positive change for the agrifood sector.

This priority will identify a series of potential programs for investment that drive collective action at scale to transform industry within the remit of AgriFutures Australia and to encourage innovation, adaptation, and value for the sector. These annual programs of work will be guided by priority setting followed by the development of scaled investments that complement other activities and research being undertaken elsewhere in the Australian innovation system.

Outcome

Challenges and opportunities that are common across rural industries are identified and addressed.

Investment budget for 2020–21

$16,341,000
Our arenas

3 Growing Profitability

Goal

To enhance the profitability and sustainability of our leveled rural industries.

Regional communities and the broader Australian economy depend on profitable farms and industries. We know that there is a clear link between economic prosperity and our capacity for innovation and uptake of new technology. Rural industries that are well placed to adopt new ideas and use technology to create productivity benefits establish their competitive advantage and are structured for sustainable growth.

That’s why AgriFutures Australia invests in RD&E that enhance the profitability and sustainability of agriculture.

AgriFutures Australia supports rural industries with an R&D levy that do not have an industry specific Research and Development Corporation.

Industries like the Australian rice industry which is a world leader in production, efficiency, water use efficiency and environmental management. Australian rice growers produce more rice per hectare than anywhere else in the world. Over the past 20 years the rice industry has drastically improved its water use efficiency using 50% less water than the global average per kilogram of rice produced.

We support the thoroughbred horse industry. The thoroughbred horse breeding industry is big business in Australia, with new analysis putting the annual economic impact at $1.16 billion and 8,000 jobs. The Australian industry also punches well above its weight on the world stage, with 660 stud farms and more than 13,000 foals born each year, second only to the United States. The thoroughbred industry is a large employer of people over 50 years of age and breeding alone sustains more than 3,000 jobs a year with 18,000 people involved in the breeding sector as participants, employees or volunteers.

We support the chicken meat industry with 90% of Australians eating chicken meat at least once a week and a third of us eating it three or more times a week. The industry has an approximate retail value of around $6.6 billion.

AgriFutures Australia also supports farmers producing, export fodder, pasture seeds, honey bee and pollination, ginger, tea tree oil, kangaroos, buffalo, goat fibre and deer.

We will empower our levy-paying industry participants to shape RD&E priorities, encourage industry uptake of innovation, and support our rural industries to adapt to changing environments – at operational, market and regulatory levels.

Priorities

Engaging industry participants in determining RD&E priorities.

Our research is targeted at rapidly unearthing commercial solutions and significantly increasing the profitability of rural industries for rural people. To achieve this, we actively connect with our stakeholders and scan the horizon for emerging technologies and innovations to identify priorities and optimise the RD&E portfolio for their industries.

Investing in innovation that assists levied industries to be more profitable.

Each industry has an agreed RD&E Plan. Based on this Plan we identify RD&E investment opportunities. Industry panels advise AgriFutures Australia on the allocation of levied funds to individual projects.

Program requires ongoing management. In partnership with each industry panel, we intervene when projects are not delivering the outcomes anticipated and when priorities change.

The industry panels consist of industry stakeholders, scientific experts and AgriFutures Australia staff.

Delivering outcomes to maximise industry uptake and adoption.

AgriFutures Australia’s investment is focussed on delivering practical actions that individual farmers can implement on their farms to improve the long-term profitability of their businesses. Our success depends on farmers innovating. Until a farmer does something different on their farm and sees a benefit, their return on investment is zero.

Commercial uptake of research findings is critical. Research findings are communicated to farmers through events like field days and workshops and through communication channels including e-newsletters, emails, social media and hardcopy publications.

Outcome

Industry participants are confident that their levy investment is delivering value.

Investment budget for 2020-21

$11,172,000
Our arenas

4 Emerging Industries

**Goal**
To support new and emerging rural industries.

With global environmental and market trends impacting food consumption, Australian rural industries have an opportunity to identify new food types and to connect with and drive new and expanding markets.

As such, AgriFutures Australia is dedicated to identifying and supporting the development of new rural industries that can meet changing demand and make an economic contribution to Australia.

AgriFutures Australia will focus on identifying new industries with high potential. This will result in a strong alignment of research activities that address AgriFutures Australia’s legislative requirements and the government’s research priorities.

AgriFutures Australia will build partnerships with key stakeholders, including partners in the private sector, to support the development of these high potential emerging rural industries.

**Priorities**
Supporting the early stage establishment of high potential rural industries.

AgriFutures Australia will target high potential emerging rural industries by supporting rigorous feasibility assessments and identifying critical impediments that can be addressed through RD&E.

**Outcome**
High potential emerging rural industries established.

**Investment budget for 2020–21**
$3,800,000
**Key Performance Indicators (KPIs) and investment highlights**

**People and Leadership**

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<td>3</td>
<td>Grow the AgriFutures Ignite Network to 2,000 members with a minimum of 70% participating as “active members”.</td>
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<td>4</td>
<td>Deliver one major capacity building program for AgriFutures Ignite Network members.</td>
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<td>5</td>
<td>Develop capacity building programs exclusively for AgriFutures levied industries that positively impacts 30 stakeholders from levied industries.</td>
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<tr>
<td>7</td>
<td>80% of AgriFutures Horizon Scholars secure employment in our rural industries or a related sector within six months of graduating.</td>
</tr>
</tbody>
</table>

**National Challenges and Opportunities**

<table>
<thead>
<tr>
<th>KPIs</th>
<th>Planned activity/activities to achieve KPIs</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Inform debates of national significance to rural industries and Australia’s food and agriculture sectors.</td>
</tr>
<tr>
<td>2</td>
<td>Facilitate opportunities to drive progress in innovative agrifood technologies and to lift the prosperity of Australian agrifood industries.</td>
</tr>
<tr>
<td>3</td>
<td>Develop two cross-sector research programs with collaboration at scale that can be described as having high impact potential to the agricultural sector.</td>
</tr>
</tbody>
</table>

**Inform debates of national significance to rural industries and Australia’s food and agriculture sectors.**

- Engage Rural Research & Development Corporations in consultation to identify national collaborative projects.
- Develop and deliver 10 research projects that address issues of significance that positively affect more than one sector of Australian food and fibre industries.

**Facilitate opportunities to drive progress in innovative agrifood technologies and to lift the prosperity of Australian agrifood industries.**

- Deliver collaboration opportunities for connection of people and business to share technologies that demonstrate benefit to Australian agrifood industries.
- Deliver one scanning project that identifies emerging technologies, opportunities and risks for the agrifood sector.
- Engage and evaluate three commercial agrifood partnerships supporting the adoption and uptake of agricultural technologies.
- Deliver three projects that address technology adoption and innovation uptake.
- Develop and launch the grow\textsuperscript{AG} platform.
- Grow and build on the evoke\textsuperscript{AG} Network.

**Develop two cross-sector research programs with collaboration at scale that can be described as having high impact potential to the agricultural sector.**

- Deliver two large cross-sectoral research projects involving collaborating partners established through an environmental scan and focused on industry-wide benefit.
- Build partnerships with Rural Research and Development Corporations, commercial agribusiness and other partners, as appropriate, to partner in the delivery of the large cross-sectoral collaborations.
Key Performance Indicators (KPIs) and investment highlights

**KPIs**

**Planned activity/activities to achieve KPIs**

1. **85% of KPIs outlined in program specific RD&E five-year plans are met.**
   - Monitoring of the alignment of industry KPIs with industry priorities through consultation with the levied industry Advisory Panels and key industry stakeholders at least four times per year.
   - Alignment of RD&E investment with industry priorities through consultation with levied industry Advisory Panels and key industry stakeholders at least four times per year.

2. **75% of stakeholders rate the value of AgriFutures Australia’s information products and services as high or very high.**
   - Stakeholder satisfaction with information products measured through the AgriFutures Australia annual stakeholder survey.
   - Continue ongoing engagement and support of industry extension programs to value add to existing industry communication channels.

3. **80% of growers are comfortable or very comfortable with paying the R&D levy.**
   - Grower comfort in paying the R&D levy measured through the AgriFutures Australia annual stakeholder survey.
   - Alignment of RD&E investment with industry priorities.

4. **80% key stakeholders rate the guidance and leadership for industry RD&E investment provided by AgriFutures Australia as high or very high.**
   - Key stakeholder satisfaction measured through Advisory Panel surveys and through the AgriFutures Australia annual stakeholder survey (new for 2020-21).

5. **80% of Advisory Panel members and research providers rate AgriFutures Australia management of the industry RD&E investments as high or very high.**
   - Research program RD&E expenditure is managed within 10% of the annual budget.
   - Advisory Panel member and research provider satisfaction measured through Advisory panel surveys and AgriFutures Australia survey of research providers (new for 2020-21).

6. **80% of stakeholders are comfortable or very comfortable with level of engagement between AgriFutures Australia and the industry.**
   - Stakeholder comfort with the level of engagement measured through the AgriFutures Australia annual stakeholder survey.
   - Host one annual Levied Industry Advisory Panel Chairs meeting.
   - Host one annual key stakeholder forum.
   - Continue ongoing engagement between our research program staff and industry through attendance of at least one key industry event, and at least one networking opportunity with key stakeholders within each levied industry, providing connection and adding value.

---

**Emerging Industries**

**KPIs**

**Planned activity/activities to achieve KPIs**

1. **Generate enhanced economic benefit by investing in research and development to support at least five new rural industries with potential to exceed $10m per annum (GVP).**
   - Support RD&E as “early stage” investments for at least two industries with a Gross Value Production (GVP) less than $2 million per annum.
   - Support RD&E investments to progress the growth of industry capacity for at least six industries with a GVP between $2 to 10 million per annum.
   - Support RD&E investments for at least two industries that have a GVP greater than $10 million per annum.

2. **Identify and prioritise at least five high growth emerging industries for investment.**
   - Develop strategic research investment plans to identify knowledge gaps and RD&E opportunities for a minimum of five emerging industries.
   - Undertake an annual survey to measure and report on industry value and growth.
   - Undertake future trend research bi-annually to identify at least five emerging industries with market potential.

3. **Partnerships and collaborations across five emerging industries to accelerate growth and foster capacity building opportunities.**
   - Support the creation of a minimum of five industry events to build industry networks and foster collaboration.
   - Formalise two collaborative partnerships in emerging industries to extend the benefits of research investment and or capacity building.
   - Support training and or professional development opportunities for industry stakeholders associated with high growth emerging industries.
### Appendix A

**Budget income and expenses for 2020-21**

<table>
<thead>
<tr>
<th></th>
<th>2019-20 Estimated actual $’000</th>
<th>2020-21 Budget $’000</th>
<th>2021-22 Forward estimate $’000</th>
<th>2022-23 Forward estimate $’000</th>
<th>2023-24 Forward estimate $’000</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee benefits</td>
<td>3,000</td>
<td>3,800</td>
<td>3,960</td>
<td>3,960</td>
<td>3,960</td>
</tr>
<tr>
<td>Supplier expenses</td>
<td>9,574</td>
<td>10,067</td>
<td>9,900</td>
<td>9,900</td>
<td>9,900</td>
</tr>
<tr>
<td>Grants</td>
<td>30,320</td>
<td>33,538</td>
<td>34,500</td>
<td>36,500</td>
<td>36,500</td>
</tr>
<tr>
<td>Depreciation and amortisation</td>
<td>252</td>
<td>415</td>
<td>503</td>
<td>590</td>
<td>657</td>
</tr>
<tr>
<td>Finance costs</td>
<td>3</td>
<td>1</td>
<td>11</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td><strong>Total expenses</strong></td>
<td>43,149</td>
<td>47,621</td>
<td>48,874</td>
<td>50,957</td>
<td>51,021</td>
</tr>
<tr>
<td><strong>Less: Own-source income</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Own-source revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industry contributions</td>
<td>8,748</td>
<td>10,086</td>
<td>8,933</td>
<td>8,667</td>
<td>8,499</td>
</tr>
<tr>
<td>Interest</td>
<td>600</td>
<td>875</td>
<td>750</td>
<td>645</td>
<td>525</td>
</tr>
<tr>
<td>Royalties</td>
<td>338</td>
<td>313</td>
<td>313</td>
<td>300</td>
<td>300</td>
</tr>
<tr>
<td>Other</td>
<td>3,255</td>
<td>2,290</td>
<td>1,799</td>
<td>2,012</td>
<td>2,186</td>
</tr>
<tr>
<td><strong>Total own-source revenue</strong></td>
<td>12,941</td>
<td>13,564</td>
<td>11,795</td>
<td>11,624</td>
<td>11,520</td>
</tr>
<tr>
<td><strong>Net cost of (contribution by) services</strong></td>
<td>30,208</td>
<td>34,057</td>
<td>37,079</td>
<td>39,333</td>
<td>39,501</td>
</tr>
<tr>
<td>Revenue from Government[^1]</td>
<td>55,012</td>
<td>32,612</td>
<td>33,079</td>
<td>33,333</td>
<td>33,501</td>
</tr>
<tr>
<td><strong>Total revenue from Government</strong></td>
<td>55,012</td>
<td>32,612</td>
<td>33,079</td>
<td>33,333</td>
<td>33,501</td>
</tr>
<tr>
<td>Surplus/(deficit) attributable to the Australian Government</td>
<td>24,804</td>
<td>(1,448)</td>
<td>(4,000)</td>
<td>(6,000)</td>
<td>(6,000)</td>
</tr>
<tr>
<td><strong>Total comprehensive income/ (loss) attributable to the Australian Government</strong></td>
<td>24,804</td>
<td>(1,448)</td>
<td>(4,000)</td>
<td>(6,000)</td>
<td>(6,000)</td>
</tr>
</tbody>
</table>

\[^1\] A matching one-off back payment of $21.4m was received in 2019-20 due to changes in the methodology used for calculating the Commonwealth contribution to AgriFutures Australia in accordance with the PIRD Act 1989.

---

### Appendix B

**Research and Development expenditure estimates 2020-21 across the Strategic Science and Research Priorities**

<table>
<thead>
<tr>
<th>Science and Research Priorities</th>
<th>Arena 1 ($’000)</th>
<th>Arena 2 ($’000)</th>
<th>Arena 3 ($’000)</th>
<th>Arena 4 ($’000)</th>
<th>Total ($’000)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Food</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1 Knowledge of global and domestic demand, supply chains and the identification of country specific preferences for food Australia can produce.</td>
<td>0</td>
<td>79</td>
<td>103</td>
<td>0</td>
<td>182</td>
<td>0.54%</td>
</tr>
<tr>
<td>1.2 Knowledge of the social, economic and other barriers to achieving access to healthy Australian foods.</td>
<td>450</td>
<td>2,590</td>
<td>0</td>
<td>0</td>
<td>3,040</td>
<td>9.06%</td>
</tr>
<tr>
<td>1.3 Enhanced food production.</td>
<td>160</td>
<td>13,073</td>
<td>10,218</td>
<td>3,800</td>
<td>27,251</td>
<td>81.27%</td>
</tr>
<tr>
<td>2. Soil and Water</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.1 New and integrated national observing systems, technologies and modelling frameworks across the soil-atmosphere-water-marine systems.</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>2.2 Better understanding of sustainable limits for productive use of soil, freshwater, river flows and water rights, terrestrial and marine ecosystems.</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>2.3 Minimising damage to, and developing solutions for restoration and remediation of, soil, fresh and potable water, urban catchments and marine systems.</td>
<td>0</td>
<td>0</td>
<td>48</td>
<td>0</td>
<td>48</td>
<td>0.14%</td>
</tr>
<tr>
<td>3. Transport</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3.1 Low emission fuels and technologies for domestic and global markets.</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>3.2 Improved logistics, modelling and regulation: urban design, autonomous vehicles, electrified transport, sensor technologies, real time data and spatial analysis.</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>3.3 Effective pricing, operation, and resource allocation.</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>4. Cybersecurity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.1 Highly-secure and resilient communications and data acquisition, storage, retention and analysis for government, defence, business, transport systems, emergency and health services.</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

Please note that the financial data contained in this Annual Operational Plan is accurate as at the date of publication. However, it may differ from the financial data contained in the 2020-2021 Portfolio Budget Statements which will not be published until October 2020 due to delays associated with the COVID 19 pandemic.
### Science and Research Priorities

<table>
<thead>
<tr>
<th>Arena 1 ($'000)</th>
<th>Arena 2 ($'000)</th>
<th>Arena 3 ($'000)</th>
<th>Arena 4 ($'000)</th>
<th>Total ($'000)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

#### 4.2 Secure, trustworthy and fault-tolerant technologies for software applications, mobile devices, cloud computing and critical infrastructure.

#### 4.3 New technologies and approaches to support the nation’s cybersecurity: discovery and understanding of vulnerabilities, threats and their impacts, enabling improved risk-based decision making, resilience and effective responses to cyber intrusions and attacks.

#### 4.4 Understanding the scale of the cyber security challenge for Australia, including the social factors informing individual, organisational, and national attitudes towards cyber security.

#### 5. Energy

<table>
<thead>
<tr>
<th>Arena 1 ($'000)</th>
<th>Arena 2 ($'000)</th>
<th>Arena 3 ($'000)</th>
<th>Arena 4 ($'000)</th>
<th>Total ($'000)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
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<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>125</td>
<td>0</td>
<td>125</td>
<td>0.37%</td>
</tr>
</tbody>
</table>

#### 5.1 Low emission energy production from fossil fuels and other sources.

#### 5.2 New clean energy sources and storage technologies that are efficient, cost-effective and reliable.

#### 5.3 Australian electricity grids that can readily integrate and more efficiently transmit energy from all sources including low- and zero-carbon sources.

#### 6. Resources

<table>
<thead>
<tr>
<th>Arena 1 ($'000)</th>
<th>Arena 2 ($'000)</th>
<th>Arena 3 ($'000)</th>
<th>Arena 4 ($'000)</th>
<th>Total ($'000)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

#### 6.1 A fundamental understanding of the physical state of the Australian crust, its resource endowment and recovery.

#### 6.2 Knowledge of environmental issues associated with resource extraction.

#### 6.3 Lowering the risk to sedimentary basins and marine environments due to resource extraction.

#### 6.4 Technologies to optimise yield through effective and efficient resource extraction, processing and waste management.

#### 7. Advanced manufacturing

<table>
<thead>
<tr>
<th>Arena 1 ($'000)</th>
<th>Arena 2 ($'000)</th>
<th>Arena 3 ($'000)</th>
<th>Arena 4 ($'000)</th>
<th>Total ($'000)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>0</td>
<td>419</td>
<td>0</td>
<td>419</td>
<td>1.25%</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>384</td>
<td>0</td>
<td>384</td>
<td>1.14%</td>
</tr>
<tr>
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</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

#### 7.1 Knowledge of Australia’s comparative advantages, constraints and capacity to meet current and emerging global and domestic demand.

#### 7.2 Cross-cutting technologies that will de-risk, scale up, and add value to Australian manufactured products.

#### 7.3 Specialised, high value-add areas such as high-performance materials, composites, alloys and polymers.

#### 8. Environmental Change

<table>
<thead>
<tr>
<th>Arena 1 ($'000)</th>
<th>Arena 2 ($'000)</th>
<th>Arena 3 ($'000)</th>
<th>Arena 4 ($'000)</th>
<th>Total ($'000)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,615</td>
<td>270</td>
<td>0</td>
<td>0</td>
<td>1,885</td>
<td>5.62%</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

#### 8.1 Improved accuracy and precision in predicting and measuring the impact of environmental changes caused by climate and local factors.

#### 8.2 Resilient urban, rural and regional infrastructure.

#### 8.3 Options for responding and adapting to the impacts of environmental change on biological systems, urban and rural communities and industry.

#### 9. Health

<table>
<thead>
<tr>
<th>Arena 1 ($'000)</th>
<th>Arena 2 ($'000)</th>
<th>Arena 3 ($'000)</th>
<th>Arena 4 ($'000)</th>
<th>Total ($'000)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>204</td>
<td>0</td>
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<td>204</td>
<td>0.61%</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

#### 9.1 Better models of health care and services that improve outcomes, reduce disparities for disadvantaged and vulnerable groups, increase efficiency and provide greater value for a given expenditure.

#### 9.2 Improved prediction, identification, tracking, prevention and management of emerging local and regional health threats.

#### 9.3 Better health outcomes for Indigenous people, with strategies for both urban and regional communities.

#### 9.4 Effective technologies for individuals to manage their own health care, for example, using mobile apps, remote monitoring and online access to therapies.

#### Total

<table>
<thead>
<tr>
<th>Arena 1 ($'000)</th>
<th>Arena 2 ($'000)</th>
<th>Arena 3 ($'000)</th>
<th>Arena 4 ($'000)</th>
<th>Total ($'000)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2,225</td>
<td>16,341</td>
<td>11,172</td>
<td>3,800</td>
<td>33,538</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

---
### Appendix

#### Research and Development expenditure estimates 2020-21 across the Rural Research and Development Priorities

<table>
<thead>
<tr>
<th>Rural Research and Development Priorities</th>
<th>Arena 1 ($'000)</th>
<th>Arena 2 ($'000)</th>
<th>Arena 3 ($'000)</th>
<th>Arena 4 ($'000)</th>
<th>Total ($'000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Advanced Technology</td>
<td>620</td>
<td>5,116</td>
<td>3,179</td>
<td>0</td>
<td>8,915</td>
</tr>
<tr>
<td>2. Biosecurity</td>
<td>0</td>
<td>4,405</td>
<td>171</td>
<td>0</td>
<td>4,576</td>
</tr>
<tr>
<td>3. Soil, water and managing natural resources</td>
<td>0</td>
<td>6,270</td>
<td>503</td>
<td>0</td>
<td>6,773</td>
</tr>
<tr>
<td>4. Adoption of R&amp;D</td>
<td>1,605</td>
<td>550</td>
<td>7,319</td>
<td>3,800</td>
<td>13,274</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,225</strong></td>
<td><strong>16,341</strong></td>
<td><strong>11,172</strong></td>
<td><strong>3,800</strong></td>
<td><strong>33,538</strong></td>
</tr>
</tbody>
</table>

---

### Appendix

#### Science and Research Priorities and the Rural Research and Development Priorities

<table>
<thead>
<tr>
<th>Arena</th>
<th>Program Name</th>
<th>Project</th>
<th>Project Number</th>
<th>Science and Research Priorities</th>
<th>Rural Research and Development Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>All Horizon Scholarships</td>
<td>N/A</td>
<td>N/A</td>
<td>8.3</td>
<td>4</td>
</tr>
<tr>
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### Arena: Science and Research Priorities

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<td>Thoroughbred Horses</td>
<td>Improving jockey safety through virtual reality and biomarkers of concussion</td>
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<td>Improving the detection of parasitic infections and control strategies of horses</td>
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<td>Understanding the epidemiology of Chlamydia psittaci infections in mares</td>
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<td>PhD Understanding, reducing the effects of heat stress on TB stallion fertility</td>
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<td>Thoroughbred Horses</td>
<td>Improved bacterial identification and antimicrobial susceptibility testing</td>
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<td>Science fact not fiction: Detecting gene edited racehorses</td>
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<td>Emerging Industries</td>
<td>Defining terroir of Australian Coffee to increase demand and investment</td>
<td>PRJ-012341</td>
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<td>National Agronomy Sesame Trials</td>
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<td>Developing Industry Standards for Australian Native Oils</td>
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<td>Emerging Industries</td>
<td>Hazelnuts in Australia: Productivity &amp; Economic Analysis for Industry Expansion</td>
<td>PRJ-010774</td>
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AgriFutures Australia

Advisory Panels – Chairs

Rice
Mr Drew Braithwaite

Chicken Meat
Mr Guy Hebblewhite

Export Fodder
Mr Peter Baker

Ginger
Ms Nicole Christodoulou

Pasture Seeds
Mrs Lisa Anderson

Honey Bee & Pollination
Dr Doug Somerville

Tea Tree Oil
Mr Michael Flanagan

Thoroughbred Horses
Prof. Nigel Perkins

Emerging Industries
Mr Brian Ruddle

Ignite
No Chair appointed

The AgriFutures Australia Board is accountable to the Parliament of Australia through the Minister for Agriculture.

The Board:
• Sets strategic direction and establishes policies for the organisation
• Oversees operational and functional performance against budget and other key performance indicators on behalf of stakeholders
• Remuneration to Directors estimated at $686,500 for 2020-21.

AgriFutures Australia Board of Directors as of 30 June 2020
Chairperson
Mrs Kay Hull AM

Deputy Chair
Mr Ian Henderson

Managing Director
Mr John Harvey

Non-Executive Directors
Dr Kate Andrews
Mr Ric Clark
Dr Tony Hamilton
Dr William Ryan

Stakeholders
• The Australian Government on behalf of rural industries and taxpayers
• Industry funders
• Levy payers
• The Australian community
• Primary clients
• For AgriFutures Australia related industries, all participants in the production and marketing chain (producers, processors, distributors and consumers)
• On AgriFutures Australia’s strategic cross-sectoral program, the National Farmers’ Federation on behalf of all rural industries

Reporting to stakeholders
There are four key accountability documents for stakeholders:
1. The Strategic Plan sets out strategies, directions and performance indicators for the Corporation,
2. A five year R&D plan for each industry program within new and Emerging Industries, established rural industries and national rural issues.

Corporation directory
Chair
Mrs Kay Hull AM 02 6293 6900

Managing Director
Mr John Harvey 02 6923 6901

General Manager
Corporate
Mrs Louise Heaslip 02 6923 6903

General Manager
Business Development
Mr Michael Beer 02 6923 6915

General Manager
Communications and Capacity Building
Ms Belinda Allitt 02 6923 6919

General Manager
Research
Mr John Smith 02 6923 6921

Service charter
AgriFutures Australia’s enabling legislation is the Primary Industries Research and Development Act 1989 (Commonwealth Government of Australia) (the PRD Act).

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Communications channels between AgriFutures Australia and rural industries meet two essential functions - accountability and bringing industry influence to bear on the research agenda. At the peak industry level, the organisation is accountable to:
• The National Farmers’ Federation
• The Australian Chicken Meat Federation.

These two organisations are prescribed by section 7 of AgriFutures Australia’s enabling legislation. This requires AgriFutures Australia to report on its activities each financial period. This accountability runs parallel to AgriFutures Australia’s Annual Report to the Minister and the Parliament.

All of AgriFutures Australia’s research programs have advisory or reference panels with stakeholder membership.

Notification of significant events
This plan has been written to align to terms of section 19 of the Public Governance, Performance and Accountability Act 2013, which defines a particular class of proposal as ‘significant’ and notifiable to Ministers.

The organisation confirms, in the context of section 15, that there are no ‘significant’ proposals in this Plan that should be drawn to the attention of Ministers.

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