

**Pests and diseases pose a productivity challenge to Australian agriculture due, in part, to animals and plants developing resistance to existing agricultural pesticide and veterinary (AgVet) technologies. New and emerging industries also face a lack of adequate AgVet technologies. These challenges are expected to significantly increase within the next decade.**

This issue is exacerbated by a lack of incentive for Agvet chemical registrants to invest in AgVet technologies, meaning many Australian producers do not have the same level of access to pesticides as their competitors. For example, the wine industry in California has access to double the range of fungicides that Australian wine producers can currently access.

Australia represents less than 3 per cent of the global crop pesticide market and less than 1.5 per cent of the broader global AgVet market. Market failure in investment arises because the case for commercial investment is not always strong given the regulatory cost for chemical registration and the relatively small market size.

## IMPROVED ACCESS TO AGVET CHEMICALS FOR AGRICULTURAL INDUSTRIES

The AgVet Collaborative Forum was established in June 2015 to identify solutions to key pest and disease challenges through improved access to AgVet technologies. It aims to highlight areas of business opportunity for registrants by providing a Priority List of industry needs and a process to identify potential partnerships and co-investment opportunities with industry.

Information sharing and cross industry collaboration to support product registration applications can deliver cost savings and productivity gains to Australian farmers. Increased collaboration by industry within a commodity crop group or increased international data sharing based on areas of similar environment and chemical use patterns (known as *agro-ecological co-equivalence*), will lead to cost savings. For example, citrus industries in southern California have similar soils, climate and production issues to citrus growers in the Australian Riverland and Sunraysia region.

The impact of AgVet technologies along the food supply chain means that it is important for plant and animal industries to work together. For instance solutions to crop/pest issues in the plant industries can have impacts in the intensive livestock sectors such as dairy or poultry through their use of animal feeds.

Through the Forum, industries identify issues requiring AgVet solutions. These issues may arise from new pests or diseases requiring a solution, resistance to existing treatments, or a need to broaden use options for existing AgVet technologies.

Commercial registrants, relevant Rural Development Corporations (RDCs) and industries identify any existing solutions and actions required to address the issue.

“ The rice industry is a strong supporter of this initiative. The collaboration RIRDC has started through this process is essential to industries like ours gaining timely access to previously unavailable chemical technologies ”

Mr. Andrew Bomm  
Executive Director, Ricegrowers' Association of Australia Inc

### Prioritisation

Following identification of all issues, it is necessary to prioritise them to reduce real and perceived commercial barriers to product development. Industry peak bodies in collaboration with their relevant RDC identify their top 5 priorities for further consideration by the Forum.

In assessing priorities the Forum considers a range of issues including whether there is a current solution and if so, whether additional solutions are required to allow producers to effectively manage issues such as resistance and environmental impacts. Registrant technical support for progressing potential solutions into products, or registering existing solutions in Australia, are also considered.

Issues submitted to the Forum are allocated one of the following groups according to the technical viability of a solution:

**'A' priority** – an issue with a known solution, of priority to industry and has industry, RDC and registrant commitment to invest in a project to develop a product.

**'P' priority** – an issue with a known solution, of priority to industry but no registrant support to develop it. There is a commitment from industry and the relevant RDC to investigate and fund the development of a solution.

**'B' priority** – an issue with a known solution, of priority for industry, but has unclear registrant support. There is industry commitment to formal discussions with a registrant to clarify support and invest if required for trial work.

**'C' priority** – an issue with no known solution where industry is seeking registrant assistance to identify whether a potential solution exists.

### Outcomes

The AgVet Collaborative Forum has, for the first time in Australia, facilitated a direct, formal discussion between the users of AgVet technologies and those businesses that produce them.

To date, the outcome for the plant industries has been particularly significant with discussion between industry and registrants identifying solutions to a significant proportion of industry issues, which previously had no identified solution. For example, one third of the crop/pest priorities submitted to the workshop had no identified solution. Through the Forum solutions for 58 per cent of these needs were identified.

In addition, all issues raised by the animal industries had a solution identified. A common need by all industries for access to anesthetic technology for improving animal welfare led to this being listed as a high priority.

Access to a wider range of appropriate AgVet technologies gives Australian producers a broader suite of solutions to assist them in producing clean, healthy food in a sustainable manner. The benefits flow beyond the farm gate to improved environmental, animal welfare and food quality outcomes.

#### » Priority List

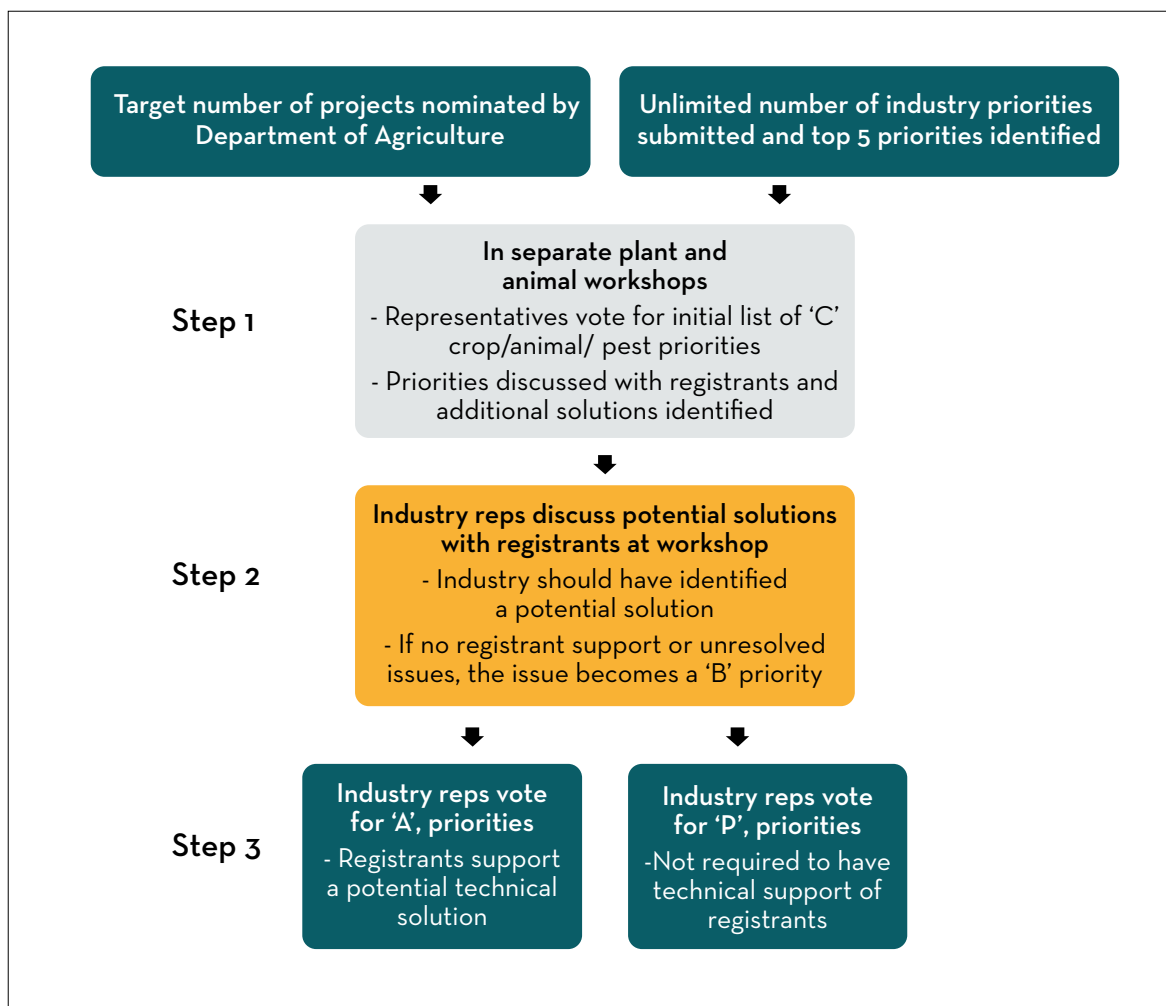
The Priority List from the 2015 Forum includes:

Plant Industries - 326 unique crop/pest issues submitted and of these:

- there were 191 issues with a solution identified by industry, and of those 47 per cent had at least 1 additional new solution identified by registrants - potentially improving options for managing resistance.
- 135 had no identified solution - registrants identified 78 new potential solutions where none were previously known.

Animal Industries - 98 unique animal pest issues were submitted and of these:

- All had potential solutions identified by registrants
- Of the 98 issues with a solution, 4 per cent had at least 1 additional new solution identified by registrants - potentially improving options for managing resistance.



» *Where to from here?*

- The collated Priority List provides a searchable tool for Australian and international registrants to consider in their business planning.
- All 'A' and 'P' priorities will be mapped against internal research programs, databases and registrations. This will be completed and supplied to relevant RDCs by 30 September 2015.
- All plant industry crop/pest issues and at least one chemical solution for identified 'A' priorities, have been submitted to the OECD global minor use chemical priorities program.
- Registrants have been strongly encouraged to clarify commitment to support projects which currently have no support for product development.
- This prioritisation process has created a framework for further discussions over the coming 12 months and creates opportunities for addressing industry needs more effectively and promptly. Priorities which have a 'B' classification may be subject to discussion within this framework.

**GOAT INDUSTRY COUNCIL OF AUSTRALIA**

*“ The Forum has provided us with valuable contacts in the AgVet chemical industry and a way forward to improving the management of Australia’s goats in higher rainfall areas, improving animal welfare and Australian goat industry profitability both locally and globally ”*

Dr. Bob Crouch  
Goat Industry Council of Australia

## » *Improved access to AgVet chemicals for agricultural industries project*

The AgVet Collaborative Forum Project has been supported through the Department of Agriculture and is being managed under the Rural Industries R&D Corporation's (RIRDC) National Rural Issues program. It is part of an \$8 million investment by the Australian Government to help farmers gain improved access to safe and effective agricultural and veterinary (AgVet) chemicals. For further information about the project see: *A Competitive Agriculture Sector - improved access to agricultural and veterinary chemicals*.

**RIRDC invests in research and development to support rural industries to be productive, profitable and sustainable. RIRDC's National Rural Issues program delivers independent, trusted and timely research to inform industry and government leaders who influence the operating environment of Australia's rural industries.**

This research:

- Informs policy development and implementation
- Identifies future opportunities and risks
- Covers multiple industries and locations

RIRDC invests approximately \$1 million per annum in the National Rural Issues program and attracts other investment and partnerships to undertake research that supports cross sectoral and national decision making. From 2015, RIRDC will host an annual Agricultural Policy Roundtable to identify emerging opportunities and issues that independent, trusted and timely research could contribute to.

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