BLUEPRINT TO ENHANCE THE GROWTH OF THE QUEENSLAND SHEEP AND GOAT INDUSTRIES

AGFORCE

THE VOICE OF QUEENSLAND SHEEP AND GOAT PRODUCERS

AgForce Queensland Farmers (AgForce) is a peak organisation representing Queensland's sheep, wool and goat, cane, cattle, and grain producers. The sheep, wool and goat, cane, beef and grain industries in Queensland generated in excess of $7.8 billion in on-farm value of production in 2019-20. AgForce's purpose is to advance sustainable agribusiness and strives to ensure the long-term growth, viability, competitiveness and profitability of these industries. Almost 5,900 farmers, individuals and businesses provide support to AgForce through membership. Queensland primary producers provide high-quality food and fibre to Australian and overseas consumers and contribute significantly to the social fabric of regional, rural, and remote communities.

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MISSION

Double the value of agricultural production from sheep and goats from **$170m (2016)** to **$350m by 2026**, through optimising productivity, maintaining profitability and continuously improving environmental management.

VISION

The Sheep and Goat industries are a vibrant part of regional Queensland contributing positively to regional economies, communities and the sustainable management of the landscape.

CURRENT SITUATION

At the date of the last ABS agricultural census in 2016, the Queensland sheep population was approximately 1.8 million head, a decline of 90% from the 1990 numbers of 18 million. Since that time, the commodity prices for wool, mutton, lamb and goat meat have increased by between 2-6 times.

It is an opportune time for key stakeholders to recognise the value of small stock in Queensland production systems. There is an opportunity to lift the value of production of sheep and goats in Queensland from $170 million per annum to around $350 million within the next five years (subject to seasonal conditions).

The Blueprint to Enhance the Growth of the Queensland Sheep and Goat Industries **(Blueprint)** investigates the opportunities and challenges that face the re-development of the sheep and goat industries and guides producers, industry and other stakeholders towards actions that will allow those opportunities to be fully embraced.

A key goal of the Blueprint is the need to develop a preferred future and roadmap for the Queensland small stock industries, that is owned and shared by industry, providing confidence to both current stakeholders and investors.

EIGHT KEY BLUEPRINT OBJECTIVES
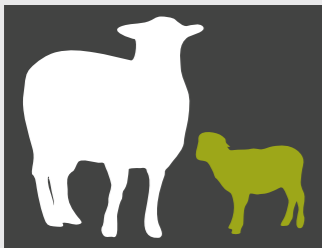
## Increase small stock numbers in Queensland

Sheep numbers to increase from 1.8 million (2016) head to 3.5 million head and goats from 0.1 million to 0.25 million by 2026. Growth in small stock numbers through a combination of better-informed enterprise choice decisions as well as growth of enterprises within existing small stock businesses.

Determine the optimum balance between enterprises like wool, sheep meat, goats and livestock trading based on geographical location, a well-informed and objective long-term view of the respective industries, resource capability and personal preference.

Assist graziers to improve genetics, husbandry techniques and stock management to reinforce small stock as a viable economic asset.

1
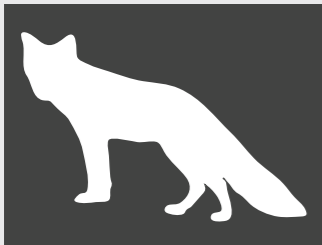
Control of pest animals and improved biosecurity

Further enable enterprise choice through private expansion of exclusion fencing in Queensland and take advantage of the fencing put in place via government subsidy. Reduce losses due to predation and enhanced biosecurity outcomes, leading to increased reproductive rates and productivity through a reduction in livestock stress.

2

Managing seasonal variability

Developing resilient enterprises that are synchronised better with local environmental and climatic conditions; and are able to manage production through variable seasons with adjustments including supply chain specialisation providing flexibility within breeding, growing and fattening enterprises similar to cattle enterprises.

3

Productivity

Focus on increasing productivity within enterprises through peer-to-peer knowledge transfer as well as science to industry knowledge transfer.

Clearly articulate goat and sheep specifications and growth pathways to better target processor expectations to meet market demands and achieve a higher return.

Identification of any knowledge and/or research gaps and advocate for research, development and extension to ensure industry remains technologically sophisticated, innovative, competitive, sustainable and profitable.

Product quality, provenance and sustainability will assume increasing importance, as will ethical production practices which will be required to maintain industry's licence to operate.

4

5 Environmental management

Develop a path to integrated sustainable land management systems that incorporate ecological benefits (including carbon sequestration) with viable commercial enterprise options.

6 Knowledge development and retention

Develop and retain skills within the industry that enables growth of the industry as well as growth in productivity. Re-introduction of rural training for young adults seeking a career in broadacre agriculture is critical for industry to achieve its vision and goals. Support research and development activities focused on increasing productivity as well as new technologies that can improve efficiency.
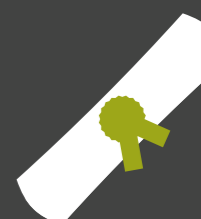
7 Industry attraction and collaboration

Develop communication tools that position the industry to external stakeholders in a positive manner, reflecting the underlying values of its members. Collaborate with industry bodies such as Meat and Livestock Australia, Australian Wool Innovation and processing sector representatives to better position support and investment for sheep and goat meat production.

8 Export and Domestic market promotion

Promote wool, goat and sheep meat within export and domestic markets to lift demand. Utilise the assistance of trade bodies including Meat and livestock Australia and Austrlain Wool Innovation to achieve increased diversification of market and increase export volumes.

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KEY STRATEGIES TO ACHIEVE THESE OBJECTIVES

1 Increase small stock numbers in Queensland

Target	Activity	Measurement
3.5 million sheep in Queensland by 2026	Support and educate stakeholders around enterprise choice and the role of small stock to determine the optimum balance between sheep and other enterprises in their production system such as wool, sheep meat, goats, cattle or livestock trading, with:	Sheep numbers from ABS Ag census data 2021 and 2026
250,000 farmed goats by 2026	• Gross margin calculator • Case studies • Regional suitability (production systems that fit with local environment and climatic conditions) • Infrastructure such as exclusion fencing, sheep facilities etc. • Diversification (reduce risk)	Goat numbers from ABS Ag census data 2021 and 2026

2 Control of pest animals and improved biosecurity

Target	Activity	Measurement
15 million hectares with exclusion fencing in Queensland by 2026	Support and educate stakeholders around the benefits of exclusion fencing with: • Case studies • Linkages to "Not just a fence" • Good ecological outcomes • Good biosecurity outcomes • Increasing viability, profitability and sustainability	Biosecurity Queensland data on exclusion fence areas "Not Just a Fence" data on small stock numbers

3 Managing seasonal variability

Target	Activity	Measurement
An increase in the number of producers able to manage enterprise to mitigate economic impact of seasonal variability and improve drought resilience	Support and educate stakeholders around the benefits of management of seasonal variability including: • Manage total grazing pressure • Early de-stocking to protect environmental condition • Supply chain options to reduce stock numbers including sheep feed-lotting • Risk management tools to mitigate economic costs • Case studies • Attitudinal surveys	Attitudinal survey of small stock producers focused on their ability to manage seasonal variability 2023 and 2026

4 Productivity

Target	Activity	Measurement
12.5 million kilograms of greasy wool production 20 million kilograms (dressed weight) of mutton and lamb meat produced in Queensland [1] 10 million kilograms (dressed weight) of goat meat processed in Queensland [2]	Support and educate producers around increasing productivity relating to: • Reproductive rates in wool sheep, meat sheep and goats • Increased weight at turnoff for meat sheep and goats • Genetic selection for increased body weight in meat sheep and goats • Genetic selection for increased wool cuts per head, or increased value of wool per head • Promote a continuous improvement mindset where productivity improvements are continuously pursued Tools for knowledge transfer include: • Case studies • Linkages to research materials • Improved communication between processors and producers	ABS Ag census data 2021 and 2026 on sheep and goat production Production survey of small stock producers covering reproductive rates and genetic selection 2023 and 2026 Utilise ABS catalogue 7218.0 to assess quarterly mutton and lamb slaughter and meat production Utilise export data to track volumes exported by month

[1]"Produced in Queensland" refers to all sheep meat sold from the Queensland sheep flock including sheep meat processed interstate.

[2]"Processed in Queensland" refers to all goat meat processed through abattoirs in Queensland whether grown in Queensland or interstate.

5 Environmental management:

Target	Activity	Measurement
Increase in producers capturing revenues for environmental management. 25% of Queensland sheep and goat producers participating in voluntary and accredited sustainability schemes	Support and educate stakeholders around increasing knowledge of environmental management opportunities including: • Carbon sequestration in the landscape • Greenhouse gas emission management protocols • Ground cover measurement protocols • ABCD land condition assessment Participate in, and meet the standards of, an Australian livestock and wool industry provenance/sustainability scheme which has credibility in the eyes of customers in their target market for meat and wool	Attitudinal survey of small stock producers focused on their ability to environmental management issues 2023 and 2026 Adoption of provenance recording systems Adoption of sustainability management systems Revenue from environmental services

6 Knowledge retention:

Target	Activity	Measurement
Access to knowledge relevant to small stock management is available to new entrants as well as existing producers wishing to expand	The Blueprint provides a portal for knowledge transfer for all personnel involved in the sheep and goat supply chain Different skills will be required across the supply chain into the future. Develop an industry narrative to attract new skills to the industry Develop a skills assessment tool so that producers can self-assess "what they need to know" to successfully run their business – and source these skills either by their own professional development, or by retaining expert advisers where needed The industry must continue to drive the Research and Development required to enable the industry to become more competitive over time. The successful Queensland sheep and goat industry of the future will be more technologically sophisticated Support the adoption of new technologies through providing opportunities for 'innovation' professionals to contribute to the industry	Increased employment in Agriculture Attitudinal survey of small stock producers focused on knowledge retention and knowledge transfer Research and development projects focused on the sheep and goat industries New technology developments

7 Industry attraction and communication

Target	Activity	Measurement
Position the industry in a positive manner that reflects the underlying core values	Ensure the practices of the industry meet future community expectations. Product quality, provenance and sustainability will assume increasing importance, as will animal welfare and ethical production practices, which will be required to maintain industry's social licence to operate. Tools for communication include: • Sheep and goat blueprint narrative website • Case studies • Linkages to research materials • Improved communication between producers and consumers The sheep and goat Industry has an interest in maintaining a critical mass of participants for both human resource and investment reasons. The industry needs to continue to identify, support the development of and celebrate a new generation of leaders who will act as role models for others	Attitudinal survey of small stock producers focused on delivery of external stakeholder expectations Retention of young people in the sheep and goat industries Engage with Meat and Livestock Australia and Australian Wool Innovation to focus on collective resources to devote to sheep and goat meat production

8 Export and Domestic market promotion

Target	Activity	Measurement
Promote domestic and international trade in wool and sheep and goat meat.	Work with processors, state and national export bodies to diversify and obtain new markets for wool, sheep meat and goat meat	Increased promotion and growth in wool, sheep and goat meat exports Increased promotion and growth in domestic sales Utilise export data to track volumes exported by month

STAKEHOLDERS INVOLVED IN THE BLUEPRINT TO ENHANCE THE GROWTH OF THE QUEENSLAND SHEEP AND GOAT INDUSTRIES

- Queensland primary producers currently running small stock and wishing to expand their operations
- Queensland primary producers not currently running small stock but with capacity to do so
- Interstate primary producers interested in investing in primary production land in Queensland and wanting to investigate enterprise options
- Agricultural land and or business investors
- Queensland Government agencies including Queensland Department of Agriculture and Fisheries; Department of Environment and Science; Treasury; Department of State Development, Infrastructure, Local Government and Planning; Department of Resources; Department of Regional Development, Manufacturing and Water; and Trade and Investment Queensland

- Commonwealth Department of Agriculture, Water and Environment
- Small livestock industry organisations including, Meat and Livestock Australia, Australian Wool Innovation, Sheep Producers Australia, WoolProducers Australia and Goat Industry Council of Australia.
- Research and Development organisations including CSIRO and nationally recognised action groups for vertebrate pest management and control
- Meat and wool processing organisations
- Employment groups
- Elected representatives
- Meat and Fibre consumers
- Financial institutions
- Agricultural service providers (accountants, insurance, others)

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