

# The role of Australian agriculture in Southeast Asian markets

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## About AUSVEG

AUSVEG is the prescribed Peak Industry Body representing the interests of the Australian vegetable, potato, and onion industry. AUSVEG is a not-for-profit, member-based organisation that is run by growers, for growers.

AUSVEG represents over 3,600 vegetable producers that account for 3.6 million tonnes of vegetable production, and an annual farmgate value of \$5.8 billion.

AUSVEG is a nationally federated body with the following members: AUSVEG VIC, AUSVEG SA, Queensland Fruit and Vegetable Growers, vegetablesWA, NSW Farmers, NT Farmers, WA Potatoes, and TasFarmers.

The purpose of AUSVEG is to advocate on behalf of industry at local, state, and federal levels with the core purpose of enhancing the economic, social, and commercial environment for growers so that the industry can continue to produce outstanding vegetables, potatoes, and onions for Australian and international consumers.

AUSVEG also delivers services for growers around Australia in the areas of extension, communication, environmental sustainability, biosecurity, export development and market access, working closely with growers to ensure their needs are reflected in this work.

In partnership with the International Fresh Produce Association A-NZ, AUSVEG hosts Hort Connections, Australia's largest horticulture conference and trade show which attracts more than 3,500 delegates annually. This event brings growers, supply chain, government and industry members together to increase awareness and uptake of the latest industry innovations, research and development outcomes, and to facilitate vital industry networking opportunities.

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## Executive Summary

Australian agriculture has a pivotal role in supporting food security and sustainable agricultural development in Southeast Asia, a region facing rapid population growth, urbanisation, and the escalating threats of climate change. By leveraging its strengths in high-quality agricultural produce, advanced technologies, and innovative farming practices, Australia is uniquely positioned to contribute significantly to food systems.

The export of premium Australian agricultural products such as grains, meat, dairy, and fresh produce not only diversifies food sources but also stabilises local food markets, thereby enhancing Southeast Asian food security. Australia's leading-edge agricultural technologies and practices, from precision agriculture to climate-resilient farming techniques, also offer solutions to increasing agricultural productivity and sustainability. These advantages can contribute significantly to addressing yield gaps, reducing crop losses, and improving post-harvest management in Southeast Asia.

In order to best leverage Australian contributions, investment in the ongoing development of Southeast Asian expertise and capacity building are vital. Tailored training programs for local Southeast Asian farmers and agribusiness professionals, focusing on advanced and sustainable agricultural methods, can greatly enhance local agricultural skills and knowledge. Additionally, encouraging Australian agribusinesses to engage in direct investments and public-private partnerships in Southeast Asia, can help build much-needed infrastructure and strengthen the entire agricultural value chain.

Policy support and bilateral, as well as multilateral collaborations, facilitated by the Australian Government, also play crucial roles. By forging stronger trade links and regulatory harmonization, and engaging in regional cooperative frameworks, Australia can support more integrated, secure, and resilient food systems in Southeast Asia.

The Southeast Asian region, characterized by its dynamic economies and rapidly expanding populations, faces significant challenges in ensuring food security and adequate nutrition. Australian vegetables, known for their quality and safety, play a crucial role in addressing these challenges, supporting health outcomes, and enhancing dietary diversity across Southeast Asia.

With its proximity to established trade routes, Australia serves as a reliable supplier of a wide array of vegetables that are not only high quality, but also adhere to some of the strictest safety standards in the world. These vegetables fill crucial gaps in local production, especially during periods of shortage due to seasonal variations or agricultural constraints in the region, thereby strengthening Southeast Asian food security.

Australia's rigorous food safety protocols, coupled with advanced agricultural practices, ensure that the vegetables exported to Southeast Asia meet high safety and quality standards. These standards are enforced through stringent regulatory frameworks, regular inspections, and compliance with both domestic and international requirements. This adherence builds a strong trust in Australian vegetables, which is critical for consumer confidence in a region increasingly concerned with food safety due to past food-borne illness outbreaks and ongoing issues with pesticide use in local production.

For Australian growers and exporters, Southeast Asia represents a significant market opportunity that may drive additional demand for Australian produce and support rural economies in Australia.

The trade in vegetables also facilitates a beneficial exchange of technology and farming techniques between Australia and Southeast Asia. Australian agribusinesses often bring innovative practices to their partnerships in the region, including precision agriculture, sustainable farming techniques, and advanced post-harvest handling practices that reduce waste and increase the shelf life of produce. These practices help elevate the overall standard of agriculture in Southeast Asia, promoting sustainability and efficiency.

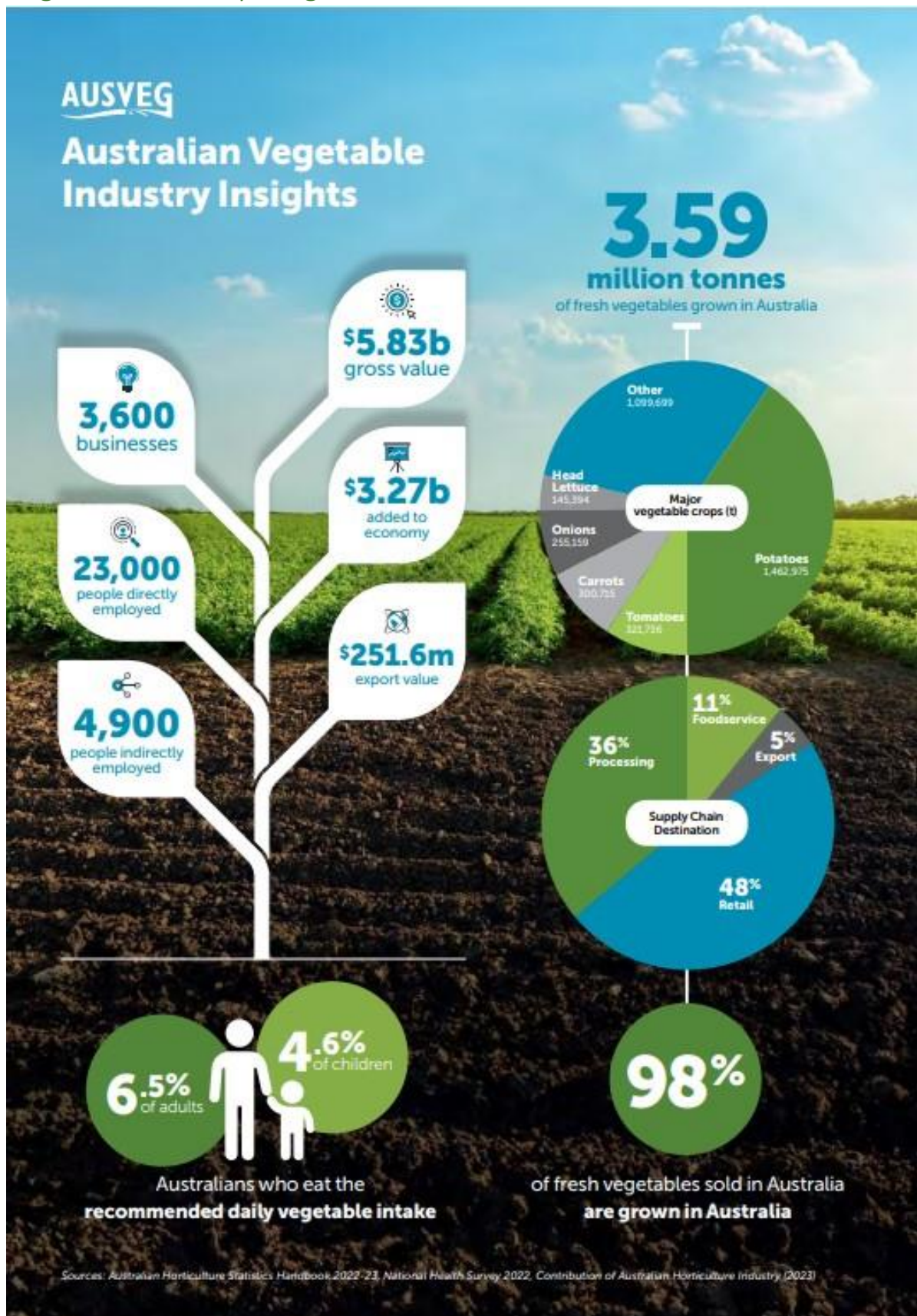
Currently 38 percent of Australia's fresh vegetable exports are imported by Southeast Asian countries, with Singapore and Malaysia accounting for 27 percent of trade. Carrots, potatoes, brassicas, onions, cucurbits, and leafy greens account for a majority of vegetable exports.

Australian Fresh Vegetable Export Statistics (Jan-Dec) 2021-2023					
Rank	Trade Partner	2021	2022	2023	% Trade
		AUS	AUS	AUS	
	World	\$243,404,604	\$229,282,836	\$247,752,893	
1	Singapore	\$48,486,777	\$41,942,095	\$42,538,063	17%
2	United Arab Emirates	\$32,072,117	\$32,539,222	\$33,891,943	14%
3	Malaysia	\$28,941,020	\$22,998,763	\$24,727,666	10%
4	Korea, South	\$12,294,061	\$16,512,819	\$17,108,202	7%
5	Saudi Arabia	\$16,574,589	\$13,841,498	\$14,880,859	6%
6	Hong Kong	\$18,938,507	\$15,931,076	\$14,132,549	6%
7	Thailand	\$12,697,258	\$16,266,589	\$14,007,724	6%
8	Taiwan	\$8,350,335	\$10,093,258	\$12,618,370	5%
9	New Zealand	\$11,719,249	\$7,524,120	\$12,476,827	5%
10	Japan	\$7,938,657	\$8,843,452	\$8,961,319	4%
11	Philippines	\$5,402,093	\$5,338,210	\$7,112,885	3%
12	Qatar	\$8,766,079	\$8,150,926	\$5,614,969	2%
13	Fiji	\$1,559,452	\$3,268,347	\$5,577,884	2%
14	Papua New Guinea	\$2,185,568	\$2,812,061	\$3,916,169	2%
15	New Caledonia	\$1,941,598	\$3,782,752	\$3,909,447	2%
16	Spain	\$1,109,189	\$1,610,768	\$3,501,322	1%
17	Netherlands	\$1,948,755	\$912,908	\$3,482,150	1%
18	Indonesia	\$4,090,002	\$2,919,385	\$2,879,188	1%
19	Kuwait	\$3,167,898	\$2,258,831	\$2,456,395	1%
20	Bahrain	\$1,754,727	\$1,544,383	\$1,709,084	1%
21	Belgium	\$1,468,777	\$573,343	\$1,483,348	1%
22	Brunei Darussalam	\$3,681,674	\$1,604,496	\$1,441,845	1%
23	Vietnam	\$1,125,186	\$1,159,694	\$1,295,460	1%

To maximize the benefits of importing Australian vegetables, Southeast Asian countries and Australia can further develop strategic partnerships that enhance the agricultural value chain. Investments in cold chain infrastructure, logistics, and biotechnology can improve the quality and safety of food products region-wide. Additionally, collaborative efforts in agricultural research and policy-making can address shared challenges such as climate change, water scarcity, and farm sustainability, fostering a resilient agricultural sector.

The integration of Australian agriculture into Southeast Asian food security strategies not only serves the economic and geopolitical interests of Australia but also supports a sustainable, stable, and prosperous Southeast Asia, underscoring the profound interconnectedness of regional food systems and the importance of collaborative solutions to global challenges.

## Vegetable Industry Insights



## How the Australian Government can support agriculture and food industries in leveraging partnership opportunities within the region.

The Australian Government can play a pivotal role in supporting the agriculture and food industries in Southeast Asia by leveraging partnership opportunities within the region and beyond. This involves a multi-faceted approach focusing on enhancing market access, streamlining trade systems, and helping industry players to identify and capitalise on new market opportunities. Here are several strategies the government could implement:

### Enhancing Market Access

**Negotiate Free Trade Agreements (FTAs)** - Continue to negotiate and implement FTAs with key trading partners to reduce tariffs and non-tariff barriers on agricultural products. The fact that Malaysia and Singapore are the two biggest markets in SE Asia is not an accident, but due to Singapore and Malaysia both being non-protocol markets and relatively open/easy supply Australian fresh produce into.

**Leverage Existing Trade Agreements** - Utilise existing FTAs more effectively by helping businesses understand and take full advantage of the benefits, such as those under the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).

**Sanitary and Phytosanitary (SPS) Measures** - Work on harmonizing SPS measures with trade partners and streamlining processes so that they do not unnecessarily impede trade. Indonesia, Vietnam and the Philippines are identified as having far greater export potential and additional work needs to be done to facilitate greater trade opportunities and reduce non-technical barriers.

**Diplomacy** – Better utilisation of diplomatic channels to address trade disputes and barriers, ensuring that Australian agricultural exports are not unfairly blocked or hindered. The recent (May 2024) *Taste the Wonders of Australia* event in Jakarta, is an excellent example of industry and government collaborating to increase food and beverage exports to Southeast Asia.

### Streamlining Trade Systems

**Digital Trade Facilitation** - Develop and implement digital systems for smoother trade processes, such as e-certification, blockchain for supply chain transparency, and AI for logistics and compliance checks.

**Infrastructure Investments** - Invest in critical infrastructure, such as ports, roads, and digital networks, to enhance the efficiency of export operations.

**Regulatory Streamlining** - Simplify regulatory requirements where possible, and provide clear, accessible information to exporters to reduce the burden of compliance.

### Market Development and Diversification

**Market Intelligence** - Fund and facilitate the gathering of market intelligence to keep Australian exporters informed about trends, consumer preferences, and regulatory changes in different markets.

**Trade Missions and Exhibitions** - Organize and support participation in trade missions, exhibitions, and fairs to help Australian businesses establish contacts and enter new markets. AUSVEG participates in key trade shows such as Asia Fruit Logistica, HOFEX, Food and Hotels Asia (to name a few) however trade activities are limited by resources.

**Branding and Promotion** - Promote Australian agricultural products globally under a unified national brand that emphasizes quality, safety, and sustainability.

### Supporting Innovation and Sustainability

**Research and Development (R&D)** - Invest in R&D to develop innovative agricultural practices and products that meet specific market needs, especially in terms of sustainability and climate resilience.

**Sustainable Practices** - Encourage and facilitate the adoption of sustainable agricultural practices through incentives and support programs, which can be a key selling point in environmentally conscious markets.

### Building Regional Cooperation

**Regional Partnerships** - Strengthen partnerships with regional bodies such as ASEAN, APEC, and the Pacific Islands Forum to work on common agricultural challenges and opportunities.

**Technical Assistance and Capacity Building** - Offer technical assistance and capacity-building programs to neighbouring countries, which can help develop markets for Australian products and strengthen regional ties.

### Education and Training

**Skill Development** - Enhance skills and knowledge in international trade among Australian farmers and food producers through targeted training programs.

**Cultural Competence** - Provide resources and training on cultural competence to help businesses effectively engage with diverse markets and stakeholders.

What are the opportunities to build and strengthen partnerships in Southeast Asia that build capability in the region, including in the area of animal and plant biosecurity, adapting to a changing climate, improving agriculture sustainability and agriculture technology and innovation

The Australian vegetable industry has multiple opportunities to build and strengthen partnerships in Southeast Asia, a region characterized by rapidly growing markets and increasing demand for sustainable agricultural practices. These partnerships can focus on shared challenges such as plant biosecurity, climate adaptation, sustainability, and technological innovation.

### Plant Biosecurity

**Joint Research Initiatives** - Collaborate with Southeast Asian research institutes and universities to conduct joint research on plant diseases and pest control methods specific to the region. This can include sharing best practices and technologies for biosecurity management.

**Training and Workshops** - Australian growers can offer expertise in biosecurity training, providing workshops for local farmers and agricultural businesses in Southeast Asia. This helps build local capacity and strengthen biosecurity measures across borders.

### Adapting to a Changing Climate

**Climate-Resilient Crop Varieties** - Partner with local agricultural bodies to develop and distribute crop varieties that are more resilient to the changing climate conditions in Southeast Asia, such as varieties that are drought-tolerant or flood-resistant.

**Shared Pilot Projects** - Establish pilot projects that test innovative farming techniques to deal with climate variability, such as water-efficient irrigation technologies and integrated pest management systems that reduce reliance on chemical pesticides.

### Improving Agriculture Sustainability

**Sustainable Farming Practices** - Share expertise and technologies in sustainable farming practices, such as organic farming, minimal soil disturbance, and crop rotation. Australian growers can help set up demonstration farms that showcase the economic and environmental benefits of these practices.

**Agroforestry and Permaculture** - Engage in partnerships to promote agroforestry and permaculture practices which integrate tree planting with crop farming, enhancing biodiversity and soil health.

### Agriculture Technology and Innovation

**Tech Transfer Agreements** - Collaborate on technology transfer in areas like precision agriculture, which utilizes GPS, IoT sensors, and data analytics to optimize farming operations. This can help Southeast Asian farmers increase yields and reduce costs.

**Start-Up Ecosystems** - Invest in or partner with agri-tech startups in Southeast Asia to develop and scale new technologies. Australian businesses can provide mentorship, funding, or research collaboration to foster innovation in the region.

**Digital Platforms for Farmers** - Develop and share digital platforms that provide access to market information, weather forecasts, and online training modules, empowering local farmers with knowledge and tools to improve their productivity and sustainability.

### Capacity Building and Education

**Educational Exchange Programs** - Establish exchange programs between Australian and Southeast Asian agricultural universities and vocational schools. These programs can facilitate the sharing of knowledge and skills among next-generation farmers and agronomists.

**Professional Development Programs** - Offer professional development programs focused on modern agricultural techniques, business management, and sustainable practices, tailored to the needs of Southeast Asian agricultural professionals.

### Policy Development Support

**Collaborative Policy Frameworks** - Work with Southeast Asian governments to develop policies that support sustainable agriculture, such as subsidies for sustainable technologies, tax incentives for green farming practices, and stricter regulations on pesticide use.

Identify new and emerging opportunities and challenges in the region for the Australian agriculture industry, including enhanced market intelligence for exporters to support them to navigate markets and realise opportunities.

For the Australian agriculture industry, Southeast Asia represents a dynamic and evolving market landscape. Identifying new and emerging opportunities along with potential challenges is crucial for Australian exporters aiming to navigate and capitalise on these markets effectively. Enhanced market intelligence plays a vital role in this process, providing critical insights and strategic guidance.

### Opportunities

**1. Growing Middle Class** - Southeast Asia's rapidly expanding middle class is driving demand for high-quality, diverse food products. Australian exporters can capitalise on this by marketing premium products such as organic fruits and vegetables, dairy, and meats.

**2. Health and Wellness Trends** - There is a growing awareness and preference for health and wellness products among Southeast Asian consumers. Australian producers of organic, bio-dynamic, and health-optimized foods (like fortified or functional foods) have significant opportunities here.

**3. E-commerce Boom** - The surge in online shopping provides a new channel for Australian agricultural products. Developing partnerships with regional e-commerce platforms can facilitate direct-to-consumer sales and broader market penetration.

**4. Demand for Sustainable and Traceable Products** - Consumers in Southeast Asia increasingly prefer products that are sustainably sourced and traceable. Australian agriculture, known for its strict standards and sustainability practices, is well-positioned to meet these demands.

**5. Agri-tech and Innovation** - There's a growing interest in agricultural technology to improve yield, efficiency, and sustainability. Australian agri-tech firms can find ample opportunities in providing solutions ranging from precision farming to supply chain innovations in Southeast Asia.

### Challenges

**1. Trade Barriers and Regulations** - Navigating the complex and varied regulatory environment of Southeast Asian countries remains a challenge, including tariffs, non-tariff barriers, and fluctuating import regulations.

**2. Competition** - Competitors from within the region and other major exporting nations like the U.S. and China offer stiff competition, especially on pricing and market access.

**3. Logistical and Supply Chain Issues** - Challenges in logistics and supply chain efficiency, exacerbated by geographical and infrastructural constraints in certain Southeast Asian countries, can increase costs and reduce the freshness of perishable goods.

**4. Political and Economic Stability** - Some countries in the region face political and economic instability, which can affect market and investment conditions unpredictably.

**5. Climate Change Impacts** - The region is vulnerable to climate change, affecting agricultural productivity and creating uncertainty for long-term planning.

### Enhanced Market Intelligence

To support Australian exporters in navigating these markets and realizing opportunities, robust market intelligence is indispensable:

**Consumer Preferences and Trends Analysis** - Regularly updated data and analysis on consumer behaviour and preferences can help exporters tailor their products to meet local demands.

**Regulatory Insights** - Detailed, up-to-date information on regulations, tariffs, and compliance requirements is crucial for exporters to navigate the bureaucratic landscapes efficiently.

**Competitive Analysis** - Intelligence on what local and international competitors are doing can help Australian businesses develop strategies to differentiate their products and services.

**Technology and Innovation Trends** - Insights into local technological advancements and innovations can guide investment and collaboration opportunities.

**Risk Monitoring** - Continuous monitoring of political, economic, and environmental risks will help businesses anticipate and mitigate potential disruptions.

Market intelligence agencies, trade associations, and governmental bodies can collaborate to provide this vital information through detailed market reports, regular updates, and strategic advice. Utilising digital platforms and AI can enhance the speed and accuracy of such intelligence, enabling real-time analytics and forecasting.

## What are the mechanisms for government and industry to leverage identified opportunities for Australian agriculture, and to address key priorities in the Southeast Asia region

The Australian Government and the agricultural industry can collaborate through a variety of mechanisms to leverage opportunities and address key priorities in the Southeast Asia region. This strategic partnership can be structured around several core initiatives including:

### Policy and Trade Agreements

**Negotiate and Enhance Trade Agreements** - Strengthen existing free trade agreements (FTAs) and negotiate new ones to reduce tariffs, address non-tariff barriers, and secure comprehensive market access for Australian agricultural products.

**Engage in Bilateral and Multilateral Forums** - Participate actively in ASEAN, APEC, and other regional forums to influence regional economic policies and promote favourable trade norms and standards.

### Funding and Investment

**Direct Funding for Market Expansion** - Provide grants and subsidies to help farmers and agribusinesses expand into Southeast Asian markets, focusing on market entry strategies, branding, and meeting local market standards.

**Support for Research and Development** - Invest in R&D for developing products and technologies suited to Southeast Asian climates and consumer preferences, such as tropical-friendly crop varieties and precision agriculture technologies.

### Educational and Technical Assistance

**Capacity Building Programs** - Launch initiatives to train local farmers in Southeast Asia on Australian farming techniques, biosecurity measures, and sustainable practices, fostering goodwill and opening markets for related products and technologies.

**Exchange Programs** - Promote educational exchanges and internships between Australia and Southeast Asia to enhance technical knowledge and build networks in agricultural sectors.

### Market Intelligence and Advisory Services

**Establish Market Intelligence Portals** - Develop digital platforms that provide real-time data and analysis on market trends, regulatory changes, and consumer behaviour in Southeast Asia.

**Advisory Services** - Offer consultancy and advisory services to Australian agribusinesses on navigating Southeast Asian markets, including legal, cultural, and logistical aspects.

### Promotion and Branding

**Marketing Campaigns** - Implement targeted marketing campaigns promoting the quality, safety, and sustainability of Australian agricultural products.

**Brand Australia** - Strengthen the “Brand Australia” initiative to associate Australian products with quality and reliability, enhancing their appeal in Southeast Asian markets.

### Technology and Innovation

**Agri-Tech Hubs** - Support the creation of agri-tech hubs that foster innovation by connecting Australian startups with Southeast Asian markets, focusing on technologies that improve agricultural productivity and sustainability.

**Partnerships with Tech Companies** - Facilitate partnerships between Australian agri-tech companies and Southeast Asian firms to develop and deploy new technologies tailored to regional needs.

### Infrastructure Development

**Invest in Supply Chain Infrastructure** - Collaborate on projects to improve logistical infrastructure, such as cold storage facilities and transportation networks, making the export process more efficient and products more competitive.

### Regulatory Cooperation

**Harmonize Standards** - Work with Southeast Asian countries to harmonize standards and regulations, making it easier for Australian products to enter and compete in these markets.

By employing these mechanisms, the Australian government, in partnership with the agricultural industry, can effectively capitalize on the growing opportunities within Southeast Asia. This will help secure a more prominent role for Australian agriculture in the region, benefiting from increased exports, technology exchange, and enhanced bilateral relations.

## How can Australian agriculture support Southeast Asia's food security [towards 2040].

As we look towards 2040, the role of Australian agriculture in supporting Southeast Asia's food security becomes increasingly vital, especially given the region's susceptibility to food security challenges. Australian agriculture, with its advanced agricultural practices, technological innovations, and robust policy and regulatory frameworks, can play a significant role in enhancing food security in Southeast Asia through several strategic avenues:

### Export of High-Quality, Safe Produce

Australia can help mitigate food shortages in Southeast Asia by supplying high-quality agricultural products, including grains, meat, dairy, and horticultural goods. These exports can help stabilise local markets and provide a diverse array of food products, thereby improving nutritional outcomes.

### Agricultural Technology and Innovation Transfer

**Precision Agriculture** - Share technologies that increase crop yields and reduce waste, such as precision farming tools that utilize GPS, drones, and IoT sensors.

**Climate-Resilient Farming Techniques** - Transfer knowledge and technology related to drought-resistant crops and efficient water management practices to help Southeast Asian farmers adapt to climate variability.

**Post-Harvest Technologies** - Improve food storage, handling, and processing in the region through Australian technology, reducing post-harvest losses significantly.

### Capacity Building and Training

**Training Programs** - Develop comprehensive training programs for local farmers and agricultural workers in Southeast Asia focusing on modern farming techniques, sustainable practices, and business management.

**Educational Exchange** - Facilitate educational exchanges involving students, academics, and professionals in agriculture to foster learning and innovation.

### Sustainable Agricultural Practices

**Promoting Sustainable Practices** - Encourage practices that maintain ecological balance, such as integrated pest management, organic farming, and conservation agriculture.

**Diversified Farming System** - Support and promote systems that are proven agricultural best-practice to enhance biodiversity, improve soil health, and increase yields.

### Investment in Agribusiness

**Direct Investment** - Encourage Australian agribusinesses to invest in Southeast Asian agricultural sectors, particularly in areas like agri-tech, food processing, and logistics.

**Public-Private Partnerships (PPPs)** - Facilitate PPPs to bolster infrastructure development, such as irrigation systems, roads, and cold storage facilities, enhancing the overall agricultural value chain.

### Policy Support and Collaboration

**Bilateral and Multilateral Agreements** - Strengthen policy agreements that support trade, share food reserves, and coordinate on biosecurity and food safety standards.

**Regional Cooperation** - Engage more actively in ASEAN and other regional bodies to address transboundary issues like water management and pest control, which are critical for food security.

### Research and Development

**Joint R&D Projects** - Collaborate on agricultural research projects focusing on issues pertinent to Southeast Asia, such as crop adaptation to local climates and pest-resistant varieties.

**Innovation Hubs** - Establish or support innovation hubs in Southeast Asia that focus on agricultural advancements and local solutions to food production challenges.

### Climate Change Adaptation

**Mitigation Strategies** - Share expertise and technologies for mitigating the impact of climate change on agriculture, including methods to reduce greenhouse gas emissions and carbon footprint from farming activities.

By integrating these strategies, Australian agriculture can significantly contribute to securing food availability, improving nutritional quality, and ensuring sustainable food production in Southeast Asia. This not only helps address immediate and future food security challenges but also strengthens economic and diplomatic ties between Australia and the Southeast Asian region, fostering a stable and prosperous regional environment.