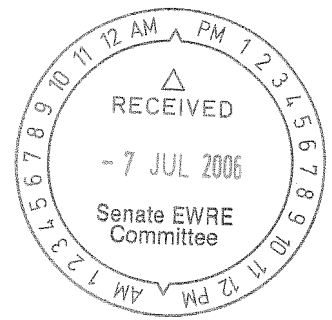


Submission

to

Senate Employment, Workplace Relations and Education
References Committee

Inquiry into Pacific Region seasonal contract labour



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Australian Government

Department of Agriculture, Fisheries and Forestry

Mr John Carter
Committee Secretary
Senate Employment, Workplace Relations and Education Committee
Department of Senate
Parliament House
CANBERRA ACT 2601

Dear Mr Carter

Senator Gavin Marshall, as Chairman of the Senate Employment, Workplace Relations and Education References Committee, wrote to the Minister for Agriculture, Fisheries and Forestry, the Hon Peter McGauran MP, inviting the Department of Agriculture, Fisheries and Forestry to make a submission to the Senate References committee Inquiry into Pacific Region Seasonal Contract labour.

Attached for your information and consideration is the Department's submission. The submission outlines the relative importance of horticulture in the agriculture sector. The submission also provides details on studies that have been done on the supply of labour as a determining factor in the development and future of the industry.

Thank you for the opportunity to make a submission to this Inquiry. If you wish to discuss any issues raised in this submission please contact me on 6272 3476, or Siandra Wastell, Manager, Corporate Policy and Planning, on 6272 3242.

Yours sincerely

A handwritten signature in black ink, appearing to read 'Craig Penney', written over a large, light-colored scribble.

Craig Penney
General Manager
Corporate Policy and Governance
4 July 2006



Australian Government

Department of Agriculture, Fisheries and Forestry

Submission to
Senate Employment, Workplace Relations and
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Inquiry into Pacific Region Seasonal Contract
Labour

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Executive Summary

The continued expansion of the Australian economy and the associated low levels of unemployment, as well as difficulties experienced in attracting appropriately skilled workers to rural and regional Australia, have resulted in labour and skills shortages in some segments of the agriculture and food, fisheries and forestry industries. In the horticulture industry labour shortages in the lower paid, lower skilled employment areas of seasonal harvesting are causing particular concern for some producers, and leading to the call for an overseas worker scheme.

Horticulture is the third largest agricultural industry in Australia, and is spread across the country, although the main growing areas are Queensland, Victoria and New South Wales. The Australian horticulture industry is highly diverse with a large range of crops across the fruit, vegetables, wine grapes, table and dried grapes, nuts, nursery products, cut flowers and turf industries. Horticulture is a labour intensive, seasonal industry, with high labour requirements in seasonal peaks to carry out crop harvesting or picking, pruning and trimming vines and trees, thinning and trimming flowers and bunches, and general maintenance crop work.

In 2003-04 the Gross Value of Production (GVP) of horticulture was \$6.6 billion and is expected to continue to grow. The industry is characterised by small-scale family farms, although these are giving way to larger operations as the industry strives for more efficient production through achieving economies of scale. In an attempt to decrease their cost base, many of the large operations are moving to areas where land is more abundant and not affected by non-agricultural factors raising land prices.

The Australian horticulture industry is operating in an increasingly complex and dynamic environment and is facing a number of challenges. Challenges including increasing international competition from low cost countries; global sourcing of food products by local retailers; the current value of the Australian dollar making Australian horticultural exports more expensive and less competitive with overseas produce; increased concentration in the food retailing and processing sectors; and increasing regulation have resulted in increased cost-price pressures for growers. To maintain and grow its markets, the industry needs to increase its productivity.

In relation to employment, the horticulture industry experiences many of the same issues as other industries in the agriculture sector. Factors and trends affecting employment in the agriculture sector include fast growth in the services sector; strengthening of the Australian labour market; a declining regional population; fewer young people entering farming; recent drought and competition for labour with more attractive industries, such as hospitality or tourism, or industries such as mining, that can offer higher remuneration compared to horticulture.

Productivity has grown significantly over the last decade due to industry expansion, access to new technology and better management. While some segments of the horticulture industry have benefited from mechanical harvesting, many horticultural crops still require harvesting by hand to meet the quality standards of domestic and export markets. As a result seasonal harvesting requires large numbers of workers for relatively short periods of time across the different industry segments. The short-term, high demand for labour is reflected in horticulture having the second highest level of casual and part-time workers (27.1%) in comparison to other agriculture sectors.

For most horticulture producers, supply-chain cost pressures and fluctuations in seasonal prices place significant downwards pressure on producer returns. This restricts the remuneration farmers can offer employees. Restricted wages combined with poorly perceived work conditions and reduced access to services and facilities in non-metropolitan locations mean farmers are finding it hard to get sufficient reliable harvest labour.

Access to suitable accommodation and transport is a current barrier to attracting seasonal workers. The harder it is to get to a region, due to poor transportation links, the less attractive it is for workers. If no accommodation is available or accommodation provided is considered sub-standard workers will not want to stay. The weather also impacts on the attractiveness of the industry as variable seasonal conditions can mean work is sporadic.

There is limited information available at present on the extent and impact of seasonal labour shortages in the horticulture industry and the wider Australian economy. The lack of available data means that there is no clear understanding of the issue and its effect on the capacity of the horticulture industry to develop. Despite the lack of detailed information, there is anecdotal evidence to suggest that access to labour is a significant issue in the industry.

In response to concerns regarding labour shortages, the Australian Government has undertaken a number of measures to improve access to seasonal labour. One major initiative has been the revival of the Harvest Trail, supported by the National Harvest Labour Information Service; a service designed to market harvest work opportunities to job seekers and other employment service providers, to meet the labour requirements of growers. The development of networks of harvest activity means there is potential for successful harvest trails to be established, providing year-round harvest work. For harvest trails to be successful, strong transport links between different harvest trail sites are important.

In November 2005, the Government also approved the extension of the Working Holiday visa, where current holders of the visa who complete three months seasonal work in regional Australia can apply for another 12-month visa. Reports from industry suggest this initiative has been successful in providing more labour. The definition of seasonal work currently applies mainly to the horticulture industry; however this definition will be expanded from 1 July 2006 to include other agriculture, forestry and fishing industries. The length of time visa holders can work with one employer will also be extended from 3 to 6 months.

There are also a number of visas available to overseas workers to undertake temporary work under the Temporary Business (Long Stay) Visa or the Sponsored Training Visa. These all require a minimum skill level, although some exemptions are available for regional areas with special circumstances.

Skills development may improve the capacity of the industry to deal more efficiently and effectively with seasonal labour shortfalls and other related issues, by encouraging people into the horticulture industry, and improving the skills of those already in the industry. There are a number of programmes and training courses provided by the Department of Agriculture, Fisheries and Forestry (DAFF) and other organisations to develop skill levels. DAFF has also been working with the horticulture industry through initiatives such as the Industry Partnerships Programme,

to improve industry and organisational capacity to prosper in a changing environment. On 1 July 2006, an initiative will also commence, under the Council of Australian Governments National Reform Agenda, which will target skills shortages in regions through the sharing of labour market information and the development of strategies to address regional labour market needs. This is part of the New National Approach to Apprenticeships, Training and Skills Recognition package.

While these Government measures have been welcomed by the horticulture industry, proposals have been put forward for the introduction of a special short-stay unskilled visa class and the development of a contract labour scheme to employ overseas workers to provide seasonal labour for the Australian horticulture industry. A Pacific Region seasonal contract labour scheme presents a unique opportunity to assist our Pacific neighbours, many of whom have an abundant pool of willing labour, to the mutual benefit of employers and employees. A successful scheme may also have flow on benefits to the food processing industry and associated businesses in regional Australia. However, there are a number of concerns about how a Pacific Region seasonal labour scheme could operate in Australia, possible overstay issues, the potential pay differentials, and whether such a scheme would be financially viable.

There are currently seasonal worker schemes in operation in other countries including the US, Canada, Kuwait, Saudi Arabia and Germany. These schemes might be explored for a better understanding of the feasibility and operation of an overseas workers' scheme and present possibilities for how such a scheme might operate in Australia. Work is currently being done on this issue at the Swinburne Institute for Social Research (SISR). In particular, the research is exploring the option of seasonal workers coming from the Pacific region, and presenting the scheme in operation in Canada as a possible model.

Some of the benefits of a guest worker scheme identified in the SISR research include better planning and management by farmers because of greater security and reliability of labour, greater spending in local and home country economies, development and transfer of skills and better living conditions in the workers' home country. Negatives associated with a guest worker scheme, identified by SISR, include the potential for exploitation of foreign workers and marginalisation leading to the creation of a social underclass of lower paid foreign workers and negative social impacts in the workers' home countries.

There would be substantial costs and logistics involved in establishing and running a guest worker scheme in Australia. Transport and accommodation for overseas workers are likely to be two major issues. Workers would need to be transported from and to their home country, as well as between the properties where they would be working. There would likely be a need for cooperation between farmers to coordinate and integrate a range of work placements, most likely across a number of properties, to justify the expense of transporting overseas workers.

At present in Australia there is limited on-farm accommodation for seasonal workers and many farmers expect workers to find their own accommodation, usually in local hotels, hostels or caravan and camping parks. Given the current concerns regarding the availability and quality of accommodation, this could be a major impediment for an overseas workers scheme. Social support for overseas workers also requires consideration, when issues such

as language and cultural issues may prove problematic for the operation of a guest worker scheme.

DAFF understands that there is general agreement within the industry that any overseas workers should be paid at award rates. Farm studies suggest however, that industry is likely to find it problematic if they were expected to shoulder the additional costs associated with a contract labour scheme.

While contemplating a contract labour scheme involving workers from overseas, it would appear pertinent to better explore the nature of the labour shortage problem and consider other actions that might be taken to address the situation. All reasonable attempts need to be made to source local labour prior to engaging overseas workers. Exploration of the following ideas may assist in the identification of solutions: gathering better data on the magnitude, location and impact of labour shortages in the horticulture industry; identification of barriers to labour supply; sharing of information about successful domestic initiatives and opportunities to attract labour and better match demand and supply; development of other labour hire systems; improvements in farm management skills and access to skills and employment initiatives to attract more people to the industry.

1. Introduction

Interest in the Inquiry

The Australian Government Department of Agriculture, Fisheries and Forestry (DAFF) welcomes the opportunity to provide a submission to the Senate Employment, Workplace Relations and Education Committee Inquiry into Pacific Region seasonal contract labour. DAFF has a keen interest in ensuring that the concerns of its portfolio industries relating to the availability of labour are appropriately addressed. Information on the role and responsibilities of DAFF is provided below.

Agriculture is now a very sophisticated business requiring farmers to possess a greater range of skills. Due to a large number of factors, some segments of agriculture are experiencing difficulties in attracting appropriately skilled workers to rural and regional Australia. Labour shortages in the lower paid, lower skilled employment areas of seasonal harvesting of horticulture products are causing particular concern for some producers. (Labour shortages are also an issue in some more remote pastoral industries).

Scope of the Inquiry

The Terms of the Reference require the Committee to examine the viability of a contract labour scheme between Australia and countries in the Pacific region, for the purposes of providing labour for selected rural industries. In doing so, the Committee will take into account the following:

- a) labour shortages in rural and regional Australia;
- b) the availability and mobility of domestic contract labour, and the likely effects of such a scheme on the current seasonal workforce;
- c) social and economic effects of the scheme on local communities;
- d) likely technical, legal and administrative considerations for such a scheme; and
- e) the effects of the scheme on the economics of Pacific nations.

Contents of the Submission

Given the focus of the Inquiry's Terms of Reference on labour shortages, DAFF's submission concentrates on the availability of lower skilled workers for rural industries, predominantly in relation to horticulture. Although there are reports of labour shortages in other rural industries, the short-term, seasonal nature of the work in the horticulture industry presents a particular challenge in securing workers. Therefore, the horticulture industry is where most calls arise for the establishment of a contract labour scheme involving overseas workers. In addition, the Committee has specifically requested DAFF to provide information on the horticulture industry.

DAFF supports the objective of the Inquiry to examine options that may address the seasonal labour supply issue. There are a range of issues that will need to be considered in examining whether options proposed, including Pacific region seasonal contract labour, are suitable.

Section 2 of this submission provides an overview of the horticulture industry, including information on the industry's structure, key characteristics, operating environment and outlook. Information is also provided on horticulture's relative importance to the agriculture sector and the Australian economy.

Section 3 discusses the demand and supply issues for labour in agriculture generally, and horticulture specifically. This section also summarises existing arrangements implemented by the Australian Government, industry and rural-focused organisations to address labour and skills shortages in the horticulture industry and the agriculture sector.

Section 4 identifies issues that need to be considered when assessing the viability of Pacific Region seasonal contract labour. Information is provided on seasonal worker schemes in operation in other countries and their suitability for adoption in Australia. This section also suggests the need to better explore the nature of the labour shortage problem and consider other actions that might be taken to address the situation.

Role and Functions of the Australian Government Department of Agriculture, Fisheries and Forestry (DAFF)

DAFF is involved in wide-ranging activities, which extend along the entire food supply chain, from producer to processor to the consumer. These activities seek to:

- help Australian agricultural, food, fisheries and forestry industries become more competitive, profitable and sustainable;
- enhance the natural resource base on which these industries rely;
- deliver scientific and economic research, policy advice, programmes and services to help deal with the challenges faced by agricultural, food, fisheries and forestry industries;
- address issues relating to the integrity of Australia's food supply chain, from producer to processor to the consumer;
- safeguard the integrity of Australia's animal, plant and fish health status;
- uphold quarantine, export inspection and certification and food safety standards activities, essential for maintaining Australia's highly favourable animal and plant health status; and
- improve trading opportunities for Australian agriculture and food industries, while protecting Australia's plant and animal health and environment.

DAFF includes businesses units that provide specialist services to portfolio industries such as the Australian Quarantine and Inspection Service (AQIS), the Australian Bureau of Agricultural and Resource Economics (ABARE), and the Bureau of Rural Sciences (BRS). DAFF also oversees a number of statutory marketing authorities, regulatory authorities, Research and Development Corporations and advisory bodies. Biosecurity Australia is a prescribed agency also within DAFF.

In 2004-05, DAFF received an estimated \$312 million in Commonwealth revenue to deliver portfolio outputs in addition to receiving \$214 million from external customers and clients for specific services. The Department also administered \$1,356 million of additional Government funds directed towards programmes for Australia's agricultural, fisheries, forestry and food industries and to support improved natural resource management.

In 2005, the Agriculture and Food Policy Reference Group, chaired by Peter Corish, was commissioned to review current agriculture and food policies to identify the changes needed to place the sector in a strong position for the future. The Reference Group report, known as 'the Corish Report' was released, in 2006. One part of the review looked at the issues surrounding labour supply and skills shortages across the agriculture sector.

2. Overview of Horticulture in Australia

Industry Description

Australia's horticulture industry has enjoyed a reputation for quality, primarily because of high standards in all stages of the supply chain. In terms of value, horticulture is the third largest agricultural industry in Australia, behind beef and wheat, and contributes significantly to the economies of regional centres across Australia.

Australian horticulture is a labour intensive, seasonal industry, characterised by relatively small-scale family farms (in comparison to other agricultural activities) growing a range of crops; however, these 'traditional' family farms are increasingly being replaced by larger operations, many of which can produce more efficiently through economies of scale.¹ Within the agriculture sector, 17 per cent of Australian farm businesses are classified as horticultural farms² and, at present, the total area used for production in Australia is about 2,500 square kilometres.

The Australian horticulture industry is highly diverse encompassing the fruit, vegetables, wine grapes, table and dried grapes, nuts, nursery products, cut flowers and turf industries. The major horticultural products, including volume and value of production data in 2003-04 are listed at Tables 1 and 2.

The main growing areas for horticulture in Australia include the Goulburn Valley of Victoria, the Murrumbidgee Irrigation Area of New South Wales (NSW), the Sunraysia district of Victoria/NSW, the Riverland region of South Australia, northern Tasmania, southwest Western Australia and the coastal strip of both northern NSW and Queensland. A sizeable amount of horticultural produce in the southern states is directed to processing while Queensland vegetables typically supply the southern states during the cooler June to October period. Nursery production generally occurs close to the capital cities.

Banana, pineapple, mandarin, avocado, mango and fresh tomato production is concentrated in Queensland; stonefruit, oranges and grapes in NSW, Victoria and South Australia; potato processing in Tasmania; fresh pears, canning fruit and processing tomatoes in Victoria; and apples and fresh vegetables in all states.

Australia has a sizeable tropical horticulture industry including large irrigation schemes in the Ord River in Western Australia and the Burdekin River in Queensland. Bananas, mangoes, avocados, papaya, lychees, cucurbits (rockmelons, watermelons, pumpkins) together with tropical nursery plants and vegetables are important industries. There is also a growing "rare and exotic" fruit industry, for example rambutans, durians, tamarillos, carambolas (starfruit), jackfruit and mangosteens.

Table 1. Horticultural food production and value, by commodity – fruit, nuts and berries

		Production	Value		Production	Value
	Unit	2003-04	\$m		2003-04	\$m
			2003-04			2003-04
Fruit				Nuts and berries		
Apples	kt	255	368	Almonds	kt	9
Pears	kt	139	105	Chestnuts	t	600
Nashi	kt	3	10	Macadamia	kt	29
Avocado	kt	42	104	Berries	kt	22
Melons	kt	204	144	Stonefruit		
Pineapples	kt	110	37	Peaches	kt	74
Bananas	kt	257	286	Nectarines	kt	25
Kiwifruit	kt	3	8	Apricots	kt	11
Mangoes	kt	37	86	Plums	kt	24
Wine grapes	kt	1 895	1 469	Cherries	kt	8
Table and dried grapes	kt	198	166			
Oranges	kt	410	236			
Mandarins	kt	97	133			
Lemons/limes/grapefruit	kt	41	31			
Other fruit	kt		132			

Source: Australian Food Statistics 2005³

Table 2. Horticultural food production and value, by commodity – vegetables

		Production	Value
	Unit	2003-04	\$m
			2003-04
Vegetables			
Potatoes	kt	1 310	481
Onions	kt	233	153
Carrots	kt	303	150
Asparagus	kt	10	47
Broccoli	kt	52	81
Cauliflower	kt	78	57
Tomatoes	kt	474	280
Mushrooms	kt	46	219
Lettuce	kt	127	115
Capsicum/chillies	kt	56	116
Cabbage	kt	na	35
Beans	kt	31	62
Other	kt	na	415

Source: Australian Food Statistics 2005

Importance to Australia's Economy

In 2003-04 the Gross Value of Production (GVP) of horticulture was \$6.574 billion.⁴ This estimate was calculated by ABARE using ABS and industry data. The value of the horticultural sector has steadily increased and this trend is expected to continue in subsequent years.

Key sectors of the horticultural industry are major providers of raw materials to Australia's food processing industry, for both export and domestic consumption. In 2004-05 there were around 81,500 growers of fruit, vegetables and nuts for the domestic and export markets. A steady number are employed throughout the year, but the horticulture industry also experiences seasonal peaks, particularly at harvest time, requiring substantial, short-term increases in the number of staff required. Harvest

work includes crop harvesting or picking, pruning and trimming vines and trees, thinning and trimming flowers and bunches, and general crop maintenance, all of which are generally considered to be unskilled work.⁵

The horticultural industry also supports many rural and regional communities through production and processing, and the associated investment and employment in associated businesses, supplying inputs and downstream marketing, packaging and transportation. Approximately 194,000 people are employed in food and beverage manufacturing,⁶ and total sales and service income for the food processing industry was \$66 billion in 2002-03, with industry value added of nearly \$17 billion.⁷

Exports of fresh horticulture produce reached a value of \$800 million in 2004-05, while exports of processed horticultural products, which include dried, frozen, cut or preserved fruit and vegetables, canned or bottled fruit, ground nuts and juice, were worth \$387 million. The major fresh horticultural export products and markets are listed in Table 3.

Table 3. Major export markets for fresh horticultural produce.

Fruit	
Oranges	Malaysia, Hong Kong, USA
Apples	India, Malaysia, Sri Lanka
Grapes	Hong Kong, Malaysia, Indonesia
Pears	Singapore, Malaysia, Indonesia
Vegetables	
Potatoes	Korea, Malaysia, Mauritius
Tomatoes	New Zealand, Singapore, Hong Kong
Carrots	Malaysia, Singapore, UAE
Onions	Netherlands, UK, France
Lettuce	Singapore, Philippines, Malaysia

Source: Australian Agriculture and Food Sector Stocktake 2005⁸

Horticultural produce is also imported into Australia during the off-season or periods of domestic shortage. Imports have been increasing, although a wide range of fresh produce is prohibited from entering Australia due to quarantine restrictions. The value of the major fresh horticultural imports for 2004-05 was \$362 million. Processed horticulture products which Australia imports include cut or preserved fruit and vegetables, olive oil, canned or bottled fruit, juice and jams; the value of processed horticultural imports in 2004-05 was \$864 million.

Industry Operating Environment and Outlook

The Australian horticulture industry is operating in a complex and dynamic environment. After rapid growth in the late 1990s, the industry is facing a number of challenges which are significantly impacting on its international competitiveness. Access to labour is just one of these. Other key challenges for the industry are:

- **internationally** – the Australian food industry is facing increasing competition in overseas markets. Technological capabilities are improving in low-cost competitor countries and local food retailers, in response to commercial pressures, are benchmarking supplier competitiveness on an increasingly wider geographical basis, such as global sourcing of food products. The current value of the Australian dollar has also made Australian fruit and vegetables more expensive in markets where it must compete with subsidised overseas produce, and produce from low-cost countries like China, South Africa and Chile. For example a recent

analysis by ABARE⁹ found Italy, with its access to cheaper labour, can land Roma tomatoes at a price that Australian producers cannot compete with. Food producers and manufacturers must now be internationally competitive to secure new overseas markets, but also to succeed domestically. This is placing significant pressure on food producers, including horticulturalists, to decrease their cost base and increase scale; and

- **domestically** – increasing concentration in the food retailing and processing sectors, cheap imports of fresh and processed food, rising input costs (like water, fuel and fertiliser) and increasing compliance costs of food safety and regulatory requirements have resulted in increased cost-price pressures for growers¹⁰

In relation to the competitiveness of the industry, growers and food manufacturers have concerns that Australia's industrial relations commitment to minimum wages, superannuation, workers compensation, and meeting OH&S standards mean the costs of labour are considerably higher than those of Australia's major competitors. According to Simplot Australia Pty Ltd, in their submission to the Agriculture and Food Policy Reference Group,¹¹ the rolled up labour costs for New Zealand producers is around 30% lower than Australia because they are not required to pay costs such as payroll tax, superannuation levies, occupational health levies and overtime penalty rates.

Some farmers in Europe, particularly in Belgium, the Netherlands and Luxembourg benefit from large subsidies. In Belgium, for example, subsidies are estimated to contribute approximately 37% of gross income.¹¹ South Africa and countries in Asia and South America all benefit from low labour costs, such as \$A4.80/hour in Malaysia, \$A1.27/hour in China and \$A6.00/hour in South Africa.¹¹ The Australian industry's reliance on relatively high-cost labour, particularly in relation to emerging international competitors, is a major challenge.

DAFF and Other Government Programmes

DAFF is working with the horticulture industry to improve its longer term sustainability and competitiveness through initiatives such as the Industry Partnerships Programme (IPP). The Industry Partnerships Programme is part of the Agriculture Advancing Australia (AAA) package, which includes FarmBis, Farm Help, the Rural Financial Counselling Service and the Farm Management Deposits Scheme.

The IPP focuses on an industry's ability to continuously yield positive financial returns; capacity to operate in future environmental and social settings; ability to compete in the global marketplace; capability to respond to change and be flexible; and confidence to manage their affairs. To achieve these goals the Programme works with industries to highlight and build on strengths, identify and respond to threats and risks, and develop skills and structures to improve industry and organisational capacity. Emerging from the IPP for the vegetable industry, the Government has provided \$3 million to help the industry improve its performance and economic sustainability.¹² The \$3 million will be used to support seven 'foundation projects' to help the vegetable industry tackle the challenges identified in the IPP project.¹³

The Australian Government also attempts to improve the profitability, competitiveness and sustainability of Australia's horticulture industries through

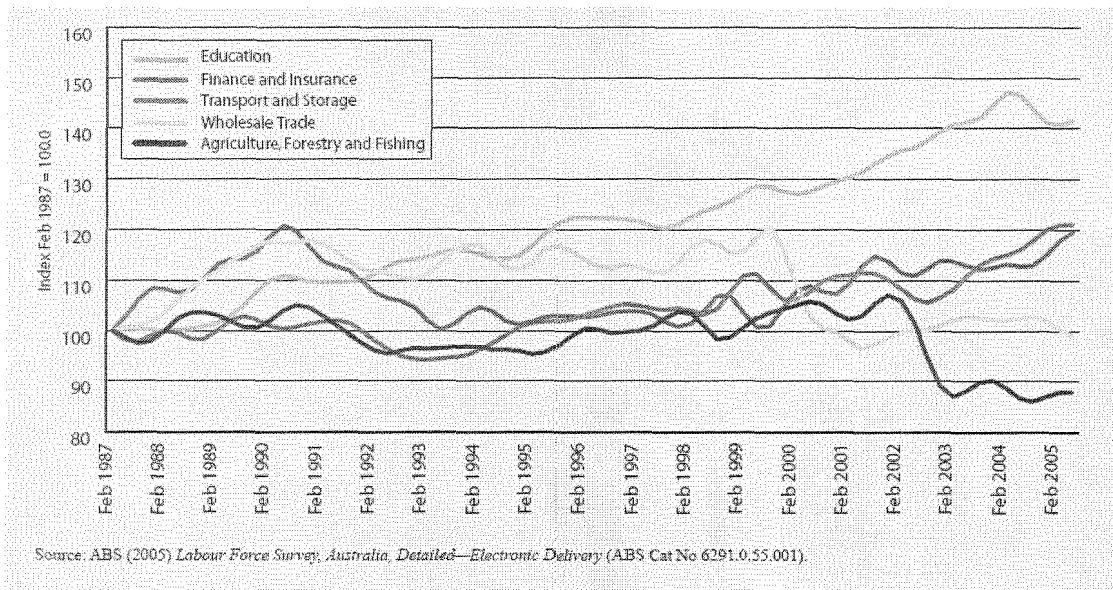
matching statutory and voluntary industry contributions paid to Horticulture Australia Limited (HAL) – a horticultural industry marketing and research organisation – for research and development. In 2003-04, HAL invested almost \$60 million in R&D programmes, with around \$30 million provided by the Australian Government. HAL also invested around \$10 million in marketing. The Rural Industries Research and Development Corporation (RIRDC) helps small and emerging agricultural industries organise and invest in research and development. RIRDC invests around \$3 million a year on R&D for industries not covered by HAL. The Government contributes around two thirds of RIRDC's funding each year.

3. Discussion of Labour Issues

Agriculture

Although labour productivity has increased, since 1980 the overall employment levels in agriculture have remained steady (except for the short-term negative effects of drought).¹⁴ However, the agriculture sector's share of total Australian employment has more than halved since the 1960's.¹⁵ Figure 1 provides a comparison of employment growth in a variety of industries.

Figure 1. Employment growth for selected industries



Source: 'Workforce Tomorrow', DEWR 2005¹⁶

Rural and related industries in Australia currently employ approximately 374,000 people, mostly in regional Australia, and contribute 3.2% of Australia's GDP and 24% of its export revenue.¹⁷ The issue of securing a strong workforce for the future, in the face of labour shortages in rural communities, is a major challenge for the Australian agriculture and food sector. According to a report by the Agriculture and Food Policy Reference Group (the Corish Report), the long-term viability of agriculture and the food sector will depend on securing both skilled and unskilled labour at competitive rates.¹⁸

Difficulties experienced in attracting skilled labour and professionals to work in rural and regional areas are well documented. Submissions to the Agriculture and Food Policy Reference Group indicated that businesses in rural and regional areas face significant problems securing both permanent and casual labour.¹⁹ Findings from pilot surveys conducted by the Department of Employment and Workplace Relations (DEWR) indicate that in regional areas of Australia employers are experiencing problems attracting applicants for a range of occupations, from low-skilled work such as labouring and cleaning, to trades and professional employment.²⁰

Other factors and trends affecting employment in the agriculture sector include:

- fast growth in the services sector as a result of sustained economic growth and increased personal welfare,²¹

- strengthening of the Australian labour market, resulting in the agriculture sector competing for labour with more attractive industries such as tourism and hospitality, which are located in the city and coastal areas, or mining which can offer higher remuneration.²² Mining is highly capital intensive, which means the industry has much greater capacity to pay higher wages compared to horticulture;
- Australia has an ageing population—this will mean fewer workers available and greater competition for these workers.²³ Skills shortages could become even more acute, particularly in industries where there is already a high proportion of older workers. In agriculture, forestry and fishing 52.1% of workers are 45 years and older;²⁴
- fewer young people are entering farming;²⁵ and
- regional populations are declining as people move away from rural and regional areas to metropolitan areas due to loss of available work due to drought; loss of services such as health and education, social, cultural and recreational facilities; and looking for better employment opportunities—‘better jobs’, higher paying jobs.

Some employers in the Australian farm sector are not competitive in attracting labour resources because of a general perception of agriculture as having poor working conditions; long hours involving heavy work; lack of professional development, providing little career structure or opportunity for advancement or enhancement of individual skill base. Coupled with the regional location of the jobs, attracting and retaining workers in a competitive employment market is challenging.²⁶ Lower birth rates, the ageing demographic profile, low unemployment and higher levels of education have also combined to reduce the supply of workers who are available (or willing) to undertake physically demanding labour for relatively low pay.²⁷ Without sufficient skilled workers, many businesses will have difficulty in continuing production at current levels of output, let alone expand output to keep up with the consumption wishes of Australians and export markets.²⁸

There is also an issue with regard to skills. Agriculture is becoming a more sophisticated business, requiring farmers and food processors to acquire a greater range of skills including business management—financial and risk management; market awareness; leadership; natural resource management; and information technology.²⁹ Specific skills shortages identified in rural and related industries include: ‘farm-ready’ farm hands, multi-skilled across the rural sector; machinery operation and maintenance; chemical application for crop spraying; livestock husbandry; and unskilled labour.³⁰ These shortages are likely to impact on the capacity of farming businesses to stay in operation and could ultimately reduce the farming sector’s contribution to economic growth.³¹

Horticulture

Employment trends in horticulture reflect trends in agriculture broadly, although, with the rise in intensive industries in agriculture, horticulture has actually gained employment share and is now the second biggest employer in agriculture, behind broadacre industries (beef, sheep and grains).³² The Corish Report acknowledges that to continue to compete in the face of emerging international competitors and take advantage of the growing export trade in fresh produce, Australia’s horticulture industry needs to increase its productivity.

Productivity has grown over the last decade as a result of new technology, and better access to and management of natural resources.³³ At this stage, however, there is a limit to the contribution of technology to harvesting. While horticultural industries such as wine grapes and olives have benefited from mechanical harvesting, there are still many crops requiring product to be harvested by hand. Ensuring the product is harvested at the right time and in the right way to maintain the integrity of the product, is essential for meeting the high quality standards of domestic and export markets. One way it can do this is to secure the right number of suitable, seasonal labour, when required.³⁴

Seasonal harvesting requires large numbers of workers for a relatively short period of time across the different industry segments. The short-term, high demand for labour is reflected in horticulture having the second highest level of casual and part-time workers (27.1%) in comparison to other agriculture sectors.³⁵ At present, this casual labour supply is drawn from:

- existing workers—including family members, who are employed permanently on the farm;
- local labour in the area;
- Australians and New Zealanders looking for temporary employment (for example students);
- self-funded retirees;
- professional, regular itinerant workers;
- working holiday maker backpackers; and
- illegal workers.³⁶

Deterrents or barriers to people undertaking harvest labour include the temporary nature of the work, potential wages and the cost of getting to a harvest location, accommodation costs and working conditions. Farmers generally rely on workers to provide their own transportation and accommodation. Those without their own transportation rely on public transport—limiting their access to harvest areas on main routes—or they will connect up with other travellers who have transportation. Accommodation is usually caravan parks and tents or nearby hostels. Some farmers will approach a hostel directly when looking for available labour, and some hostels promote local harvest work and provide transportation to and from the farms. In general, however, there is minimal suitable transportation and accommodation available to workers.

Another barrier, further complicating access to workers is the remoteness of some of the industries. Many horticulture enterprises have expanded or feel the need to expand to achieve economies of scale. High land prices and lack of space for expansion have led to many large scale enterprises moving to areas where land is more abundant and land prices are not affected by factors such as demand from lifestyle/hobby farmers. The drawback of this move has been that many producers have found themselves unable to attract sufficient labour due to their remoteness and lack of amenities in close proximity. The reliance on itinerant workers means the further away the farm is from the regular transport and travel routes, the harder it is to secure labour. The weather also impacts on the ability to secure labour. The vagaries of the weather mean farmers cannot always guarantee work.

Reports Exploring Labour Issues in Agriculture

Some of the issues highlighted above have been drawn from reports that have explored labour shortages in varying levels of detail and focus. These reports include:

- ‘Creating Our Future: Agriculture and Food Policy for the Next Generation’ (the Corish Report);
- Agriculture Farm Institute (AFI) Farm Demography Report;
- ‘Harvesting Australia’: Report of the National Harvest Trail Working Group; and
- Stocktake reports of a number of horticulture industries carried out as part of the Taking Stock and Setting Directions component of the Industry Partnerships Programme.

The Corish Report reviewed the current situation of the agriculture and food sector in Australia and identified the issues and challenges facing the sector. The AFI report explores similar ground looking at current trends in agriculture and future farm policy implications. Harvesting Australia explored the idea of reviving the Harvest Trail in response to reports of labour shortages within the horticulture industry, and the reliance on Working Holiday Makers to fill these gaps. Under the Taking Stock and Setting Directions component of IPP, key horticultural sectors, including the vegetable, tropical fruits, summer fruits (fresh peaches, nectarines, apricots and plums) and cherry industries have undertaken studies to analyse current performance and identify opportunities for and challenges to future growth and development, and develop strategies for action. Although labour shortages were identified as an issue in some industries, the main focus of each sector is on skills and capacity building, ensuring better management and a sustainable sector. (Further details of all of these reports are available in Attachment A).

Although these reports examined labour shortages in agriculture in general or in horticulture specifically, they do not provide detailed information on the extent or impact of labour shortages. The diverse nature of the horticulture industry with great variety between growing regions, types of crops, timing and duration of growing seasons, and the fact there is no single representative body gathering data, also make it hard to quantify labour shortages.

Despite the lack of detailed information, industry concern has been growing about difficulties in attracting an adequate supply of seasonal labour. Anecdotal evidence from within the horticulture industry is that this is resulting in significant losses from crops remaining unpicked and left to rot or ploughed into the ground.³⁷

DAFF is unaware of any studies that calculate the financial impact across the whole horticultural industry. However, studies have been undertaken in Queensland and the Northern Territory that give an indication of the possible magnitude of the costs. In 1999, Growcom estimated a loss of \$90 million to Queensland’s gross value of production, due to seasonal labour shortages.³⁸ Economic loss due to labour shortages in the Northern Territory mango industry is estimated to range from \$5.8 million to \$26.1 million in 2006.³⁹

Current Arrangements to Address Labour Shortages

In response to concerns regarding labour shortages, the Australian Government has undertaken a number of measures to improve access to seasonal labour. Most significantly, the Government implemented recommendations from the Harvesting Australia report. A major initiative emerging from the report is the establishment of the National Harvest Labour Information Service (NHLIS) and the revival of the National Harvest Trail.

The NHLIS started on 1 July 2003 and is designed to market harvest-work opportunities with other employment services providers and at places frequented by overseas travellers (such as backpacker hostels). It also mobilises job seekers from locations outside the harvest area to meet the labour requirements of growers; liaises with growers and supports their labour needs before and throughout the harvest period; and screens job seekers to ensure they are eligible to work in Australia. Information on the Harvest Trail can be accessed online at the harvest trail website at <http://www.jobsearch.gov.au/harvesttrail/>.

The different harvest times of industries around the country and the development of networks of harvest activity means there is potential for successful harvest trails to be established and the provision of year-round harvesting work. For harvest trails to be successful, the development of strong transport links between different harvest trail sites is important.

In November 2005, the Government approved the extension of the Working Holiday visa. The Working Holiday Program is administered by the Department of Immigration and Multicultural Affairs (DIMA), and provides opportunities for people between 18 and 30 to supplement their travel funds through incidental employment, while on holiday for 12 months in Australia. Countries involved in the scheme are: United Kingdom, Canada, the Netherlands, Japan, Republic of Ireland, Republic of Korea, Malta, Germany, Denmark, Sweden, Norway, the Hong Kong Special Administrative Region of the People's Republic of China, Finland, the Republic of Cyprus, France, and Italy, Belgium, Estonia and Taiwan.

Current holders of the visa who complete three months seasonal work in regional Australia can apply for another 12-month visa. Seasonal work currently includes picking fruit, nuts and other crops, pruning and trimming vines and trees, crop maintenance and packing and processing work. Reports from within the industry indicate that this initiative has already started to have a beneficial impact on the availability of labour for horticulture producers.⁴⁰ From 1 July 2006 the definition of seasonal work will be expanded to include other agriculture, forestry and fishing industries. The Working Holiday Maker (WHM) visa limitation on work with an employer will also be increased from three months to six months.⁴¹

Australia has other visas that allow foreign nationals to work temporarily in Australia⁴². The main purpose of these visas is to fill skilled labour shortages or to provide professional and trade skills development. Under the Temporary Business (Long Stay) Visa, Australian and overseas businesses may sponsor personnel from overseas where they are unable to meet the skill needs from within Australia. Sponsorship is for a specified number of positions for up to two years. For circumstances that cannot be covered by standard sponsorship arrangements, Labour Agreements are formal agreements between industry associations and the Government

that enable Australian companies to recruit a specific number of workers from overseas in response to identified or emerging labour market (or skill) shortages. The Sponsored Training Visa is also related to trade or professional skills development. Foreign nationals are able to take up an apprenticeship vacancy for a trade occupation in shortage, located in a regional area and unable to be filled by an Australian; or undertake workplace-based training programmes in Australia, in their current area of occupation.

A minimum skill level applies to all vacancies filled by overseas employees, and must be listed as a gazetted occupation. Skilled agricultural and horticultural workers include shearers; wool, hide and skin classers; horse and other necessary animal trainers; nurserypersons; green keepers; head gardeners; general gardeners; landscape gardeners and tree surgeons. Labour agreements for regional employers may be exempt from this requirement due to the special circumstances requiring the need to create a Labour Agreement. At present the temporary migration visa system does not have a non-skilled visa class.

While skills development may not directly address the dependence on short term, seasonal labour and subsequent shortfalls, it may improve the capacity of the industry to deal more efficiently and effectively with this and other related issues. The benefits of skills development to address labour shortages are potentially two-fold, by encouraging people into the horticulture industry, and improving the skills of those already in the industry.

There are a number of programmes and training courses designed to develop skill levels and address labour shortages, with a view to ensuring the sustainability of the agriculture and horticulture industries in Australia. These include:

- programmes administered by DAFF, designed to encourage skill development, and greater participation, such as the Industry Partnerships Programme and FarmBis;
- Rural Skills Australia provides training courses and certificates in production horticulture;
- State governments and regional bodies have also developed initiatives to build up a reliable, trained local labour force; for example the Northern Territory Mango Industry Association training package and labour initiative;
- various job placement and employment agencies directly involved in matching seasonal labour demand and supply; for example, the Agri-food Industry Skills Council (AISC) has a seasonal work website providing links to agencies and organisations seeking workers in Australia.

A new measure involving a targeted response to skills shortages in regions through the sharing of labour market information and development of strategies to meet regional labour market needs is commencing on 1 July 2006. This initiative arises out of the New National Approach to Apprenticeships, Training and Skills Recognition package, which is one element of the National Reform Agenda adopted by the Council of Australian Governments (COAG) at its meeting in February 2006.

4. Consideration of a Pacific Region Seasonal Worker Scheme

At present it is hard to quantify the extent and impact of seasonal labour shortages on the horticulture industry and the wider Australian economy. The lack of available data means that there is no clear understanding of the issue and its effect on the capacity of the horticulture industry to develop. Despite the lack of detailed information, there is anecdotal evidence to suggest that access to labour is a significant issue for the industry.

As mentioned in the previous chapter, the Australian Government has recently implemented a number of measures specifically designed to improve the coordination and supply of seasonal workers. Given the relatively short time these measures have been in place, particularly the changes to the Working Holiday Visa, which were made in November 2005 (and which will be extended in July 2006), it would appear premature to conclude an assessment of their effectiveness.

While the Government measures have been welcomed, proposals have been made for the introduction of a special short-stay unskilled visa class and the development of a contract labour scheme to employ overseas workers to provide seasonal labour for the Australian horticulture industry. A Pacific Region seasonal contract labour scheme would be of benefit to our Pacific neighbours, many of whom have an abundant pool of willing labour, to the mutual benefit of employers and employees. A successful scheme may also result in increased food processing, packaging, distribution, storage and transport activity, particularly in regional centres, with associated economic and employment benefits. However, there are a number of concerns about how a Pacific Region seasonal labour scheme could operate in Australia including possible overstay issues,⁴³ the potential pay differentials, and whether such a scheme would be financially viable.

There are currently seasonal workers schemes in operation in other countries including the US, Kuwait, Saudi Arabia and Germany, and New Zealand is presently piloting a scheme. In considering a possible scheme for Australia, a comprehensive review and comparison of these international schemes would be beneficial. Work is currently being done at the Swinburne Institute for Social Research (SISR), exploring the issue of labour shortages, focussing on research into the feasibility of a temporary overseas workers scheme between the Pacific and Australia (in particular, the Swan Hill/Mildura region), to cover seasonal labour shortages. (Further details about this research can be found at Attachment A). The AFI Farm Demography Report also included a section on seasonal workers, which reviewed overseas workers schemes in various countries, and offered suggestions for making guest workers schemes more attractive.

These reports have identified the following benefits of a guest worker scheme: increased labour reliability at times of peak demand; reduction in the pressure caused by labour shortages; better management of farm operations and better planning for production increases; and employment in higher skilled jobs in associated rural industries is maintained or expanded. Local communities and economies are boosted through increased local spending by migrant workers and, because employment will be legal, there is reduced fear among growers (and workers) of getting caught in immigration raids, and of the subsequent penalties.

For guest workers and their home countries such a scheme provides opportunities for unemployed or underemployed workers to earn income at pay rates well above those on offer in their home countries. There is also the transfer of newly gained skills and

experience to their home country. Greater equity may be achieved in the home country as the scheme can be targeted at impoverished regions. Remittances are used to supplement overseas development assistance and provide greater income security, better housing, education, nutrition, and health for families. Family bonds are maintained or strengthened as a result of the increased income and opportunity for workers to return home regularly. Overseas growers may also indirectly promote tourism for their home country. Finally, for both growers and workers there is continuity, where workers may have the opportunity to return to the same farm(s) each year. This helps the retention of skills, reduces the need for retraining, and increases the familiarity of workers with their employer, their work, the local community and each other.⁴⁴

However, experience in other countries has shown guest worker schemes can be accompanied by several problems. Despite attempts to build worker guarantees into the schemes, exploitation of foreign workers does occur. Guest workers are often not fully aware of their rights and employers can take advantage of this. Examples of worker exploitation include poor accommodation facilities, unsafe working conditions and equipment, and long working hours. Workers may be reluctant to complain or make enquiries about their rights for fear of possible cancellation of their employment and/or visa, essentially leaving them trapped.

The SISR report indicates separation from family, friends and community can lead to morale problems among workers. Workers may feel marginalised living in a different culture and they may experience xenophobia or exclusion from the general community. This may lead to the separation of the workers from the community and the possible creation of a social underclass. The SISR report also provides details of negative social impacts that migration schemes have had on the home country.

Many countries have been concerned about overstay through these schemes, but have addressed these by building arrangements into schemes, such as requiring payment of a bond by workers. According to the SISR research, experience in countries like Canada has found the actual rates of overstay are minimal.

Within the SISR project, the Canadian Seasonal Agriculture Workers Program has been offered as a possible model for an Australian scheme. The Canadian scheme has been in operation for over 40 years, bringing workers from the Caribbean and Mexico to cover labour shortfalls in agriculture. Workers are issued with a visa that is valid for eight months and are usually offered an average of four months work. While in Canada they pay local taxes and are covered under Canada's health care system. Before work can be offered to migrant workers, farmers must have certification that no Canadian workers are available to fill the jobs. Under the scheme farmers are required to provide free housing, including meals or cooking facilities, and they must guarantee a minimum of 240 hours work over six weeks at or above minimum wage rates.⁴⁵ Farmers must also take out workers compensation for the migrant workers and pay the cost of the workers' airfare—although they can recoup 50% of this cost.

There would be substantial costs and logistics involved in establishing and running a guest worker scheme in Australia. Transport and accommodation for overseas workers are likely to be two major issues. Workers would need to be transported from and to their home country, as well as between the properties where they would be working. There would likely be a need for cooperation between farmers to coordinate and integrate a range of

work placements, most likely across a number of properties, to justify the expense of transporting overseas workers.

At present in Australia there is limited on-farm accommodation for seasonal workers and many farmers expect workers to find their own accommodation, usually in local hotels, hostels or caravan and camping parks. Under the Canadian scheme farmers are required to provide approved, on-farm accommodation for free.⁴⁶ Given the current concerns regarding the availability and quality of accommodation, this could be a major impediment for an overseas workers scheme. Social support for overseas workers also requires consideration, when issues such as language and cultural issues may prove problematic for the operation of an overseas worker scheme.

DAFF understands that there is general agreement within the industry that any overseas workers should be paid at least award rates. However, results from SISR studies conducted into farmers' attitudes to labour shortages,⁴⁷ suggest that industry is likely to find it problematic if they were expected to shoulder the additional costs associated with a contract labour scheme. Under the Canadian scheme the costs of the scheme are paid for upfront by the farmers and most are recovered through payroll deductions.

Consideration would need to be given to whether workers would be prepared to come to Australia if they were to bear the costs of transport, accommodation, overstay bonds and other living costs, such as food, clothing and entertainment, even if the wages offered in Australia are higher than those in their home country. One of the claims of such a scheme is the financial benefits it creates for the workers' home country. Under a scheme involving workers covering these costs, they may have little left of their wages to return to their home country.

While contemplating a contract labour scheme involving workers from overseas, it would appear pertinent to better explore the nature of the labour shortage problem and consider other actions that might be taken to address the situation. All reasonable attempts need to be made to source local labour prior to engaging overseas workers. Exploration of the following may assist in the identification of solutions:

- Better data on the magnitude, location and impact of labour shortages in the horticulture industry;
- Identification of barriers to current, domestic labour supply, such as transportation, accommodation, and other working conditions;
- Sharing of information about initiatives and opportunities created by some farmers to attract labour;
- Considering ways to improve utilisation of the NHLIS so as to better match demand and supply;
- Development of other labour hire systems that provide continuity of work in industries with seasonal peaks;
- Skills and employment initiatives to encourage more people to enter the horticulture industry and supply farmers with better skilled labour. This may have the added benefit of introducing fresh and innovative ideas; and
- Improvements in the management skills of farmers so they are in a better position to plan for peaks, utilise new technology, provide a good work environment and encourage workers to stay or return in subsequent years.

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Research Reports

General Agriculture Industry Reports

There have been a number of research reports looking into the state of agriculture at present. Each of these reports discussed the issues of labour need within agriculture. The purpose, findings and recommendations of these reports are outlined below.

Creating Our Future: Agriculture and Food Policy for the Next Generation (February 2006)

This report was prepared by the Agriculture and Food Policy Reference Group. Released in February 2006, it provides the most recent profile and future challenges facing the agriculture sector as it strives to improve its profitability, competitiveness and ensure its sustainability. Chapter 8 provides information on education, skills and labour supply. Copies of the report are available online at: http://www.agfoodgroup.gov.au/next_generation.html. Printed copies of the report can be obtained from the Department of Agriculture, Fisheries and Forestry by contacting Megan McIntyre on 6272 3624.

Agriculture Farm Institute Farm Demography Report (August 2005)

Released in August 2005, this report aimed to provide a detailed and comprehensive picture of Australian farming and consider the implications for future farm policy development (AFI 2005). The report considered aspects of farming ranging from demographic change, comparisons with agricultural industries in other developed countries, and policy issues and development in the farming sector. With regard to labour issues the report provides an overview of human resource policies and considerations for agriculture in Chapter 6, and specifically explores human resource issues for seasonal workers in Chapter 7. Copies of the report are available from the Agriculture Farm Institute, website address: http://www.farminstitute.org.au/publications/project_reports.

NFF Labour Action Plan (September 2005)

The Action Plan was developed with the objective of identifying realistic solutions that can be pursued by the NFF to assist the agriculture industry in resolving labour shortages. It includes a discussion paper on migration options to resolve labour shortages in the agricultural industry. A copy of this report is available online at <http://www.nff.org.au/pages/pub/LSAP%20Final.pdf>

Trends in Australian Agriculture (July 2005)

A Productivity Commission research paper, a copy of this report is available online at: <http://www.pc.gov.au/research/crp/agriculture/index.html>

Horticulture Industry Specific Reports

Harvesting Australia (June 2000)

The National Harvest Trail Working Group was formed in 1999 in response to concerns regarding the supply of labour in harvest regions. The main aim of the working group was to explore the revival of the harvest trail concept with a view to provide a workforce for the horticultural industry, and provide continuing work opportunities for unemployed Australians. In its report *Harvesting Australia*, the workgroup made a number of recommendations with a view to improving labour supply to affected regions and businesses. The report is available online at: <http://www.workplace.gov.au/workplace/Category/SchemesInitiatives/JobPlacementSchemes/HarvestLabour/HarvestingAustralia.htm>

Horticultural Labour Situation Statement (June 2005)

Funded by Horticulture Australia Limited (HAL) and Growcom. The report was prepared by CDI Pinnacle Management for Growcom (formerly known as the Queensland Fruit and Vegetable Growers Ltd (QFVG)). The report provides current statistical data in relation to types of labour and employees; current and emerging industrial relations and workplace issues of importance to growers; information on management and administration issues; training and education issues for employers and staff in the industry; and scope for productivity improvements. A copy of this report may be obtained from Growcom by contacting Brendan Nolan, Policy Development Coordinator, Growcom, Tel: 07 3620 3844, Fax: 07 3620 3880 e-mail: bnolan@growcom.com.au

Industry Partnerships Programmes – Taking Stock and Setting Directions (2005)

While the Department of Agriculture Fisheries & Forestry (DAFF) has not directly studied the issue of labour shortages in agriculture in Australia, it has coordinated a number of studies as part of the Industry Partnership Programme.

There are three initiatives under the IPP:

- **Taking Stock and Setting Directions** – provides industries with an opportunity to evaluate strengths and weaknesses, and identify opportunities and threats likely to face them over the next five to ten years
- **Action Partnerships to Advance Success** – assists industry sectors with practical short-term projects which make a significant contribution to their success. The completion of a project aims to resolve a major issue or capitalise on a significant opportunity. Applications for a second round of Action Partnerships are currently open
- **Industry Capacity Building Initiatives** – a range of initiatives by which farmers and non-government rural organisations can improve their capacity to participate in, and contribute to, rural industries. By enhancing the skills and knowledge of women, young people and Indigenous people involved in agriculture, fisheries and forestry, industries will improve their ability to yield positive financial returns, to be competitive in the global marketplace, increase their capacity to operate in future environmental and social settings, respond to change, and have the confidence to manage their affairs

Within this programme, DAFF conducted a stocktake of a number of horticultural industries to identify strengths and weaknesses of these industries, and opportunities available to build on its strengths, and ensure the sustainability of the industry. Industry stocktakes have been conducted for the summerfruit industry (peaches, nectarines, apricots and plums), cherry industry, tropical fruit industry, apple and pear industry and vegetable industry.

Copies of the individual reports can be accessed from the various industries involved. Following is a list of contacts for the relevant industries:

- Apple and Pear Australia – Alma Reynolds
Email: ism@apal.org.au
Tel: 03 5825 2355
39 O'Connell St
North Melbourne VIC 3051
- AusVEG – Jonathon Eccles
Industry Development Manager
Email: jonathon.eccles@ausveg.com
- Cherry Growers of Australia – Trevor Ranford
Email: aplpear@ozemail.com.au
Tel: 08 8349 4556
6 Frederick St
Cavan SA 5094
- Summerfruit Australia Ltd – Jo Solley
Email: em@summerfruitaustralia.com.au
Tel: 02 6622 2000
PO Box 1038
Lismore NSW 2480
- Tropical Fruits – Ian Kikkert
Email: exoticfruit@optusnet.com.au

Specific Guest Worker Visa reports

Peter Mares and Nic MacLellan are currently conducting research through the Swinburne Institute for Social Research. The research 'Pacific Labour and Australian Horticulture', explores the issue of temporary visas to fill seasonal labour shortages. This 18-month research project will investigate the costs and benefits of increasing labour mobility between the Pacific and Australia by studying the feasibility of a seasonal labour program to employ agricultural workers from Pacific Island nations in the Swan Hill/Mildura region during periods of peak labour demand.

Their industry partners are Oxfam/Community Aid Abroad, Swan Hill Rural City Council, and the Sunraysia Mallee Economic Development Board. They have released a couple of reports on their findings so far.

- *Labour mobility in the Pacific: creating seasonal work programs in Australia*, was prepared for the “Globalisation, Governance and the Pacific Islands” Conference, held at the Australian National University in October 2005.
- Peter Mares has released a short report on a survey conducted among growers in the Murray Valley, titled *Labour Shortages in Murray Valley Horticulture: A survey of growers needs and attitudes*.

These reports are available online at: <http://www.sisr.net/cag/projects/pacific.htm>.