



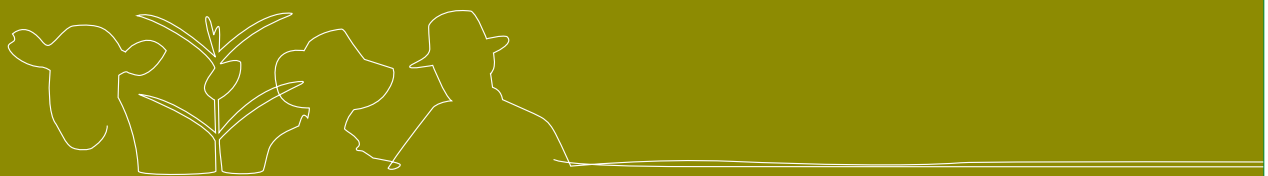
» trade policy brief

» Our Priority

The National Farmers' Federation is determined to achieve significant new export market opportunities and reduce distortions in global markets through agricultural trade reform in the World Trade Organisation (WTO).

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» Doha round

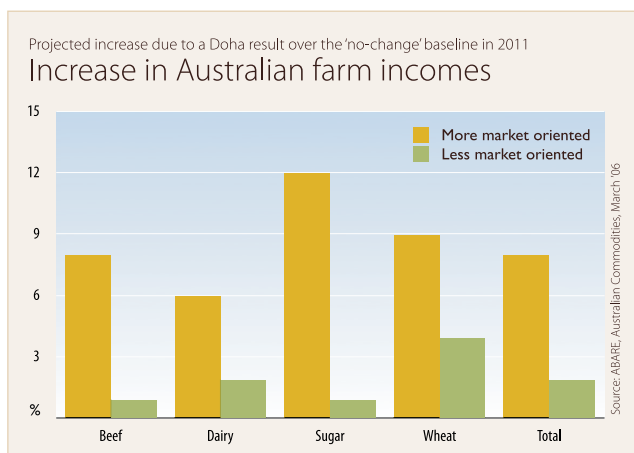
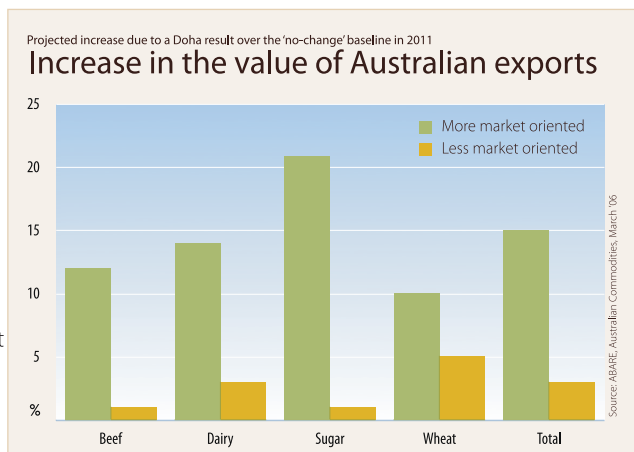
Q What are farmers really going to get from the Doha Round?

A An agreement will result in higher prices in both Australian and export markets for Australian producers and increases in the volume of exports to major markets.

How much higher? There is a range of estimates because there are still many uncertainties about the shape of any final agreement. Australian Bureau of Resource Economics (ABARE) projects an increase in the value of Australian agricultural exports for all products of between 3% to 15% over the no-Agreement 'baseline' outlook. The increase in gross producer incomes in Australia would range from 2% to 8% over the no-Agreement 'baseline' outcome.

Even the bottom of this range represents a meaningful positive change in the outlook for NFF members, especially when you take account of the expected distribution of increased benefits that favours producers in industries like sugar that have suffered most from unfair trade and production practices in the past.

Of course, it's impossible to be certain what the outcome will be until we get there. But ABARE's analysis is like every other expert analysis, confirming that Australian farmers will be among the biggest 'winners' from an agreement.



Q What are the chances there'll be an agreement?

A Still good. Every government wants the World Trade Organisation (WTO) and the Doha round to succeed because the alternative holds too many risks. But it's a negotiation; it isn't over until governments find mutual agreement on the terms of 'success'.

While differences between participating countries led to 'suspension' of the negotiations in the second half of 2006, behind the scenes work continued. It was decided in January 2007, following several meetings involving a number of Ministers (including from Australia) and the WTO Director-General, that work on the Doha Round would fully resume in Geneva in all areas of the agenda. The task of Ministers is to now work hard towards finding agreement that delivers on the Doha mandate as soon as possible.

EC Export Subsidy Budget, 2006

Product	Exports subsidy (€ millions)	(in \$A millions)
Dairy products	€ 840.00	\$1,402.80
Sugar	€ 801.00	\$1,337.67
Meat products	€ 292.00	\$487.64
Processed food	€ 415.00	\$693.05
Cereals	€ 215.00	\$359.05
Others	€ 60.00	\$100.20
Total budget	€ 2,600.00	\$4,342.00

Source: AgraEurope. December, 23 2005 "EU Summit, WTO Ministerial point way ahead for CAP"

» The end of export subsidies

The decision that the final agreement in the Doha round will include the elimination of export subsidies by the end of 2013 puts an end to one of the biggest threats to Australian producers' incomes and will open up new market opportunities.

Although both the EC and USA cut back the use of export subsidies dramatically a decade ago at the end of the Uruguay Round, the EC is still using billions of dollars of taxpayer's fund to wreck global markets.

over proposals to increase market access and cut domestic market supports have lasted for more than two years, pushing the round beyond its intended finishing date.

Although some differences on these questions between major players like the United States and the European Community (EC) have narrowed slightly, there are still major gaps. The United States (US) needs to do more on domestic support. On market access, countries with the highest tariffs—the EC, India and Japan—still refuse to open their markets to an extent that will delivered the commercially meaningful results that the USA, Australia, and Cairns Group members want.

Arguments in the market access negotiations are not just over the size of tariff cuts but over proposals for the designation of 'sensitive' and 'special' products or the use of 'safeguards' that could undermine any agreed cuts to tariffs and allow protected sectors to be shielded from reform.

NFF considers the EC and some of the big developing countries of the G-20, including India, must agree to bigger cuts in border protection if we are to achieve the 'substantial liberalization' that all WTO members pledged to secure in the Doha Round.

Q Where are the negotiations up to?

A Negotiations fully resumed in late January 2007 after a period of suspension. Members are working together in a range of formal and informal settings to try to resolve the outstanding issues.

Some 'final' decisions have already been made: all forms of export subsidies will be eliminated by the end of 2013, once overall agreement is reached. But disagreements



What is NFF doing to secure the Doha agreement?

We have an important responsibility, as the Chair of the Cairns Group Farm Leaders' Forum, to advocate global market reform. The Cairns Group remains influential in the negotiations because it is still the only forum that brings together both developed and developing countries with different backgrounds and interests but a shared commitment to reform.

NFF puts a high value on the role of the Farm Leaders' group in advocating reform of global trade and in disseminating information on the potential gains from open markets. We will continue to contribute energy, ideas and strong advocacy positions that Farm Leaders around the world can draw on in their work to bring the talks to a successful conclusion.

NFF will continue to work with the government and others to make the most of the opportunity presented by Cairns Group meetings and by Australia's host-role at Asia Pacific Economic Cooperation (APEC) in 2007 amongst others to secure progress on the Doha negotiations. We will also assess whether we need to advance any alternative, complementary strategies for trade reform.

» The US President's Trade Promotion Authority

In the Trade Promotion Authority (TPA) Act, the US Congress agreed to accept or reject but not amend the outcome of trade negotiations negotiated by the US Administration. Ninety days after receiving details of the draft 'deal', the Congress would vote US approval either 'up' or 'down'. Without this provision prohibiting amendment no country would be able to judge how the Congress might alter the deal in the course of approval. Negotiations would be impossible.

The TPA expires in June 2007.



What does NFF want in the final Doha deal?

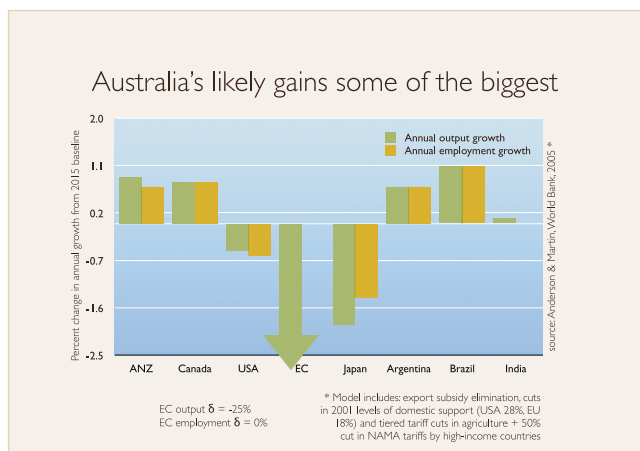
Our objectives remain as they were when the talks started in 2001:

- 1) Reaching an agreement that will deliver substantial improvements in market access by cutting tariffs deeply, with the highest tariffs being cut more deeply, and by expanding tariff rate quotas to ensure commercially meaningful gains in market access
- 2) Achieving the early elimination of all forms of export subsidies on all products by 31 December 2013 (agreed at the Hong Kong Ministerial Conference) with workable disciplines to ensure that food aid, government export credits and state trading enterprises do not circumvent elimination
- 3) Achieving real cuts to current expenditure on trade-distorting production subsidies (not merely changes to accounting procedures)

We believe—along with independent analysts in e.g. the World Bank, Food and Agriculture Organisation (FAO) and Organisation of Economic Cooperation and Development (OECD)— that an outcome along these lines would offer strong economic gains to both developing and industrialized countries, with Australia making some of the biggest gains.

But the potential gains would be jeopardised by

- Broad exceptions for 'sensitive' agricultural products that effectively de-link important markets from the trade reform package;



- A deal on 'special' agricultural products in developing countries that allows bars on reform in sectors of commercial potential;
- A broad 'special agricultural safeguard' for developing countries that could allow back-sliding on commitments to cut protection ;
- Insulation of trade-distorting government handouts to producers in industrialized countries using legal manoeuvres to re-define the terms of a program to make it seem less distorting.

What is NFF ready to give up to get a deal?

A It's not up to the NFF to identify 'trade-offs'. We won't be balancing the interests of Australian farmers one against the other.

The Doha round negotiations cover every aspect of international trade, so the nature of the deal is complex, made up of a lot of swings-and-roundabouts within and between sectors. Our job is to contribute to an Australian negotiating strategy in which our members make the biggest possible gains as exporters or importers—of services, equipment and technology—and as important stakeholders in a prosperous national economy.

Worthwhile trade reform will bring change and challenges. But because the Australian farm sector is highly competitive with very low or zero levels of tariff protection and few if any trade-distorting supports we think it is unlikely there will be any net losses for our Members in a deal.

» Impacts of recent FTAs

As a result of the Australia/United States Free Trade Agreement (FTA), around 66 per cent of US agribusiness tariffs have been bound at zero, with a further nine per cent to be eliminated by 2009.

The Thailand/Australia FTA delivered the elimination of high tariff and quantitative restrictions for agricultural exporters and the elimination of a wide range of tariffs for processed foods and beverages.

The Singapore–Australia FTA eliminated all remaining tariffs.

Are there alternatives to Doha? Fall-back plans?

A The Doha negotiations remain the top priority for the NFF because no other agreement offers as much to a globally competitive producer industry as an agreement on global trade reform.

Should the Doha negotiations not progress satisfactorily in the near future, the NFF will continue to also look at other opportunities to increase market access for Australian farmers, potentially including

- Regional trade agreements, particularly the FTA negotiations with China and the proposed negotiations with Japan. We consider that Australia has no more important trade relationships and we are already giving a high priority to these talks
- Possible APEC decisions at the Summit meeting to be hosted by Australia in 2007 to promote regional economic integration. Such Initiatives could lead to more secure market access prospects for our Members in the world's most dynamic economic region

- A global agreement in the WTO will, however, remain NFF's long-term priority.

Q How did agriculture become the stumbling bloc?

A Agriculture remains the key to unlocking the entire Doha negotiation because agricultural trade reform has the greatest impact on most developing economies.

- 1) Agricultural exports account for less than 20% of the value of developing country trade but the sector provides more than a quarter of Gross Domestic Product (GDP) and 50% of employment, on average, in those economies.
- 2) Agricultural trade disputes among industrialized countries are frequent because of the inappropriate policies of some.

It will be impossible to reach agreement in the Doha Round on non-agricultural market access (NAMA) or on trade in services until the shape of the deal on agriculture is decided.

At the end of July 2006, after two years of effort to bridge remaining differences on the approach to agricultural trade reform the WTO's Director-General 'suspended' the talks. Although the suspension has since been lifted, key sticking points remain. A basic problem is that managers of the world's biggest agricultural market, the European Communities, have not made an offer on market access that matches the offers from Europe's trading partners—including the G-20 developing countries. Also, some developing countries are demanding too much flexibility to protect their markets with so called 'special products' and 'safeguards'.

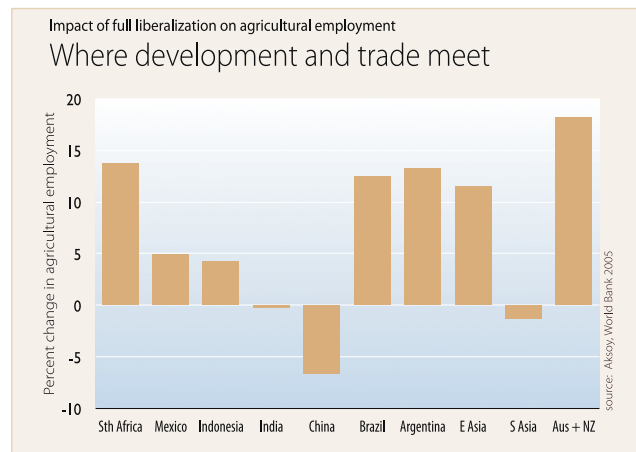
The only deal that could be reached on the basis of the EC's current offer would not meet the NFF's requirements for 'substantial reform' or a commercially meaningful outcome.

We are continuing to work with these countries and our own government towards an outcome that will deliver commercially meaningful new trade opportunities for farmers.

Q Have we had any real gains from WTO?

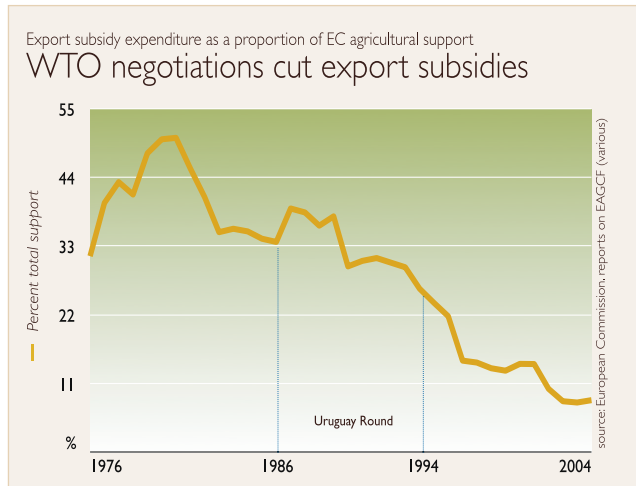
A Yes. Farmers' income and opportunities have been boosted by the WTO's reforms.

Although it delivered revolutionary changes in the rules, the trade impacts of the first steps on access, domestic support and export subsidies were modest overall. ABARE estimated they would deliver an increase in the value of Australian production of \$1.1 bn every year and a gain in the value of exports



of about \$1 bn. This was sufficient to see Australia increase its share of world markets for beef, grains and dairy products.

The Uruguay Round Agreement on Agriculture saw agriculture incorporated, for the first time, into the same world trade rules that apply to manufactures and services.



For the first time the rules prohibited the use of variable levies, 'voluntary restraints' and a host of other non-tariff barriers that had plagued our access to markets in the USA, Japan, EC, Korea, Taiwan and elsewhere. Tariffs immediately replaced these non-tariff barriers (but some tariffs were far too high).

Also for the first time, we achieved a cap, and a major reversal, in the use of export subsidies that had allowed the world's richest, but least competitive, industries to dump their surpluses in our markets.

The changes to the rules had real and sustained impact on Australian agricultural exports. Some of the evidence lies in our successful defence of our new trade rights against protectionist lobbies in important

export markets. Thanks to an improved WTO disputes system, Australia had more success breaking down barriers in the first 10 years of WTO than in the forty years of the General Agreement on Tariffs and Trade (GATT) that preceded it.

The price and volume gains due to lower subsidies and more open markets continued, too. But other market events can make these benefits difficult to discern. For example, within three years of the end of the Round, our exports also experienced the *negative* impacts of the 1994-95 drought and the Asian region 'financial markets crisis' (1997-98) combined with the *positive* impact of China's rapid growth.

Product	Complaint	Value of Australia's affected exports (1994 – 2004)
Beef	Korean quotas and domestic support payments (1999)	\$75 – 80m to Korea
Lamb	US import 'safeguard' quotas (1999)	\$15 - \$50m to USA
Dairy	Canada's export subsidies (1999 – 2003)	\$2bn- \$3 bn. Test case affecting subsidies to world markets.
Sugar	EC's export subsidies (2002 – 2004)	\$1.3bn - \$2bn Case affecting world price for sugar.
Trade-marked food products	EC's 'geographical indications' (2003 - 2005)	A proportion of processed food exports valued at \$15bn in 2002-3

» trade reform

Q What are NFF's trade policy goals for Australia?

A **Australia's trade policies** must reflect our own economic experience and outlook. Our attitude is that we must get our own economic policies right as a matter of priority—to ensure that our own markets work well and support prosperity at home—and follow the same principles in our goals for global markets

There is no sustainable alternative to market-based economic policies that employ the lightest possible regulation to ensure free and fair terms of market entry and exit and to meet social responsibilities.

This assessment holds for the domestic and external environment and has been the foundation of our approach to trade policy for many decades. NFF members realised in the late 1970s that our traditional domestic markets were shrinking, so we turned our attention to a broader international arena. Today, when we export more than two-thirds (70%) of all that we grow, access to international markets is crucial. We need the rules of fair competition to apply in export markets just as they apply in Australia.

Some countries have lagged behind us in opening their markets and in some cases have adopted anti-competitive policies including export subsidies that have hurt our exports while Australia has embraced an open-market approach eliminating trade barriers such as tariffs, quotas and regulation.

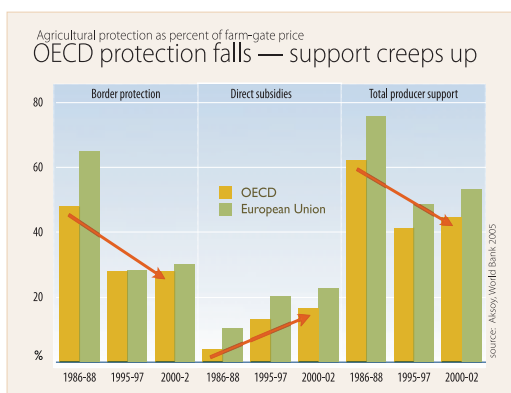
All of us feel angry about the unfairness of this, sometimes. Global trade in agriculture remains more affected by distorting trade policies than any other sector.

But it doesn't mean we should change our policies to match the deficiencies of others.

As the economist Joan Robinson asked: "why throw rocks into your harbours just because your trading partner has thrown rocks into his own?"

In fact, international barriers have come down in the past decade and Australia is benefiting. Since we began to diversify our export markets four decades ago, the real output of Australian agriculture has more than doubled and exports have almost tripled in value.

In real terms, export prices for meat, dairy, wine and a range of other smaller commodities such as pre-



served and frozen foods and fodder are up by 300 to 500% over that period. Increasing demand plays the biggest role, of course; but trade policy reform—keeping markets open and cutting unfair subsidies—has helped us to access that demand.

Q Why is agricultural trade reform important for Australia?

A **Australian agriculture relies on exports**; after all, ninety-nine percent of world demand for our produce lies offshore.

There's little we can do about the natural barriers we face, such as distances from farm to port and from port to customer. But we try to reduce the regulatory barriers—such as tariffs and quotas—that block most of our markets in one way or another. 'On-shore' demand for most of our production is not growing, so export markets are the key to expanded sales.

The role of trade liberalization in keeping costs down at home is also important, given the water and land-use constraints that mean most Australian farm industries have few low-cost expansion options left. An open market and a competitive economy are important for sustainable farm businesses.

Growing export demand, not domestic market demand, is the source of higher prices and improved margins for most Australian farm produce. Those commodities that have seen real price improvements of 300% and 500% in the past forty years have been those where export demand has driven growth.

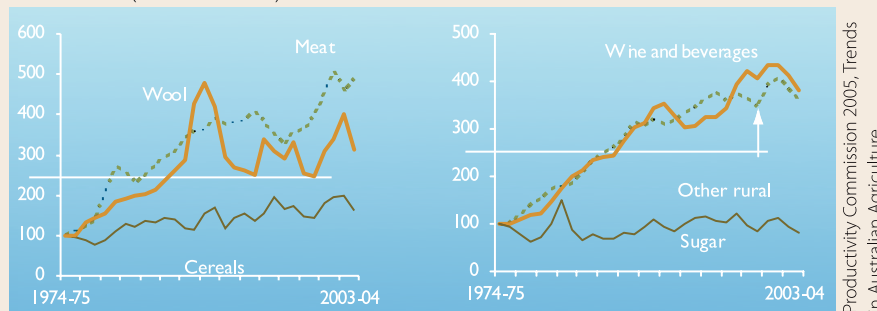
We export two-thirds of our total agricultural production worth \$28.8 billion in 2005-06. A sustained one-percent increase in those returns due to better access or higher prices is more than a quarter of a billion dollars every year.

ABARE's estimates of the impact of even a 'less market oriented' outcome in the Doha Round agriculture negotiations project a 3% increase in the total value of agricultural exports over the 'no-change' baseline outlook for 2011.

So it's very much worth keeping up the fight. There is a lot of upside for Australian agriculture from serious international trade reform.

Real increases in export prices

Price index (100 = 1974-75)





Is agricultural trade reform a realistic goal?

Yes. It's already happening—albeit, slowly—as a result of agreements in GATT and WTO and due to developing countries' discovery of the great economic benefits of opening up their own markets.

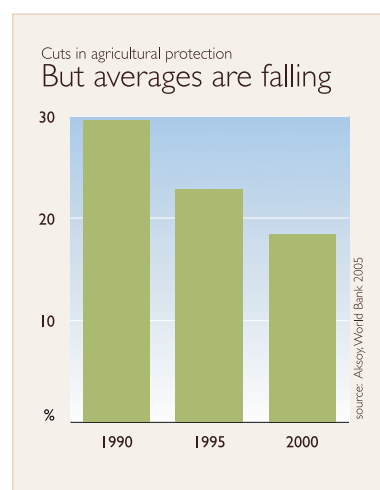
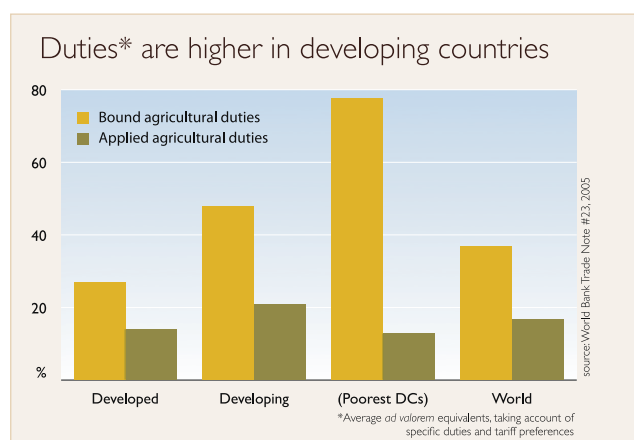
Take China, for example. China is a poor country by any standard with average levels of annual income and output per head of just over \$US1,000. It is also a country heavily dependant on agriculture for employment: more than half of its workers are farm workers.

But China is already the world's second biggest economy, measured by the purchasing power of its currency, thanks in large measure to dramatic economic reforms that it began in the 1980s. Among those reforms has been the opening of its markets to supply and competition from abroad. When it joined WTO in 2001, China agreed to further cut its agricultural barriers to levels of about 15%, well below the average for developing countries.

The transformation of China's economy based in part on trade liberalization was established well before its accession to WTO. The consequences for Australian farmers have been dramatic. Over the period 1990-91 to 2003-04, China's share of our agricultural exports tripled to almost 9% (more than \$2.5 bn) making it our third largest agricultural trading partner behind Japan and the USA.

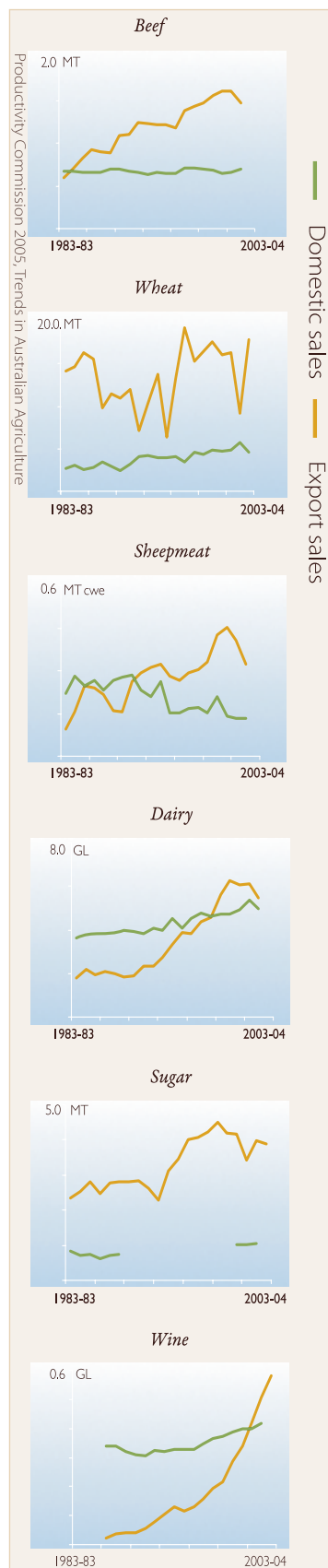
The speed of China's reforms is unusual. Although many developing countries have cut agricultural protection, their protection levels are still high, reaching average ad-valorem equivalents (AVEs) of 20% for applied duties in 2001.

In the absence of an economic 'crisis', reform frequently takes decades. Governments lose enthusiasm for results that will occur well beyond the end of a parliamentary or political cycle. The NFF has been actively promoting trade reform, in the interests of our members, for many decades but we recognise there is still a long way to go.



Why does NFF oppose tariffs at home and abroad?

Tariffs are a tax on doing business across a border. Nothing more. An industry like ours that makes two-thirds of its income doing business across borders doesn't need governments taxing our activities more than necessary. Simple as that.



Well, almost that simple. Tariffs have an inherently negative impact on farmers; high tariffs mean higher prices for inputs such as machinery, fertilizer, agricultural chemicals, irrigation equipment and so on. They have the effect of allowing some suppliers of inputs to things we buy—including motor vehicles and clothing in Australia—to charge higher prices than they would in a fully competitive market. But they do so at the cost of shrinking the economy a little bit by reducing demand. That means a 'double-whammy' for every consumer: one hit for the tax and another for the lower pace of economic growth.

Worse: they don't work. Industries that are challenged by import competition are never 'saved' by tariff protection.

Some advocates of tariff protection argue that moves towards free markets and globalization destroy political sovereignty and some people advocate a 'Fortress Australia'. In NFF's view, this approach would be disastrous for economic growth and the farm sector. Many Australian farmers understood this dynamic in the 1980's long before many others in the community did and Australia's exports have gone from just over \$20 billion in 1980 to over \$190 billion in 2005-06.

What is NFF doing in its campaign for trade reform?

On the international front, NFF is working hard at achieving our goal of a fundamental improvement in the fairness of international trade rules for trade in agricultural products.

We do this not to pursue some form of free market philosophy, rather we do this because of the fact that trade reform will result in more dollars in the pockets of Australian farmers. This is good for farmers, good for regional communities and good for Australia.

Some argue we are beating our head against a brick wall; that we will be waiting forever. NFF does not agree. We must remain engaged to positively influence the result.

NFF is working hard with the Australian Government, colleagues through the Cairns Group Farm Leaders forum, the International Federation of Agricultural Producers and with other like-minded groups such as the American Farm Bureau Federation.

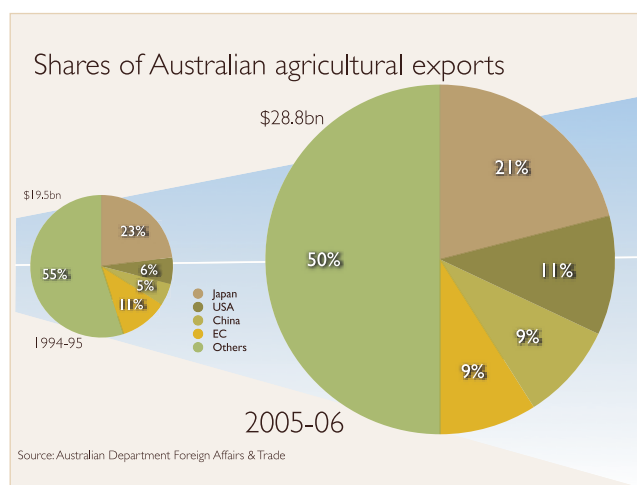
Why don't we concentrate all our efforts on the WTO negotiations instead of pursuing FTA's?

The WTO negotiations are the NFF's top priority. In our view—expressed many times to the Australian government at the highest level—regional and bilateral 'free trade' agreements are at best a second option.

Although three or four markets account for about half of our export trade, prices for our produce are set in global markets, not in any bilateral or regional exchange. Only a global reform can deliver the increase in demand—as a result of reduced market access barriers—that would underwrite sustained improvements in price levels and stability.

The NFF's first priority is to push for meaningful reform of international trade rules for agriculture. We will only truly succeed in dismantling export subsidies and removing exorbitant tariffs on agricultural produce by a binding global agreement in WTO. However with 149 countries needing to agree to changes, negotiations can be slow-going as evidenced by the current suspension of the WTO negotiations. This is why Australia also pursues FTAs.

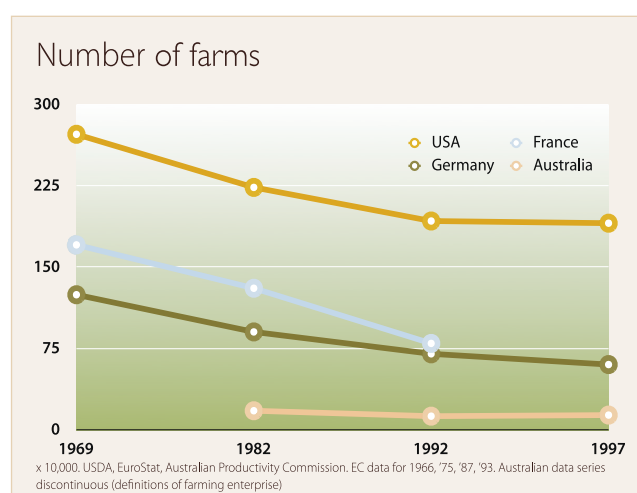
Regional and bilateral FTAs can deliver meaningful market access for Australian products sooner than the WTO. FTAs also provide the scope to negotiate specific agreements on access that are more liberalizing in a small number of markets than is normally possible in a WTO negotiation.



Q Is trade liberalisation pushing Australian farmers off the land?

A No. It's been many decades since tariffs affected farm incomes in Australia. Import protection for most farm products came to an end when Closer Economic Relations with New Zealand was completed in the early 1990s. But, since that time, Australian farm output and prices have continued to rise, in part due to trade liberalization in our export markets. So trade liberalization does not explain the continuing fall in the numbers of farms.

Farm numbers are falling everywhere in the industrialized world: at about 1.5% per year over many decades, even in countries that maintain high tariffs and spend billions of dollars in production subsidies. Farm numbers have fallen at a slightly lower rate in Australia: about 1% per year up to the mid-1990s and about 1.2% per year after that.



There are several other explanations for the fall in farm numbers—and the associated growth in farm sizes—around the world. The most important drivers of this structural change are:

- The value of alternative uses of agricultural land
- The falling cost of transport and communications, and
- The higher productivity that is typically associated with larger farm size in Australia and elsewhere in the industrialized world.

The message is clear, that providing high levels of support for farmers cannot reduce the trend towards fewer, larger farms across the OECD countries.

Q *Doesn't trade liberalisation mean more imports?*

A **Yes it does. That's one of the main benefits** of tariff reductions. Imports are good for consumers and the economy as a whole. In fact, being able to import is why we bother to export at all: so we can afford to buy the things that are better made, or more cheaply made, abroad from mobile phones to passenger aircraft.

If you think that there's something wrong with that, please think again. In every respect, trade is just like a resource-saving technology; it's a way to leverage what we do best or at lower cost than others to access things we want at lower cost or better quality from elsewhere. Like any other resource-saving technology, you'd be mad not to take full advantage.

Q *Isn't Australia being swamped by cheap horticulture imports?*

A **No, not even nearly.** Most of the fresh horticultural produce available for retail sale in Australia is grown in Australia; trade in horticultural products is small in proportion to output and consumption.

For example, vegetable production in Australia in recent years has been valued at about \$2 bn. Trade in fresh products—dominated by exports—

amounts to less than \$250 m. Trade in processed products—dominated by imports—is valued about at about the same amount.

Australian horticulture production & trade

	Fresh fruit	Fresh Vegetables
Production (2002)	3.7bn	2.3bn
Imports (2002/3)	0.08bn	0.02bn
Exports (2002/3)	0.5bn	0.2bn

Source: Austrlian Horticulture Statistics Handbook 2004 (AHC)

According to survey data, 99% of fresh vegetables sold in Australian supermarkets are Australian produce.

Protection against imports of horticultural products is very low. So the fact that Australian demand for fresh produce is served by Australian production with very

low levels of imports tells us that local producers are meeting the price and quality demands of Australian consumers.

The high proportion of processed products in our low level of vegetable imports is partly a result of the globalization of the food production systems over recent decades and partly because processors need guaranteed year-round supply that in some cases means importing produce, especially vegetables. It is vitally important to the food-processing sector in Australia—and to the Australian producers that account for most of their supply— that factories can run twelve months of the year.

Protection of certain sectors against foreign imports is not a viable, long-term solution for our farm economy or for dynamic sectors such as the horticulture industries.

Q *Why do we allow food imports from countries with less stringent standards than ours?*

A **If imported food meets Australian standards**

of food safety and freedom from pests and disease then, in NFF's view it should be allowed to compete in the market, wherever it was produced. That's the same rule we want applied everywhere.

Production standards are a matter of 'horses for courses'. Production environments vary greatly around the world. Some have a 'fragile' ecology, some are 'dirty' with natural or introduced contaminants in the water or soil. Some economies have a lot of low-cost unskilled labor. Others have high-priced, highly skilled labor and employ advanced technologies. There's no production standard or process that will fit every environment and circumstance.

NFF works with Australian authorities to ensure that our food production and processing standards are as stringent as they need to be for Australian conditions, but no more. We also work with the quarantine services to ensure that all agricultural products entering Australia meets Australian health and safety standards.

Internationally, we are active in global standards-setting bodies to ensure that the standards other governments apply to our exports are those that can be tested in the product—such as residual levels of harmful compounds—not those that this country or that believes are appropriate for its own environment.

In broad terms, that's also the approach required by the WTO rules.



» our strategy

Q What is NFF doing to assist Australian farmers?

A In 2006 the National Farmers' Federation

undertook a major review of its core business to critically examine and adapt to new and emerging priorities and to ensure the continued relevance of its strategic focus.

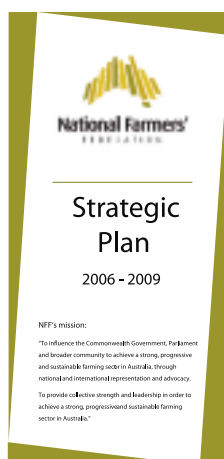
The **NFF's Strategic Plan 2006-09** has been developed to:

- Ensure NFF Policy Council (the NFF's elected policy formation body, with representatives from all member organisations) approves of NFF's work priorities;
- Consider new objectives in the context of existing and emerging priorities;
- Provide the NFF Secretariat with clear direction as to work priorities; and,
- Make an unambiguous statement of NFF's purpose, functions and priorities.

1. Goal: Maintain and Improve Competitiveness

Objectives to meet goal

- 1) Access to high-quality, affordable telecommunications services.
- 2) A competitive and flexible labour market.
- 3) A competitive economic framework for farmers (taxation, infrastructure, and macroeconomic settings).
- 4) Reduction of cost in, and increased access to, farm inputs.
- 5) Access to labour (unskilled, semi-skilled, skilled).
- 6) High-level skills levels and capacity in farming population.
- 7) High-level research and development models in agriculture.
- 8) Improved value and innovation for farmers along the supply chain (including in the food sector).
- 9) Access to new technologies, including GM technology.
- 10) Access to innovative farm management planning models.



2. Goal: Secure & Grow Domestic & International Markets

Objectives to meet goal

- 1) Improve domestic market power conditions for farm businesses.
- 2) Reduce market access barriers faced by Australian farm exports in international markets.
- 3) Reduce unfair competition from subsidised products in Australian domestic and export markets.
- 4) Ensure a robust, effective, science-based biosecurity and quarantine framework.
- 5) Promote high and continually improving standards of animal health and welfare, which are understood by the community.

3. Goal: Sustainability

Objectives to meet goal:

- 1) Greater Natural Resource certainty for farmers (land and water).
- 2) More efficient delivery of Government environmental programs 'on-farm'.
- 3) Facilitate programs to allow stewardship payments for farmers providing environmental services on behalf of the community.
- 4) Manage the impacts of climate (short and long-term) and greenhouse gas emissions on agricultural production.
- 5) Ensure efficient, targeted adjustment/change policies in agriculture (e.g. Exceptional Circumstances, Farmhelp, and succession planning).
- 6) A more streamlined and predictable native title system.

4. Goal: Increase Community Perception & Awareness of Australian Agriculture

Objectives to meet goal:

- 1) Proactively raise the positive profile of farming issues and the innovative practices involved in modern, dynamic, competitive and sustainable farming practices.
- 2) Build positive awareness of farming, its role, contribution and value to the broader community and stakeholder groups.
- 3) Establish confidence, trust and credibility in the information, services, expertise and endeavours of the farming community.
- 4) Influence community and stakeholder attitudes, behaviours, decisions and choices.

The goals and objectives outlined in the new Strategic Plan are designed to create a synergy of purpose, forming an integrated strategic package around four key pillars.



For more information

The National Farmers' Federation:

www.nff.org.au

The Australian Department of Foreign Affairs and Trade

www.dfat.gov.au

The Australian Department of Agriculture, Fisheries and Forestry

www.daff.gov.au

The Cairns Group

www.cairnsgroup.org

The World Trade Organization

www.wto.org

The World Bank's Trade Division

www.worldbank.org/trade

The OECD's Trade Division

www.oecd.org/trade

The FAO's Trade Division

www.fao.org/trade

The Australian Bureau of Agricultural and Resource Economics

www.abareconomics.com

The Rural Industries Research & Development Corporation

www.rirdc.gov.au

The Centre for International Economics

www.thecie.com.au

Peter Gallagher

www.inquit.com



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