



Department of  
Primary Industries and  
Regional Development

Protect  
Grow  
Innovate

# Primary Industries Plan 2024 Update





## Introduction

Following an extensive planning and consultation process, DPIRD launched the Primary Industries Plan (2020 – 2024) ('the Plan') in October 2020 that described how DPIRD would operate to assist Western Australia's (WA) primary industries to grow and thrive.

The objectives of the Plan set clear priorities for investment and established a platform for strengthened collaboration between government and primary industries. The Plan reflected and supported the State's economic development framework, Diversify WA, and presented five Strategic Initiatives to grow and de-risk WA primary industries.

As the lead agency, DPIRD oversaw the implementation of the Plan in collaboration, where appropriate, with WA's primary industries, external funding bodies, other state departments and the federal government.

Annual updates produced for 2021, 2022 and 2023 identified achievements that were made relating to the strategic initiatives identified in the Plan, this is the final 2024 update. This reporting showed that the Plan was a driving force in directing the activities and outputs of DPIRD, illustrating good progress in all areas and meeting the specific outputs that were identified under some of the strategic initiatives.

It should be noted that the three previous updates looked at changes in key facts and figures from WA primary industries. Due to changes in the way the Australian Bureau of Statistics (ABS) is now collecting and reporting data, some production figures are not available. This will be reported on as new official data becomes available.

The impact of the global pandemic was a dominant factor in the 2020-2024 Plan. This impact diminished over time, only to be replaced by the impacts of the conflict in Ukraine and the associated impacts on world agricultural markets and agricultural input prices.

Additionally, during the life of the 2020-24 Plan there were several incidents including two Queensland fruit fly incursions, the polyphagous shot hole borer, in addition to the relocation of head office to East Perth and the closure of the South Perth office site.

The extra resources (human and financial) required to navigate these incidents regrettably diminished DPIRD's ability to deliver consistently across the Plan. These impacts were managed and minimised where possible, assisted through DPIRD receiving increased funding for support these incidents, through both State and Federal government contributions.

This is the final update for the 2020-2024 Plan, as DPIRD are currently developing a new Plan using short-medium term priorities with a 10+ year outlook.

## Western Australia's Strategic Context

### WA is a small supplier to a very large and rapidly growing market

Due to poor seasonal conditions, declines in crop exports drove overall export value from WA lower in 2023-24 with a \$3.2 billion (-19.6%) fall to \$13.0 billion. While crop exports fell by \$3.1 billion (-25.3%) there were some bright spots, i.e .

- Rock lobster exports rebounded 31.3% to have their best year since 2018-19.
- Avocado exports saw an increase from \$7.1 million in 2022-23 to \$36.1 million in 2023-24 ([Rural Bank](#)).

### WA primary producers face increasing competition

WA continues to compete strongly in export markets, assisted by the lower exchange rate of the Australian dollar being maintained.

The continuing war in Ukraine has also restricted its ability to produce and export grain to the extent it was pre-war, reducing competition in some of our key grain markets.

### Consumer expectations of product, production systems and nutritional values will continue to grow

For fisheries this continues to be important with more than 90% of WA's fishery value sourced from fisheries certified as sustainable by the Marine Stewardship Council (MSC). The Pearl Oyster fishery was recertified in 2023 across a wider scope that now includes its hatchery component.

For a number of years canola has been grown using sustainable farming systems and can be certified as meeting sustainability criteria for biofuel, as required in the EU.

### Product and market concentration of WA primary industries is significant.

Concentration of product and markets is still an issue for WA. For various reasons, new industries struggle to develop significantly. For products we export, they tend to gravitate to the highest paying market.

Removal of barley tariffs by China saw a rapid return to this market by sellers despite the efforts to cultivate new markets over the last few years.

Canola is heavily reliant on the EU, but exports to, Japan, UAE and Pakistan have increased with the larger crops produced in recent years. Exports to the EU represented 42% of all exports in 2023/24, compared to an average of 65% over the last ten years.

Large plantings of avocados are now resulting in increased production and increasing exports from WA, diversifying our horticultural exports.

In northern WA, cotton is showing potential in the Ord River Irrigation Area. The construction of the Kununurra cotton gin is due to be completed in the second half of 2025 and is expected to create added confidence in the crop and increase plantings.

### Climate change will continue to drive change in primary production conditions in Western Australia

The 2023/24 season saw poor growing conditions for broadacre crops and pastures in the southwest of WA. The total grain production in the 2023/24 season in WA of 14.5 million tonnes was nearly 50% lower than the record years of 2022/23 and 2021/22. For many growers, total rainfall received in 2023 was well down on 2019 rainfall, when 11.3 million tonnes was produced on a similar area of crop sown, illustrating that incremental improvements in production systems are tending to buffer the downside of these poor years (Grains Industry Association of [WA](#)).

## Ownership and management of agribusinesses in Western Australia will continue to evolve

According to ABS, WA farm business numbers have been fairly stable in recent years, with 8,233 reported in 2021/22, down slightly from 8,425 in 2020/21.

Foreign investment in WA agricultural land has fluctuated in recent years. According to Australian Treasury data (*Register of foreign ownership of agricultural land Report of registrations at 30 June 2023*), there was 14.394 million ha at June 2021, 11.092 million hectares at June 2022, and 11.296 million hectares at June 2023 held by foreign owners. This represents a 1.8% increase for 2023, with 14.2% of WA agricultural land having foreign ownership.

## Western Australian food manufacturing costs remain a challenge

Overcoming the high manufacturing costs relative to major markets remains a challenge for most agricultural industries, exacerbated by the small size of the domestic market due to our small population.

The Processed Oat Partnership is funding projects that aim to increase production of processed oat products from 150,000 t to 250,000 t.

DPIRD worked closely with Wines of WA and 216 industry partners through the Wine Industry Export Growth Partnership, to increase the value and volume of wine exports. After China announced the removal of wine trade tariffs in March 2024, the partnership moved quickly to reconnect key customer relationships and sale channels.

## Key facts and figures

Exports and production		2020-21	2021-22	2022/23	
Export to major partners	China	\$1,525m	\$2,094m	\$3,014	↑
	Japan	\$765m	\$1,383m	\$1,609	↑
	Philippines	\$290m	\$868m	\$1,373	↑
	Germany	\$393m	\$863m	\$1,063	↑
	Indonesia	\$643m	\$803m	\$979	↑
	Other	\$4,629m	\$6,212m	\$8,190	↑
Export by product type	Cereals	\$4,351m	\$6,026m	\$9,562	↑
	Canola	\$919m	\$3,003m	\$3,199	↑
	Livestock (inc. Meat, Wool & Dairy)	\$1,901m	\$2,268	\$2,331	↑
	Horticulture	\$218m	\$239m	\$222	-
	Fisheries	\$323m	\$254m	N/A	
Export by value-add	Forestry	\$239m	N/A	N/A	
	Raw	\$6,211m	\$10,266m	\$14,013	↑
	Processed	\$1,626m	\$1,761m	\$2,001	↑
TOTAL EXPORTS		\$8,245m	\$12,222	\$16,225	↑
Gross value of production (GVP)	Cereals including Hay	\$4,859m	\$7,714m	N/A	↑
	Other Broadacre Crops	\$1,380m	\$3,041	N/A	↑
	Livestock (inc. Meat, Wool & Dairy)	\$2,859m	\$3,156	N/A	↑
	Horticulture	\$1,521m	\$1,603	N/A	↑
	Total Agriculture	\$10,620m	\$15,514m	N/A	↑
	Fisheries & Aquaculture	\$424m	\$414m	\$452	↑
	Forestry	\$314m	\$348m	\$339	↓
TOTAL GVP		\$11,358m	\$16,277m	N/A	↑
Primary Industries Imports	Processed	\$935m	\$923m	\$1,100	↓
	Raw goods (Fruit & Veg)	\$82m	\$73m	\$82	↓
TOTAL IMPORTS		\$1,016m	\$996m	\$1,182	↓
Employment	Agriculture	28,900	26,000	24,400	↓
	Fisheries & Aquaculture	1,300	1,400	2,000	↑
	Forestry	700	800	700	↓
	Support Services	3,000	4,200	4,300	↑
	Agriculture, Fisheries & Forestry Total	33,900	33,200	31,400	↓
	Food & Beverage Manufacturing	18,800	18,900	17,900	↓
TOTAL EMPLOYMENT		52,700	51,200	49,000	↓

*Based on ABS 6291.0.55.001 - EQ06 - Employed persons by Industry group of main job (ANZSIC), Sex, State and Territory, November 1984 onwards. Released at 11.30 am (Canberra time) 19 December 2024.*

*Values published differ slightly from previous updates due to DPIRD reviewing some agrifood export codes for accuracy and consistency as well as updated ABS data and DPIRD calculations. These figures align with the WA Primary Industries Economic Overview.*

## Commitments and actions

Nearing the end of its function the Plan is still guiding much of the department's activities. The following are examples of achievements highlighted in DPIRD's 2023/24 Annual Report, illustrating how they relate to the strategic initiatives identified in the Plan.

Protect and enhance the condition of our natural resources	
Strategic Initiatives	Achievements
Ensure aquatic resources are managed within sustainable limits.	<ul style="list-style-type: none"> <li>As a result of DPIRD's sustainable fisheries management, 96% of the state's stocks are not at risk or vulnerable to fishing.</li> <li>The <a href="#">latest scientific assessment</a> shows Gascoyne oceanic pink snapper stock is recovering. In addition, pink snapper and other demersal finfish in the West Coast are being managed under a \$10 million recovery package.</li> <li>Invested \$3.2 million in a new modern fisheries research vessel (RV) designed and built in WA. The RV Djildjit Kaartadjiny provides a larger multi-purpose research platform to perform a broad range of research, stock assessment and science monitoring tasks to boost the state's science and research capabilities.</li> </ul>
Ensure agricultural and pastoral regions are managed to improve the land and soil condition of Western Australian terrestrial resources	<ul style="list-style-type: none"> <li>Development of land condition standards for the Kimberley region with a presentation to the Cattle and Cotton forum in Kununurra in 2024.</li> <li>Development of quantitative measures of pasture condition for Kimberley pastures and identification of 100 new sites for data collection and model validation in 2024.</li> <li>Publication of pasture condition guides for pastures of the southern rangelands.</li> <li>Publication of the Southern Goldfields land resource survey.</li> </ul>
Provide leadership in land and marine-based responses to climate change	<ul style="list-style-type: none"> <li>The Carbon Farming and Land Restoration Program is supporting over 20 new soil and vegetation projects in the agricultural region that will sequester carbon, while diversifying farm income and generating carbon credits.</li> <li>Carbon for Vouchers Program is assisting more than 100 landholders to investigate carbon farming projects.</li> <li>Carbon sequestration activities expanded at the Katanning Research Station:</li> </ul>

	<ul style="list-style-type: none"> <li>- A demonstration site to help landholders adopt carbon farming and emissions reduction strategies.</li> <li>- Genetic research continues at the station to breed more productive animals that emit less greenhouse emissions.</li> <li>• The department's new GreenFeed machines and Portable Accumulation Chambers are measuring methane emitted from livestock to aid greenhouse gas emissions reduction research.</li> <li>• Completed the agricultural component of the WA Government's Sectoral Emissions Reduction Strategy and are now developing a Primary Production Sector Adaptation Plan for 2025.</li> <li>• Published an interactive groundwater map that displays groundwater level trends, groundwater salinity and yield, dryland salinity extent and valley hazard for the south-west agricultural region.</li> <li>• Updated the 2013 groundwater trends and salinity risk assessment, reported in the 2022-23 annual report.</li> </ul>
<b>Build trust in Western Australia's primary production</b>	
<b><i>Strategic Initiatives</i></b>	<b><i>Achievements</i></b>
Provide effective biosecurity emergency preparedness, response, and recovery to minimise the impact of pests and diseases that do occur	<ul style="list-style-type: none"> <li>• DPIRD led a range of responses to biosecurity incursions to protect the state's agricultural production, our environment and communities from damaging pests. This included: <ul style="list-style-type: none"> <li>- Successful eradication of Queensland fruit fly (Qfly) from Bayswater and surrounding areas, which involved regular visits to more than 5,500 properties and testing of about 3,000 fruit samples.</li> <li>- Continued efforts to eradicate the serious declared pest polyphagous shot-hole borer (PSHB) as part of a nationally coordinated and funded biosecurity response. Since August 2021, DPIRD response staff have inspected more than 1.75 million trees on over 60,000 properties as part of the biggest surveillance program in the department's history.</li> </ul> </li> <li>• DPIRD chair the state's Biosecurity Senior Officers Group (comprising DPIRD, the Department of Health, the Department of Biodiversity, Conservation and Attractions (DBCA), Western Australian Local Government Association and Forest Products Commission).</li> <li>• DPIRD chair the WA Gene Technology Interdepartmental Committee (with membership from the Department of Health and DBCA) and represent the WA Government on the national Gene Technology Standing Committee.</li> </ul>

Maintain and improve surveillance and diagnostic capability, biosecurity data and intelligence systems, and appropriate regulatory systems	<ul style="list-style-type: none"> <li>• DPIRD continued its work to ensure WA maintained area freedom from many pests and diseases found in other states and territories.</li> <li>• A total of 54,687 kg of quarantine risk material was surrendered at road and air checkpoints. The service inspected 124,387 lines of imported plant material and machinery, 19,727 interstate livestock consignments, and 809 export consignments. Ninety-five prohibited pests and diseases were prevented from entering the state as a result of these inspection activities.</li> <li>• DPIRD Diagnostic and Laboratory Services conducted 246,990 tests, comprising 98,189 animal and 30,977 plant pathology tests and 117,824 insect identifications, to ensure early diagnosis of exotic or notifiable pests and diseases as well as facilitating market access for our agrifood and seafood industries.</li> <li>• DPIRD Operations and Compliance teams conducted 4,001 land and sea patrols, leading to 83,022 fisher contacts and inspections. Additionally, officers attended 276 locations and carried out 1,614 inspections in relation to animal welfare. A total of 1,646 warnings and 1,455 infringements were issued, with an additional 357 offences being prosecuted across animal welfare, fishing and biosecurity.</li> <li>• DPIRD welcomed 22 new trainee fisheries and marine officers to continue important compliance activities across the fisheries portfolio in 2023-24.</li> </ul>
Use a risk-based approach to ensure the biosecurity system is robust and effective	<ul style="list-style-type: none"> <li>• DPIRD supported an independent panel of experts to complete the first review of the <i>Biosecurity and Agriculture Management Act 2007</i> to ensure WA has the right tools to manage increasing biosecurity risk, and to help future-proofing our biosecurity system.</li> </ul>
Support the development of national industry standards and guidelines	<ul style="list-style-type: none"> <li>• More than 90% of WA's fishery value is from fisheries certified as sustainable by the Marine Stewardship Council (MSC), and the Pearl Oyster fishery was recertified in 2023 across a wider scope that now includes its hatchery component.</li> </ul>
<b>Maintain and build competitiveness</b>	
<b>Strategic Initiatives</b>	<b>Achievements</b>
Applied research to maintain and increase productivity	<ul style="list-style-type: none"> <li>• Built a new \$1.3 million high-tech glasshouse at our Albany site to support agricultural research. The facility has a controlled environment to enable year-round use by scientists across grains, horticulture, entomology and soils research. The fit-for-purpose building with modern equipment allows for collaborative research focused on WA production systems.</li> </ul>



	<ul style="list-style-type: none"> <li>Invested \$2.5 million in a research facility upgrade at the Frank Wise Institute of Tropical Agriculture in Kununurra to support irrigated agriculture and beef production across the Kimberley and Pilbara. This included 4 refitted laboratories that support research across horticulture cropping systems, cotton, grain and fodder production.</li> </ul>
Co-invest and collaborate with industry and other research organisations to ensure primary industries have access to new products, technologies, and systems that are suitable under WA conditions, including under a changing climate	<ul style="list-style-type: none"> <li>Four projects were launched in 2023-24 under WA Agricultural Research Collaboration (WAARC) grains transformation program: <ul style="list-style-type: none"> <li>5-year Lupin Disease Resistance project</li> <li>4-year Harvestable Annual Legume Options initiative</li> <li>3.5-year N-ABLE project investigating ways to maximise legume crop use</li> <li>5-year Wheat Nitrogen Use Efficiency project.</li> </ul> </li> <li>WAARC announced a Postgraduate Research Scholarship Program to inspire the next generation of leading scientists across WA's agriculture and food sector.</li> </ul>
Increase use of online portals and digitised processes to provide a better service to primary industries, consumers and communities and businesses that support our primary industries	<ul style="list-style-type: none"> <li>Upgraded the weather station network in preparation for Telstra's switch to the 4G network, ensuring the popular DPIRD service continued to operate effectively and provide a high-quality, reliable service.</li> <li>A total of 173 DPIRD-run weather stations across WA were transformed from 3G to 4G, in addition to the 19 existing stations already connected to 4G.</li> </ul>
<b>Differentiate, value-add, and diversify primary industries</b>	
<i>Strategic Initiatives</i>	<i>Achievements</i>
Expand value-add agribusiness sector	<ul style="list-style-type: none"> <li>DPIRD facilitated the delivery of AgriFutures evokeAG 2024 in Perth, attracting record attendance of more than 1,800 delegates, bringing together some of the best minds in agriculture to focus on topics such as sustainability, productivity, food security and renewable energy.</li> </ul> <p>Providing an unprecedented opportunity for the state's food and agricultural technology sector to showcase their products, services and innovations and connect with international investors, research bodies and corporate agribusinesses.</p>

Agri-food Cluster Development Program	<ul style="list-style-type: none"> <li>• DPIRD invested \$12.2 million in the establishment of the Sustainable, Innovative Food Technologies Centre located within the Food Innovation Precinct of WA in the Peel Business Park at Nambeelup.</li> </ul> <p>The centre offers the sector a unique opportunity to test and refine products under a common use agreement, before deciding to invest in large-scale operation, commercialisation and equipment.</p>
Develop northern Western Australia irrigation, including in the Ord and Fitzroy Valley to support agricultural development, including cotton and other new industries.	<ul style="list-style-type: none"> <li>• DPIRD collaborated with government agencies, growers and Traditional Owners to diversify the economy and create new job opportunities in the East Kimberley.</li> <li>• DPIRD helped facilitate a development lease for the Knox farmlands near Kununurra to pave the way for the expansion of a sustainable cotton industry.</li> <li>• DPIRD unveiled a \$2.5 million research facility upgrade at the Frank Wise Institute of Tropical Agriculture in Kununurra to support irrigated agriculture and beef production across the Kimberley and Pilbara.</li> </ul>
WA Aquaculture Development Plan	<ul style="list-style-type: none"> <li>• Partnered with One Sea Pty Ltd and the Fisheries Research and Development Corporation on a \$2.7 million project to develop innovative techniques to spawn and grow saucer scallops in a hatchery environment to support stock enhancement of the wild capture fishery, resulting in the successful release of around 5,000 hatchery-reared juvenile scallops off the coast of Rottnest Island in April 2024.</li> <li>• DPIRD's Albany Shellfish Hatchery received a \$3.6 million to upgrade the facility to support the development of the WA shellfish industry and capitalise on increasing market demand for edible oysters, including rock oysters and akoya.</li> </ul>
Aboriginal participation	<ul style="list-style-type: none"> <li>• Launched the Innovate Reconciliation Action Plan for the period January 2024 to December 2025 to guide our department's reconciliation journey by setting out important goals, responsibilities and actions that apply to all staff.</li> <li>• DPIRD continued to coordinate the Aboriginal Pastoral Academy, bringing together Aboriginal training providers with the pastoral industry to build career pathways for young Aboriginal people. 28 graduates from pre-employment training programs were employed on Kimberley and Pilbara cattle stations during the 2023-24 season, with training to expand into the East Kimberley region.</li> </ul>

Secure and grow markets	
<i>Strategic Initiatives</i>	<i>Achievements</i>
Industry growth partnerships	<ul style="list-style-type: none"> <li>• DPIRD worked closely with Wines of WA and 216 industry partners, through the Wine Industry Export Growth Partnership, to increase the value and volume of wine exports.</li> <li>• Following the removal of wine trade tariffs with China in March 2024, the WA government provided a \$500,000 package to help meet the costs of re-engaging with Chinese retailers and distributors.</li> </ul>
Targeted in-market development	<ul style="list-style-type: none"> <li>• Round 4 of the Agrifood and Beverage Voucher Program allowed 58 local businesses to share in \$431,934 of funding with an industry co-contribution of \$726,246 to drive business growth, resilience and sustainability.</li> <li>• DPIRD continued to administer the Royalties for Regions Program, which disbursed \$1.1 billion towards 353 projects in 2023-24 to support economic, business and social development in regional WA.</li> <li>• Round 6 of the Regional Economic Development Grants program allocated \$4.94 million towards 42 locally driven projects to stimulate job creation and economic growth in the regions including across multiple industries. The seventh round was also opened offering \$10 million in funding to support locally driven projects in regional WA.</li> </ul>
Strengthening market access and marketing	<ul style="list-style-type: none"> <li>• Buy West Eat Best (BWEB) celebrated its 15-year milestone in October, making it the nation's longest-running voluntary state-of-origin food labelling program.</li> <li>• BWEB's annual trade event 'Meet the Buyer' featured more than 80 exhibitors showcasing over 530 WA food and beverage products to around 200 prospective buyers, generating positive feedback as well as a raft of commercial transactions.</li> <li>• Assisted WA avocado exports to Thailand, following new trade protocols, via trade missions, customer introductions, retail promotions and exhibitions.</li> <li>• Facilitated avocado exports to India, following the removal of tariffs on the Hass variety under the new Australia-India Economic Cooperation and Trade Agreement.</li> </ul>