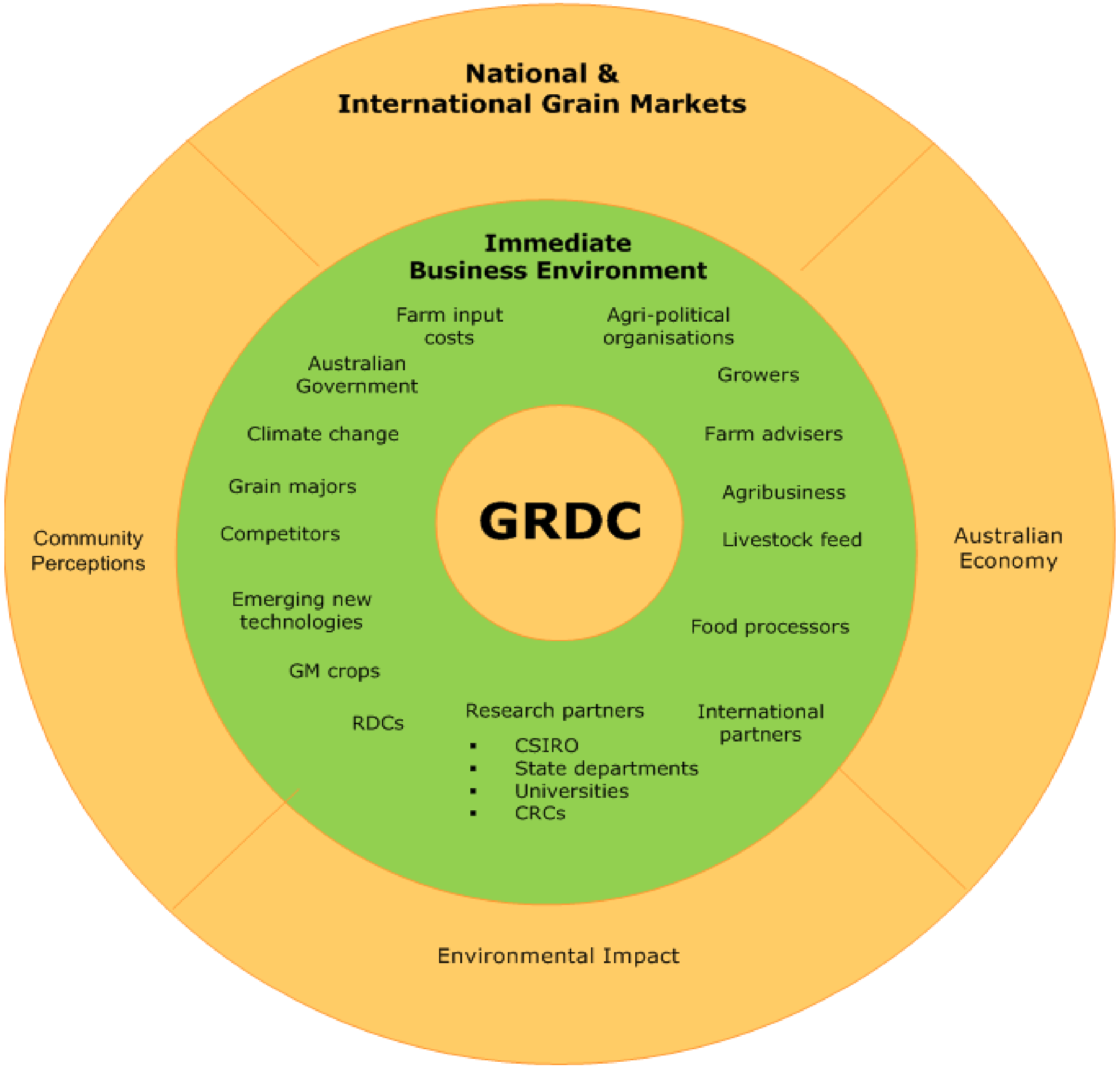
"The Changing Face of Australian Grains Research, Development & Extension"

July 2009

Australian Government
Grains Research and Development Corporation

GRDC Grains Research & Development Corporation

Grains Industry Environment

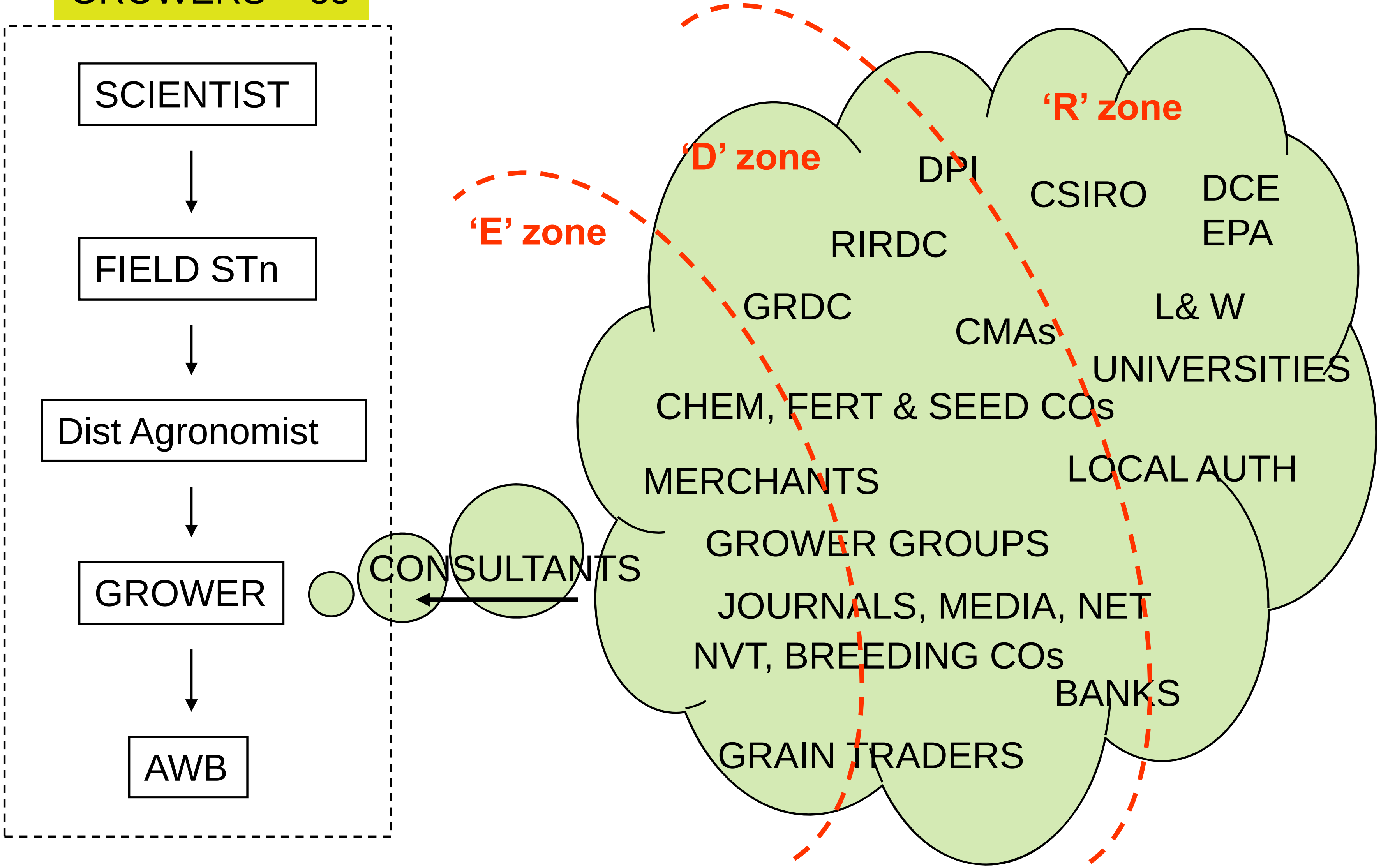


The Grains RD&E world has changed!

Old linear regulated hierarchy

GROWERS > 55

New multi-dimensional deregulated matrix

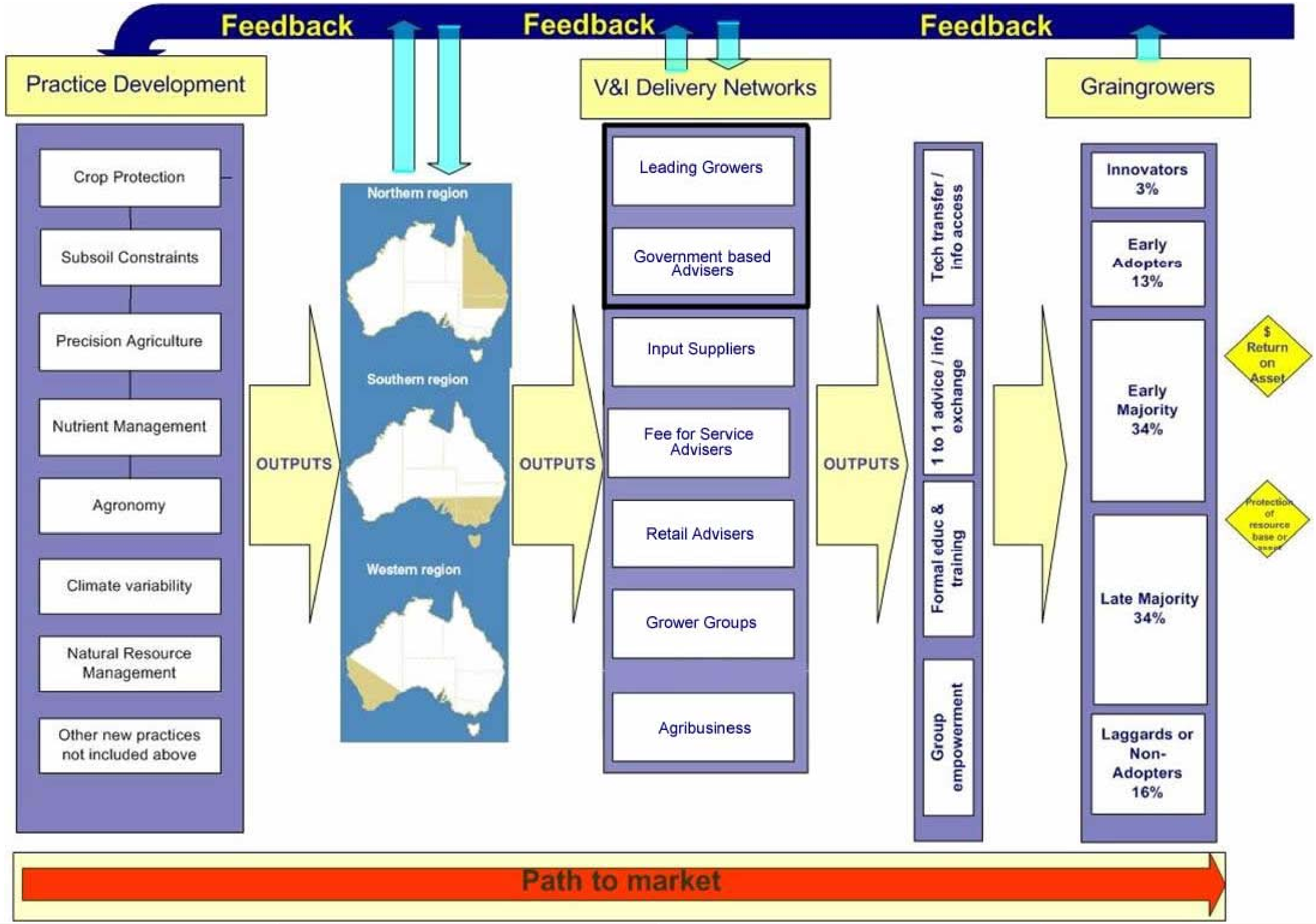


Acknowledgement to Prof P Phillips, UWA, 2009

BRAVE NEW WORLD, GROWERS < 30


ACPFG
Molecular Plant Breeding CRC
CSIRO
HEXIMA
Dow AgroSciences
PIONEER
A DuPont Business
MONSANTO
BASF
The Chemical Company
Bayer CropScience
Limagrain
Céréales Ingrédients
Arcadia
Biosciences

Practices core activities



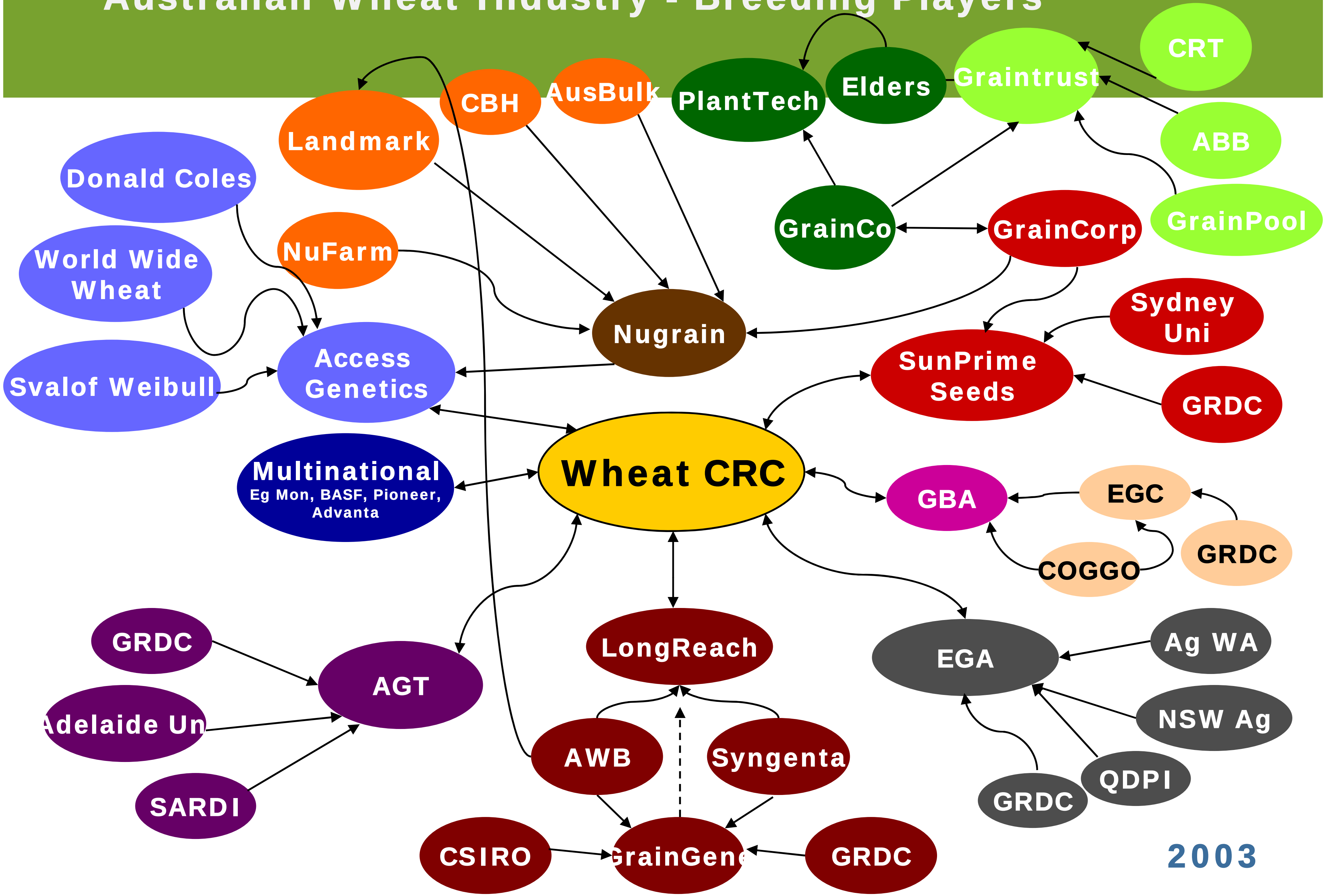
Why did the Grains RD&E world have to change?

- ↑ pressure on State agriculture departments budgets
- Industry good versus public good/market failure/NRM
- Global trends on public R&D investments in developed countries
- ↑ acceptance of national approach to R D & E (PISC process)
- GRDC strategy
- Growth of private industry involvement (consultants, input suppliers etc)
- Long term future of the RDC model
- The potential of bio-technology in the grains industry

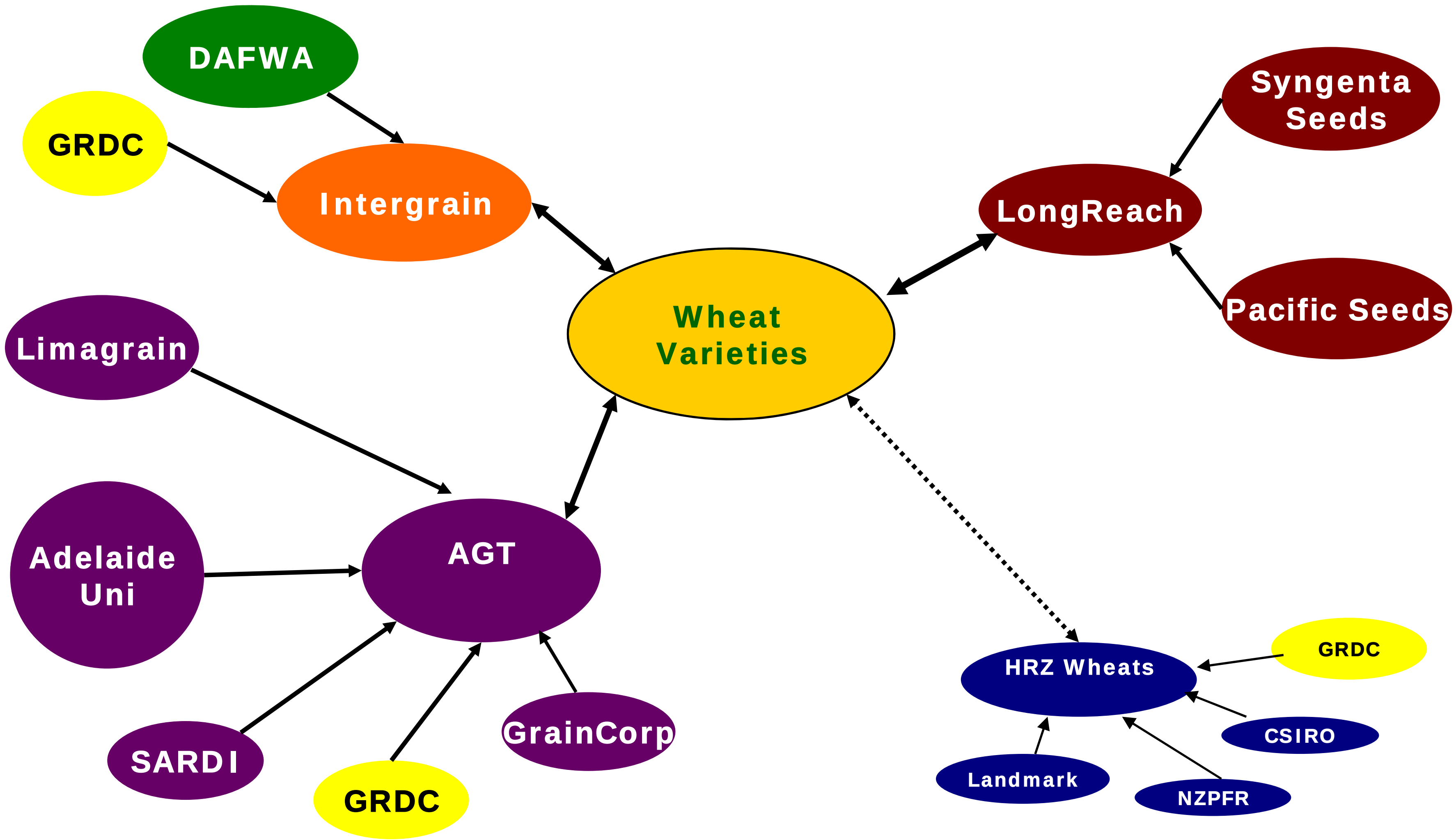
"Current State of Turbulence"

- Stakeholder Confusion
  - Growers
  - Researchers
- Skill levels/staff retention/capacity shortages
- RD&E partner strategies
- Private investment suspicion
- Path to market for bio-technology

Australian Wheat Industry - Breeding Players

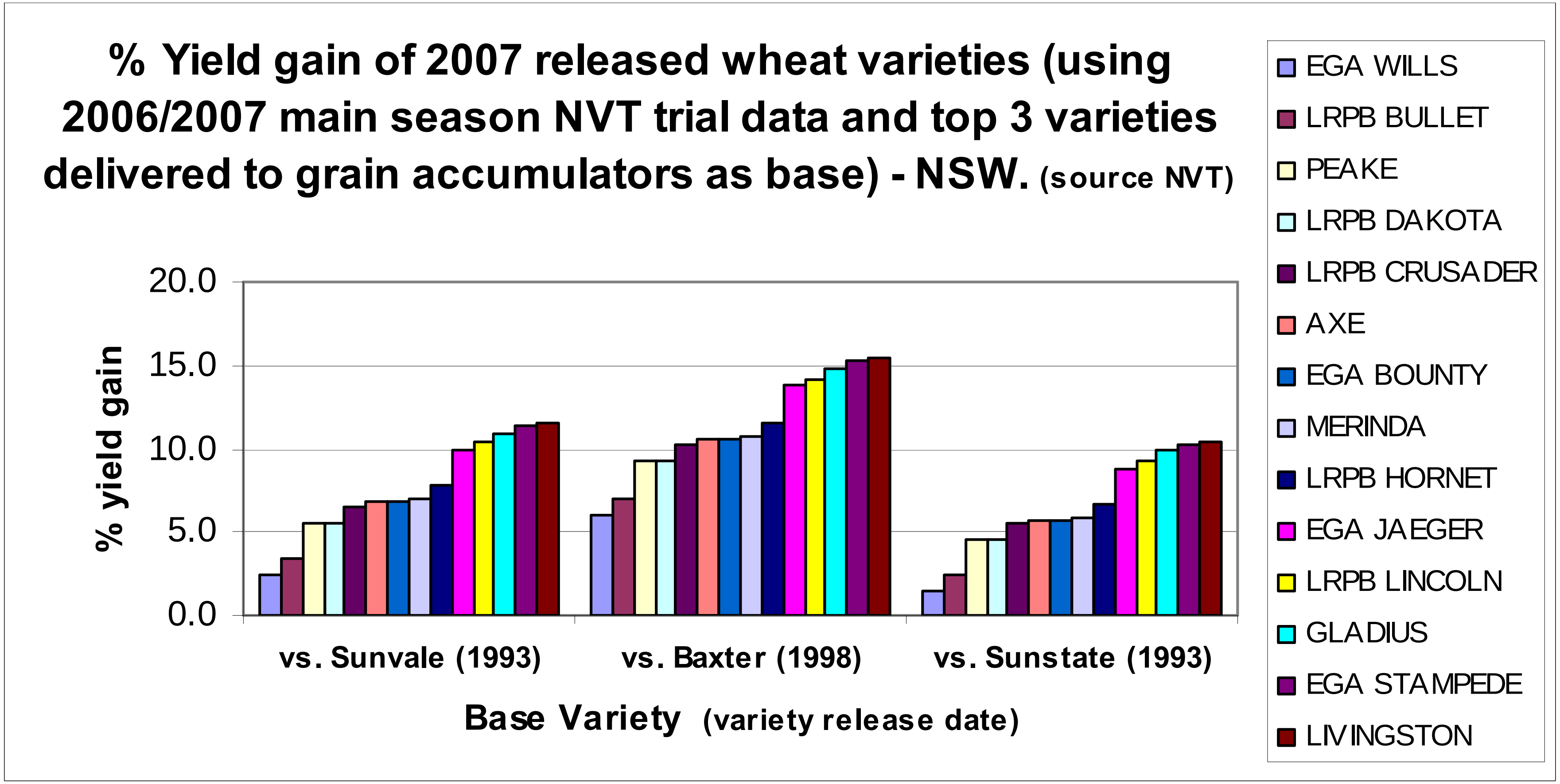


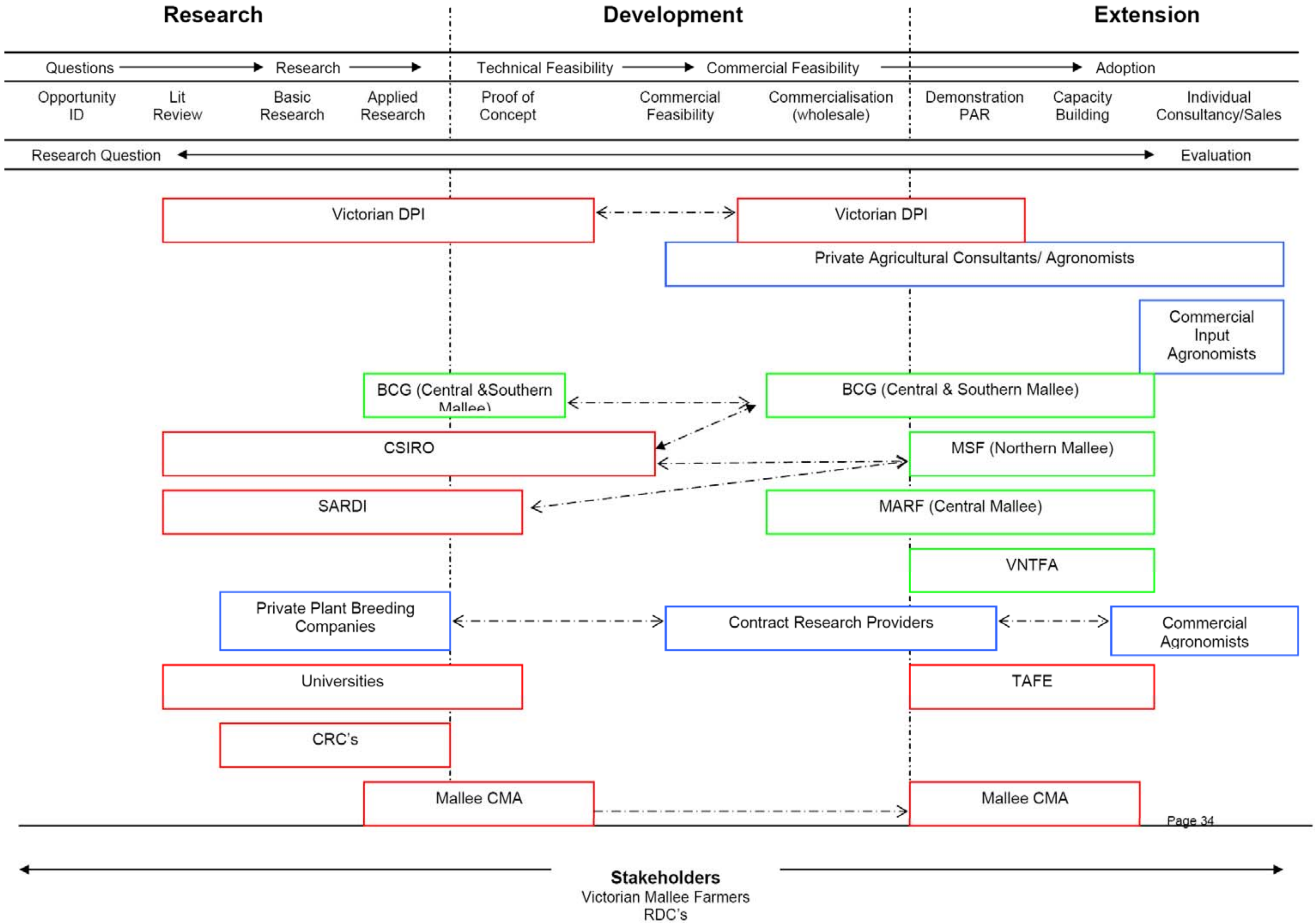
Australian Wheat Industry Breeding Players



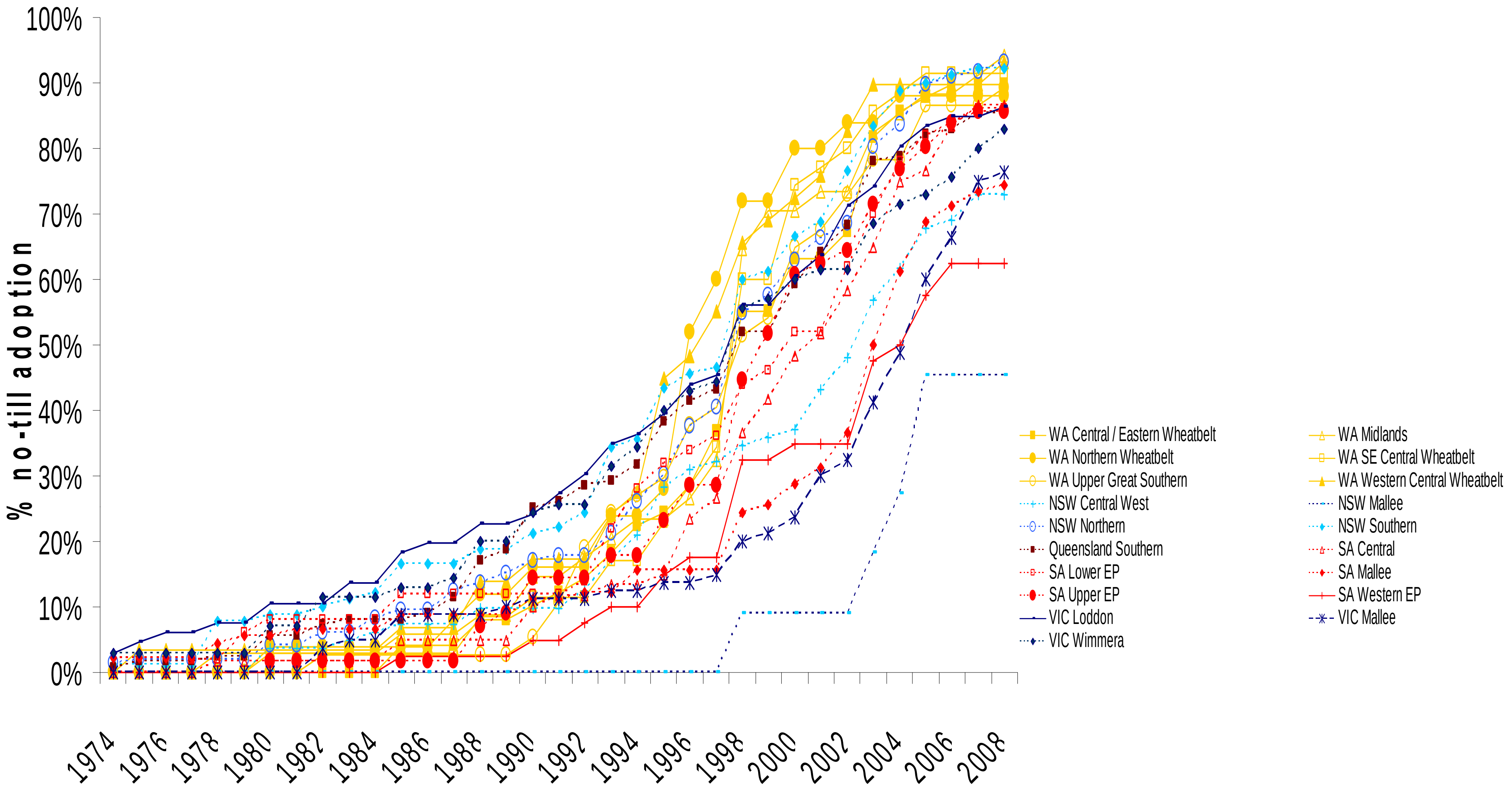
2009

National Variety Trials – yield NSW

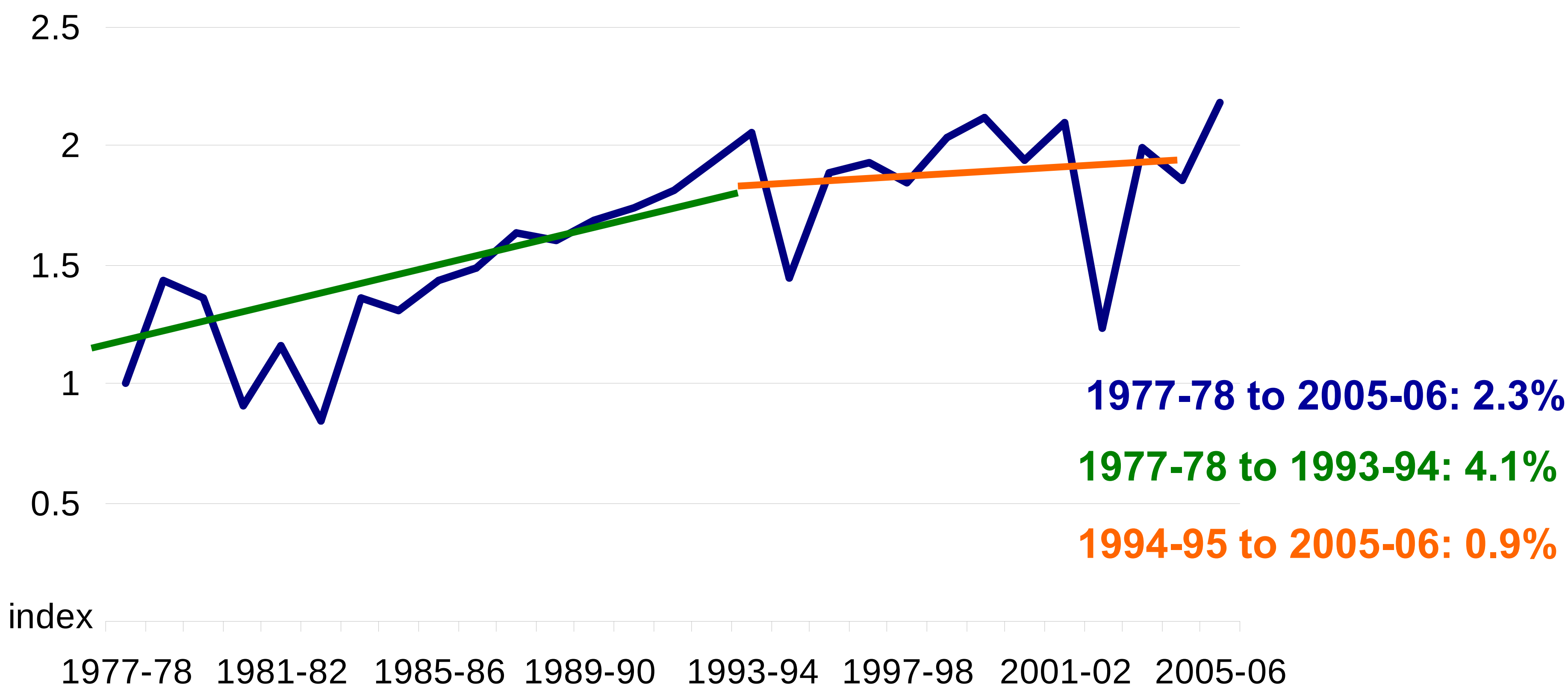



Research
Development
Extension
Questions
Research
Technical Feasibility
Commercial Feasibility
Adoption
Opportunity ID
Lit Review
Basic Research
Applied Research
Proof of Concept
Commercial Feasibility
Commercialisation (wholesale)
Demonstration PAR
Capacity Building
Individual Consultancy/Sales
Research Question
Evaluation
Victorian DPI
Victorian DPI
Private Agricultural Consultants/ Agronomists
Commercial Input Agronomists
BCG (Central &Southern Mallee)
BCG (Central & Southern Mallee)
CSIRO
MSF (Northern Mallee)
SARDI
MARF (Central Mallee)
VNTFA
Private Plant Breeding Companies
Contract Research Providers
Commercial Agronomists
Universities
TAFE
CRC's
Mallee CMA
Mallee CMA
Stakeholders
Victorian Mallee Farmers
RDC's

No-till adoption across a diverse range of districts



Cropping Sector Productivity Growth



Suspected Factors for Decline

- Severe drought years
- Reduced crop inputs
- Lack of new “near market” technologies
- Delays in introduction of GM technologies
- Farm management
- Public reduced R&D funding on Total Factor Productivity

↓

Major Initiative with ABARE

GRDC Strategic Drivers

- Continue to fully implement current “lines of business strategies”
- Increase speed of development and adoption of existing technologies:
  - Plant breeding
  - Validation and extension
- Remove ‘shackles’ from biotechnology path to market
- Increase leadership in climate change
- Increased focus on Impact Assessment
- Drive grains sector National RD&E Strategy including national portfolio balance
- Increase ‘BOP’ on business processes and enabling functions
- Increase effective communication to stakeholders


JUST DO IT!