



CULTIVATING THE GRAIN INDUSTRY WORKFORCE OF THE FUTURE

The purpose of this report is to illustrate the value of vibrant regional communities to Australia's economic prosperity, and to identify the workforce gaps that are holding back the grain industry. This report delves into the current constraints and future solutions to attract and retain a world leading grain industry workforce, providing recommendations for government and industry.

This report is informed by GrainGrowers' Annual Policy Survey 2024 as well as other internal and external research conducted by GrainGrowers.

Harvesting Gold - Charlotte Peakall (WA)


About GrainGrowers


GrainGrowers is a national organisation working to enhance the profitability and sustainability of Australian grain farmers. This is achieved through policy and advocacy, grower engagement, thought leadership and active investment in future focused activities for all growers. Australian growers are at the heart of all that GrainGrowers does.


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
 Level 19, 1 Market Street
Sydney NSW 2000


 PO Box Q1355 Queen
Victoria Building NSW 1230


 (02) 9286 2000


 www.graingrowers.com.au

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Sorghum Harvest - Janet Dampney (NSW)

CONTENTS

- Executive Summary**.....4
- Recommendations 5
- Where do Australian grain farm workers come from?**6
- The grain farm workforce** 8
- Rethinking the regional workforce in a changing regional Australia**..... 9
- Defining regional Australia 9
- Changing trends in rural, regional and remote Australia 9
- Key Challenge and recommendations**.....11
- Data constraints 11
- Employers of Choice12
- Migration13
- Skills and Training14
- Hidden Workers 15
- Regionalisation16
- Summary**.....17

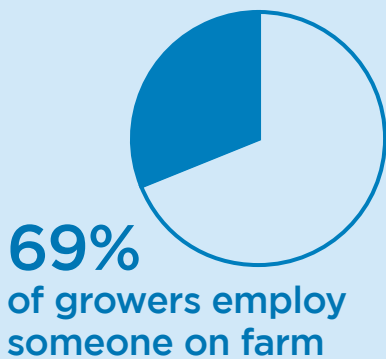


Fields of gold - Kasie Guest (WA)

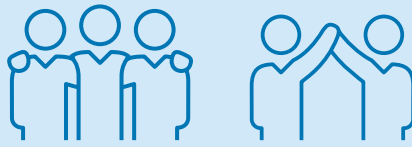
EXECUTIVE SUMMARY

Experienced farm workers are a critical resource within grain farming systems. Without the skills and expertise of these workers, improvements to productivity and innovation will be difficult to achieve. Beyond the farmgate, grain farm workers and their families are an important element of rural communities and local economies. Through [GrainGrowers' Annual Policy Survey](#), growers have repeatedly voiced challenges with the attraction and retention of qualified staff.

Snapshot



***Farms larger than 3000ha were significantly more likely to have employees on-farm.**



The average grower employs 3 full-time employees and 2 part-time

***Farms smaller than 1000ha were more likely to have employees working part-time hours (less than 38 hours per week).**



31% were looking to fill roles on their farm in the past 12-months

***There was greater demand (45%) to fill roles from those with farm sizes greater than 3000ha.**

Source: GrainGrowers Annual Policy Survey 2024

Regional Australia has experienced decades of shifting demographics which have impacted the rural workforce as working-aged people moved to urban centres. This trend has increased the difficulty of attracting and retaining skilled workers for many rural communities and industries. However, following COVID-19 there has been a steady reversal in population movement patterns. Higher costs of living, a lack of affordable housing in urban centres and the establishment of remote work and alternative job opportunities are drawing young families and skilled professionals back to regional areas. This change presents a unique opportunity for the grain industry to improve its current workforce attraction and retention strategies and make it easier for the industry, growers themselves and their communities to find the skilled workers they need.

Both industry and government have critical roles to play to improve growth and productivity. Targeted policies that address workforce data constraints, streamlined migration pathways, and an improvement of regional skills diversity and coordination across states and territories will help ensure that grain growers can access the labour force they need. Encouraging employment-related 'best practice' within the grain industry will further strengthen its appeal to prospective workers. By embracing inclusive recruitment strategies that engage underrepresented groups (referred to as "hidden workers"), and by investing in regional liveability, the grain industry can develop a workforce more resilient to external shocks.

EXECUTIVE SUMMARY

The Australian grain industry contributes over \$22 billion annually to the national economy and is vital to regional prosperity. However, acute workforce shortages, particularly in skilled and seasonal roles, threaten this growth. Government and industry have a unique opportunity to create meaningful change for grain farming communities, and with appropriate policy settings, rural Australia can remain a powerhouse of the Australian economy.

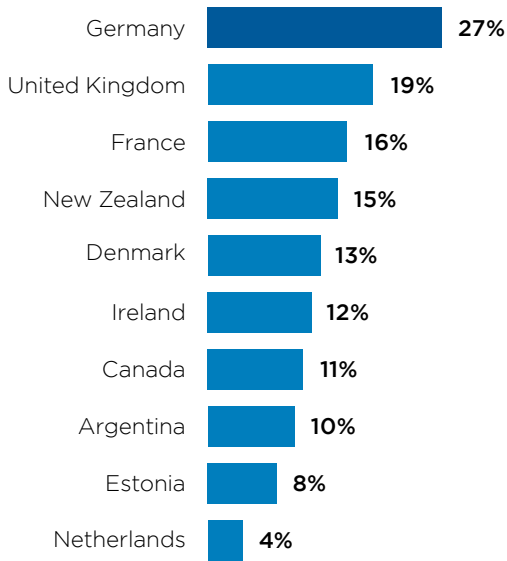
Recommendations

- Improve industry-wide data collection to identify skills gaps and workforce shortages in the grain industry.
- Support grain growers in becoming Employers of Choice.
- Co-design migration programs to align with grain industry seasonal needs and explore partnerships with source countries for skilled workers.
- Promote relevant visa pathways to potential overseas workers.
- Map the supply and demand of grain industry skills to guide coordinated training.
- Identify and promote upskilling pathways for 'hidden workers' in the grain industry.
- Invest in regional communities with infrastructure and services to support long-term settlement of skilled workers.

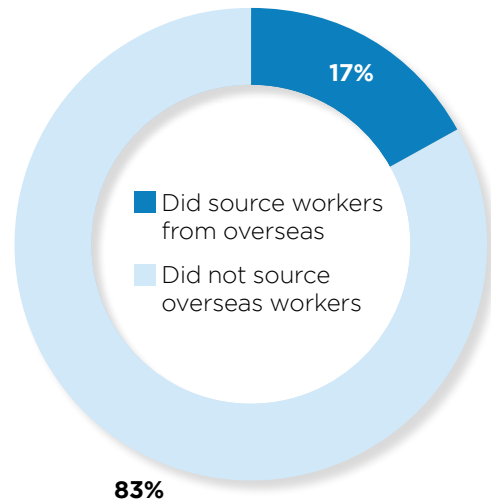


Last minutes before the sun drops behind the mountain - Krystal Muller (QLD)

Top 10 countries of origin for overseas grain farm workers



% of grower respondents who sourced workers from overseas*



Source: GrainGrowers Annual Policy Survey 2024

*In the 12 months to March 2024

However, accessing skilled international workers is often difficult due to complicated application pathways, processes, costs and timelines that act as a deterrent for potential employees, and create uncertainties that make workforce planning difficult for grain growers.

While an important part of Australian migration policy, skilled regional migration remains a fraction of total Australian migration. States and Territories that have existing larger capital cities have a significantly imbalanced proportion of regional migration compared to total migration, meaning that highly skilled migrant workers are even less likely to settle in the regions and further contributing to urbanisation .

% Regional from total Migration in 2023-24

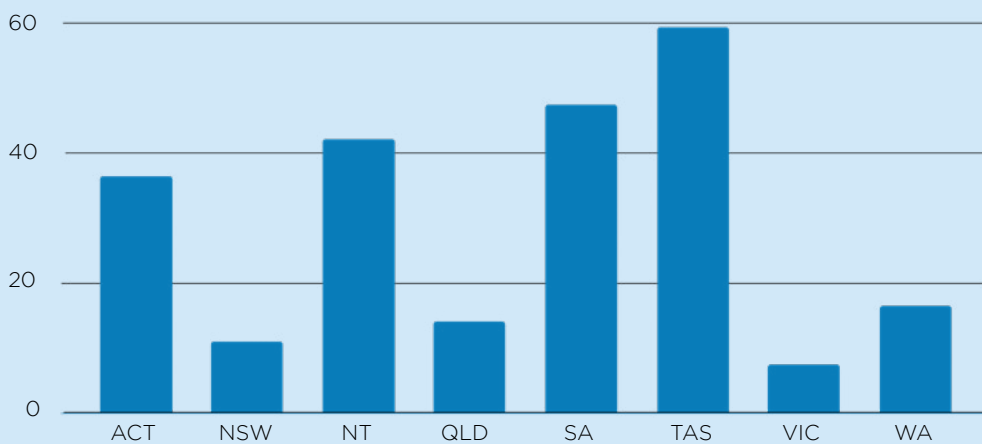


Figure 1. Proportion of regional migration from total skilled migration to Australia in 2023-24 (Department of Home Affairs 2024)

THE GRAIN FARM WORKFORCE

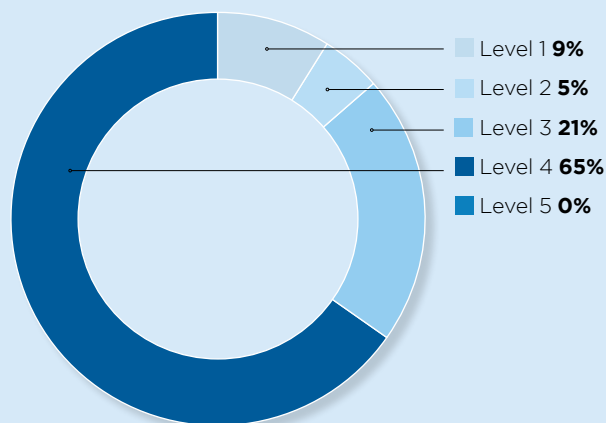
The grain industry relies on a stable supply of skilled workers throughout the growing season, with significant spikes in labour demand around planting and harvest. Workforce roles within the grain industry can be found both on-farm and off-farm.

Job roles within the farm business ecosystem are variable both in terms of tasks undertaken as well as associated skill levels. Grain farms are by vast majority family farms, on average employing five workers including the owner manager and contributing family members⁷. Employees external to the farming family are sourced from the local community or are transient workers typically employed on a seasonal or nonongoing/casual basis. In GrainGrowers' Annual Policy Survey 2024, growers indicated they encountered significant difficulties in successfully filling the onfarm positions they advertised for.

Over the 12 months to March 2024, the top job roles growers advertised for included Farm Workers, Tractor/Harvester Operators, Truck Drivers, Senior Farm Workers, Chemical Spray Operators and Farm Managers. While in lesser demand, growers advertised for a multitude of other occupations such as diesel mechanics, bookkeepers and cooks, an indication of the diversity of job roles and skills found within modern grain farming businesses.

With potential employees in short supply across most grain growing regions, growers increasingly need to develop innovative methods to attract and retain prospective workers and their families within their businesses and communities, and commonly offer benefits additional to remuneration such as housing, vehicle and/or other allowances. A pilot survey conducted by GrainGrowers has highlighted typical wages and allowances for key roles in grain farming.

Proportion of ANZSCO Skill Level for advertised roles



Proportion of ABS grouping for advertised roles

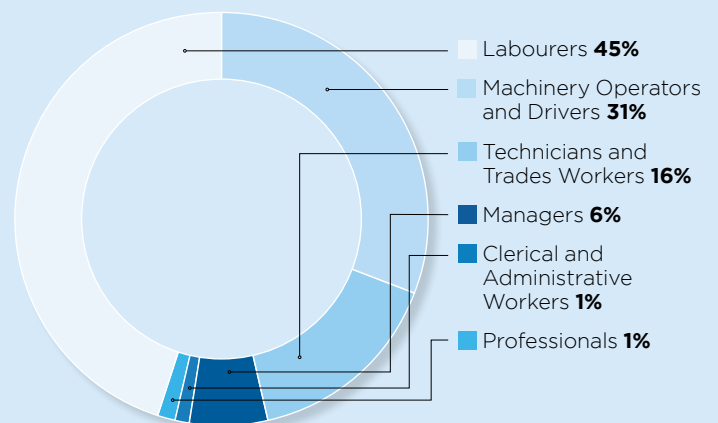


Figure 2. The mix of roles sought by grain growers sorted by corresponding skill level and occupation group (GrainGrowers Annual Policy Survey 2024).

RETHINKING THE REGIONAL WORKFORCE IN A CHANGING REGIONAL AUSTRALIA

Defining regional Australia


To effectively approach regional challenges, inconsistent definitions of what makes up regional Australia must be addressed. These inconsistencies have significant implications for policy and program implementation in rural Australia. For the purposes of policy development and alignment with government practice, the Regional Australia Institute (RAI) defines rural and regional Australia as the towns, cities and areas outside Australia's largest population centres (Sydney, Melbourne, Canberra, Brisbane, Perth, Adelaide)⁸, covering the majority of Australian landmass. However, under current policy settings there is misalignment in postcode designations as being regional or not, leading to disparity in the rollout of government programs (including for migration) and initiatives aimed at supporting regional communities (such as disaster relief).

Changing trends in rural, regional and remote Australia

Regional Australia can offer a unique and appealing lifestyle to those living in metropolitan areas as well as those seeking to migrate, live and work in Australia. In addition, median incomes

for those working in rural, regional and remote Australia are often higher than those in major centres after considering living costs such as housing⁹. However, a historical lack of coordinated action and strategy focused on the long-term growth of regional communities has led to skewed and uneven migratory patterns, which in turn has led to the creation of significant constraints for regional communities.

While large in acreage, rural and regional Australia only accounts for a combined 32.5%¹⁰ of Australia's population, and the majority of that rural population resides in civic centres associated with Australia's coastal regions. A lack of holistic effort from governments to reverse sustained urbanisation over recent decades has contributed to the population imbalance between urban and rural populations, and the majority of Australians now reside and work in the few urban capitals across the country¹¹. Today, Sydney and Melbourne alone are estimated to account for 42 per cent of Australia's total economic output¹². These urbanisation trends have varied across the country, with some rural centres and specific regions across Australia recording significant growth alongside major city centres. However, this growth has tended to occur at the expense of regional townships further inland from the coast¹³.



Chickpea dust on last light - Krystal Muller (QLD)

Total Population

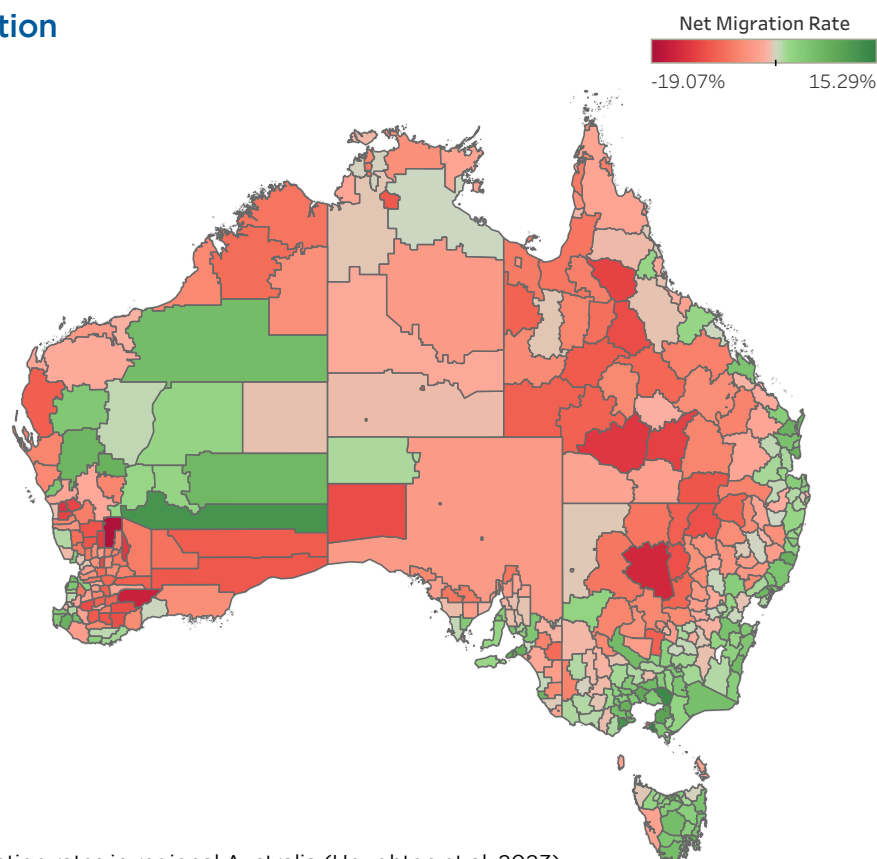


Figure 3. Net migration rates in regional Australia (Houghton et al. 2023)

Low population density in the regions leads to a lack of available workers and skills diversity, which can prevent regions from reaching their full economic potential. This skills deficit is evident in the acute job shortages and record low unemployment observed across rural Australia¹⁴, and creates further complications for regional communities seeking to grow their skilled labour base through the emergence of cascading issues such as a lack of housing and infrastructure suited to a growing economy. Deficits in skilled labour vary by region, for example skilled labour shortages within the grain industry may be greater in regions where competition for labour with the mining sector occurs¹⁵.

Despite this backdrop, shifting migration trends and a renewed interest in regional life by the broader public present an opportunity to reinvigorate the grain industry workforce.

To effectively eliminate these issues and to capitalise on the opportunities that arise, targeted policies that address barriers to settlement, such as access to housing and essential services, and difficulties in navigating migration pathways, are required. Improving liveability in grain growing regions alongside coordinated skills development and mobility will help ensure that regional Australia remains attractive to the skilled workers essential for the future of the grain industry.

Australian grain farms employ and rely upon a diverse range of skills and occupations to grow and deliver grain to market. With increasing use of sophisticated technology and associated machinery on farm, growers also increasingly rely on novel and often niche skillsets. Developing a strong skills-base upon which the grain industry can thrive requires united effort between government, community and industry.



KEY CHALLENGES AND RECOMMENDATIONS

Data constraints

Challenge:

As noted by ABARES¹⁶, there are significant gaps surrounding agricultural workforce data that can cause adverse outcomes when attempting to predict current and future labour demand. In its People and Capability Workforce Policy, GrainGrowers has sought to highlight the need for improved data collection to inform a better understanding of the grain industry workforce and its needs as a key priority. Eliminating these data gaps is a complex task and will require concerted effort from all stakeholders involved.

Recommendation:

Industry-wide data collection needs to be improved to better understand the current grain industry workforce and clearly identify skills gaps and worker shortages.

Potential benefits:

By clearly identifying current grain industry workforce capacity and skills gaps, policymakers can create targeted policies that facilitate the growth and improvement of grain industry workforce capabilities in anticipation of future industry needs. A clearer understanding of workforce fluctuations throughout the growing

season, tracking the countries overseas grain farm workers are travelling from alongside visa pathways utilised, and mapping the skills environment grain farming businesses operate in are all important components of addressing current employment data gaps for the grain industry.

Employers of Choice

Challenge:

An Employer of Choice is a business that people are eager to work for and stay with because it offers a work environment and conditions that suit their lifestyle. Employers of Choice have the capacity to outcompete other employers in tight employment markets as workers consider them to offer arrangements better tailored to their needs.

Employees are motivated by more than just wages¹⁷. Economic uncertainty and a changing working culture that is more flexible to the needs of individuals and their circumstances means that work-life balance and professional workplace processes are basic expectations of modern workers.

While most Australians believe that rural industries offer meaningful career pathways and an attractive lifestyle, significant misconceptions surrounding the farm business environment remain among the general public¹⁸. There are opportunities for further industry action to understand the expectations and needs of potential employees, and challenging community perceptions to attract new participants to the grain industry.

Recommendation:

Both industry and government need to support grain growers in becoming Employers of Choice.

Potential benefits:

Industry has a leading role in addressing misconceptions by promoting success stories to the broader public and supporting growers in adopting on-farm practices that enhance their continued development as Employers of Choice.

Government must also remain actively involved in the development of the rural workforce by ensuring access to purpose-built education and training programs for employers and employees on both 'soft' and 'hard' business skills. By minimising the regulatory burden placed on small farming businesses, employers can instead invest that time in innovations to their human

resourcing activities, which can facilitate the organic improvement of standardised recruitment practices across the sector.

By supporting grain growers to become employers of choice and by promoting the credentials of the grain industry, there is opportunity for the sector to become more competitive in the attraction of quality workers. Improving the worker experience in rural Australia can create communities that are more attractive to young working-age families.



Golden hour over the lupins - Chlesea Gordon (NSW)

Migration

Challenge:

Skilled migrants make immense contributions to Australia's productivity^{19 20} and deliver a significant boost to innovation²¹. As identified in GrainGrowers' Annual Policy Survey 2024, skilled international workers are a significant piece to the grain industry workforce puzzle. Grain growers have indicated that programs such as the Pacific Australia Labour Mobility (PALM) Scheme are not suitable to the grain industry due to significant mismatch in skill levels. Growers are more likely to employ overseas workers entering Australia via visa pathways that allow for greater flexibility for both employers and employees during periods of highly elastic labour demand (such as harvest).

Additionally, visas better tailored to the seasonal flexibility required have enabled employers to access workers with the skillsets suited for grain farm work, who are familiar with the technology and equipment used. However, accessing skilled international workers is often difficult due to complicated, costly and lengthy application processes for both employer and employee, and pathways to permanency for those skilled migrants and their families often remain unclear.

The recent Review of Australia's Migration System²² noted that Australian migration settings are in need of significant holistic reform. To ensure better outcomes related to the settlement of regional migrants, place-based (rather than sector-based) approaches to regional migration have been identified as opportunities to ensure skilled overseas workers can fulfil regional skills gaps²³.

Recommendation 1:

The grain industry and government need to co-develop migration programs better tailored to industry seasonal requirements. Partnerships with countries that offer potential sources of appropriately skilled workers for the grain industry should be explored.

Recommendation 2:

Government and industry should cooperate on the promotion of visa pathways relevant to potential overseas workers that want to work in the grain industry.

Potential benefits:

GrainGrowers' Annual Policy Survey 2024 highlighted a diverse variety of countries growers source overseas workers from. There are opportunities to develop worker mobility partnerships with other nations to facilitate the movement of skilled grain farm workers. By

clarifying these pathways to entry for foreign workers, government and industry can improve the attractiveness for skilled overseas workers and develop pathways to permanency better suited to growing regional communities.



Aerial drone view of header and chaser - Lina Varone (WA)

Skills and Training

Challenge:

Grain growers have indicated that there is a general lack of skilled workers across the industry, which is related to geography and proximity to major population centres or other competing industries such as mining. This is further complicated by changing demands for skills in our industry, the complex operational environment of agricultural businesses and a volatile seasonal labour demand. There is a strong need to better understand the actual skills requirements of on-farm roles and how they are forecast to change. A systemic lack of coordination within the Tertiary Education sector has further hampered a national response to training.

Recommendation:

The supply and demand of skills in the grain industry should be mapped to provide guidance toward the coordination and harmonisation of training delivery to the National Skills Plan.

Potential benefits:

Training should be coordinated across jurisdictions to ensure better outcomes for workers seeking employment across States and Territories, and to provide trainees with skills better suited to the Australian grain sector. Harmonisation of skills

assessments, recognition of qualifications and prior experience, and licensing requirements can lead to reduced red tape for small business and improved job mobility for workers in areas of low economic diversity.



Wheat Posy - Philip Down (VIC)

Hidden Workers

Challenge:

Diversity in the workplace has been identified as a key workforce challenge for the grain industry²⁴. The ABS indicates that two thirds of Australian grain farms are typically non-employing and are operated solely by the farmer-owner and their family²⁵. Historically there has been a limited external workforce employed within broadacre grain businesses, which has been driving the need for action within the industry to improve practises and develop strategies to promote access to skills and a more diverse labour force.

Increasing trends of farm consolidation and corporatisation within the industry are further driving the need for strategies to identify and attract new employees to the industry. Additionally, with unemployment rates reaching record lows and as the pool of available working-age employees reaches depletion in regional communities, employers seeking to fill labour gaps are increasingly investigating potential pathways to employment for 'hidden workers' (workers who experience discouragement when their efforts to seek employment consistently fail due to hiring processes that focus on credentials over capabilities)²⁶. Around 1.9 million Australians have been identified as potential workers – those who are not currently employed but want to work²⁷.

Community groups who are commonly recognised as components of the 'hidden workforce' include²⁸:

- Women
- Aboriginal people
- People with disabilities
- Neurodivergent people
- Carers
- Semi-retired people
- Relocating spouses and partners

Engaging 'hidden workers' represents a considerable opportunity for the Australian economy²⁹. It is in the best interest of any community that government and industry closely cooperate on the identification of potential pathways to employment for 'hidden workers' and the development of relevant initiatives to encourage the workforce participation of marginalised cohorts.

Recommendation:

The grain industry along with community groups and training providers should explore, identify and promote pathways for 'hidden workers' to be upskilled and engaged.

Potential benefits:

Workers from non-traditional backgrounds represent a potential source of workers that have not necessarily been effectively engaged in the grain industry in the past. By identifying nuanced constraints to workforce engagement

for those cohorts, we can create a safe and flexible workplace environment that allows for the inclusion of non-traditional workers to fill critical labour gaps whilst ensuring better outcomes for marginalised groups.

Regionalisation

Challenge:

Regional liveability has a large impact on accessing and retaining grain farm workers and leads to broader community perceptions that the grain industry is too difficult to enter³⁰. The distance from many city-based services, combined with a lack of infrastructure, housing and other amenities necessary to provide competitive opportunities for young working families, inhibits the sustainable growth of the working population in small towns, leading to difficulties with attracting and retaining grain farm workers³¹.

Recommendation:

Regional communities need to be empowered with tools, services and infrastructure to incentivise the long-term settlement of skilled workers in regional Australia. This support includes urban planning and the development of infrastructure such as housing and essential services.

Potential benefits:

Initiatives that incentivise and support the growth of regional communities should be prioritised. Issues such as a lack of regional housing and lack

of schooling, medical and telecommunications serviceability are barriers toward the sustainable growth of regional communities.



Still night - Carla Crossley (NSW)

SUMMARY

The Australian grain industry workforce is a powerhouse of regional productivity, with a diverse array of skills required to respond to the challenging work taking place on grain farms. However, significant challenges in attracting and retaining skilled workers to grain growing communities continue to persist, and are compounded by inconsistent policy settings, a complicated migration system and a lack of coordinated skills development tailored to the needs of regional Australia.

This report has sought to outline challenges surrounding the attraction and retention of the grain industry workforce and the opportunities generated by changing regional demographics. It also highlights how key constraints such as limited

housing availability and deteriorating regional liveability are impacting regional communities. The report draws upon GrainGrowers' Annual Policy Survey 2024, industry research, and national workforce data, to highlight opportunities for improvement through a series of brief recommendations for government and industry to consider as they develop policy, projects and other initiatives aimed at creating better outcomes in this space.

Targeted and place-based solutions are essential to appropriately respond to the workforce needs of grain farm businesses and to ensure regional communities are adequately equipped to prosper into the future.



Pretty in Yellow - Chelsea Gordon (NSW)

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Dry Sowing - Damien Sommerville (SA)



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