



Australian Government



Jobs and Skills Australia

Food Supply Chain Capacity Study

Terms of Reference

Overview

The Australian Government has commissioned Jobs and Skills Australia (JSA) to undertake an independent capacity study on the workforce needs of Australia's food supply chain. The study will provide critical evidence, insights and recommendations to support workforce planning, policy development and program design.

JSA will focus its efforts on addressing evidence gaps in priority areas by complimenting the existing work of Jobs and Skills Councils, the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES), industry and others. The study will consider challenges and opportunities that sit across the food production, manufacturing and distribution workforce (see [Attachment A](#)).

The study's research and advice will be consistent with JSA's broader legislative remit, including a particular focus on priority cohorts (such as First Nations Australians and people with disability), gender equality, insecure work and regional Australia. In the study's final report JSA may identify workforce issues which require further research but sit outside the scope, remit or timing of this particular study.

JSA will deliver a final report to Government by September 2024 and publish it shortly thereafter.

Governance and consultation

This study will be underpinned by close consultation and collaboration with state and territory governments and industry stakeholders, including peak bodies, employers, unions, universities, and training providers. JSA will also work closely with Jobs and Skills Councils.

JSA will leverage existing governance arrangements, including the Agricultural Workforce Forum and Agriculture Senior Officials Committee, and provide opportunities for stakeholders to contribute to the study through public submissions and forums.

JSA will regularly brief the Australian Minister for Skills and Training, Minister for Employment and Workplace Relations, and Minister for Agriculture, Fisheries and Forestry on the study's progress.

Scope

This study will support the development of a sustainable and resilient food supply chain workforce that:

- maintains our position as a major producer of quality food
- minimises disruptions to domestic food security
- provides safe, secure and rewarding employment opportunities across Australia
- has the skills needed to enable industry growth and greater diversification, value-adding and productivity

As part of the study JSA will:

1. Map Australia's workforce across food production, manufacturing and distribution, including identifying critical occupations and the pathways into them.
2. Explore the flows into and out of this workforce, including between regions and with other sectors of the economy.
3. Examine factors that influence the demand and supply of workers and managers, including:
 - a. attraction, retention and job quality
 - b. market volatility, seasonality and climate
 - c. business conditions and structures
 - d. regulation, safety and security
 - e. access to and availability of housing, infrastructure and services
 - f. broader population, economic and labour market trends, especially in regional Australia
4. Identify opportunities to increase the participation, retention and career progression of workers across the food supply chain by drawing on domestic and international successes.
5. Explore the education and training barriers faced by students, employers and providers, particularly in thin markets. Consider innovative delivery models to improve access to and relevance of education and training.
6. Explore the impact of technology and productivity on the size, composition and future skills needs of this workforce and emerging industries.
7. Consider the relative contribution of temporary and permanent migration and how this has changed over time. Explore opportunities to build on recent reforms, including the Migration Strategy and Pacific Australia Labour Mobility (PALM) scheme, to ensure this pipeline is able to address genuine shortages while preventing migrant exploitation and the displacement of Australian workers with similar skills
8. Work with the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES), relevant Jobs and Skills Councils and other data holders to develop a workforce monitoring plan for the food supply chain. This includes identifying significant data gaps and opportunities to bridge them in partnership with industry.

The study will not measure the financial, social or environmental impact of workforce constraints as these issues sit outside of JSA's remit.

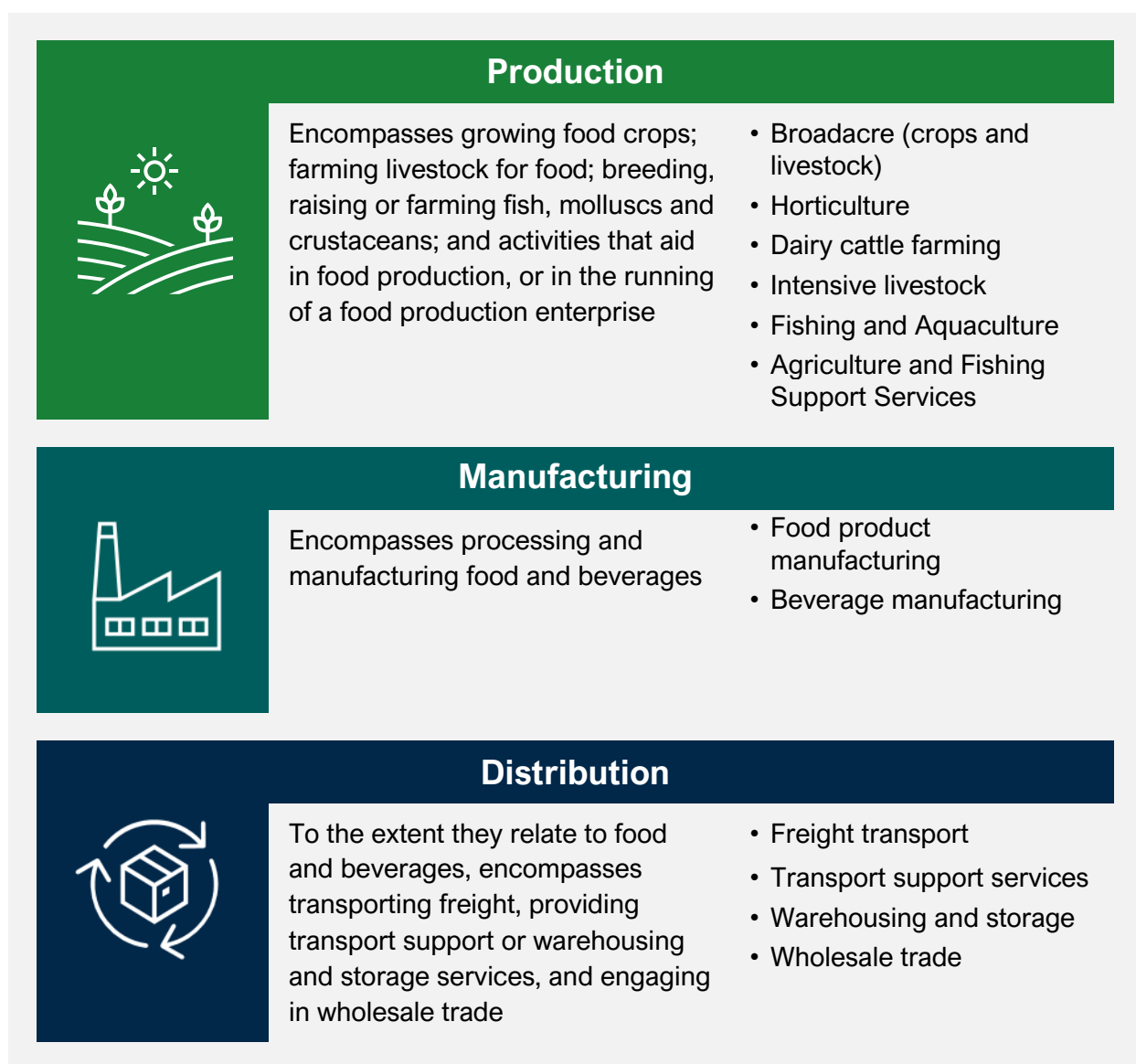
Attachment A. The Food Supply Chain

Australia has an extensive food supply chain that is truly ‘end to end’: from pre-production activities like fertiliser manufacturing all the way to food services and retail. This is an extensive supply chain that employs hundreds of thousands of Australians and provides high quality food worldwide.

While there are many activities vital to the food supply chain, the primary purpose of this study is to explore the production, manufacturing and distribution of food. This means the study will be able to consider the cross-cutting issues unique to this sector of the economy. The consumer-facing part of the supply chain, such as food retail and hospitality, is not in scope.

The study will also explore the role of preproduction, biosecurity, research, and the enduring contribution of First Nations people, land holdings, businesses and practices. The study will not include non-food production such as fibre and forestry.

Figure 1. Industry scope of the food supply chain study



Attachment B. Related work

The capacity study will have regard to other work underway, including but not limited to:

- the tripartite Agricultural Workforce Forum
- key reforms in response to the Migrant Workers' Taskforce report
- the House Standing Committee Inquiry into Food Security in Australia
- Jobs and Skills Council work plans, including a proposed Agricultural Trade Apprenticeship Project by Skills Insight
- reforms to expand and improve the Pacific Australia Labour Mobility scheme
- the National Skills Agreement, and government responses to the Migration Strategy and Universities Accord
- the National Reconstruction Fund and investment in value-adding across the food supply chain
- the 2023-24 independent review of Food and Grocery Code of Conduct.