

Performance Report

2024-25



Delivering
for Dairy

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Introduction

I am pleased to present the Dairy Australia Performance Report, a companion document to our Annual Report 2024-25. This is our final year reporting against Dairy Australia's 2020-2025 Strategic Plan.

Progress against our strategy is measured regularly and reported annually. This report provides detailed information about our achievements and status on initiatives that work towards shaping a profitable and sustainable dairy industry.

Our 2025 targets are a mix of desired levels of outcomes for the dairy industry and stretch targets designed to break new ground for the industry. We continue to improve the way we monitor and measure performance to gain a more comprehensive insight into on-farm practices and the benefit of the levy investment. Our performance is also measured in line with the Dairy Australia Evaluation Framework, which provides a structured mechanism for monitoring performance and outcomes of our investments.

In 2024-25, Dairy Australia invested \$67 million across seven strategic priorities. Our work and investment are focused on services, connections and engagement with farmers throughout the eight dairy regions in Australia.

Dairy Australia delivers to industry by:

- Enhancing farm business management.
- Supporting employment and people development.
- Driving herd and feed innovation.
- Managing climate and environment.
- Advancing industry sustainability.
- Promoting Australian dairy.
- Supporting international dairy markets.
- Responding to critical issues and events.

We are committed to transparency and providing information that is of interest and relevance to farmers, industry and government stakeholders, including our many partners who invest with us on major initiatives.

Over the coming year – the first year of Dairy Australia's new Strategic Plan – we will sharpen our focus to deliver investments that matter most to farmers and their teams. Guided by the priorities of the new strategy – profitability, productivity and sustainability – we'll continue to engage with the industry to ensure our work drives meaningful outcomes and supports a strong future for Australian dairy.

To read more on our achievements, people and corporate governance, see the Dairy Australia Annual Report 2024-25 available on dairyaustralia.com.au.



Paul Roderick Chair

Our strategy

Dairy Australia has seven strategic priorities. Each priority is underpinned by a goal, and key outcomes.

	Priority 1	Priority 2	Priority 3	Priority 4
Goals	More resilient farm businesses	Attract and develop great people for dairy	Strong community support for dairy	Thrive in a changing environment
	Farm businesses that are more profitable, resilient and innovative in managing price and cost volatility.	Attract great people to the dairy industry, build their capability and careers, and foster a safe work culture.	Enhanced trust and value in the Australian dairy industry, its farmers and products.	Profitable farm businesses that adapt to the changing natural environment and provide good stewardship of resources.
Outcomes	a Business planning that leads to better decisions and sustained success.	a Greater awareness of Australian dairy as an attractive industry with rewarding careers.	a The Australian dairy industry is trusted and accepted by the community.	a Greater ability to adapt to changes in the natural environment.
	b Clear and understood drivers of dairy farm profitability and productivity.	b Clear and supported skill development and career pathways.	b Australian dairy is valued for superior health and nutrition benefits.	b Efficient and profitable use of land, water, carbon and energy resources which nurtures and sustains the natural environment.
	c Expanded range of risk management tools for price and cost volatility.	c Access to capable and skilled farm employees and service providers.	c The Australian dairy industry is committed to animal wellbeing.	c Proactive action to reduce global warming and greenhouse gas emissions.
	d Innovation in finance that increases access to capital for expansion and new entrants.	d Support farm businesses and their service providers to get the basics right.		

Priority 5

Success in domestic and overseas markets

Improved access to high-value dairy markets, backed by trusted market insights and a favourable regulatory and policy environment.

a Australian dairy is valued around the world for its premium products.

b A favourable policy and regulatory environment.

c Access to trusted market insights that inform decision-making.

Priority 6

Technology and data-enabled dairy farms

Inspire more agile and responsive dairy businesses through greater integration of technology and data.

a Accelerated genetic progress in feedbase and animal breeding.

b More flexible and agile dairy production systems.

c Greater use of high-value technology on-farm.

d Connected dairy production systems utilising multiple data sources to enhance decision-making.

Priority 7

Innovative and responsive organisation

An organisation that is farmer-focused, with talented people who embrace innovative thinking and decisive action.

a We have a farmer-focused service delivery model.

b Our culture of learning and innovation, values and ways of working deliver success.

c Our infrastructure, resources and processes allow us to be informed, agile and responsive.

d We have effective and transparent management of resources.



Key achievements

The following highlights some of the many ways Dairy Australia has delivered value to dairy farmers in 2024-25.



Regional services

Created 12,000 **meaningful connections** with farmers, to enable them to access services that support their business goals.



Climate and environment

Delivered practical insights into farm carbon to 450 farmers and service providers through **Understanding Farm Carbon** workshops, supporting them to measure and understand greenhouse gas emissions.



Farm business management

Enhanced farm decision-making through **DairyBase** – a tool for measuring and comparing farm business performance. DairyBase now supports over 3,130 registered users, with 18,700 farm datasets and 5,300 carbon calculator datasets.



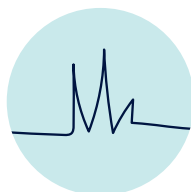
Feed innovation

Supported farm decision making by publishing ryegrass biomass (dry matter) performance and nutritive values through the **Forage Value Index**.



Farm business management

Supported 127 farmers to achieve their business and personal goals, contributing to more than 1,400 farmers who have benefited from practical planning through **Our Farm Our Plan**.



Feed innovation

Explored ways to **improve pasture performance** by using satellite technology, refining grazing strategies, and optimising resilient kikuyu varieties through DairyUp.



Training and development

Engaged farmers to pilot the **Dairy Capability Guide**, a framework for farmers and their teams to assess current and future career development needs.



Herd innovation

Updated breeding priorities to support **more productive, fertile and resilient cows** through the National Breeding Objective.



Soil health

Supported farmers to adopt multi-species pastures and soil health practices through the **Grounds for Growth** event, where 180 participants explored global research and practical insights over three interactive days.



Herd innovation

Supported herd health and reduction in antibiotic use through the development of the **Clinical Mastitis app**.



Health and nutrition

Boosted consumer trust in dairy's health benefits by sharing the latest science with GPs and dietitians – leading to 89% of consumers hearing positive health messages about dairy foods from health professionals.



Sustainability

Advanced efforts to reduce dairy food waste by delivering key actions under the Dairy Food Waste Action Plan – including standardised data collection, waste assessments at 10 processing sites, and development of a milk equivalence calculator.



Promoting Australian dairy

Built trust in dairy and the industry through the **Aussie Dairy, Simple Greatness** campaign, which promoted dairy's health benefits and helped 84% of Australians trust the industry.



International markets

Celebrated 25 years of the **Dairy Australia Japan Scholarship** program, recognised for strengthening Australian dairy's reputation, market access and export intelligence.



School education

Educated school children through the **Discover Dairy** website, **Picasso Cows** and Virtual Reality Farm Tours, with teachers rating student knowledge of dairy foods at 9.6/10.



Policy development

Delivered **policy support** across industry to areas including health and nutrition, productivity and competitiveness, energy, climate, carbon, water and calf management.



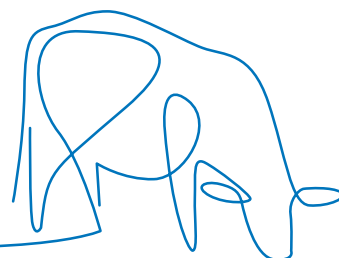
Sustainability

Supported viable pathways for dairy calves by 2035 through the launch of the **CalfWays** roadmap, in collaboration with Meat & Livestock Australia – aligning farming practices with community expectations.



Responding to critical issues and events

Continued to support **industry preparedness** and response to droughts, floods and animal diseases.





Our portfolios

1

More resilient farm businesses

Farm businesses that are more profitable, resilient and innovative in managing price and cost volatility.

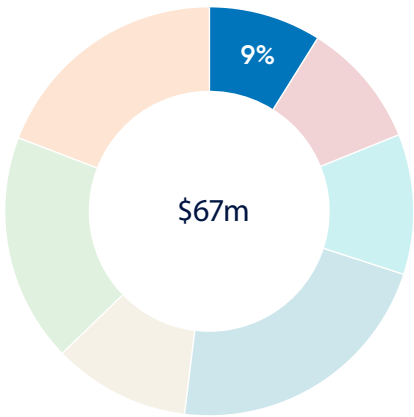
Strategic outcomes

- a Business planning that leads to better decisions and sustained success.
 - b Clear and understood drivers of dairy farm profitability and productivity.
 - c Expanded range of risk management initiatives.
 - d Innovation in finance that increases access to capital for expansion and new entrants.
-



Investment

Dairy Australia investment 2024-25 **\$5.9m**



External investment 2024-25 **\$0.47m**

Key funding partners	Contribution
Geoffrey Gardiner Dairy Foundation Ltd	\$0.34m
Department of Agriculture, Fisheries and Forestry	\$0.11m

Key partners

- Commonwealth and state governments and their agencies
- Australian Dairy Farmers (ADF), Australian Dairy Products Federation (ADPF), State Dairy Farming Organisations (SDFOs)
- Gardiner Dairy Foundation
- Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES)
- Processors

Performance summary

- Expanded and improved programs, tools and insights to support farm business performance, planning and risk management. Our Farm Our Plan (OFOP) delivered one-to-one support to 127 farmers. Development of advanced farm business management products and learning opportunities began.
- DairyBase remains a key tool for dairy farmers, with over 3,130 users, 18,700 farm datasets, and 5,300 carbon calculator datasets to track productivity and profitability. The Dairy Farm Monitor Project (DFMP) analysed 245 high-quality farm datasets in 2024-25, providing benchmarks across eight regions via DairyBase and Farm Business Snapshot.
- The International Productivity Report was published, supported by a webinar attended by 190 farmers and service providers. This work contributed to the Dairy Australia Strategic Plan 2030 and strengthened ties with DairyNZ and Teagasc. Two national webinars enhanced understanding of milk market dynamics and farm gate pricing.

Strategic outcome 1a

Business planning that leads to better decisions and sustained success

A robust and regularly reviewed business plan is essential to manage farm businesses. This forms the basis to set goals, measure farm performance, confidently make decisions and capture opportunities.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Dairy farm businesses perform systematic, periodic business reviews at least annually.	80% farm businesses	69%	79%*
Dairy farm businesses make key long-term decisions using a documented business plan.	80% farm businesses	49%	21%*

* Question reviewed to improve alignment with success indicator.

Key achievements

- Supported 127 farmers in comprehensive business planning to support their future success through first-time participation in Our Farm Our Plan. Expected participation levels were impacted by the challenges of drought and flood events.
- Commenced development of advanced farm business management products and learning opportunities using modern delivery approaches, in partnership with the Gardiner Foundation and DairyNZ.

Strategic outcome 1b

Clear and understood drivers of dairy farm profitability and productivity

The drivers of profitability and productivity can differ between individual farms, regions and production systems. Understanding those drivers, their differences and the levers that can affect them, is what will drive margin on farms. This is even more important at times when there is increased volatility and disruption to normal business operations.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Farm decision-makers can accurately state the profit metrics for their farm.	60% farm businesses	15%	74%*
Farm decision-makers can accurately state the productivity drivers for their farm.	90% farm businesses	81%	85%*

* Question reviewed to improve alignment with success indicator.

Key achievements

- Supported dairy farmers to accurately state their profit metrics and productivity drivers through DairyBase. As of 30 June 2025, DairyBase supports 3,130 registered users with over 18,700 farm datasets and 5,300 carbon calculator datasets.
- Strengthened the quality of farm business analysis and insights through the Dairy Farm Monitor Project (DFMP), while enhancing benchmark data in DairyBase and Farm Business Snapshot. In 2024-25, over 240 datasets were collected, analysed and reported on with the results published across all eight dairy regions.
- Collaborated with the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) to establish a working group to review Australian dairy farm performance datasets. Early sharing of statistical expertise has also begun, supporting future improvements to the DFMP survey design.
- Delivered practical insights into farm productivity through publishing the International Productivity Report, supported by a webinar attended by 190 farmers and service providers, with a further 260 recording views. The work contributed to the development of the Dairy Australia Strategic Plan 2030. An economics community of practice was also established with DairyNZ and Teagasc.

Strategic outcome 1c

Expanded range of risk management initiatives

Australia's tools for securing farm operating margins in an environment of price and cost volatility are under-developed in comparison to major overseas competitors. Given the ongoing volatility in Australia, it is important to rapidly improve tools for risk management.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Farm businesses are actively using risk mitigation initiatives.	80% farm businesses	57%	99%*

* Question reviewed to improve alignment with success indicator.

Key achievements

- Supported farmers to enhance understanding of milk market dynamics and the drivers of farm gate milk price through delivery of two webinars that reached over 400 industry participants.
- Supported farming teams to navigate seasonal and market challenges by refreshing key tools, including the Australian Milk Value Guide, in partnership with industry experts.
- Strengthened capability to support farm financial decision making through pilot delivery of the Cash, Costs and Margins workshop, in preparation for a national rollout in 2026.

Strategic outcome 1d

Innovation in finance that increases access to capital for expansion and new entrants

As finance is a highly innovative sector, it is important to provide dairy businesses seeking additional capital with better access to finance.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Farm owners and managers have opportunity to access capital to meet their requirements.	80% of farms that had no problems accessing finance for capital investment when attempted to do so	78%	83%
Dairy farm businesses are aware of information, case studies and resources on pathways to investment such as share farming, equity partnerships, vendor finance, etc.	50% of farm businesses	New metric introduced 2023-24	47%

Key achievements

- Supported farmers and new entrants to explore pathways to farm ownership and succession through video case studies highlighting successful models, including sharefarming.



Case study

Cash, Costs and Margins

Objective

To strengthen farm financial decision making and improve support for farmers to manage their cashflow, control costs and understand margins – the key drivers of dairy farm business profitability.

Background

Dairy Australia provides access to business planning and risk management tools to support farmers' decision making. The new Cash, Costs and Margins initiative – delivered in person and online – focuses on the importance of managing cash flow and costs within a farm business, emphasising margins as a key driver of profitability.

This initiative bridges the gap between existing introductory programs, like Farm Business Fundamentals, and advanced offerings such as Dairy Farm Business Analysis.

Action

The Cash, Costs and Margins workshop has been developed for national rollout in 2025-26, with farmers in three regions already benefitting from the program during its development. The workshop introduces the Farm Business Snapshot, a Dairy Australia tool that equips farmers to capture farm data and benchmark insights against Dairy Farm Monitor data. The workshop includes practical exercises on marginal thinking to support informed and optimal decisions on key inputs (such as fertiliser and supplementary feeds), which can significantly impact profitability.

Digital micro-learning products will complement the workshop and be made available more broadly to farmers seeking additional information about managing their business.

Cash, Costs and Margins will build capability within the dairy service sector, supporting a shared understanding of cashflow and cost management across the industry.

Impact

Cash, Costs and Margins is designed to build confidence and capability in farm business decision making and support the achievement of farm business goals, particularly relating to profitability. Through including the Farm Business Snapshot, Dairy Australia will support farmers to focus on income and expenditure trends and use data to guide choices within their farm business.

Acknowledgement

Dairy Australia's farm business initiatives is supported by funding from the Gardiner Foundation and the Commonwealth Government.



Post-investment impact assessment

Dairy Farm Monitor Project

Background

The Dairy Farm Monitor Project (DFMP), including the Queensland Dairy Accounting Scheme (QDAS), is a Dairy Australia initiative, delivered in partnership with state government organisations and supported by our regional teams. It provides a comprehensive physical, financial and carbon emissions analysis of around 250 dairy farm businesses across the eight dairy regions. The participating farms represent a range of farm sizes, feeding systems, herd sizes and locations across each region. The results should not be viewed as a representation of the entire dairy farm population, as farms are not selected through random population sampling.

Recording the physical and financial performance of individual dairy farms provides the information needed to improve farm business performance, support industry and government decision making, and help demonstrate the industry's climate credentials. Through coordinated efforts between industry and government, DFMP ensures consistent data collection, avoids duplication, and delivers valuable insights that benefit the entire sector.

Activities

Detailed analysis undertaken through DFMP tracks the financial performance of participating dairy farms year on year, as well as physical characteristics such as herd size, stocking rate, pasture production, cow efficiency, labour efficiency, and carbon emissions. All reporting follows a consistent, agreed-upon dairy industry methodology, based on measures of cash, profit and wealth. Participating farmers receive a detailed report on the performance of their individual farm businesses. Industry and government receive detailed farm-level and aggregated data in annual reports, accessible via the Dairy Australia website.

The DFMP provides the comparative data in Farm Business Snapshot and DairyBase, which enables dairy farmers to track their business performance over time and compare it against industry benchmarks.

Findings of the independent evaluation

An independent post-investment economic evaluation of the DFMP/QDAS program, commissioned in 2025 and conducted by Marsden Jacob Associates, found that for every dollar invested in DFMP/QDAS there is an estimated return of at least eight dollars.

This return is driven by value delivered across the sector:

- Farmers use insights from DFMP to understand the performance of their business relative to their peers and make incremental and step changes, such as changing feeding and milking systems.
- Farm advisors and consultants use DFMP data as a secondary source when guiding farm decisions.
- Governments rely on DFMP data to inform policy, program design and research, development and extension (RD&E) investment.
- Milk processors use DFMP to support reporting on greenhouse gas emissions, though the scope of this use varies.
- Dairy Australia uses DFMP data to inform strategy and RD&E portfolio design.

The evaluation, which covered the financial years from 2020–21 to 2024–25, drew on survey responses and interviews with farmers, consultants, processors, government officers and other stakeholders. It confirmed that DFMP/QDAS is a mature, valued program, which is modest in scale but rich in outcomes, and continues to deliver value across the sector.

The evaluation also found that DFMP addresses significant information deficiencies or market failure. Without the program, the industry would face duplicated data collection efforts, lower data quality, increased challenges in accessing data, and less effective decision-making.

Management response

Dairy Australia's management has carefully reviewed the ex-post economic impact assessment for DFMP/QDAS activities and accepts the benefit cost summary presented in this analysis.

Dairy Australia acknowledges the findings and in principle, supports the key recommendation from the report. We also recognise that including a broader and more diverse sample of farms would improve benchmarking accuracy and address stakeholder concerns. Dairy Australia will look to expand farmer representation, particularly in Victorian regions, in future DFMP data sets commencing in the 2027–28 financial year.

2

Attract and develop great people for dairy

Attract great people to the dairy industry, build their capability and careers, and foster a safe work culture.

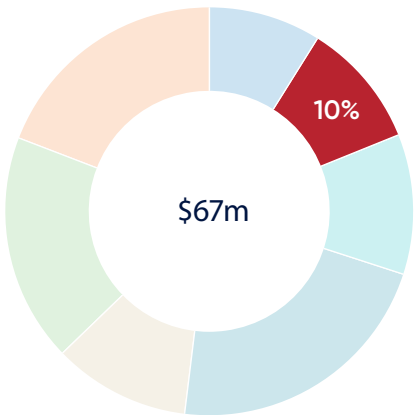
Strategic outcomes

- a Greater awareness of Australian dairy as an attractive industry with rewarding careers.
- b Clear and supported skill development and career pathways.
- c Access to capable and skilled farm employees.
- d Support farm businesses and their service providers to get the basics right.



Investment

Dairy Australia investment 2024-25 **\$6.5m**



External investment 2024-25 **\$0.12m**

Key funding partners	Contribution
Western Dairy Incorporated	\$0.12m

Key partners

- AgriFutures Australia
- Marcus Oldham College
- University of Tasmania
- Gardiner Foundation
- National Centre for Farmer Health (NCFH)
- National Herd Improvement Association (NHIA)
- NSW Agriculture, Food & Animal Management Industry Training Advisory Body (AFAM ITAB)
- NSW State Government
- Primary Industry Education Foundation Australia (PIEFA)
- Regional Development Corporations (RDCs)
- Rural Safety Health Alliance (RSHA)
- Skills Insight
- The Careers Department
- Victorian State Government
- WorkSafe Reference Group

Performance summary

- Supported farmers to attract, develop and grow their workforce. This included introducing initiatives to support the development of workplaces and roles to attract talented people to the dairy industry. An industry Employee Value Proposition (EVP) strategy was developed for all stages of the employment journey.
- Completed the Power of People Survey, with the key insight indicating that the perception of the industry as a great place to work has increased to 76% (up from 74% in 2023).
- The Artificial Insemination (AI) Simulation course is an innovative learning initiative to develop a simulation-based training option for AI that is funded externally through the government Workforce Training Innovation Fund. The course was successfully adopted by the three project partner TAFEs and continues to be delivered as part of the TAFE curriculum.
- Delivered key initiatives to support farm workforce needs, including priority talent pipelines, onboarding experience, people development programs, external education pathways and farm safety and wellbeing.

Strategic outcome 2a

Greater awareness of Australian dairy as an attractive industry with rewarding careers

There are strong community perceptions about dairy based on historic views of long hours and hard work. Modern dairy operations are more diverse with roles that are highly skilled and provide genuine career opportunities.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Dairy farm employers can describe why dairy is rewarding to work in.	80% of employers	75%	76%
Australians would consider working on a dairy farm.	30% of community	20%	20%
All dairy farms implement good safety practices.	100% farm employees	85%	88%*

* Question reviewed to improve alignment with success indicator.

Key achievements

- Assisted farmers in placing 345 jobs over the lifespan of the Workforce Attraction program and supported farmers to attract and retain skilled people. Perception of the industry as a great place to work has reached 76%. Three permanent Workforce Attraction Leads now actively support the attraction and retention of great people to the dairy industry.
- Enhanced workforce stability on farms by designing targeted initiatives that reduce early-stage employee exits. Developed an onboarding program to address the significant turnover identified in the first six months of an employee starting on a dairy farm and delivered the Dairy Ready pre-employment program in New South Wales (NSW) supported by NSW Government AgSkilled funding.
- Attracted secondary school students to explore a career in dairy through targeted education and practical programs. This included a partnership with Explore Careers that reached 3,000 secondary schools, a Dairy Career Taster course in NSW for secondary students to experience a day on a working dairy farm, and the Cows Create Careers program, delivered in more than 200 secondary schools to over 14,000 students.

Strategic outcome 2b

Clear and supported skill development and career pathways

As the needs of the dairy industry evolve, the industry requires a workforce with an advanced range of capabilities and a greater diversity of career pathways. This will lead to more successful dairy careers, including pathways to business ownership.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Employees have clear, logical and supported development pathways in dairy.	70% of farmers who are building their career in dairy	54%	78%
Employers have clear, logical and supported development pathways for themselves.	70% of employers	52%	43%

Key achievements

- Enabled clearer expectations around roles, capabilities and behaviours, and strengthened goal-setting for people working on farms by launching the Dairy Capability Guide and supporting its adoption among farmers and their teams.
- Built leadership capability on farm by delivering the Second-in-Charge (2IC) program across Western Victoria, Gippsland, Mt Gambier and Camden, with over 90% of participants reporting high satisfaction.
- Promoted dairy careers by partnering with the Primary Industries Education Foundation Australia (PIEFA) to develop resources for teachers to educate students about the Australian dairy industry. The dairy curriculum is available to teachers across all states.

Strategic outcome 2c

Access to capable and skilled farm employees

Farm businesses continue to require skilled labour on farm and access to quality service provision from external providers. Success requires employers to be confident and capable to hire, manage, lead and provide a safe work environment for capable people. Service providers need to invest in their own capability and support a new generation of talented professionals.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Employers report that the time taken to find a new employee was less than one month.	80% of employers that employed someone in the past 12 months	69%	76%
Employers were able find an employee with the right capability for the role in the past 12 months.	80% of employers that employed someone in the past 12 months	70%	75%

Key achievements

- Contributed to a stronger talent pipeline for the dairy industry by developing the Talent Pipeline Strategy, designed to encourage new entrants with a focus on overseas workers and participants in the Young Dairy Network.
- Supported farmers to retain overseas workers – including migrants, backpackers and visa holders – by enhancing the onboarding experience through a newly introduced, compulsory learning program.
- Encouraged career pathways into dairy by partnering with AgriFutures and Marcus Oldham College to offer scholarship opportunities to emerging talent.
- Equipped farm managers with tools to build and manage strong farming teams through the development of conversation cards, interview guides and position description templates.

Strategic outcome 2d

Support farm businesses and their service providers to get the basics right

Farm businesses are complex with many interconnected decisions required daily to produce milk.

Establishing fundamentals such as soil management, pasture agronomy, animal nutrition and milk quality are important for farm success.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Farm businesses have access to the information and tools they need to get the fundamentals right on-farm.	80% of farm businesses	63%	58%
Service providers have access to the information and tools that they need to get the fundamentals right on-farm.	80% of service providers	65%	78%

Key achievements

- Improved People in Dairy website experience, resulting in over 53,000 farmer visits.
- Enhanced farm safety and wellbeing by partnering with organisations including the Rural Safety and Health Alliance and The Resilience Project to deliver targeted initiatives.
- Supported farmers to access skilled labour by partnering with Global Skilled Employment Services to deliver visa pathways sessions, including a national webinar and three face-to-face events, focused on Dairy Industry Labour Agreements and visas available to dairy workers.
- Supported ongoing upskilling of farm employees, with an average 25% capability uplift following the completion of people programs.



Case study

Dairy Capability Guide

Objective

Strengthen workforce capability across dairy farms by developing a clear, consistent framework that defines the skills and behaviours needed to be successful on a dairy farm.

Background

The Dairy Capability Guide helps farming teams understand role expectations, supports managers to align roles with farm business goals, and provides a foundation for performance management and team development. By embedding the guide across the industry, Dairy Australia aims to support the creation of high-performing and rewarding workplaces for farming teams.

Action

To support adoption, Dairy Australia conducted one-to-one discussions with farmers who employ people, focusing on practical opportunities for implementation of the guide. The farmers responded positively, identifying a range of applications including position descriptions, performance reviews and pay structures.

Farmers recommended piloting the guide on a small number of farms before broader industry rollout. In response, a pilot was developed to support consistent implementation across farm businesses.

The pilot is designed to demonstrate the relationship between employee capability and outcomes such as productivity, retention, safe work, positive workplace culture and engagement at all stages of the employee journey. It will also help clarify the tools and resources needed to support implementation and enhance existing workplace practices. The resources are currently in development and will be made available nationally via the People in Dairy website.

Impact

Farmers highlighted the guide's potential to add value to their farm businesses. One farmer commented: "I'd love to build our whole farm capability strategy around the Dairy Capability Guide – it's a great foundation for clear capability development pathways and role expectations."

The Dairy Capability Guide supports farming teams pinpoint where skills or knowledge might be missing and shows how training and development can be planned to build those capabilities. This feature was acknowledged by a farmer, who said: "We've identified skill gaps, but didn't know where to go after that. The Dairy Capability Guide gives us some direction."

Feedback from farmers has directly informed future updates to the guide, including expanded content on intensive feeding systems, biosecurity and cultural diversity.

Acknowledgement

The Dairy Capability Guide was co-created with a focus group of dairy farmers and dairy industry stakeholders. Their input and support are sincerely appreciated and has contributed to the development of a valuable resource for the Australian dairy industry.

3 Strong community support for dairy

Enhanced trust and value in the Australian dairy industry, its farmers and products.

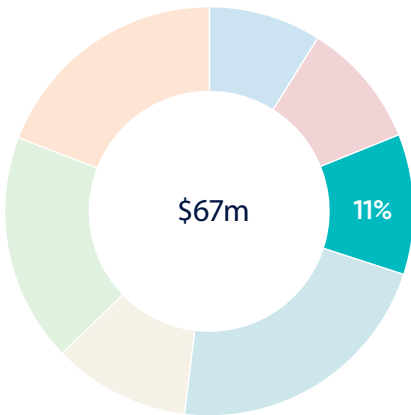
Strategic outcomes

- a The Australian dairy industry is trusted and accepted by the community.
- b Australian dairy is valued for superior health and nutrition benefits.
- c The Australian dairy industry is committed to animal wellbeing.



Investment

Dairy Australia investment 2024-25 **\$7.2m**



External investment 2024-25 **\$0.24m**

Key funding partners	Contribution
Sustainability Victoria	\$0.12m
Food Innovation Australia Ltd (FIAL)	\$0.03m

Key partners

- Sustainability Framework Consultative Forum
- Australian Dairy Sustainability Framework Steering Committee
- Sustainable Agriculture Initiatives Platform
- International Dairy Federation
- Global Dairy Platform
- International Milk Promotion Group
- Dairy Research Consortium
- Australian Dairy Farmers (ADF), Australian Dairy Products Federation (ADPF), State Dairy Farming Organisations (SDFOs)
- Processors
- University of Melbourne
- Sydney University
- Life Education
- Meat & Livestock Australia
- Dairy Manufacturers Sustainability Council

Performance summary

- Boosted the profile of Australian dairy, with public trust rising to 84% – reflecting improved consumer views on animal care, ethics and transparency. Positive sentiment towards dairy products grew and daily consumption increased to 58%. The Aussie Dairy Simple Greatness campaign promoted dairy's bone and muscle health benefits and was supported by targeted health messaging through Healthy Bones Action Week, World Milk Day, engagement with health professionals and a partnership with Life Education.
- The 26th Australian Grand Dairy Awards generated over 60 media stories, reaching more than three million people and helping to increase preference for Australian-made dairy by five per cent. Community engagement benefited from education and ambassador-led outreach, including 102 Farmer Ambassadors delivering over 470 engagements, the Picasso Cows program reaching 11,000 students, virtual farm tours and agricultural event participation.
- Sustainability efforts included a formal double materiality review and an ongoing operational and governance review of the Australian Dairy Sustainability Framework to update goals and metrics by 2025. The CalfWays roadmap, supported by co-investment from Meat & Livestock Australia, was launched to provide viable pathways for calves by 2035, ensuring farming practices align with community expectations.
- Food waste reduction progressed through the Dairy Food Waste Action Plan, while a cross RDC bioenergy project identified Warrnambool as a prime site for converting animal waste to biogas. This has the potential to generate significant renewable energy and economic value.

Strategic outcome 3a

The Australian dairy industry is trusted and accepted by the community

The Australian community is taking a greater interest in the food they consume and the way it is produced. Trust and resulting acceptance in agriculture, including dairy, cannot be taken for granted. Sustainable production of dairy foods requires a demonstrable commitment to people, animal care and the environment. This commitment includes understanding and staying ahead of community expectations and working with industry to set targets and measure progress at a national and global scale.

The voice of farmers is essential to convey pride in their industry and to speak positively about being in dairy.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Results
Consumers trust the dairy industry.	79% of consumers	75%	84%
Farmers actively promote the industry.	40% of farmers	31%	31%
Consumers prefer to buy Australian-made or locally-produced dairy products wherever possible.	85% of consumers	81%	81%
Consumers agree dairy farmers do a good job caring for the environment.	75% of consumers	64%	66%
The Sustainability Framework is recognised, supported and trusted as providing evidence of industry's commitment to sustainable dairy practices.	80% community representatives on the consultative forum	70%	83%
Dairy manufacturers are engaged in industry-led initiatives to improve the water, waste, packaging and emissions intensity of their operations.	90% of milk pool	91%	92%

Key achievements

- Built community trust via the You Ask, We Answer platform, with 322,626 views from July 2024 to June 2025. Top topics included nutrition, milk production myths and weight gain.
- Promoted dairy through 102 Farmer Ambassadors participating in 171 engagements (media, podcasts, schools) and over 300 local and community outreach efforts.
- Educated more than 11,000 students in 100 schools on dairy's farm-to-plate journey through the eight-week Picasso Cows program.
- Increased awareness among children and families via virtual farm tours and presence at agricultural shows, regional events and expos.
- Highlighted Australian dairy quality through the Australian Grand Dairy Awards and a public relations campaign that generated 60 media stories reaching three million people, driving a five per cent rise in preference for Australian-made dairy. The event and award-winning produce were promoted by 13 influencers reaching over 627,000 people on Instagram.
- Led a review of the Australian Dairy Sustainability Framework (ADSF) to update goals, targets and metrics based on a formal, double materiality assessment, ensuring relevance amid shifting sustainability challenges. The review is expected to be completed in 2025.
- Advanced food waste reduction through the Dairy Food Waste Action Plan, standardising data collection, conducting waste assessments at 10 processing sites, and creating a milk equivalence calculator with support from Sustainability Victoria.
- Completed a cross-RDC feasibility study on converting animal waste to biogas, identifying potential to divert 30,000 tonnes of waste, generate 26,500 GJ of renewable energy and create \$2-3 million in annual value for energy producers.

Strategic outcome 3b

Australian dairy is valued for superior health and nutrition benefits

There continues to be differing opinions about the role of various foods for good health and nutrition which compete with established science-based advice. Consumers require access to information that supports their ongoing consumption of healthy and nutritious foods.

There is an opportunity to further increase the strong support for dairy products and the industry and continue to reinforce the reasons to consume and buy Australian dairy.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Results
Consumers trust dairy as a wholesome and healthy food.	87% of consumers	83%	86%
Consumers hear positive health messages about dairy foods from health professionals.	86% of consumers	85%	92%
Consumers make an effort to consume dairy every day.	55% of consumers	49%	58%

Key achievements

- Strengthened consumer understanding of dairy's health benefits by engaging health professionals via the Dietitians Australia Conference and a partnership with Sports Dietitians Australia.
- The national 'Aussie Dairy, Simple Greatness' campaign reached 89% of adults 18-49, with 73% of recognisers increasing daily dairy intake and one in three making a purchase.
- World Milk Day 2025 raised awareness with 89 million impressions from 117 media stories, four million paid social impressions, and more than 175,000 views via Sports Entertainment Network, including radio broadcasts across 79 stations.
- The 2024 Healthy Bones Action Week campaign targeted women 18-25, reaching 11.5 million through media and influencers. Surveys showed 94% were unaware of dairy intake recommendations.
- Educated 116,243 students on dairy's role in bone health through a Life Education partnership.
- Supported regulatory decisions by submitting to FSANZ's Health Star Rating and Nutrition Information Panel review. The submission highlighted dairy industry concerns, prompting FSANZ to acknowledge issues like low Health Star Ratings for cheddar cheese.

Strategic outcome 3c

The Australian dairy industry is committed to animal wellbeing

The wellbeing of animals is critical to the Australian dairy industry. Appropriate care for our animals is essential to the success of every farming business and a moral responsibility. There is opportunity to continue to improve our practices, report transparently on how we are progressing and identify where we need to do more to ensure industry practices align with community values.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Results
The community believes the dairy industry meets their expectations in doing the right thing.	77% of consumers	73%	75%
Consumers agree that dairy farmers do a good job caring for their animals.	80% of consumers	74%	77%

Key achievements

- Increased the number of consumers who agree that dairy farmers do a good job caring for their animals by communicating the industry's commitment to animal wellbeing through dairy.com.au, Discover Dairy schools and the You Ask, We Answer platform.
- Launched the CalfWays roadmap to eliminate routine euthanasia of viable calves by 2035, supported by a three-year co-investment with Meat & Livestock Australia.
- Partnered with the National Centre for Antimicrobial Stewardship and University of Sydney to raise awareness of antimicrobial resistance (AMR) risks, conducting the first AMR survey in dairy herds and engaging vets and farmers to benchmark antibiotic use and animal health.



Case study

Aussie Dairy, Simple Greatness campaign

Objective

Strengthen consumer trust and reconnect Australians – particularly those aged 18 to 49 – with the everyday health benefits and value of dairy in the diet.

Background

While most young Australians consume dairy, they can have more questions about products than older generations. Australians are also increasingly pursuing health and wellness through complex routines involving supplements, intense workouts and tracking devices. Dairy Australia identified an opportunity to reframe dairy as a simple, science-backed solution to achieving health goals, leveraging its unique nutritional profile and emotional relevance.

Action

In April 2025, Dairy Australia launched Aussie Dairy, Simple Greatness, a national campaign around the idea that achieving health and nutrition goals doesn't need to be complicated. Through relatable storytelling and tailored messaging, the campaign highlighted the simple nature and nutritional power of milk, cheese and yoghurt, particularly their calcium and protein content for bone and muscle health.

The campaign reached 89% of the target audience through a strategic mix of high-impact media channels, including Meta (5.3 million), TikTok (3 million), YouTube (2.3 million), television (1.5 million), Spotify (1.1 million), and broadcast video on demand (1.1 million). Recognising the influence of healthcare professionals in promoting the health benefits of dairy, the campaign extended to doctor's clinics nationwide, with a nine-week activation across 600 screens featuring interactive Q&A-style videos encouraging patients to reflect on their dairy intake and speak with their doctor.

The campaign carried through to World Milk Day (1 June), celebrating the 'simple greatness' of milk's nutritional value and the work of Australian dairy farmers. This activation reached 89 million Australians through 117 earned media stories, four million via paid social, and 175,000 views through a partnership with the Sports Entertainment Network.

Impact

The campaign delivered strong shifts in consumer perception and consumption behaviour. Among those who saw the campaign, 68% agreed that the health benefits of dairy outweigh any concerns and 64% agreed that Aussie dairy foods are great for health. Those who recalled the campaign were significantly more likely to endorse dairy's role in a healthy diet and its wide-ranging health benefits. Of those, one in three reported purchasing dairy products as a result of the campaign, and 73% said they make an effort to consume dairy daily.

The campaign also enhanced trust in dairy's sustainability credentials and animal welfare practices, particularly among the target audience of younger Australians. In healthcare settings, 92% of people agreed that hearing dairy messages from a doctor made them feel more positive about consuming dairy. The Simple Greatness campaign proved a powerful platform to reinforce dairy's health benefits and will be further leveraged in 2025-26.



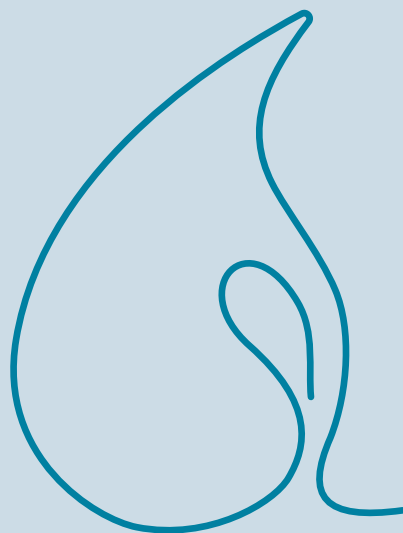
4

Thrive in a changing environment

Profitable farm businesses that adapt to the changing natural environment and provide good stewardship of resources.

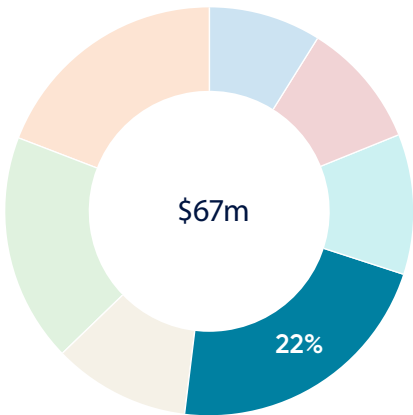
Strategic outcomes

- a Greater ability to adapt to changes in the natural environment.
- b Efficient and profitable use of land, water, carbon and energy resources which nurtures and sustains the natural environment.
- c Proactive action to reduce global warming and greenhouse gas emissions.



Investment

Dairy Australia investment 2024-25 **\$15.1m**



External investment 2024-25 **\$2.19m**

Key funding partners	Contribution
Gardiner Foundation	\$0.92m
Department of Industry, Science, Energy and Resources	\$0.59m
Department of Primary Industries – Queensland	\$0.30m
Sustainability Victoria	\$0.14m

Key partners

- Commonwealth and state governments, including National Landcare Project
- Regional Development Corporations
- Australian Dairy Farmers Natural Resource Management Policy Advisory Group
- Dairy Manufacturers Sustainability Council
- Tasmanian Institute of Agriculture
- University of Melbourne Dairy Innovation Hub
- Bureau of Meteorology
- Australian Alliance for Energy Productivity
- Stop Food Waste Australia
- Processors

Performance summary

- Focused on managing climate and environment, emissions reduction, the importance of soils and continuing to support diverse dairy farming systems.
- Enabled farmers to manage changes in climate by assessing expected climate impacts across dairy regions, identifying feedbase and heat stress risks along with mitigation options, through completion of the National Climate Change Adaptation Framework.
- Supported farmers transitioning to a contained housing system by delivering a clear set of research, development and extension priorities for contained housing.
- Supported farmers adopting multi-species pastures and other soil health practices by delivering the Grounds for Growth event, where 180 attendees engaged with global research and practical insights over three interactive days.
- Co-designed a shared path forward across the entire dairy supply chain to accelerate adoption of practices and technology to reduce on-farm emissions, through the Australian Dairy Emissions Reduction Roadmap.

Strategic outcome 4a

Greater ability to adapt to changes in the natural environment

Dairy has immediate and substantial risks from the impacts of climate variability, far more so than our competitors. Pressures from changes to the natural environment are wide-ranging, from restricted access to water, to more extreme climatic events and less secure access to nutrients and feed sources. These pressures will increase with predicted impacts from climate change and require innovation to counter these pressures.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Farmers have access to enough information to understand the impacts of changes in the environment.	90% of farmers	74%	70%
Farmers have the right information and skills to thrive in increasingly volatile climatic conditions.	95% of farmers	84%	90%

Key achievements

- Enabled farmers to manage changes in climate by assessing expected climate impacts in 24 locations across dairy regions, identifying feedbase and heat stress risks along with mitigation options, through completion of the National Climate Change Adaptation Framework.
- Supported farmers to build climate resilience and strengthen business practices by identifying opportunities to integrate climate risk management into existing Dairy Australia services.
- Assisted farmers to improve environmental practices by supporting 115 dairy farm businesses to start Farm Environmental Tracker action plans, with 70 completed.
- Provided insights to inform grazing decisions by commencing trials under the C4Milk project, focused on Proportion of Ungrazed Pasture grazing.
- Enabled farmers to make informed decisions about farm system changes by delivering workshops on using the Farm Systems Evaluator tool.
- Continued providing farmers with up-to-date information to support investment decisions by initiating updates to the National Feedpad and Contained Housing Guidelines.

Strategic outcome 4b

Efficient and profitable use of land, water, carbon and energy resources which nurtures and sustains the natural environment

Future success depends on efficient use of natural inputs with a focus on land, water, carbon, and energy. This efficiency needs to be considered over a longer term in a way that nurtures and sustains the natural environment and is profitable for dairy businesses.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
Dairy farm businesses have adopted technologies and management practices to achieve land, water, carbon, nutrient, and energy efficiency.	70% of farmers	66%	97%*

* Question reviewed to improve alignment with success indicator.

Key achievements

- Supported farmers adopting multi-species pastures and other soil health practices by delivering the Grounds for Growth event in March 2025. This was a first for the Australian dairy industry, with 180 attendees engaging with global research and practical insights over three interactive days.
- Invested in future soil health outcomes for farmers by commencing work to identify research, development and extension priorities aligned with sector needs, and contributing to a cross-RDC project to establish a Soil Health Framework. This will enable farmers to make informed decisions about soil-management practices.
- Laid the groundwork for improved effluent management on farm by identifying future research, development and extension priorities in collaboration with industry partners at Dairy Australia's Manure Summit held in November 2024.

Strategic outcome 4c

Proactive action to reduce global warming and greenhouse gas emissions

The dairy industry has committed to being part of the solution to global warming. This will require a reduction in greenhouse gas emissions, especially in the farm sector. Investment is required to identify commercial solutions.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Results
Dairy farm businesses generating renewable energy.	85% of farmers	61%	64%
Dairy farm businesses have access to and have adopted commercial solutions for reducing on farm emissions.	40% of farmers	17%	75%*
Dairy farm businesses with 300+ herd size understand their carbon footprint.	50% of farmers	26%	24%

* Question reviewed to improve alignment with success indicator.

Key achievements

- Secured a federal grant to fund the development and delivery of improved farmer services to achieve profitable emissions intensity reduction.
- Supported farmers, processors, retailers and financial institutions to co-design the Australian Dairy Emissions Reduction Roadmap to support reductions in greenhouse gas emissions intensity while maintaining profitability, resilience and competitiveness.
- Engaged farmers on improving productivity and sustainability and preparing for regulatory and market changes through national workshops on understanding farm carbon. Over 400 farmers and service providers attended with 35 farmers engaged in one-to-one consultations to calculate their farm carbon number.



Case study

Know Your Carbon Number

Objective

Equip dairy farmers to understand, estimate and act on carbon, and safeguard the industry's future by reinforcing Australian dairy's reputation as a global leader in environmentally sustainable production.

Action

This program delivers initiatives to build capability and confidence across the industry, and support action on farm to reduce greenhouse gas emissions. Key services and activities include:

- Enhancements to the Australian Dairy Carbon Calculator, improving technical accuracy and ease of use.
- Workshops and one-to-one support for farmers and service providers to understand farm carbon emissions and estimate their carbon footprint
- Development of tailored services that enable farmers to explore their carbon number in depth and plan changes to enhance productivity and profitability while reducing emissions.
- Co-design of the Australian Dairy Emissions Reduction Roadmap, with more than 50 participants including farmers, representative groups, banks, food retailers, processors and the Gardiner Foundation. The roadmap builds on existing work and outlines a shared vision, targets, footprinting method, and practical options for emissions reduction while showcasing industry progress to date.

Impact

Almost 450 farmers and services providers have attended Understanding Farm Carbon workshops, gaining practical insights into farm carbon footprint drivers and market expectations.

Feedback has been positive, with attendees reporting an increased understanding of farm carbon and many requesting follow-up support. One farmer shared: "Really good workshop. Loved the group activities. Really well done and knowledgeable presenters who were great at answering questions."

Over 70 farmers received one-to-one support to estimate their carbon number, with the number of farm businesses that know their carbon number more than doubling since 2023.

Acknowledgement

This program was co-funded by Dairy Australia, Gardiner Foundation and the Commonwealth Government. Australian Dairy Farmers have also provided significant support.

5

Success in domestic and overseas markets

Improved access to high-value dairy markets, backed by trusted market insights and a favourable regulatory and policy environment.

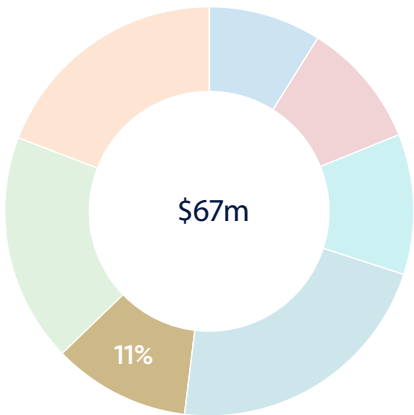
Strategic outcomes

- a Australian dairy is valued around the world for its premium products.
- b A favourable policy and regulatory environment.
- c Access to trusted market insights that inform decision-making.



Investment

Dairy Australia investment 2024-25 \$7.5m



External investment 2024-25 \$0.76m

Key funding partners	Contribution
Department of Agriculture, Fisheries and Forestry	\$0.22m
Department of Jobs, Skills, Industry and Regions	\$0.19m
Department of Foreign Affairs & Trade	\$0.17m
Department of Agriculture, Fisheries and Forestry	\$0.12m

Key partners

- Commonwealth and state governments
- Dairy representative organisations – Australian Dairy Farmers (ADF), Australian Dairy Products Federation (ADPF), State Dairy Farming Organisations (SDFOs)
- Processors
- Exporters
- Research and Development Corporations (RDCs), particularly through the Emerging National Rural Issues (ENRI) forum
- Gardiner Foundation
- Animal Health Australia
- National Foundation for Australia China Relations

Performance summary

- Strengthened relationships with key trade partners through inbound scholarship visits for Japan, South-east Asia and China, with support from the Victorian Government. Supported improved market access for Australian dairy through the successful conclusion of the United Arab Emirates-Australia Comprehensive Economic Partnership, which is set to deliver tangible export gains once ratified.
- Monitored global trade developments and provided policy advice to safeguard farmers' access to key export markets amid shifting international trade dynamics.
- Commissioned two analytical studies to support advocacy on issues affecting farm viability: one examining the drivers of competitiveness and value creation in dairy, and another assessing the potential impacts of water buybacks on farms and regional communities in the southern Murray-Darling Basin.

Strategic outcome 5a

Australian dairy is valued around the world for its premium products

Favourable trade arrangements are linked to recognition that Australian products are premium in terms of food safety, provenance and meeting tight product specifications.

Our progress against strategy

Key strategic success indicator	Target % of surveyed customers	Baseline	Results
Australian dairy products are nominated as preferred status by customers in the key markets of Japan, Greater China and South-east Asia.	Japan – 70%	50%	82%
	Greater China – 60%	40%	94%
	South-east Asia – 60%	62%	84%
Australian dairy makes tangible market access gains in all completed trade negotiations involving Australia.	All	100%	100%

Key achievements

- Raised the profile of Australian dairy in our largest export markets through a series of events in Japan, Hong Kong and Taiwan marking the 25th anniversary of the Scholarship Program in North Asia, and an event in Melbourne recognising the 10th anniversary of the South-east Asia Scholarship Program. The events were co-funded through government grants.
- Delivered an activation in Taiwan, including an industry roundtable and networking, to discuss market access and build high-level engagement with CEOs and decision makers in local companies importing Australian dairy products. The work was funded through a federal grant and delivered in collaboration with Meat & Livestock Australia, Hort Innovation, Wine Australia and Seafood Industry Australia.
- Secured \$1.1 million in funding from the National Foundation for Australian China Relations, allocated to Dairy Australia to promote the sustainability of Australian dairy in China from 2025–28. Dairy Australia receives A\$250,000 for market development in China in 2026–27, and the remaining funds go towards joint work with RDCs and project management. The funding enables collaboration with Meat & Livestock Australia, Wine Australia, Seafood Industry Australia and Hort Innovation, and includes opportunities to take dairy farmers to China for an exchange on sustainable farming practice.
- Showcased Australian dairy sustainability at a forum on the Agreement Establishing the ASEAN–Australia–New Zealand Free Trade Area, through the Leveraging Australian Dairy Sustainability Credentials for South-East Asia (LASSEA) program.
- Demonstrated the quality of Australian dairy to domestic and international audiences through the analysis of Australian dairy farms' bulk milk cell counts as part of Dairy Australia's Milk Quality Awards, and analysis of bacteriological data.

A favourable policy and regulatory environment

Credible and fact-based insights matched with incisive policy analysis and broad industry backing are powerful tools to create a favourable policy and regulatory environment.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Results
Industry and government stakeholders value the work of Dairy Australia to inform policy discussions.	100% of stakeholders that use policy related services	100%	89%
Stakeholders value the work of Dairy Australia to help ensure access to markets.	90% of stakeholders that use market access related services	81%	89%

Key achievements

- Delivered 18 policy submissions with peak dairy bodies on key industry issues.
- Supported improved market access by convening industry Trade Reference Group meetings on key trade issues such as European Union free trade agreement (FTA) negotiations and the completion of the United Arab Emirates-Australia economic partnership.
- Monitored global trade to protect farmers' export market access amid changing dynamics.
- Supported industry advocacy through submissions on agriculture's role in South-east Asia and FTAs, plus two studies on dairy competitiveness and the impact of water buybacks on the Murray-Darling Basin.
- Enhanced emergency animal disease preparedness by helping secure funding for milk tanker decontamination procedures for foot-and-mouth disease; securing \$500,000 co-funding for a Highly Pathogenic Avian Influenza risk assessment; and re-establishing Emergency Animal Disease (EAD) response structures and testing industry readiness via a scenario-based industry exercise. The Dairy EAD Action Guide outlining outbreak roles and processes was subsequently delivered.

Strategic outcome 5c

Access to trusted market insights that inform decision-making

The Australian dairy supply chain is characterised by a sophisticated collection of market data that is readily available to support decision-making by industry and government stakeholders.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Results
Dairy Australia is considered by industry stakeholders as the most trusted and credible source of information to inform decisions related to dairy markets.	85% of stakeholders utilising Dairy Australia market analysis or data	81%	75%
Dairy Australia's market information is widely utilised by industry and government stakeholders.	90% stakeholders utilising Dairy Australia market analysis or data	86%	85%
Dairy Australia is considered the most trusted and credible source of dairy market information by the media.	200 annual dairy market related media articles referencing Dairy Australia analysis or data	153	226
Dairy Australia maintains and grows its access to industry milk production data to inform market analysis.	95% of milk production	92%	88%
Dairy Australia maintains and grows its access to industry domestic sales data to inform market analysis.	90% of domestic market sales (liquid milk, cheese, butter and yoghurt)	81%	79%
Dairy Australia maintains and grows its access to industry manufacturing production data to inform market analysis.	90% of manufacturing production data	82%	90%

Key achievements

- Informed a wide range of policy initiatives and everyday decision-making by farmers and milk processors by providing high quality data and market analysis.
- Delivered market insights through the Dairy Australia Industry Update breakfast attended by dairy farmers, processors and industry analysts.



Case study

Celebrating 25 years of the Japan scholarship and alumni

Objective

Reinforce industry relationships in Japan, Australia's most important market for cheese.

Action

To mark the 25th year of the Dairy Australia Japan Scholarship Program and alumni network, Dairy Australia held a special alumni forum and dinner ahead of the annual Australian Dairy Conference in Japan. The forum included a panel discussion with dairy farmer and former Dairy Australia Chair, James Mann, former Dairy Australia's General Manager – Sustainable Dairy, Charles McElhone, and ADPF President, John Williams.

The forum provided an opportunity to share the outlook for Australian dairy in Japan with more than 80 attendees, reflect on decades of successful trade and look to the future. It was designed to inspire the next generation of Japanese dairy manufacturers and reinforce Australia's commitment to producing quality, sustainable dairy.

The investment included a visit to Australia for Japanese dairy professionals to undertake technical training farm visits. The activities in Australia were funded by the Victorian Government.

Impact

Relationships nurtured with the Japanese industry increase the profile and demand for Australian dairy, creating profitable export revenue and opportunities for farmers to increase dairy production.

Japan is Australia's second largest export market for dairy on both a volume and value basis. In 2024-25, Australia exported 77,000 tonnes of dairy to Japan, worth A\$534 million.

Valuable two-way learning was fostered between our industry delegation and the Japanese alumni of the Scholarship Program through panel discussions, seminars and dairy farm and supermarket visits.

James Mann, dairy farmer and former Chair of Dairy Australia, reflected: "The evening was a great celebration. You could feel the camaraderie and the appreciation towards the Australian dairy industry. There is no doubt that the experience meant a huge amount to them then and it has really influenced where they are today."

Mr Takeda, alumnus from 1999, thanked the Australian dairy industry on behalf of the Japanese alumni. "The Japanese industry has benefitted from the trade with Australia, the quality of milk, products and the innovation, especially when we were just developing our own dairy sector. Foremost though, is the sense of connection and confidence we gained with the Australian farmers whose farms we visited. It was such a formative experience, and for me the passion, resilience of the Australian dairy farmers left a huge impression on me," he said.

A large percentage of the program's alumni have stayed in the dairy industry and now have senior roles. The Japanese alumni provide valuable insights, intelligence and connections for the Australian dairy industry, which in turn, helps with market access and trade opportunities.



Case study

Impact of water buybacks on the southern Murray–Darling Basin dairy industry

Objective

Provide robust, evidence-based analysis of how further water buybacks on the southern Murray–Darling Basin (sMDB) could affect dairy farmers, processors and regional communities.

Background

In response to growing concerns from farmers and processors about the impact of further water buybacks in the southern Murray–Darling Basin, Dairy Australia identified a need for robust, dairy-specific analysis. We commissioned independent modelling to quantify the risks to production, farm viability and regional communities. The goal was to strengthen industry advocacy by providing credible evidence and exploring alternative approaches that support environmental outcomes, without compromising food security.

Action

Dairy Australia defined the problem, shaped the research and engaged with stakeholders, ensuring the study reflected the realities of dairy farming and processing.

We provided the consultant with Dairy Farm Monitor Program data to underpin detailed modelling and analysis of two plausible water buyback scenarios and measure their impact on farm profitability and total milk production, processor supply security and viability, and flow-on effects to local economies and communities.

The analysis considered direct impacts from higher water prices and reduced water availability, and indirect impacts such as employment, processing throughput and regional spending.

Dairy Australia worked with key stakeholders to ensure the findings were communicated clearly and credibly. The report launched in June 2025 and has been referenced in media, government consultations and industry submissions.

Impact

The report delivered a comprehensive, dairy-specific assessment of water buybacks in the sMDB, highlighting significant risks to farm viability and regional communities. Key findings included:

- Buybacks would shrink water available for farming by 7–16%, tightening supply across the Basin.
- Water prices could rise by up to 40%, especially in dry years, increasing costs for farmers.
- Milk production could drop by 3–15%, affecting supply chains reliant on regional milk.
- Average farm earnings could decline by 37% in a moderate scenario, with losses of up to \$430,000 in extreme dry years, raising the likelihood of farm exits.
- Processors would face reduced milk supply and higher costs, threatening plant closure and industry revenue.
- Lower farm income would reduce local spending, impacting jobs, services and the broader regional economy.

By leading this work, Dairy Australia provided the sector with credible, evidence-based insights to inform policy discussions and strengthen advocacy in national water debates. The report validated farmer concerns through rigorous analysis, giving them a stronger voice in Basin Plan discussions. The findings continue to inform dialogue, reinforcing Dairy Australia's role in supporting robust research and ensuring dairy's perspective is heard in decisions shaping the future of water management.

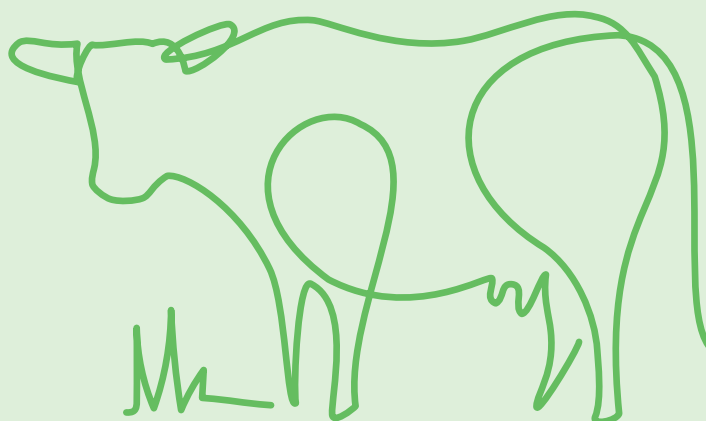
6

Technology and data-enabled dairy farms

Inspire more agile and responsive dairy businesses through greater integration of technology and data.

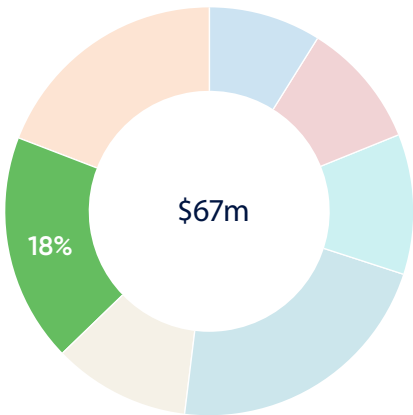
Strategic outcomes

- a Accelerated genetic progress in feedbase and animal breeding.
- b More flexible and agile dairy production systems.
- c Greater use of high-value technology on-farm.
- d Connected dairy production systems utilising multiple data sources to enhance decision-making.



Investment

Dairy Australia investment 2024-25 **\$12.1m**



External investment 2024-25 **\$2.94m**

Key funding partners	Contribution
Gardiner Foundation	\$2.03m
DataGene	\$0.38m
The University of Sydney	\$0.25m

Key partners

- Commonwealth and state governments
- DairyBio and DairyFeedbase investors and commercial partners
- Gardiner Foundation
- DataGene
- Pasture Trials Network
- Tasmanian Institute of Agriculture
- Regional Development Corporations
- University of Sydney
- University of Technology Sydney (UTS)
- Charles Sturt University
- Food Agility CRC
- Scibus
- Coles Sustainable Dairy Development Group

Performance summary

- Invested in a wide-ranging program of research to advance genetic progress, nutrition and herd performance through DairyBio and DairyFeedbase. In partnership with Agriculture Victoria and Gardiner Foundation, this work has delivered options for genomic selection to improve calf health, further evidence on the relative performance of multi-species swards for milk production, and a pathway for gene-edited short-term ryegrass.
- Contributed to a greater understanding on the relative risk of cow removal from both pasture-based and contained housing herds through DairyUP research projects. Additional project findings include a demonstrable shift in kikuyu management practices, along with future cultivar varieties that show superior disease resistance.
- Supported farmer decision-making by including additional trial information on ryegrass biomass (dry matter) performance and nutritive values in the Forage Value Index.
- Continued access to improved herd genetic information through the completion of a five-year National Breeding Objective review, successfully delivering a new set of breeding objectives to be released in December 2025.
- Supported farmers to improve herd health, potentially reducing the quantity of antibiotics being used on farm, through development of the Clinical Mastitis Decision Tool.

Accelerated genetic progress in feedbase and animal breeding

Genetic improvement remains a major productivity driver on-farm due to its ability to deliver permanent and cumulative gains in performance. Further innovation in genetics (including the expanded use of genomics and new breeding methods) will accelerate genetic gain, as well as broaden the range of traits and species/breeds that can be improved.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Results
The rate of genetic gain in ryegrass.	>2% genetic gain	<1%	<1%
Usage of Forage Value Index to select grass pasture varieties sown.	25% of farmers using Forage Value Index	9%	28%
The rate of genetic gain for sires of cows in Balanced Performance Index (BPI) units.	\$30/year	\$24/year	\$31/year (2018-2023 period)
The rate of genetic gain of cows in BPI units as a result of heifer genomic testing.	\$25/year	\$18/year	\$16/year (2012-2021 data)

Key achievements

- Supported farmer decision-making by including additional information on ryegrass biomass (dry matter) performance and nutritive values in the Forage Value Index (FVI).
- Continued access to improved herd genetic information via DataGene and the release of all updated breeding value runs. The National Breeding Objective five-year review was completed, with updates to breeding indexes planned for release in December 2025.
- Supported farmers to breed more environmentally efficient herds through the DairyBio (Animals) Green Cow project, which is in the second year of research and will create a new Australian breeding value for methane production efficiency, ensuring Australia remains at the forefront of estimating genetic progress in dairy cattle.
- Invested in long-term improvements to forage quality and availability through the development of the National Dairy Forages Research and Development Strategy, which provides an evidence-based suite of dairy forage research and development priorities.

Strategic outcome 6b

More flexible and agile dairy production systems

Many modern dairy farming systems need to modify their production systems according to seasonal conditions and changes in major input costs. These modifications are more extreme in warmer climates and with less reliable access to water.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Results
Development of new feedbase options that increase flexibility and agility.	20 new from baseline	0	13 available 12 in development
Development of new non-feedbase system options that increase flexibility and agility.	10 new from baseline	0	11 available 3 in development
Dairy farm businesses have access to the information and tools that they need to run their chosen farm system.	75% of farms	65%	54%

Key achievements

- Invested in providing insights to support early lactation decision making through successful pilot workshops for service providers, as part of the Dairy Feedbase Development Path to Change project.
- Improved pasture resilience and feed quality through research into disease-resistant kikuyu cultivars via the DairyUp Unlocking the potential of kikuyu project.
- Supported herd longevity and reduced culling risk through DairyUP Unlocking the potential of the cow research. Findings suggest that diet formulations enhanced with omega-3 fats may have a beneficial impact on longevity.
- Enabled the early detection of pasture risks using drone-based monitoring tools through the Dairy Feedbase project, Resilient Forages.

Strategic outcome 6c

Greater use of high-value technology on farm

Access to on-farm technology is increasing rapidly, while capacity to deliver insights from technology is lagging. Improvement will require a greater understanding of adoption challenges and greater alignment between the technology that delivers insights and farmer preferences for use of insights.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Results
Farm businesses have successfully adopted technology that provides new insights for farm operations	80% of farmers	48%	67%*

* Question reviewed to improve alignment with success indicator.

Key achievements

- Enabled farmers to improve herd health and potentially reduce the quantity of antibiotics being used on farm through development of the Clinical Mastitis Decision Support Tool.
- Supported future farmer decision-making about herd and pasture management by integrating all on-animal wearable sensor data, paddock and pasture data into a single database in the Ellinkbank research herd, making it easy to compare and use the information to guide farm management.

Strategic outcome 6d

Connected dairy production systems utilising multiple data sources to enhance decision-making

A proliferation of data will be of value to dairy businesses when it can be integrated and available for generating insights. This will require integration for both on-farm usage as well as to improve service provision. Improved decision-making will need to account for farmer preferences for use of insights.

Our progress against strategy

Key strategic success indicator	Target	Baseline	Actuals
New methods of collecting or analysing multiple sources of physical data on-farm.	5 new from baseline	0	7
Dairy farm businesses are routinely collecting three or more sources of physical performance data for decision-making (e.g. herd testing, pasture measurement, lameness scoring).	80% of farmers	65%	91%
Routine management decisions of dairy farm businesses (e.g. sire selection, irrigation scheduling, culling) are informed by multiple data sources.	95% of farmers	92%	76%

Key achievements

- Supported improved farm decision-making by enhancing data connectivity through the DataGene DataConnect project, which increased the number of software platforms that can input cow-level data into the industry's Central Data Repository.
- Supported farmers to improve long-term rotation and pasture utilisation planning through the release of the Pasture Smarts App, developed through Dairy Feedbase research.



Case study

DairyUP: Unlocking the potential of kikuyu

Objective

Support farmers to build more resilient, climate-adapted farming systems by identifying methods to:

- increase the nutritive value and pasture utilisation of kikuyu
- minimise toxicity and disease effects.

Background

Kikuyu-based pastures are an essential component of New South Wales coastal and subtropical dairy grazing systems. They also have utility in South-western Western Australia.

While being an important foundation of feedbase, kikuyu species can be difficult to manage. The plant needs close attention and can require the use of grazing pressure or mechanical topping to control mass while maintaining quality. Kikuyu can also pose unpredictable toxicity risks to cows, as the underlying chemical and physiological causes are not yet well understood.

DairyUP is a multi-project research program based in New South Wales and led by the University of Sydney, with major funding from the New South Wales Government and Dairy Australia, along with various research partners. The program commenced in 2021 and will finalise its current phase in 2026.

The Unlocking the potential of kikuyu project is one of four projects spanning the full period of DairyUP.

Action

Research is organised into five streams:

- Assessing and enhancing the ability to use remote sensing for better kikuyu pasture management.
- Exploring new kikuyu plant genetics to enhance biomass, nutritive value or disease resistance.
- Determining the risk factors and plant physiology of kikuyu toxicity.

- Determining the environmental footprint of kikuyu pastures.
- Creating better nutrient value predictions for kikuyu.

Studies were conducted across 15 dairy farms in NSW with kikuyu as their feedbase foundation, in addition to strip and plot studies conducted across a University of Sydney research site and three dairy farms. Some work has been laboratory-based and all research activities occurred over multiple years.

Impact

Research findings from this project will help farmers improve kikuyu pasture performance by guiding better grazing practices, introducing more resilient varieties, and supporting more accurate farm emission estimates.

Satellite technology, used to measure pasture biomass over two years, has shown promise for managing kikuyu pastures, but still requires frequent manual calibration, which could limit its broader use.

Results have identified that shorter grazing rotations help maintain kikuyu's nutritional value. Additionally, three kikuyu varieties, not yet released commercially, have shown increased disease resistance compared to the two established and widespread varieties currently used on farm. A commercial path to farm for these new varieties is currently being explored with the program's seed company partner.

The environmental impact research has demonstrated the carbon cycling metrics of kikuyu pastures for the first time and how carbon change in the herbage and soil is altered by management practices such as topping. This work can be used to better define the emissions intensity footprint of farms using kikuyu and will be a valuable factor for future farm emissions estimations.

Acknowledgement

DairyUP funding partners include New South Wales Department of Primary Industries and Regional Development, University of Sydney, Scibus, New South Wales Local Land Services, Norco, Leppington Pastoral Company, Australian Fresh Milk Holdings, Dairy NSW and Dairy Australia.

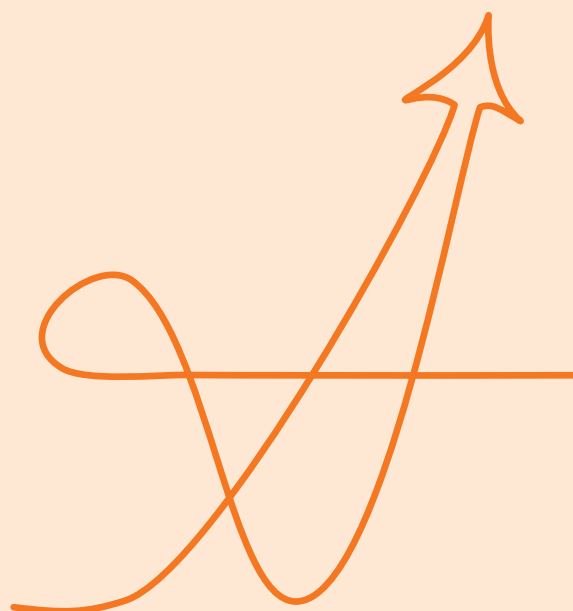
7

Innovative and responsive organisation

An organisation that is farmer-focused, with talented people who embrace innovation and take decisive actions.

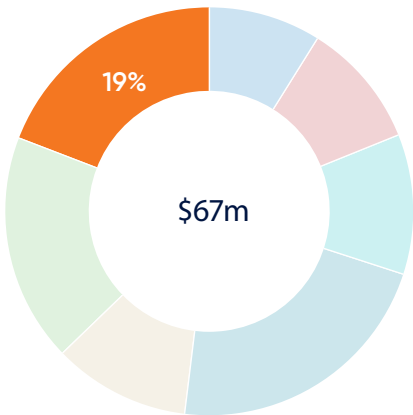
Strategic outcomes

- a We have a farmer-focused service delivery model.
- b Our culture of learning and innovation, values and ways of working deliver success.
- c Our infrastructure, resources and processes allow us to be informed, agile and responsive.
- d We have effective and transparent management of resources.



Investment

Dairy Australia investment 2024-25 **\$11.0m**



Performance summary

- Continued our primary focus on increasing the value we deliver to dairy farmers through the active management of farmer services, supported by the development of the service lifecycle to measure service value, inform extension priorities and guide decision making.
- Continued to engage directly with farmers through our national Farm Engagement practice, gaining deeper insights into their needs and connecting them with tailored services and support networks.
- Continued to embed the Development & Regional Adaptation practice, which plays a pivotal role in designing regionally adaptable, evidence-based extension services that drive meaningful practice change within the industry.
- Offered timely resources and tools to help farmers navigate critical challenges such as droughts, floods, and biosecurity threats.
- Launched the Quarterly Policy Submissions summary, demonstrating the support Dairy Australia provides to industry on key policy matters and offering clear visibility to stakeholders on how levy funds are being used.
- A strong organisational culture is reflected in a 78% participation rate and a 78% engagement score in the annual Employee Experience Survey. The organisation remains committed to attracting, developing, and retaining passionate individuals who contribute to the success of the dairy sector.
- [Given the internal organisational focus of this strategic priority, greater emphasis has been placed on key achievements, rather than detailed reporting on key success indicators.]

Strategic outcome 7a

We have a farmer-focused service delivery model

The work that Dairy Australia delivers is strongly focused on a deep understanding of farmers and farm businesses. Our work continues to be tailored to the needs of our primary stakeholders who are dairy farmers.

Key achievements

- Continued our primary focus on increasing the value we deliver to dairy farmers through:
 - Active management of farmer services, supported by the development of the service lifecycle to monitor and measure service value, while informing and guiding extension priorities and decision making.
 - Connecting farmers with regional teams and services through our national relationship management approach, resulting in 25% of farmers receiving an on-farm engagement visit and 558 new Farm Engagement Plans developed.
 - Strengthened capability to deliver extension services grounded in research and innovation through the development of an Extension Strategy that responds to current and emerging farming needs.

Strategic outcome 7b

Our culture of learning and innovation, values and ways of working deliver success

A positive organisational culture guides the delivery of our strategic plan. Our way of working is highly collaborative with a strong focus on teamwork and decisive action.

Innovative thinking is highly valued to identify new opportunities to create value for farm businesses, co-create innovation projects with partners and pursue new approaches to innovation.

Key achievements

- Continued creating value for farmers through delivery of key initiatives that support attraction, development and retention of talented people at Dairy Australia. Ongoing review of employee engagement and measuring the performance of our people to ensure they live our values of Farmer First, One Team, Innovative Thinking and Decisive Action.
- Supported farmers to access and benefit from emerging AgTech innovations by identifying agricultural technologies relevant to Australian dairy farmers and building strategic partnerships that focus on drought and climate resilience.

Strategic outcome 7c

Our infrastructure, resources and processes allow us to be informed, agile and responsive

We have the right balance of infrastructure, technical and digital capability supported by talented people and efficient processes.

Key achievements

- Supported dairy farmers and industry to navigate critical issues and events by providing timely and informative updates, particularly during periods of heightened interest or emerging challenges, including avian influenza (HPAI H5N1) and Bovaer.
- Increased organisational efficiency through the reduction and optimisation of digital platforms.

We have effective and transparent management of resources

Effective governance and transparent reporting enable Dairy Australia to make the right decisions and be accountable.

Key achievements

- Strengthened the value delivered to farmers from research, development and extension investments by defining and quantifying the value opportunities on farm to support improved investment prioritisation and benefits.
- Continued to improve communication with farmers by developing a farmer communications and engagement strategy with a focus on social media and thought leadership.
- Provided updates to industry on key policy matters through the launch of the Quarterly Policy Submissions summary, demonstrating the support we provide and offering clear visibility to our stakeholders on how levy funds are being used.
- Connected farmers with regional teams by successfully delivering farmer communications campaigns on Supporting Employment & People Development, Enhancing Farm Business Management, Managing Climate & Environment, Driving Herd & Feed Innovation, and Promoting Australian Dairy.



Case study

Farmer engagement

Objective

Support dairy farmers by connecting them with expertise, services and resources.

Background

Matt Ryan is a Tasmanian dairy farmer who entered the industry with limited experience. Last calving season, his herd was severely affected by milk fever, resulting in reduced production. Matt's farm business was also undergoing a period of change and he was seeking skilled workers to support the transition.

"Being new to the industry, I hadn't really thought too much about it," said Matt. "I thought what we were doing was okay and seemed to be working, and then last year we had big issues with milk fever."

"We lost some cows, which isn't great for anybody."

Action

Seeking answers on milk fever, Matt researched online before contacting his local Farm Engagement Lead, Rachel Gray. The Farm Engagement Lead's role is to bridge the gap between Dairy Australia's services and farmers on the ground, ensuring support is tailored to farmer needs.

Rachel escalated his concerns to Dairy Australia's Tasmania team, who organised an on-farm discussion group with seven other farmers. The session was led by the Tasmania Institute of Agriculture (TIA) and featured expert vet, Neil Leighton.

"I received lots of advice from Neil about pre- and post-calving nutrition which I implemented ahead of the season starting," said Matt.

"The discussion group was also a good opportunity to hear the strategies and ideas of other farmers and learn off one another."

Later, Matt approached Rachel with a query about international worker sponsorship.

"We were looking for an intermediate or higher-level skill set and had someone from overseas with the experience we were seeking respond to our job advertisement," said Matt.

Dairy Australia arranged an information session with a migration consultant, who explained the Dairy Industry Labour Agreement and recruitment pathways to a group of farmers.

Impact

Matt saw a dramatic improvement in herd health and gained confidence in his management practices.

"I certainly feel that my understanding is far better now than it was 12 months ago," he said.

"We have had a number of our older, higher risk cows calve with no issues this season. With the ones that have been a little bit wobbly, we've administered packs and they've got up on their own and gone on grazing."

While it is only early days in the spring calving season, Matt says incidents of milk fever are down by 75% from the previous year.

The support also helped Matt navigate workforce changes with confidence.

Reflecting on his experience, Matt praised the dairy industry's support network.

"I've had most of my working life in other industries such as vegetable and horticulture and other livestock, and I think the level of support in the dairy industry is second to none."

Disclaimer

The content of this publication is provided for general information only and has not been prepared to address your specific circumstances. We do not guarantee the completeness, accuracy or timeliness of the information.

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