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**Agriculture of the Australian Union:
Challenges, Responses, Tasks Ahead**

Abstract: The article analyses the current state of agriculture industry in the Australian Union. It examines the impact of miscellaneous factors, such as natural disasters, climate conditions, the economic consequences of the COVID-19 pandemic, the establishment of regional free trade regimes, as well as the degree of their implementation. The paper reveals the specificity of the entry of Australian agriculture products into the markets of China, South Korea and Japan along with the development of agriculture in Australia and the efforts made by the Australian government and business community to overcome the troubles the industry suffered from in 2018-2020. In the authors' opinion, the growing tensions in trade and economic relations between the Australian Union and the PRC affect the overall situation of Australian agriculture. In its turn, this incentivizes Canberra to explore new sources of agriculture product sales and expand cooperation with other partners.

Keywords: *Australian Union, agriculture, China, the Republic of Korea, Japan, international trade, COVID-19 pandemic, FTAs, RCEP, CPTTP*

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СЕЛЬСКОЕ ХОЗЯЙСТВО АВСТРАЛИЙСКОГО СОЮЗА: ВЫЗОВЫ, ОТВЕТЫ, ЗАДАЧИ НА ПЕРСПЕКТИВУ

Аннотация: В статье проанализировано современное состояние сельского хозяйства в Австралийском Союзе. Рассматривается влияние на него ряда различных факторов: стихийных бедствий, климатических условий, экономических последствий пандемии коронавируса, установления режимов свободной торговли, а также характера их реализации. Статья раскрывает специфику выхода австралийских сельскохозяйственных товаров на рынки КНР, РК и Японии на фоне развития сельского хозяйства в Австралии в целом и усилий австралийского правительства и деловых кругов, направленных на преодоление проявившихся негативных тенденций в период с 2018 по 2020 г. По мнению авторов, растущая напряженность в торгово-экономических отношениях Австралийского Союза и КНР влияет на общее положение австралийского сельского хозяйства. В свою очередь, это подталкивает Канберру к поиску новых источников сбыта сельскохозяйственной продукции и расширению сотрудничества с другими партнерами.

Ключевые слова: Австралийский Союз, сельское хозяйство, Китай, Республика Корея, Япония, международная торговля, пандемия COVID-19, ЗСТ, ВРЭП, ВПТТП

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The Australian Union Agriculture: Main Features

In order to understand the specificity of the Australian Union's agriculture, some figures are relevant. The agriculture industry in Australia has become one of the fastest growing sectors accounting for an important part of Australia's GDP¹. At the same time, the strategy to raise its value from 63 million AUD to 100 million AUD by 2030 was announced. This included multiple strategies like reliable customer-oriented value chains, the implementation development of environmentally-friendly initiatives like the carbon neutral approach and the smart water policy, the improvement of labor policy and the attraction of foreign labor force, as well as risk reduction measures². Australia's agriculture can be viewed as a sector of national economy that responds to both external and internal changes. In view of this, it seems logical to trace its dynamics in recent years.

The territory that is used by Australia's agriculture production was equal to 384 million hectares (as of June 2019)³, while the overall Australia's territory is 769.2 million hectares⁴ that is nearly 50% of the state. The amount of land covered by the industry is growing. This data indicates that the sphere is among the key drivers of Australia's economic growth despite Canberra's attention to high-tech industries. Australia has a differential system of agricultural production by various states according to their climatic conditions, access to the necessary resources and the scale of production. So, in the production of states Queensland and the Northern Territory, the focus is on cattle breeding; Tasmania's territory exports cattle, seafood and dairy products, Victoria has good conditions for wool, sheep, horticulture, cattle and dairy production; Western Australia mostly produces crops, and South Australian exports is oriented mostly on wine and crops⁵. By doing so, the Australian Union has a comparative advantage in terms of quality of its products.

One of the most attractive source of agriculture trade accounts for the beef export. Thus, the Australian Union is considered to be one of the major cattle producers and exporter and occupy 17% of the overall global exports⁶. According to OECD report database, the biggest amounts of beef productions exports from Australia in frozen format (61%), and only 39% are provided chilled⁷. Although from the side of production, the green continent is less competitive com-

paring with the countries of EU, United States and Brazil, so far, the quality of Australian products helps Australia to expand its production to the new markets. Among the biggest beef markets, Australia has Free Trade Agreements with the US, Japan, the Republic of Korea and People's Republic of China. In 2018, this accounted for more than 74% of the country's total beef export⁸.

The Australian Union is considered to be one of the most famous wine producers in Asia-Pacific and has more than 2000 wine exporters all over the world. Between 1991 and 2007, the demand for Australian wines has grown significantly from 212 million AUD to 3 billion AUD⁹. Its top trading partners included mainland China, United Kingdom, United States, Canada and Hong Kong. In 2020, the shift towards the wine export produced good results in South Korea's, Taiwan's and Malaysia's market¹⁰. Later on, the Republic of Korea's indicators grew significantly of 2017--2020, and in 2020, ROK shifted from 10th place to the 2nd¹¹. This stems from both the Chinese tariff policy and the aftereffects of Australia's FTAs with South Korea, Japan, Malaysia, Thailand and Vietnam¹².

In sum, the Australian Union has both economic and product capacities to expand its agriculture cooperation in different fields, and this industry still occupies the important place of bilateral trade in the region. At the same time, challenges that Australia faced later years connected with the results of natural disasters and the coronavirus pandemic mostly bring certain problems that will be discussed further.

The Industry Drivers and Trends

The year 2020 proved to be challenging for the Australian Union and resulted the economic decline in the agriculture industry. Among the internal challenges, one of the most important problems was generated by bushfires. By March 2020, the 12.6 million hectares had been burned, one billion animals killed, and the amount of CO₂ emissions was compared as 2/3 of what the industries of the country produced in 2018–2019¹³. The bushfires in Australia are not exceptional events, but what took place in 2020 became one of the biggest and was caused by the hottest and driest season in country's forecasts.

As a result, agriculture losses after bushfires were also high. Because of it, the Government presented the Agriculture Bushfire Recovery Plan for every state touched by the problem where a set of measures for Dairy, Apiculture and Viticulture sectors was presented¹⁴. Specifically, the NSW Government developed a plan in order to implement the Bushfire Industry Recovery Package for 140 million AUD, as well as to recover the local supply chains. After the bushfires, 7% of the workforce in regions that somehow suffered from the disaster lost their job in agriculture, and, in case of New South Wales, 16 000 agricultural properties were impacted¹⁵. These losses included infrastructure facilities, livestock, water supply interruption, short-term operation disruption and loss of feed. The initiative has become even more important accounting for the first wave of COVID-19 pandemic.

The pandemic further enhanced the need to elaborate on a proper approach towards the workforce employed in agribusiness. The Ministry of Agriculture, Drought and Emergency Management proposed temporary measures to enable faster border clearance to make the process of getting products to supermarkets easier¹⁶. As the demand for both permanent and seasonal workers rose significantly, measures to protect seasonal workers, as well as to secure supply chains and let foreigners that usually serve at seasonal work an opportunity to be legally protected from deportation, were taken.

These measures were all the more important for Australian farmers since nowadays 70% of all labor force occupied in fruit and vegetables industry are foreign workers¹⁷. As a rule, such workers use visas like Working Holiday Maker (WHM), Pasifika or Seasonal Worker Program (SWP) and also international students' visas¹⁸. With the spread of the pandemic, the supply of such labor force reduced significantly owing to entry restrictions. As a result, the Australian Union lost cheap and productive workforce to support the development of agriculture. At the same time, the amounts of undocumented migrants and workers that are still in Australia can be a solution, because according to surveys, their number varies from 50 000 to 100 000 people¹⁹. But while the non-documented labor force occupies 80 to 90% of all people in harvesting, their occupancy in other niches of agriculture is much less²⁰. In light of this, the deportation of non-documented workers nowadays seems difficult, since it can fur-

ther exacerbate the crisis. Moreover, the initiatives of certain states like Victoria to bring 1 500 Pacific Islanders by visa or Western Australia and Tasmania to bring hundreds SWP workers is not enough yet to be done for the horticulture.

With the spread of COVID-19 pandemic, the agriculture industry of the Australian Union was influenced by two factors: the supply capacities decreased, while the demand for food in the country, on the contrary, rose significantly²¹. These indicators are connected with both food security that is being at risk since the beginning of the pandemic, and the collapse of important food supply chains owing to closed borders. Simultaneously, the demand for Australian products decreased in 2020. Its export is expected to further decline by 3% and 2% for imports, and the most significant decline accounts for the Chinese exports (28%)²². Experts predict the fall to 389 million AUD for the AU seafood products alone and the similar effects on meat exports that is being reliant on importing crop protection equipment²³. The measures taken by the Australian government to support the agriculture industry during COVID-19 included, first and foremost, the development of information platform about the pandemic and gathering information on its aftereffects for agriculture, trade and the environment²⁴.

The need of joint actions to combat the COVID-19 aimed at restoring the pre-pandemic indicators rose significantly and was reflected eventually by the report of China, Australia, India, Japan and ten member states of ASEAN in June 2020. Australia emphasized the role of Asia in its economy and urged to abandon the previous patterns of international cooperation under which the European and Western partners enjoyed the central role²⁵. The main reason accounted for the success of Asian countries in grasping the pandemic challenges in comparison with the US and Europe.

Summing up the afore-discussed developments, it can be said that the agriculture of the Australian Union has to deal with the significant structural challenges that slowed the process of international interaction. At the same time, the above-mentioned problems forced the Australian Government to pay more attention to the domestic production capacities and the process of recovery.

Agriculture Products in Australia's Foreign Trade: Major Issues

Today the Australian Union devotes scrupulous attention for trade with its APEC partners, and the largest share of its export goes to China, Japan, South Korea, the United States, New Zealand, Singapore, and India²⁶. As the agriculture industry is an important part of Australia's export, it was negatively impacted by contradictions between Australia and China. Nevertheless, China is still considered to be a major economic and trade partner of the Australian Union by both export and import commodities. Overall, in 2019–2020 China accounted 39% of all Australian exports (which is 150.488 million AUD) and 27% of its imports (80.876 million AUD)²⁷. Despite tensions between Canberra and Beijing, as well as certain trade restrictions, the PRC goods and services still dominate the overall trade structure, but some barriers for the bilateral cooperation like the wine tariffs imposed in November 2020²⁸ incentivized Australia to further diversify its partners.

Among the effects that influenced upon the development Australia's agriculture, the regional arrangements are of special significance. The Comprehensive and Progressive Agreement for Trans Pacific Partnership (CPTPP) is a case in point. According to the Department of Home Affairs Notice No. 2018/37, the Schedule 8B of the Customs Tariff Act from 1995 that provides the customs duty rates for goods from Trans-Pacific Partnership countries will be fully reduced 60 days after the entering into force of TPP-11²⁹. By doing so, Australia expands its possibilities for enhancing regional cooperation and creates its exports opportunities.

The establishment of Regional Comprehensive Economic Partnership (RCEP) agreement also provided opportunities for the rise of Australia's value on the global market³⁰. As Trade Minister Simon Birmingham put it, RCEP provides two-fold benefits for Australian farmers and exporters in terms of their cross-border trade³¹. However the meeting reflected some tensions between China and the Australian Union as S. Birmingham expressed concerns over China's trade policy and military activities in the South China Sea³².

An important milestone in Australia's trade policy took place in 2015, when China-Australia Free Trade Agreement (ChAFTA)

was signed and had favorable aftereffects for agriculture, agribusiness, resources and energy manufacturing³³. According to available estimates, the Australian farm commodities (beef and sheep meat, wool, wine and barley) are heavily reliant on the Chinese market. This brings Australia 1 billion AUD annually³⁴. At the same time, the overdependence on China-Australia bilateral trade incentivizes the Australian Union to diversify its market opportunities.

Nevertheless, the Australian farmers understand that the country's policy towards China influences upon the agricultural sector. Attempts made by the Australian Government to replace China are considered to be inefficient for overcoming the deficit. Another big partner, the United Kingdom, is not capable to cover the damage caused by tensions between Australia and China. The reason why Australia's trade in barley has resulted in tangible losses is the absence of well-designed supply chains and use of the Australian barley in beer production. For the green continent, it means the loss of valuable partners from the side of Chinese breweries, as its other markets like Japan, Thailand or Saudi Arabia can absorb the amount of barley Australia produces, but the price will be much lower than China paid³⁵. This demonstrates that the Australian Union is not ready to re-direct its bilateral trade commodities to other markets.

Japan is another Australia's important partner. Since the formalization of trade relations in 1957 by signing the Commerce Agreement, the amount of investment increased in energy, minerals and food supply sectors³⁶. The export from the "green continent" to Japan accounted for natural gas that amounted 20.2 billion, coal, iron ore, beef, and copper ores and concentrates and aluminium³⁷. As for agriculture, Japan is considered the 2nd largest export market for Australia after China³⁸. Among the most promising products, cattle, crops, dairy, horticulture, sheep and seafood can be mentioned³⁹. This value of Japanese market is characterized by the effects of Japan-Australia Partnership Agreement (JAEPA) that makes 97% of Australian exports to Japan duty free⁴⁰.

Among the beef exports markets for high quality and marbled beef, Japan and South Korea are considered the most promising and occupy 39% and 14% respectively⁴¹. The success of the Australian meat production is that the country holds the number of both high quality European and British meat and provides the possibility for

Asian markets to buy the Japanese breeds like Wagyu that is characterized as premium product. Thus, the share of Australia in overall beef industry of Japan is considered 50%⁴² and is growing steadily. According to BMI Research report, the growth in trade in pork between Australia and Japan from 2017 to 2021 increased from 2.62 to 2.73 million tons per year from, beef has grown from 1.23 to 1.25 million from, and the amounts of poultry have grown to 2.51 million tons⁴³.

For Australia, Japan is a largest chilled lamb customer (64% of the overall sheepmeat imports in 2020), but the pandemic resulted the decrease in 3% of sheepmeat, and the largest amount of the product accounts for lambs (72%) and only 28% goes for mutton⁴⁴. The Australian Union farmers have strong possibilities for restoring the pre-COVID level of beef shipments to Japan not only because of efficient production chains, but also since the majority of Japanese consumers did not change their consumption habits. This gives Australia competitive advantages since the country positions itself as a supplier safe, organic and high-quality food.

Regarding South Korea, Australia and ROK enjoy effects of economic and trade complementarity. As an aftereffect of KAFTA, in 2018-2019 Australia was South Korea's 4th largest supplier of agricultural products and accounted for 10% of the overall industry import⁴⁵. The tariffs imposed by China and a shift towards new supply channels demonstrate the increasing attention of Australian exporters to the Republic of Korea. Since the pandemic outbreak, Australian beef producers have been redirecting their trade to other markets, among which South Korea is of special significance. The state of Queensland that was touched upon by the imposed tariffs by China and is the area for $\frac{3}{4}$ of all meat production redirected the red meat sales to the United States and South Korea⁴⁶.

The Republic of Korea's beef import is increasing by 2% annually⁴⁷. In 2013, the amounts of agricultural exports from the green continent to South Korea was equal to 1.9 billion AUD⁴⁸. The beef import safeguard that exists between the two countries was quite effective to hold the amounts under the agreed level till the beginning of 2021, and eventually, it was elevated to 30%. In January 2021, the tariffs were reduced to 18.6% according to KAFTA provisions⁴⁹. By doing so, the Australian Union tries to hold its positions in the im-

portant market that is dominated by the United States in terms of quality, and tries to compensate losses appeared in 2020. The other Australian agriculture commodities that are heavily dependent on South Korea's markets are wheat, cotton, sugar, malt and malting barley, edible offal, and cheese⁵⁰. The value of another component in bilateral agriculture trade cheese (mostly cream cheese and cheddar), has tripled over the past three decades⁵¹.

Additionally, the Republic of Korea is the largest export destination for unroasted malt, which accounts for 20% of Australian export shipments⁵². For South Korea, the Australian malt is almost the one and the only source of this product and accounts 68% of South Korea's overall import⁵³. One of promising markets after the implementation of KAFTA agreement is cheese and butter export that has got the additional level for development with the elimination of tariffs. Thus, tariffs on most exported units like cheddar cheese were reduced by 3% in 2017 and will be eliminated by 2026, for cream cheese and mozzarella tariffs were reduced by 28% with the future elimination in 2031, and for Gouda, Camembert, and Emmental were decreased to 28,8%⁵⁴. Overall, this market will improve Australia's competitiveness, as well as further energize Australia-ROK bilateral trade.

In light of the above mentioned, it can be seen that such countries like the PRC, the Republic of Korea and Japan are deeply incorporated in the structure of Australia's agriculture exports and reflect the overall demand for the precise country's products. Moreover, the representation of trade based on certain products shows the significant rise of bilateral trade after the implementation of bilateral FTAs and the state of competition of South Korean, Japanese and Chinese importers for the Australian beef and cattle, sheepmeat, dairy and other groups of products.

Conclusions

Arguably, the demand for Australia's agricultural products will be further impacted by the overall uncertainty connected with the COVID-19, as well as by periods of recovery from natural disasters. These challenges lead to the assumption that the current trend for reduce of certain Australian premium agriculture products will continue to be relevant. At the same time, economic cooperation with

India, China, South Korea, Japan, New Zealand, Malaysia, USA, and Vietnam will eventually restore the levels of the pre-pandemic agriculture production. The KPMG data indicates that it is possible to raise the 2020 income growth from 3.5% to 3.7% by 2025⁵⁵.

All in all, the agriculture of the Australian Union has good prospects for recovery with growing market shares for different types of products. At the same time, the significant influence of natural disasters, coupled with pandemic aftereffects and trade tensions, suggests that this process will be longer than expected and will need a well-elaborated approach developed by the Australian government towards the agriculture export policy.

Arguably, South Korea, China and Japan occupy pre-eminent positions in Australia's agriculture export. If so, Canberra's relations with Seoul, Beijing and Tokyo shape the general trends in the Australian agriculture production, as well as distinguish the privileged categories of goods. Nevertheless, growing tensions in bilateral trade between the Australian Union and China incentivize the Australian farmers to explore alternative markets for selling their products, as well as to deepen ties with those countries that can re-energize the industry. Nevertheless, Australia is not ready to lose the Chinese market, which is likely to remain Australian privileged agriculture export destination in the years to come.

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