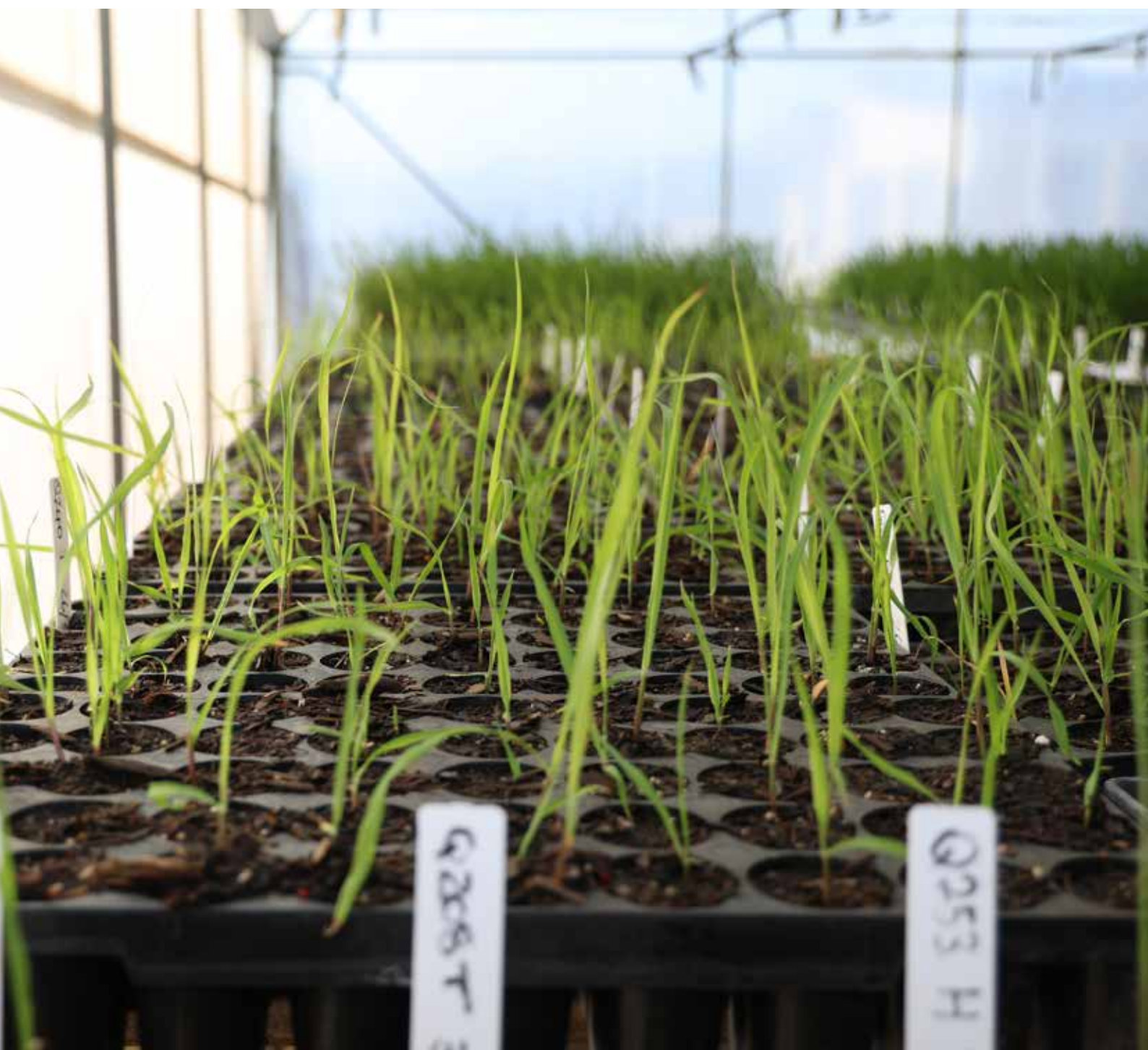


SUGAR RESEARCH AUSTRALIA LIMITED

ANNUAL OPERATING PLAN

2023/24





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1. INTRODUCTION

About Sugar Research Australia

Sugar Research Australia (SRA) is the specialist research organisation for the Australian sugar industry established in 2013 as a company owned by sugar growers and millers. SRA serves as the declared Industry Services Body for the Australian sugarcane industry under the *Sugar Research and Development Services Act 2013* (Cth).

SRA was formed through the merger of two previous entities, the Sugar Research and Development Corporation (SRDC) and the Bureau of Sugar Experiment Stations (BSES) who had individually made significant contributions to the Australian sugar industry. By combining their experience, expertise, resources, and knowledge, SRA was created to drive innovation and sustainability in the industry.

Unique to the research and development corporation (RDC) landscape, SRA operates an extensive network of research farms, laboratories, and offices throughout the industry's regions.

This widespread presence ensures that SRA staff, as well as research and adoption efforts are accessible to all growers and millers.

The primary source of funding for SRA's activities is the statutory sugarcane levy, which is paid by growers and millers to support research and development activities. SRA also receives matching funding and grants for eligible research and development activities from Commonwealth and Queensland government departments and agencies including the Australian Government's Department of Agriculture and Fisheries and Forestry (DAFF).

The strategic direction and governance of SRA are overseen by a skills-based board. The Board is selected by an Independent Director Selection Committee, endorsed by Members at an Annual General Meeting, ensuring a high level of expertise and accountability in guiding the organisation.

Strategic Plan Update

Sugar Research Australia (SRA) launched a new SRA Strategic Plan 2021-2026, after a significant engagement with key industry stakeholders to ensure we continued to evolve to meet the needs and priorities of growers and millers and the sugarcane industry more broadly. The plan had a transformational focus, providing a vision for progressing and evolving SRA to stay relevant, innovative, and sustainable.

In February 2023, the SRA Board reviewed the first year of the plan's implementation. This was to ensure we continue to guide those responsible for planning, delivering, and translating research and services to benefit our levy payers and the communities that support the sugarcane industry. The Strategic Plan 2021-2026 Update has narrowed our focus to provide a strategic roadmap, yet is comprehensive in addressing the opportunities and challenges that lie ahead for our industry and regional communities.



Updated Strategic Pillars

A HIGH-PERFORMING PORTFOLIO

- Deliver greater output for industry benefit
- Informed research investments
 - Advanced crop protection
 - Sustainable farming and milling practices and supply chain optimisation
 - Future uses of sugarcane

TRANSLATION CAPABILITY

- Continue to refresh service delivery model
- Make it easier and cost effective for industry to adopt research
- Build industry participation in district planning process

WORLD CLASS SUGARCANE VARIETIES

- Achieve improvement in yield and quality in variety development program
- Leverage science and innovation in breeding technologies
- Leverage plant-breeding rights and plan for future uses of high-fibre varieties

GROWING RESEARCH AND DELIVERY CAPACITY

- Deliver value from our research capability, intellectual property, facilities and delivery services
- Create new products and service opportunities from research
- Form research and delivery partnerships and ventures into new markets.

Updated Research Missions

PROFITABLE AND PRODUCTIVE

Overcome the challenges of improving yields sufficiently to outpace rising input costs

RESILIENT AND ENDURING

Mitigate and minimise production risks due to biosecurity and climate threats, and endemic pests, diseases, and weeds.

DIVERSIFIED AND ADAPTABLE

Support the objectives of the Sugar Plus roadmap to develop diversification opportunities.

SUSTAINABLE AND EFFICIENT

Position the Australian sugarcane industry as leaders in profitability, environmental sustainability and resource-use efficiency.

RESOURCED AND SKILLED

Support the development of people, partnerships and infrastructure required for effective research and development delivery.



2. HIGH-PERFORMING RESEARCH PORTFOLIO

The Annual Operating Plan 2023/24 details investment in research, development, and adoption (RD&A) activities and outputs consistent with SRA's Strategic Plan and to be delivered for the benefit of the industry over the coming year.

SRA has designed a focused, balanced, and collaborative research portfolio of investments that deliver tangible solutions and options to advance the productivity, sustainability, profitability, and long-term growth prospects for the Australian sugarcane industry.

By focusing research investment through the lens of five research missions, SRA ensure that investment is targeted towards delivering impacts in specific industry-identified areas.

RESEARCH MISSION 1: PROFITABLE AND PRODUCTIVE

Overcome the challenges of improving yields sufficiently to outpace rising input costs.

Inputs (\$000)	RD&A Activities & Outputs	Outcomes & Impacts
14,829	<p>Breeding program activities including parent management, field trials, genetic analysis, drone-based selection, sugar and fibre quality testing, release of new varieties, production of clean planting material, new variety promotion and marketing, led by SRA (all breeding activities for RM1/2).</p> <p>Validate genomic selection in plant breeding program to accelerate improvements in yield, commercial cane sugar, and other key traits, led by the University of Queensland (UQ) (2017002)¹.</p> <p>Develop a harvesting decision-support tool Harvest Mate to maximising cane recovery led by SRA (2020003)².</p> <p>Develop a machine learning system to measure the extraneous matter mass and billet length on cane consignments that enter mills led by Queensland University of Technology (QUT) (2022012)².</p> <p>Develop training modules for milling personnel as part of phase three of the Australian Sugar Industry Training Program led by QUT (2022014).</p> <p>Implement Small Milling Research Projects (SMRP) assessing feasibility of mill waste streams for supplemental income, benchmarking bagasse fly ash system performance, and evaluating the suitability of measuring massecuite dry substance for control on Australian pan stages, led by Isis Central Sugar Mill, Wilmar Sugar Australia, and Mackay Sugar respectively (2022/201, 2023/201, 2023/202).</p> <p>Deliver district productivity plan activities including, but not limited to, field days in each district, demonstration of cane loss monitors to grower and harvesting contractors, and the Local Expert Analysis program to analyse unidentified farm productivity data, led by SRA (all DP codes for RM1).</p> <p>Operate industry services including Near Infrared Spectroscopy (NIR) for mills delivered by SRA (all district plan activities for RM 1/2/4/5).</p>	<p>Adoption of SRA developed products, services, and research information</p> <p>Improved rate of genetic gain in plant breeding</p> <p>Reduced harvesting losses leading to increased yield, and improved cane quality</p> <p>Reduced milling costs and improved efficiency of operations from new technologies such as machine learning, NIR, and SMRPs</p> <p>Advanced knowledge in research and development to improve yields</p> <p>Increased yield and production from district activities such as the Local Expert Analysis program</p>

KEY PERFORMANCE INDICATORS

1. Increased tonnes per hectare
2. Increased sugar per hectare
3. Rate of adoption of productivity-enhancing technology
4. Number and value of elite varieties
5. Value of milling process innovation

RESEARCH MISSION 2: RESILIENT AND ENDURING

Mitigate and minimise production risks due to biosecurity and climate threats, and endemic pests, diseases, and weeds.

Inputs (\$000)	RD&A Activities & Outputs	Outcomes & Impacts
6,366	<p>Develop genetic solutions for the endemic diseases smut, Pachymetra, red rot, leaf scald, Fiji leaf gall, mosaic, yellow spot, orange rust, and brown rust supported by recurrent resistance screening of breeding germplasm for plant breeding led by SRA (all breeding activities for RM1/2).</p> <p>Obtain validation data sets to support the emergency registration of novel insecticides to control a moth borer incursion led by SRA (2018010)².</p> <p>Develop an on-farm diagnostic tool SugarPATH to detect and monitor leaf scald and ratoon stunting diseases led by Griffith University (2020002)³.</p> <p>Obtain validation data sets to support the emergency registration of novel insecticides to control canegrubs led by SRA (2020004)².</p> <p>Develop eDNA technology and sampling methods to increase detection and surveillance accuracy of exotic sugarcane pests led by EnviroDNA (2020007)².</p> <p>Establish proof of concept of novel biopesticide to control sugarcane root-feeding pests using RNAi technologies led by UQ (2020008)².</p> <p>Update the Sugarcane Industry Biosecurity Plan led by Plant Health Australia (2022002)³.</p> <p>Operate quarantine service for Australian sugarcane industry including a strategy for Fiji leaf gall inspections to make conclusions about eradication led by SRA (2022003).</p> <p>Develop an artificial diet for soldier fly to accelerate the development of new control options led by SRA (2022004)¹.</p> <p>Develop resistance screening method for chlorotic streak led by SRA (2022006).</p> <p>Produce new technologies to detect ratoon stunting disease at the mill led by UQ (2022006 and 2022007).</p> <p>Establish proof of concept of novel biopesticide to control sugarcane root-feeding pests using virus technologies led by UQ (2022016)¹.</p> <p>Improve seasonal outlook products and services used by growers and other agricultural producers led by the Bureau of Meteorology (2022901)⁴.</p> <p>Develop a map of weed distribution and severity, and management strategies for navua sedge, balsam pear and itch grass species led by SRA (2022005).</p> <p>Deliver district productivity plan activities including, but not limited to, regional workshops on RSD and monitoring of yellow canopy syndrome with expanded sampling methods led by SRA (all DP codes for RM2).</p> <p>Operate disease, pest and pathogen screening services for pachymetra, nematodes and ratoon stunting disease led by SRA (all district plan activities for RM 1/2/4/5).</p>	<p>Adoption of SRA developed products, services, and research information.</p> <p>Improved rate of genetic gain in plant breeding.</p> <p>Avoided production losses due to control of disease, pests, weeds, and climate threats.</p> <p>Reduced amount of chemicals used to manage diseases, pests, and weeds on farm.</p> <p>Advanced knowledge in research and development related to mitigating and minimising production risks.</p>

KEY PERFORMANCE INDICATORS

1. Improved resistance ratings of newly released varieties
2. Estimated avoided costs to production of potential, new and emerging pests, diseases and weeds
3. Estimated avoided production loss from advanced crop protection and management technologies
4. Farmer understanding of climate related threats and opportunities (survey)

RESEARCH MISSION 3: DIVERSIFIED AND ADAPTABLE

Support the objectives of the Sugar Plus roadmap to develop diversification opportunities.

Inputs (\$000)	RD&A Activities & Outputs	Outcomes & Impacts
1,148	<p>Build a network of existing and new industry value chain partners to uncover diversification opportunities for growers and milling companies led by QUT (2022018).</p> <p>New investment in research and development opportunities to support the Sugar Plus roadmap and diversification opportunities being pursued.</p>	<p>Connectivity of collaborative networks among research, industry and government stakeholders.</p> <p>Innovation performance as measured by new product development and technology adoption.</p> <p>New investment into the industry/ region.</p>

KEY PERFORMANCE INDICATORS

1. Percentage of farms and mills generating revenue from alternative products
2. Industry contribution to gross domestic product
3. Satisfaction with R&D support for the industry's diversification and trade and market access opportunities



RESEARCH MISSION 4: SUSTAINABLE AND EFFICIENT

Position the Australian sugarcane industry as leaders in profitability, environmental sustainability, and resource-use efficiency.

Inputs (\$000)	RD&A Activities & Outputs	Outcomes & Impacts
6,474	<p>Deliver training and adoption activities for the Cane to Creek Mackay Whitsunday project targeting improved nutrient and pesticide management solutions for growers and enhanced water quality in the Central district led by SRA (2020802)⁵.</p> <p>Investigate strategic tillage practise vs herbicide application practises and reducing pesticide use by adapting a smart spot spraying machine that detects weeds from soil and sugarcane led by James Cook University (JCU) (SRA is a delivery partner) (2020804)⁶.</p> <p>Deliver training and adoption activities for the Burdekin Irrigation Project targeting improved irrigation efficiency and water quality solutions for growers in the Burdekin district led by SRA (2020805)⁷.</p> <p>Develop a Sustainability Framework for the Australian sugarcane industry to drive improvements in the industry's environmental impact led by Roth Rural (2021008)².</p> <p>Deliver training and adoption activities for the Mobilising the Murray Project targeting whole-of-farm solutions for productivity constraints experienced by growers in the Northern district led by SRA (2021804)⁸.</p> <p>Deliver training and adoption activities for the project Soil specific management for sugarcane production in the Wet Tropics targeting improved knowledge and understanding of soils across the Wet Tropics region to support profitable and sustainable production led by SRA (2021805)⁹.</p> <p>Complete industry wide leaf and soil survey to detect hidden macro and micronutrient constraints in sugarcane led by SRA (2022010).</p> <p>Develop best practice, soil specific phosphorus management practices for sustainable sugarcane production led by SRA (2022011).</p> <p>Deliver training and adoption activities as part of XXXX Burdekin Smart Irrigation and Lower Burdekin Cane Incentives projects to improve irrigation efficiency and water quality solutions for growers in the Burdekin district led by NQ Dry Tropics (SRA is a delivery partner) (2022801 and 2022802)¹⁰.</p> <p>Deliver training and adoption activities targeting improved nutrient use efficiency and reduced amounts of Dissolved Inorganic Nitrogen flowing into water waters in the Northern district led by CANEGROWERS (Cassowary Coast Reef Smart Farming Project) (SRA is a delivery partner) (2022803)¹¹.</p> <p>Deliver district productivity plan activities, including but not limited to, SIX EASY STEPS validation trial in the North district and adoption of controlled traffic systems in New South Wales led by SRA (all district plan activities for RM 1/2/4/5).</p>	<p>Adoption of SRA developed products, services, and research information</p> <p>Reduced amount of inputs applied on farm.</p> <p>Increased tonnes of cane produced per hectare (t/ha)</p> <p>Increased profitability (\$/ha)</p> <p>Improved water savings (ML per tonne of cane)</p> <p>Improved water quality (reduced Dissolved Inorganic Nitrogen).</p> <p>Contribution to potential avoided loss of value from market closure support by improved environmental impact.</p> <p>Advanced knowledge in environmental sustainability and resource-use efficiency.</p>

KEY PERFORMANCE INDICATORS

1. Positive progress in environmental credentials measured in industry benchmarking
2. Positive external perceptions of sugar industry activities and efforts (government and public views)
3. Industry participation in green markets
4. Industry uptake of, and satisfaction with, compliance and decision tools

RESEARCH MISSION 5: RESOURCED AND SKILLED

Support the development of people, partnerships and infrastructure required for effective research and development delivery.

Inputs (\$000)	RD&A Activities & Outputs	Outcomes & Impacts
1,698	<p>Milling research capacity-building and succession-planning program for early career researchers led by QUT (2018015)¹².</p> <p>PhD scholarship: Develop method to apply mill mud and ash to maximise yield and soil health, and measure soil carbon sequestration led by JCU (2021101).</p> <p>PhD scholarship: Develop biofertiliser with optimal soil nutrient utilisation to increase yields led by UQ (2021102).</p> <p>Collaborate with rural research and development corporations across agricultural sectors and Agriculture Innovation Australia (2021601 and 2021602).</p> <p>PhD scholarship: Develop a biosensor device to diagnose diseases on farm led by Griffith University (2022101).</p> <p>Research award: Harnessing the synbio potential of Australia's stingless bees led by UQ (2022401).</p> <p>Research award: Genomic prediction of ratoon yield robustness led by UQ (2022402).</p> <p>Scholarships and bursaries for undergraduate engineering students to build knowledge and experience of milling and to support employment pathways led by QUT (2022601).</p> <p>Deliver new digital SmartCane Best Management Practice learning module led by SRA (2022804)¹².</p> <p>Deliver district productivity plan activities including, but not limited to, establishing grower groups and building participation in the industry (all district plan activities for RM 1/2/4/5).</p>	<p>Adoption of SRA developed products, services, and research information</p> <p>Increased number of research jobs created to support the sugarcane industry</p> <p>Connectivity of collaborative networks among research, industry and government stakeholders</p> <p>Innovation performance as measured by new product development and technology adoption</p>

KEY PERFORMANCE INDICATORS

1. The number and diversity of industry and research partners involved in establishing SRA's R&D goals and strategies
2. Number of capability building programs, and participation rates, including diversity of participation
3. Number of undergraduate places supported in industry critical areas such as agronomy
4. Number of PhD submissions relating to the sugar industry

1. This project is funded by the Department of Agriculture and Fisheries and Sugar Research Australia.
2. This project is funded by Sugar Research Australia and the Department of Agriculture and Fisheries.
3. This project is funded by the Australian Research Council and Sugar Research Australia.
4. *Agri-Climate Outlooks* is a collaboration across AgriFutures Australia, Australian Eggs, Australian Wool Innovation, Cotton Research and Development Corporation, Dairy Australia, Fisheries Research and Development Corporation, Grains Research and Development Corporation, Hort Innovation, Meat & Livestock Australia, and Sugar Research Australia, via Agricultural Innovation Australia, delivered by the Bureau of Meteorology.
5. The *Cane to Creek Mackay Whitsunday* project is funded by the partnership between the Australian Government's Reef Trust and the Great Barrier Reef Foundation with support from Sugar Research Australia, Mackay Area Productivity Services and Plane Creek Productivity Services.
6. This project is funded by the partnership between the Australian Government's Reef Trust and the Great Barrier Reef Foundation, and supported by James Cook University, AutoWeed and Sugar Research Australia.
7. The *Burdekin Irrigation Project* is funded by the partnership between the Australian Government's Reef Trust and the Great Barrier Reef Foundation with support from Sugar Research Australia, Farmacist, AgriTech Solutions, Burdekin Productivity Services, Burdekin Bowen Irrigated Floodplain Management Advisory Committee, NQ Dry Tropics, James Cook University and the Queensland Department of Agriculture and Fisheries.
8. The *Mobilising the Murray Project* is funded by the Australian Government's Reef Trust and delivered by Terrain NRM in partnership with Sugar Research Australia.
9. This project is supported by Sugar Research Australia and the University of Southern Queensland, through funding from the Australian Government's National Landcare Program.
10. These projects are funded by the partnership between the Australian Government's Reef Trust and the Great Barrier Reef Foundation, and Castlemaine Perkins.
11. The *Cassowary Coast Reef Smart Farming* project is funded by the partnership between the Australian Government's Reef Trust and the Great Barrier Reef Foundation.
12. This project is funded by Sugar Research Australia, Queensland University of Technology, and the Sugar Research Institute.

3. INCOME AND EXPENDITURE FORECAST

Operating Income & Expenditure

During 2023/24 SRA plans to invest \$42.8 million in RD&A activities across five research missions. This includes investment in contestable projects, core programs and services, adoption activities via district productivity plans, and corporate support initiatives.

SRA's income streams consist of a levy from sugarcane produced and processed within Australia paid by growers and millers, matched by a contribution from the Commonwealth Government for investment in research, development, and adoption activities as per the Statutory Funding Contract 2021-2031 between SRA and the Commonwealth

acting through the Department of Agriculture, Fisheries and Forestry. SRA also receives funding from co-investment partners including, but not limited to, the Queensland Department of Agriculture and Fisheries, the Queensland Department of Environment and Science, and the Great Barrier Reef Foundation.

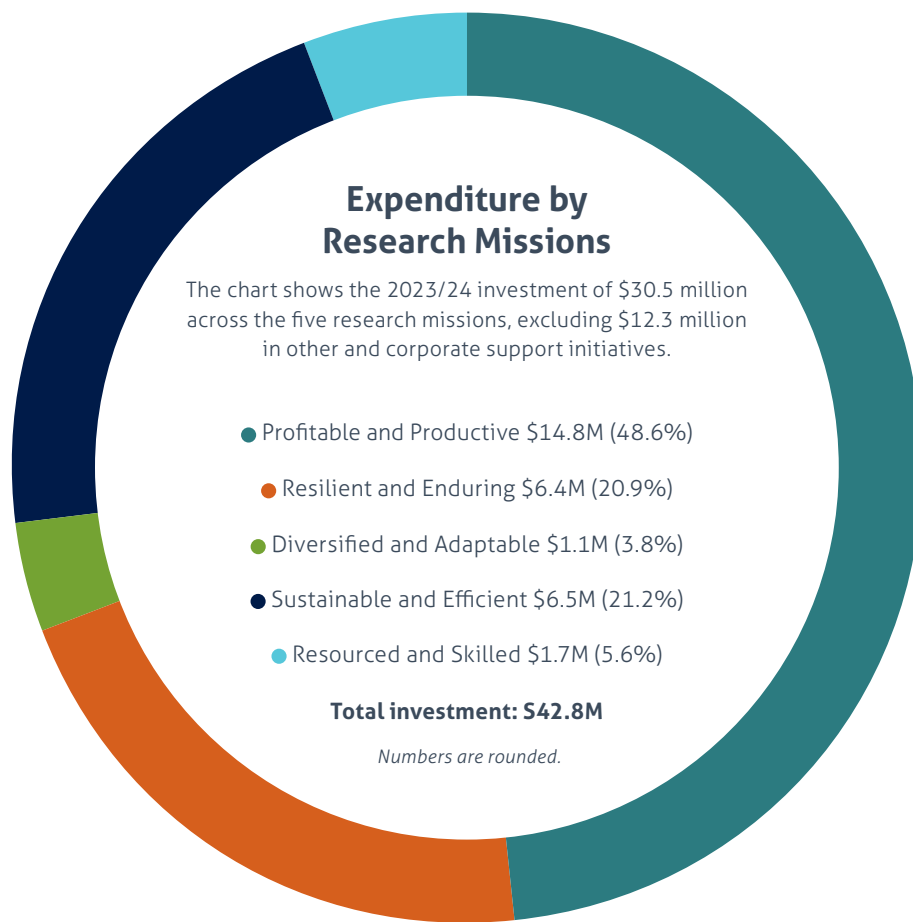
OPERATING INCOME	\$000
Industry investment	21,700
Commonwealth co-investment	6,500
Queensland Government co-investment	1,450
Collaboration income	6,033
Service fee income	442
Interest	2,059
Other income	1,323
Operating Income Total	39,509

Numbers are rounded.

OPERATING EXPENDITURE	\$000
R&D contestable	12,678
R&D internal core	13,522
Industrial contract research	1,932
Research adoption	2,383
R&D operational support	3,620
R&D expenditure total	34,138
Board and investor relations	767
Corporate support	6,892
Corporate total	7,660
Operating expenditure total	41,798
Total SRA Operating Result	(2,288)
Initiatives*	1,000
Total SRA Result	(3,288)

* Initiatives include systems and process review and improvement programs.

Numbers are rounded.



4. FORECAST EXPENDITURE BY PRIORITIES

Alignment to Government and Industry Priorities

SRA is committed to listening to our investors, understanding their needs and responding to these needs through innovative R&D solutions that are successfully adopted and deliver impacts for the industry, as well as benefits for the broader Australian community.

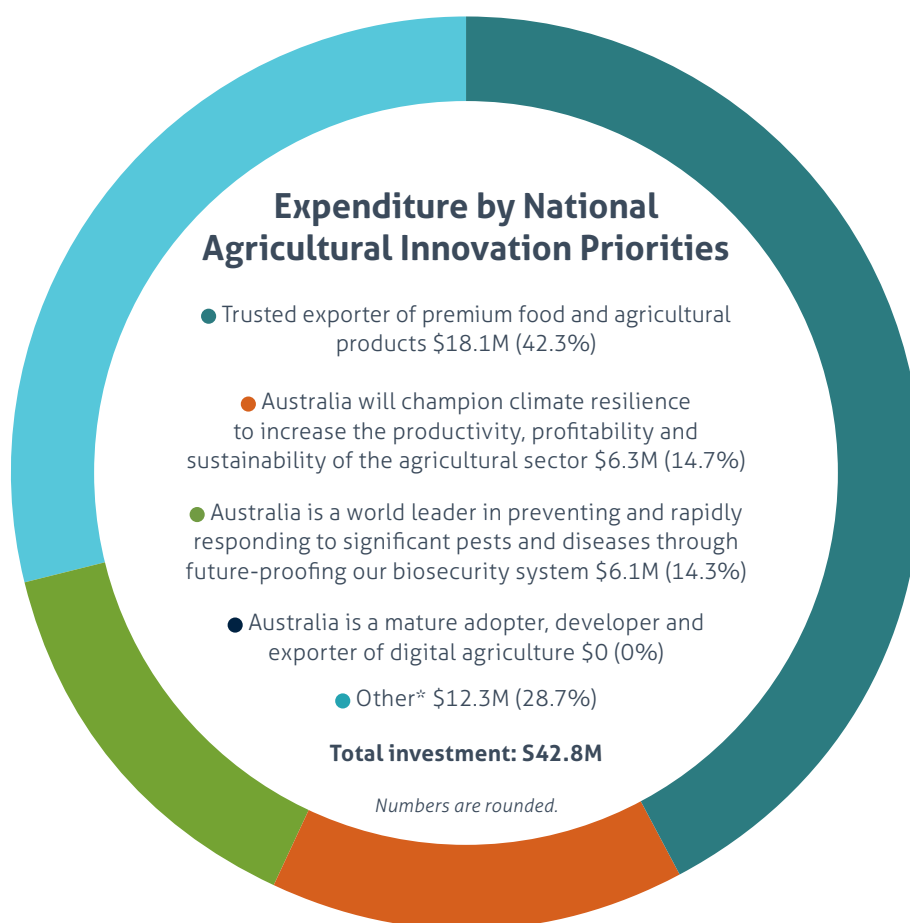
The key RD&A activities laid out in this AOP respond, within the constraints of our budget, to the priority challenges and opportunities of the sugarcane industry and more broadly, the priorities of the agricultural innovation system, government, and the wider public.

These priorities include those noted in the following strategic documents:

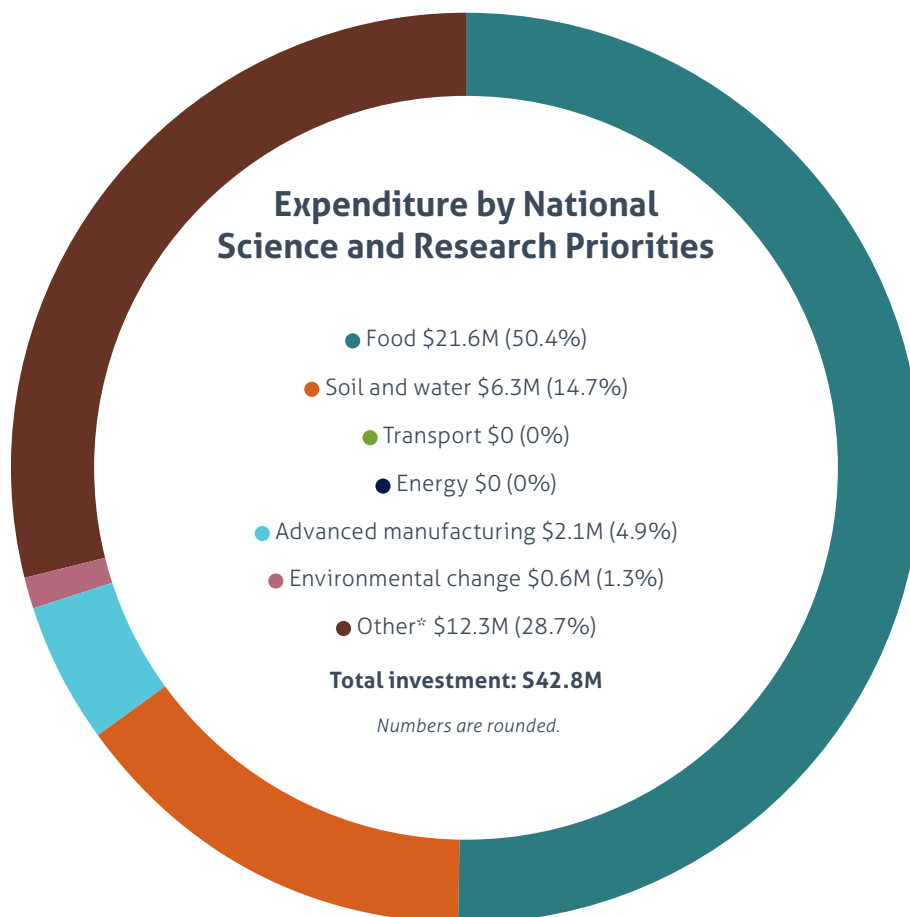
- National Agricultural Innovation Policy Statement, 2021
- Australian Government's Science and Research Priorities, Australian Government, 2015
- Rural Research, Development and Extension Priorities, 2015
- National Sugarcane Industry Research, Development and Extension Strategy, 2017
- Queensland Department of Agriculture and Fisheries Sugarcane Strategic Objectives, 2022
- Sugar Plus Industry Roadmap, 2022

These priorities together will ensure RD&A investment is strategic, collaborative, and targeted to improve profitability, productivity, competitiveness and preparedness for future opportunities and challenges.

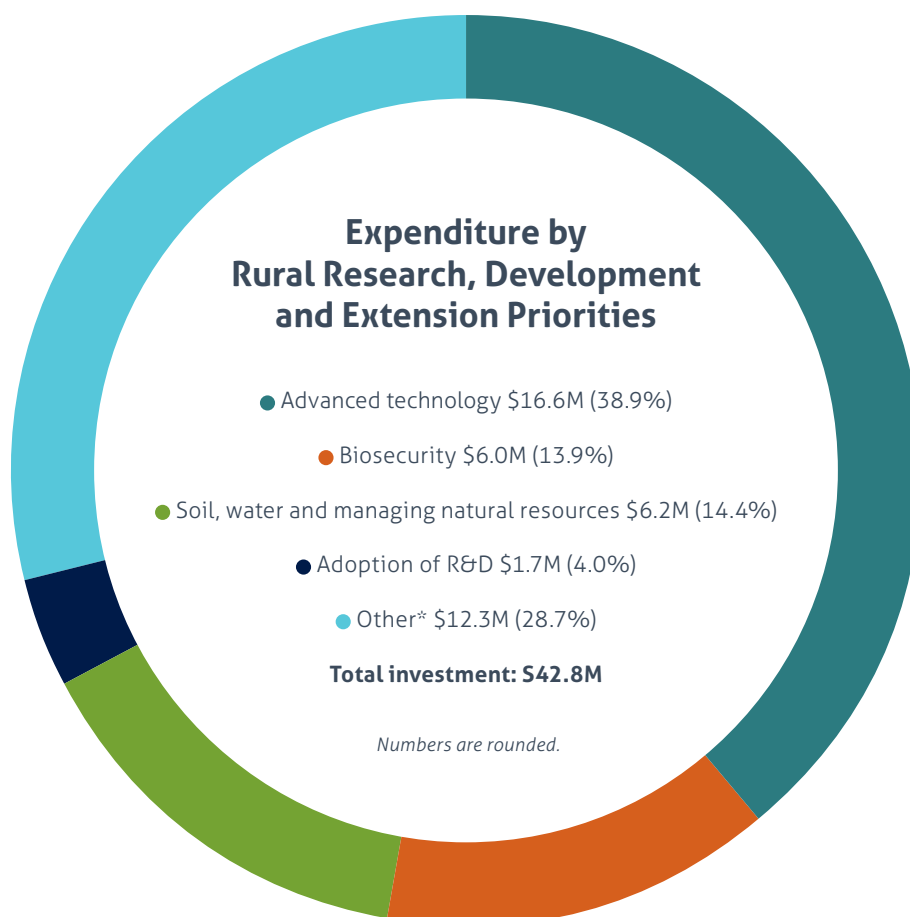
The charts below illustrate SRA's planned investment for 2023/24 by the National Agricultural Innovation Priorities, Australian Government's Science and Research Priorities, and Rural Research, Development and Extension Priorities.



*Other includes collaboration across the agricultural sector with rural research and development corporations and Agriculture Innovation Australia (2021601 and 2021602) and corporate support and other initiatives.



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5. ALIGNMENT OF SRA'S RESEARCH MISSIONS TO INDUSTRY AND GOVERNMENT PRIORITIES

The table illustrates alignment between priorities and SRA's research missions

Stakeholder Priorities	PROFITABLE AND PRODUCTIVE	RESILIENT AND ENDURING	DIVERSIFIED AND ADAPTABLE	SUSTAINABLE AND EFFICIENT	RESOURCED AND SKILLED
National Sugarcane Industry Research, Development and Extension Strategy					
1. Products: Expanding uses for sugarcane	●		●	●	●
2. Productivity: Achieving significant productivity gains and increasing adoption	●	●		●	●
3. Stewardship: Improving environmental performance and industry's social licence		●		●	●
4. People: Building the capability of industry and research			●	●	●
National Agricultural Innovation Priorities					
1. Trusted exporter of premium food and agricultural products	●		●	●	
2. Australia will champion climate resilience to increase the productivity, profitability and sustainability of the agricultural sector		●			
3. Australia is a world leader in preventing and rapidly responding to significant pests and diseases through future-proofing our biosecurity system		●			
4. Australia is a mature adopter, developer and exporter of digital agriculture	●				●
National Science and Research Priorities					
1. Food	●	●		●	
2. Soil and water				●	
3. Transport			●		
4. Cybersecurity					
5. Energy	●		●	●	
6. Resources					
7. Advanced manufacturing	●		●	●	●
8. Environmental change	●	●	●	●	●
9. Health					
Rural Research, Development and Extension Priorities					
1. Advanced technology	●		●		
2. Biosecurity		●			
3. Soil, water and managing natural resources				●	
4. Adoption of R&D	●	●	●	●	●
Queensland Department of Agriculture and Fisheries Strategic Objectives – Investment Areas					
1. New breeding technology	●				
2. Optimised production	●			●	
3. Maximised harvest	●				
4. Transformational technologies	●				
5. Plant protection*		●			
6. Regional scenario planning		●			
7. New products and value-chains			●		
8. Environmental sustainability*				●	
9. Soil biology and optimised use of inputs for sustainability*				●	
10. Collaboration and innovation design			●		●
11. Data driven agronomic decisions and digital solutions	●			●	●
12. Understanding the sugarcane system – beliefs, influencers and drivers			●		●
Sugar Plus: Australia's Sugarcane Roadmap					
1. Reliability	●			●	●
2. Efficiency	●			●	●
3. Scale				●	●
4. Growth	●		●		●

*Investment area titled given by SRA.



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