Sugar Research Australia

2024 Grower Survey

A survey of SRA members

November 2024

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Context for the research

background

Sugar Research Australia (SRA) invests in evidence-based research, development and adoption (RD&A) activities on behalf of sugarcane growers and millers to meet industry challenges and opportunities.

SRA is funded through levies from growers and millers and a co-contribution from the Commonwealth Government and grants through other government agencies, including the Queensland Government Department of Agriculture and Fisheries.

Central to achieving success of the SRA strategic plan is the engagement, support and advocacy of two key stakeholder audiences, namely:

- Growers; and
- Millers.

These two stakeholder audiences are, after all, the end recipients of the outcomes of the investment in RD&E. Building, nurturing, and sustaining good engagement with growers and millers is therefore vital.

SRA has previously undertaken an annual Grower Survey and a separate Miller Survey.

Both have provided an opportunity to stop, listen and reflect on the level of grower and miller awareness and engagement with SRA programs, communications and initiatives and their satisfaction with the outcomes being delivered through the SRA investments.

This report provides an overview of the feedback provided by growers. A separate report is provided to outline the feedback provided by Millers.

The research approach

The research reflects the views of SRA grower members

Membership of SRA is voluntary and free to all sugarcane growing and milling levy payers. There is a range of benefits associated with being a member, including eligibility to vote at the Annual General Meeting.

That said, growers need to apply for membership to SRA. As of October 2024, SRA had 2,474 members.

Currently not all growers are SRA members. Based on figures from ABS, in 2022-23 there were approximately 3,800 levy paying businesses reporting the sale of sugarcane for processing[1].

As SRA currently only has details for SRA members, the research was therefore confined to seeking feedback from this grower cohort.

There is no information to determine whether any significant differences exist between the perceptions and experiences between members and non-members.

Interpretation of the results from the research should be cognisant of the scope for this program of work.

The research design

The research was aimed at gathering feedback from growers across several different focus areas, including:

1. Measure and report on grower & miller understanding, engagement and satisfaction with the range of services, support, and RD&E delivered by SRA.

2. Provide capacity to explore and investigate results at a segment level. This will include among other things – across regions and across farm size (production).

3. Utilise this and other available information to build insights into the Grower & Miller experience, needs and expectations and experiences with SRA. Describe opportunities to strengthen the relationship, expand the engagement and increase Grower/Miller satisfaction.

Feedback from growers was collected through a computer-assisted telephone interviewing (CATI) survey. A total of n = 300 growers provided feedback using the telephone survey across the period 23rd October 2024 to 11th November 2024

A summary of the key findings followed by details results across the research now follows.

1. https://www.abs.gov.au/statistics/industry/agriculture/australian-agriculture-broadacre-crops/latest-release#sugarcane

Observations and insights

2024 Grower Survey

Sugar Research Australia

We spoke to 300 levy-paying sugarcane growers who are members of SRA - this is a summary of their feedback.

Performance indicators

Satisfaction with R&D levy investment

0 Extremely dissatisfied — **6.3** — 10 Extremely satisfied

Advocacy of the services, products and information SRA provide

0 Not at all likely — **6.8** — 10 Extremely likely

Level of urgency for SRA to fund research addressing priorities

Average % of high urgency within each program

71%	45%	62%	63%	45%
Program 1: Varieties	Program 2: Agronomy and Farming Systems	Program 3: Crop Protection	Program 4: Milling and Processing	Program 5: Adoption

Top five priorities rated by level of high urgency

#1 - 80% - Create new varieties with improved production and processing performance
#2 - 70% - Sustainable management of pests
#3 - 69% - Sustainable management of pathogens
#4 - 69% - Develop new traits, improve breeding efficiency, and fund new PhDs in plant breeding
#5 - 66% - Support correct variety adoption decisions through performance information, grower engagement, and availability of planting material

Other notable measures

+54 — Nett Sentiment about the future of the Australian sugarcane industry over the next 12 months

56% — % rating very active or active in their perception of SRA staff engaging in industry matters and events in their district

6.6 out of 10 — Average satisfaction across four aspects of the experience with local SRA staff *
(scale of 0 = Extremely dissatisfied to 10 = Extremely satisfied)

6.2 out of 10 — Average satisfaction across four aspects of SRA's plant breeding program *
(scale of 0 = Extremely dissatisfied to 10 = Extremely satisfied)

* Average of satisfaction ratings provided underneath each topic.

Observations and insights

The 2024 SRA Grower Survey (restricted to just grower members of SRA) provides a range of feedback from growers on their interaction and engagement with SRA and their experiences with, and assessment of, the outcomes achieved by SRA.

The following discussion focuses on some of the key insights from this survey.

Growers remain confident about the future

Growers continues to hold a positive outlook about the future of the Australian sugarcane industry over the next 12 months.

More than two in three (68%) growers were positive about the future of the industry. The result is softer than the nett sentiment result reported in 2023 (+78) but remains positive.

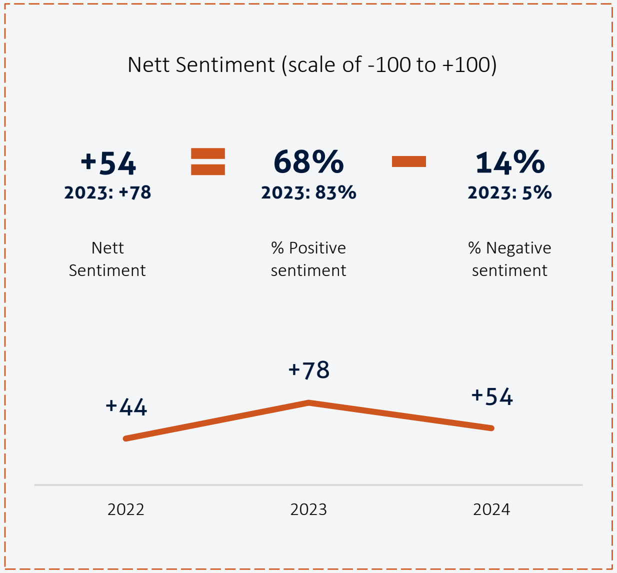
Results have reflected a positive outlook for the last three years.

The improved operating conditions and the current commodity prices have undoubtedly contributed to this outlook.

The results and analysis show that:

- The outlook was reasonably consistent across all production size cohorts with growers of all sizes typically reporting an upbeat outlook.
- Results were positive across all growing regions with Central Queensland reporting the lowest sentiment (+31). In this region, 54% were positive while 23% reported a negative outlook.

With that as context we now explore the feedback related to growers' experiences with SRA.



Observations and insights

Grower satisfaction eases back

In 2024, growers reported an overall grower satisfaction of 6.3 (on a rating scale of 0 – 10). While this represents a softening of satisfaction (down 0.3), the change is not statistically significant.

The decline illustrates the dynamic nature of grower's engagement and satisfaction with SRA. These remain a 'work in progress'.

Based on the ratings provided, we note that:

- Just over three (31%, down 6%) rated their satisfaction strongly (at 8 or above);
- More than half of growers (54%, up 1%) provided a modest rating (5 – 7); while
- Just over one in seven (15%, up 5%) rated at 4 or below.

Focus on these results should be on the increase in low satisfaction (0-4, up 5%), along with decline in growers rating 8+ (down 6%).

The results have reverted to levels like that reported in 2022. A close 'watching brief' on this measure over the next 12 months is warranted to ensure no further erosion of grower satisfaction.

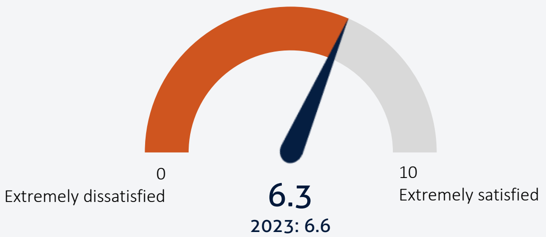
What are the satisfaction signals in the feedback from growers?

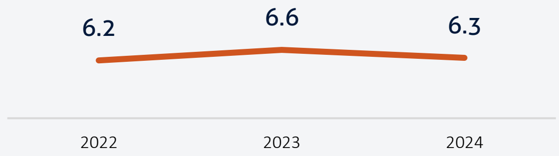
From the feedback around grower satisfaction, we noted that:

- Satisfaction results were somewhat mixed across regions. While in most regions satisfaction declined year-on-year, NSW grower satisfaction remained largely steady while satisfaction among growers in Southern Queensland increased over the last 12 months:
  - growers in NSW were again the most critical cohort (rating 5.8, down 0.1 on 2023); whilst
  - growers in Herbert (6.5) and Southern Queensland (6.8) reported the highest levels of satisfaction.
- Grower satisfaction declined across businesses of all production sizes, except for the very large cohort (production of over 50,000 tonnes) where there was a small increase in grower satisfaction.

There are likely several contributing factors to this decline in grower satisfaction. Some of these factors are discussed next.

Satisfaction with R&D levy investment





	2023	2024	Change
Far North Queensland	6.6	6.3	Down 0.3
Herbert	6.8	6.5	Down 0.3
Burdekin	6.5	6.1	Down 0.4
Central Queensland	7.0	6.2	Down 0.8
Southern Queensland	5.9	6.8	Up 0.9
New South Wales	5.9	5.8	Down 0.1
Small	6.8	6.6	Down 0.2
Medium	6.3	6.0	Down 0.3
Large	5.8	5.3	Down 0.5
Extra Large	5.5	5.9	Up 0.4

Observations and insights

While there is not a causal relationship between the following issues and grower satisfaction, the analysis suggest these issues have collectively impacted grower satisfaction in the 2024 survey.

- Visibility and perceived activity/engagement of local SRA staff

  The analysis shows a clear correlation between grower overall satisfaction with SRA and growers' perception of how active local SRA staff are in the region. Results for this measure have declined over the last 12 months, although the 2024 result remains slightly above that reported in 2022. This may be an outcome of resourcing and capacity in some regions (i.e. NSW), new staff coming on board and taking some time to build traction with local growers or a strategy looking to engage and connect with larger businesses as a priority.

  There was a call out across the survey from some growers for more ‘boots on the ground’ and stronger levels of engagement from SRA.

- Concerns from growers around pests (especially cane grubs) were articulated across the survey process - with the regulation of Paraquat, there was consistent feedback in the survey about cane grub control amongst usual pest control (soldier flies, rats, feral pigs, etc.)

- There was regular reference from growers of the impact of reduced milling capacity and performance, in particular how the current operating environment was having an immediate impact, with growers having to delay harvesting to later in the season.

- There was regular and consistent feedback in the survey around varieties. Growers were reporting frustration around the performance of new varieties, that they were increasingly relying on older SRA varieties or even Q varieties. There was a clear demand and appetite for new, better performing varieties.

  This open feedback around varieties was consistent with the more critical ratings around varieties reported in the 2024 grower survey result:

  - average satisfaction with the four aspects of the breeding program has fallen (down 1.0 to 6.2)
  - identification that new varieties do not perform better than old varieties (impact of 5.2 up from 4.3 in 2023) and that planting new varieties is too high a risk compared to old varieties (4.4 up from 3.4)
  - satisfaction with the quality of new varieties (SRA11 or later) declined this year (5.3 down from 6.5)
  - a continued reliance on personal experience, perceptions of their own farm performance and the views of other growers as the best sources of information regarding planting new varieties.

	% of growers	Satisfaction with R&D levy
Very active + active	56% (Down 10% on 2023)	7.1
Not so active + not at all active	24% (Up 5% on 2023)	4.6

Plant Breeding Program	Satisfaction with the quality of new varieties
6.2	5.3
2023: 7.2	2023: 6.5
2022: 6.8	2022: 5.8
Average of the four satisfaction ratings	

Observations and insights

Where growers see the research priorities to be

In the 2024 survey of growers, feedback was sought on the urgency or priority of SRA's current investment plan. Feedback was sought across each of the five existing program areas and the research priorities within each of these program areas.

It is important to note that the feedback focused on the relative urgency of the research priorities and not the importance of investment in these areas.

At the national level, the feedback from growers clearly indicated that:

- Varieties was the most urgent of program areas (as a collective)
- This was followed then by crop protection and milling and processing.
- Agronomy and adoption, while still important areas for research investment, were seen to have a lower urgency or priority than the other three program areas.

At the research priority level, growers reported different levels of urgency for the various priorities measured in the survey. Five priorities attracted the highest urgency rating as shown opposite.

The results provide some insights into how growers are identifying the priority areas for research investment. This will be just one of the considerations for SRA in its operational planning.

As shown later in the report, analysis of these results was undertaken and provided for the different regions and farm sizes. What is evident from this analysis is that growers in different regions have a different sense of the priority for research investment.

This presents a communication and engagement challenge for SRA as it navigates what are different expectations across the grower base.

Average % of high urgency within each program

71%	45%	62%	63%	45%
Program 1: Varieties	Program 2: Agronomy and Farming Systems	Program 3: Crop Protection	Program 4: Milling and Processing	Program 5: Adoption

Top 5 rating research priorities
(% high urgency of research priority across the 5 programs)

#1 - 80% - Create new varieties with improved production and processing performance
#2 - 70% - Sustainable management of pests
#3 - 69% - Sustainable management of pathogens
#4 - 69% - Develop new traits, improve breeding efficiency, new PhDs in plant breeding
#5 - 66% - Support correct variety adoption decisions through performance information, grower engagement, and availability of planting material

Observations and insights

Other insights

We also note from the analysis that:

- Awareness and uptake of SRA's products and services continues to remain patchy.
  - farming related guides (Weed Management Manual, Variety Guide, etc.) continue to be the dominant resources being used by growers
  - by contrast, 43% of growers were not aware of the Harvest Mate app, and just 18% had or were planning to use it.

  While there will be an ambition to boost familiarity and use across all SRA products and services, SRA may consider a staged approach to target specific services (relevant to the time of year and location) and trial some different approaches to achieve a stronger engagement among growers (this might consider specific grower cohorts or districts).

- Social channels (X or Twitter, LinkedIn, Facebook and YouTube) have a much more moderate usage. Right now, it is unclear the utility these channels offer SRA as they look to connect and build their engagement with growers.

- Increasing the use of SRA-initiated information and content in on-farm decision making remains a challenge. While there is unlikely to be a single 'silver-bullet' solution, the combination of relevant and timely content delivered through channels where growers collect their information together with a visible and trusted presence at the local level will be key ingredients to building the utility of this information and content.

With this as context, a summary of the opportunities for improvement now follow.

Observations and insights

Based on the feedback provided in the 2024 SRA Grower Survey, the following observations are noted:

- ✓ There has been a softening of results in the 2024 Grower Survey. With growers remaining largely upbeat about the next 12 months (although not as positive as 2023), there is an opportunity for SRA to rebuild grower satisfaction by considering:
  - The capacity and visibility of local SRA staff. With these staff providing a ‘shop front’ for SRA, they provide an important conduit to SRA and the information and resources available.
  - Look for all opportunities to build familiarity with and uptake of the SRA products and services varies. Attention should be directed towards exploring mechanisms to increase both awareness of and encouragement to use these products and services.
- ✓ Explore the response and ratings from growers around the current varieties. The feedback does appear to signal some dissatisfaction with the current varieties. It’s unclear whether this is an issue directly related to the performance of the current varieties or other connected issues. Regardless, the survey provides SRA an opportunity to engage with growers on variety sufficiency and performance and to outline and describe SRA’s future plans in this area.

As noted in the context for this research, the results and feedback in this survey are from SRA grower members only. It will be important, in the medium term, to consider how to expand the scope of the research to provide a full profile across all levy paying growers, members or otherwise.

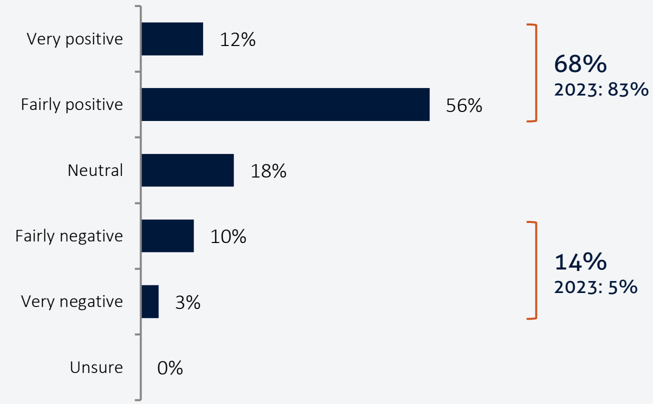
The detailed results from the 2024 SRA Grower Survey now follows.

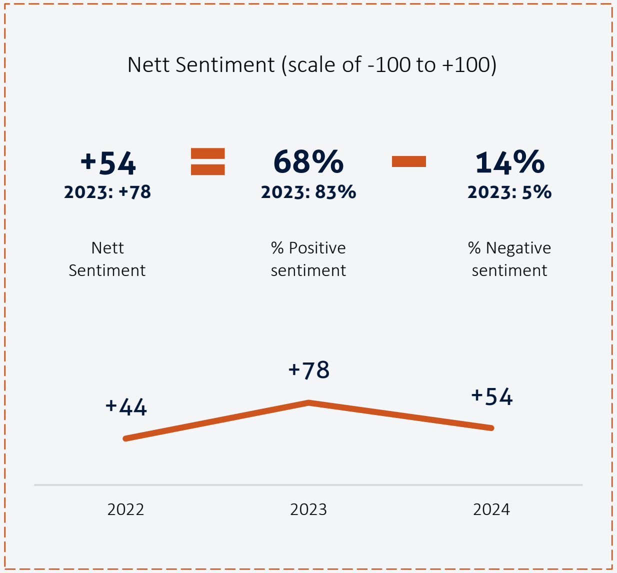
Detailed results

Grower sentiment

Future of the Australian sugarcane industry

Q4. How do you feel about the future of the Australian sugarcane industry over the next 12 months? Would you say you feel…?
Base: All growers, n = 300





	District						Production Size in 2023 Season †			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Nett Sentiment	+56	+43	+71	+31	+79	+100	+56	+50	+54	+54
% positive	71%	55%	79%	54%	83%	100%	69%	65%	71%	77%
% negative	16%	12%	9%	23%	4%	0%	13%	15%	17%	23%

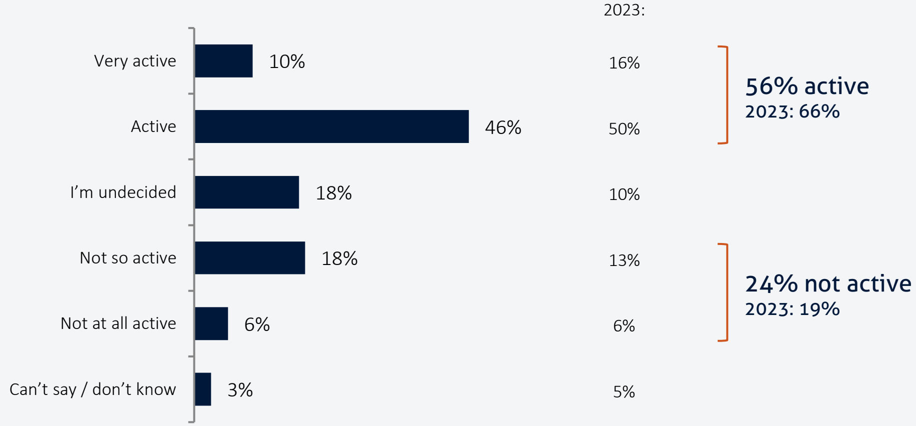
* Low sample size (n < 30). Results are indicative only.
† Please note that where a grower could not provide their production size from the 2023 season, the sample designation of production size was used instead (affects n = 14 respondents).

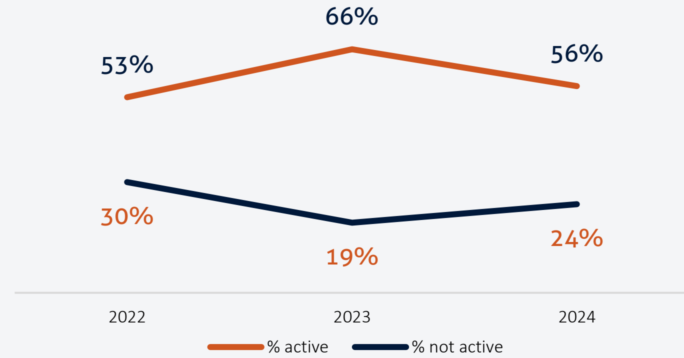
Detailed results

Perceptions of local SRA engagement

Perception of SRA staff engagement in industry matter / events

Q5. How active do you think SRA staff are in engaging in industry matters and events in your district?
Base: All growers, n = 300





	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
% Active	45%	66%	59%	61%	51%	39%	58%	52%	40%	88%
% Not active	37%	11%	16%	18%	32%	44%	21%	28%	40%	6%

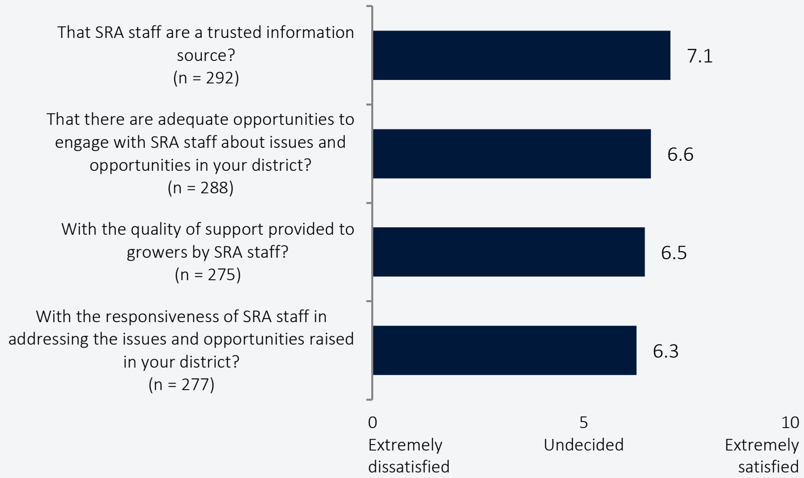
* Low sample size (n < 30). Results are indicative only.

Perceptions of local SRA engagement

Experience with local SRA staff

Q6. The following question is about your experience with local SRA staff who engage with growers. Overall, how satisfied are you…

Base: All growers (excluding "Can't say" answers), n varies. Question not asked in 2023.



6.6

Average of the four satisfaction ratings

	Activity of SRA staff in engaging in industry matters and events in your district	
	Active	Not active
Minimum base:	*146*	*77*
That SRA staff are a trusted information source?	8.0	5.7
That there are adequate opportunities to engage with SRA staff about issues and opportunities in your district?	7.7	4.4
With the quality of support provided to growers by SRA staff?	7.5	4.3
With the responsiveness of SRA staff in addressing the issues and opportunities raised in your district?	7.5	4.0

	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	*54*	*41*	*46*	*78*	*33*	*18**	*117*	*83*	*60*	*13**
That SRA staff are a trusted information source?	7.1	7.3	6.6	7.2	7.2	7.4	7.2	7.0	6.4	7.6
That there are adequate opportunities to engage with SRA staff about issues and opportunities in your district?	6.0	6.9	6.6	7.0	6.6	6.5	6.8	6.5	5.8	7.8
With the quality of support provided to growers by SRA staff?	6.0	6.9	6.4	6.7	6.5	6.1	6.6	6.5	5.5	7.5
With the responsiveness of SRA staff in addressing the issues and opportunities raised in your district?	5.7	6.9	6.3	6.5	6.3	5.8	6.3	6.3	5.4	7.6

* Low sample size (n < 30). Results are indicative only.

† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

How local SRA staff can improve the service they provide

Q7. What do the local SRA staff need to do that they aren't doing now to improve the service they provide?
Base: All growers who provided a valid response, n = 300

25% (n = 75) could not provide any improvements.

Of the 75% (n = 225) that could, this is what they said…

30% - More varieties / better varieties / new varieties

27% - More availability / more active/proactive / come and see me

6% - Cane grub control / pest control / regulation on pesticides

4% - More information days / communications / field walks / newsletters / publications

3% - Contact with the smaller growers / local growers / less about the mills

2% - More research / focus on projects that support the industry

2% - Cane trials / more trials

Some of what growers said:

"They need to focus more on the issues that are currently in the industry and deal with these issues going forward. They are dealing with issues that are not relevant to us e.g. wasting time and money sending cane over to Indonesia when our own crop this year, the sugar results are absolutely pathetic. Why are they wasting energy on doing stuff overseas, sort out what's here."

"Provide some service to growers, the ones that have been in the industry more than 10 years, we need good varieties not the ones they have or the ones they push, last good one was KQ124. all the varieties they developed are not good, have thrown out. SRA9, 12, 13, 22, 40 and all are gone, don't plant anyway. 9 and 26 ok."

"We have varieties issues, I know that they can only do so much, the best they can. We are on the southern side, our only good varieties are still the old Q varieties, they need to do more with varieties and plant, breed and stop chasing the harvesting fellas around just focus on the varieties to grow."

"For ten years my farm averaged 4,100 tonnes, for the last 13 years I've averaged 2,700 tonnes with the same inputs. My production is down because I'm not allowed to grow some varieties due to potential smut, there has not been adequate research to provide cane to match what we had in the past."

"Well you know when you don't engage with growers you can't know the needs. Lost all contact with reality. More boots on the ground cost money and money is one of the issues. Staff hamstrung to meet demands. Gotta meet with farmers and talk through issues. From that, pathway is clearer."

"They need to have a few more feedback scenarios when the do stuff, when they talk about stuff and get feedback they don't seem to reacted to it. When introducing new varieties, they don't answer the questions that people ask or do more research to find out the answers to questions."

"Go out on the field and listen to proactive growers and look at what people are doing and there are people out there leading and making money out of it. We need a resident manager. We have lost one and don't know who the replacement person is and also look at soil health."

"Not sure as quite new in the industry. Some of the shed meetings they discuss the issues in the cane industry. Different varieties but biggest issue is the cane grubs and nothing released that's working. Not lack of trying but trying different chemicals."

"We are remote, they need to get their feet on the ground, get to seen in our district. Given the distance from their office, they need to be out more, more presence, more notice. If they are here the growers can see them as a positive sign and shows value for money."

"Communicate a bit more - they need to look at both the small guy as well as the big guys. Spend more time on the ground and find out what people want. Provide some assistance to farmers with what grants are available & assistance with grant applications."

"Needs to be more focus on better varieties for growers, more productive varieties both in sugar & tonnage. Would like them to be more equipped to manage rat problems in our area - strategies & better understanding & solutions to deal with the problem."

"We are at Proserpine so we don't have any local SRA staff, we have a local productivity board that we interact with. SRA should answer their phones, I have tried multiple times to make contact and have not been able to get through or a reply."

Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Detailed results

Adoption

Adoption – Productivity Constraints

Top two productivity constraints

Q8. What are your top two productivity constraints?
Base: All growers who provided a valid response, n = 300

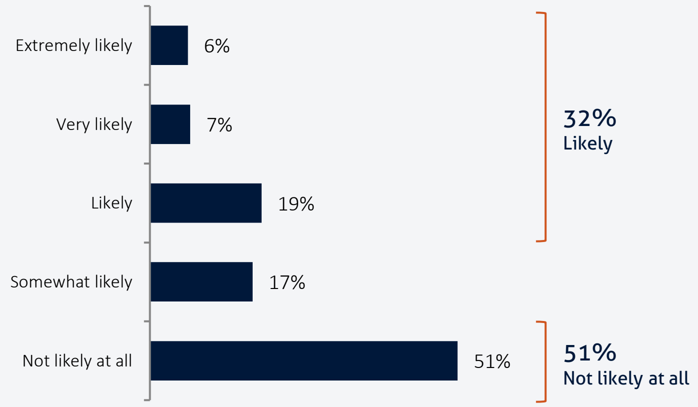
% mentioned	1st mention	2nd mention
45% - Varieties / new varieties / poor varieties / plant breeding	27%	18%
20% - Milling / mill capacity / mill performance / milling issues / carting constraints	14%	6%
20% - Weather / wet weather / too much rain / lack of rain / seasonal conditions	12%	8%
16% - Costs / input costs / cost of equipment	8%	8%
13% - Pests (e.g. rats, soldier flies)	7%	6%
13% - Grubs / cane grub	6%	7%
8% - Regulations / government red tape	4%	5%
8% - Weeds	2%	6%
8% - Soil health / marginal soil / nutrient levels/management	4%	4%
7% - Disease	2%	5%
6% - Water / water access / cost of water / lack of water / irrigation	2%	3%
6% - Harvesting / late harvesting / can't get contractors / period it is happening	4%	2%
4% - Feral pigs/animals	2%	3%
3% - Labour / staff / lack of labour	2%	1%
2% - Drainage	2%	<1%
2% - Season length (related to mill crushing)	1%	1%
1% - Fertiliser	<1%	1%
<1% - Erosion	<1%	0%

Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Adoption – Program 1: Varieties

Likelihood of planting using alternative seed / tissue culture

Q9. What is the likelihood of you planting using synthetic seed or lower cost tissue culture?
Base: All growers, n = 300



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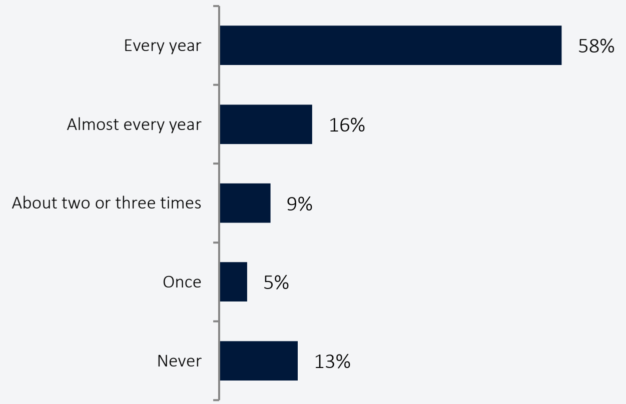
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Extremely likely	6%	12%	7%	5%	6%	0%	5%	8%	10%	16%
Very likely	13%	5%	10%	5%	2%	0%	7%	8%	5%	7%
Likely	23%	12%	14%	19%	27%	14%	21%	12%	14%	29%
Somewhat likely	16%	24%	17%	18%	7%	16%	16%	19%	20%	24%
Not likely at all	41%	47%	51%	53%	59%	69%	51%	53%	52%	24%

* Low sample size (n < 30). Results are indicative only.

Consideration of smut resistance ratings of varieties

Q10. How often in the last five years have you taken into consideration smut resistance ratings of varieties when choosing which varieties you will plant?
Base: All growers, n = 300

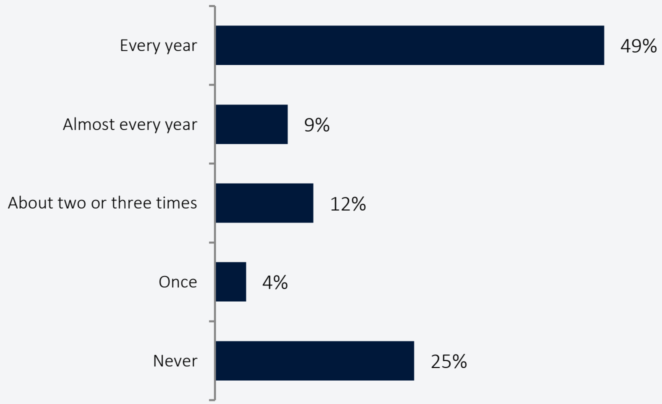


	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Every year	53%	64%	50%	64%	60%	42%	55%	61%	66%	71%
Almost every year	10%	19%	13%	15%	18%	30%	16%	18%	8%	0%
About two or three times	17%	4%	7%	5%	6%	17%	11%	4%	8%	4%
Once	8%	4%	6%	2%	9%	0%	5%	4%	8%	7%
Never	12%	9%	25%	14%	8%	11%	13%	14%	11%	18%

* Low sample size (n < 30). Results are indicative only.

Consideration of Pachymetra resistance ratings of varieties

Q11. How often in the last five years have you taken into consideration Pachymetra resistance ratings of varieties when choosing which varieties you will plant?
Base: All growers, n = 300

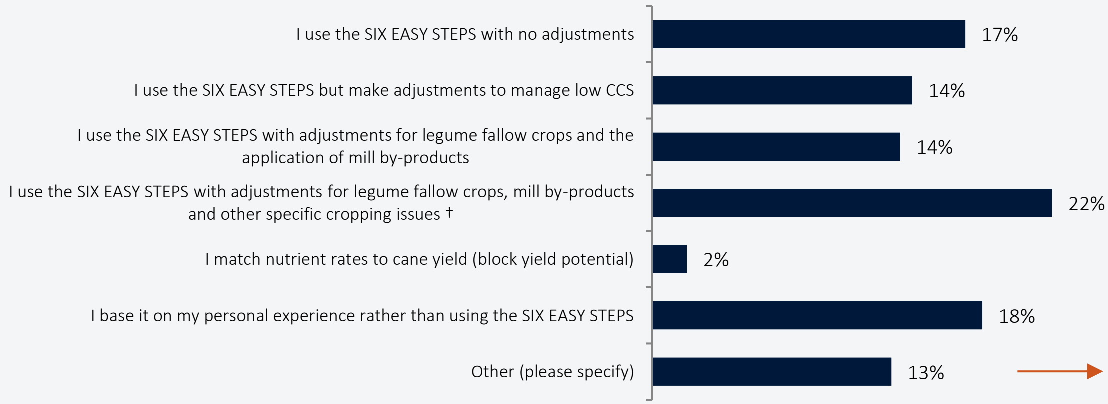


	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Every year	58%	46%	21%	70%	40%	14%	44%	61%	48%	77%
Almost every year	5%	11%	3%	14%	8%	11%	9%	8%	16%	0%
About two or three times	18%	12%	9%	5%	20%	23%	15%	9%	5%	4%
Once	5%	1%	4%	4%	8%	0%	4%	4%	5%	7%
Never	14%	30%	63%	6%	24%	52%	29%	17%	25%	12%

* Low sample size (n < 30). Results are indicative only.

Description of practice to calculate nitrogen application rates

Q12. Which of the following practices best describes how you calculated your nitrogen application rates on your farm?
Base: All growers, n = 300



Most growers who reported Other said that someone else does this calculation (e.g. agronomist, consultant, contractor, third party, Farmacist, etc.)

	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Use SES, no adjustments	18%	10%	22%	20%	18%	9%	16%	23%	12%	0%
Use SES, adjustment to manage low CCS	13%	19%	13%	15%	14%	6%	16%	10%	16%	12%
Use SES, adjustment for legume fallow crows and application of mill by-products	11%	8%	13%	21%	16%	0%	14%	13%	9%	24%
Use SES, adjustment for legume fallow crows and application of mill by-products and other issues †	28%	27%	18%	22%	6%	28%	18%	31%	28%	24%
Match nutrient rate to cane yield	0%	2%	6%	0%	6%	0%	1%	3%	5%	28%
Base it on personal experience	19%	26%	6%	10%	28%	41%	24%	5%	8%	6%
Other	11%	7%	23%	13%	12%	17%	12%	15%	22%	7%

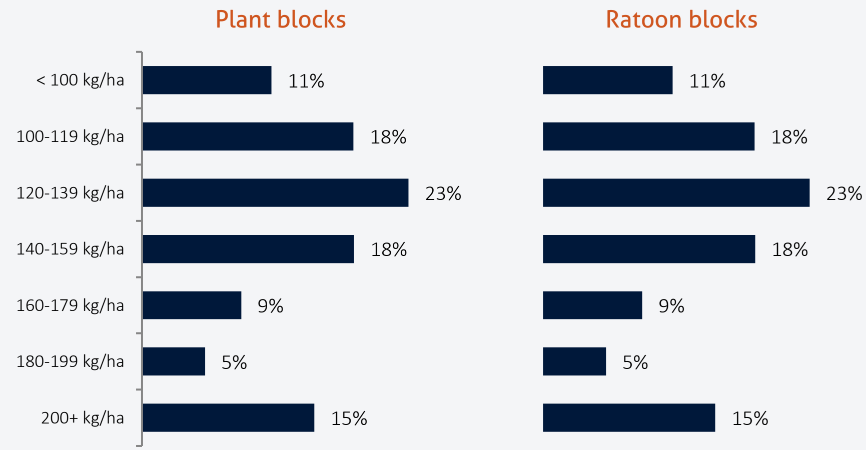
* Low sample size (n < 30). Results are indicative only.
† Examples included sodicity, waterlogging, late harvest, final ratoons where the crop response to nutrients may be reduced.

Estimate of average nitrogen application rate

Q13. What is your average nitrogen application rate (kg/ha) on...

Base: All growers who could provide a valid response, n varies

	Grower average
Plant blocks (n = 235)	154.6 kg/ha
Ratoon blocks (n = 233)	179.7 kg/ha

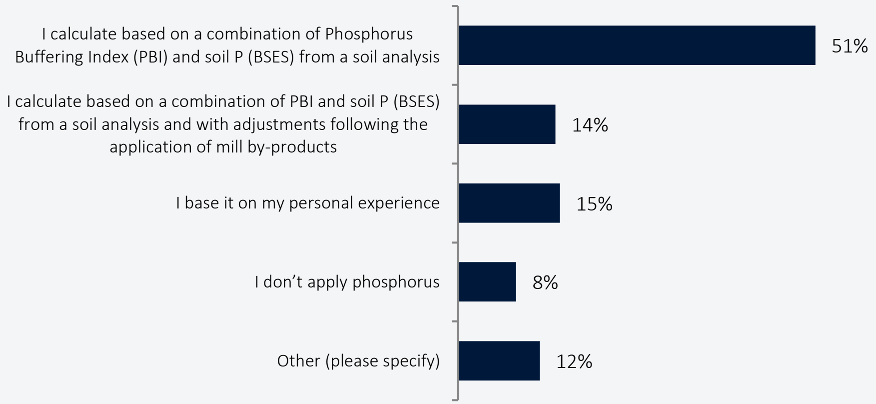


	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*46*	*34*	*44*	*71*	*21**	*19**	*88*	*75*	*60*	*12**
Plant blocks (in kg/ha)	121.6	116.9	181.3	143.3	170.7	281.1	163.5	142.1	141.5	127.6
Base:	*46*	*33*	*43*	*70*	*22**	*19**	*88*	*75*	*58*	*12**
Ratoon blocks (in kg/ha)	142.0	126.7	198.9	170.6	207.2	340.2	192.0	160.8	164.8	151.1

* Low sample size (n < 30). Results are indicative only.

Description of practice to calculate phosphorus application rates

Q14. Which of the following practices best describes how you calculated your phosphorus application rates on your farm?
Base: All growers, n = 300

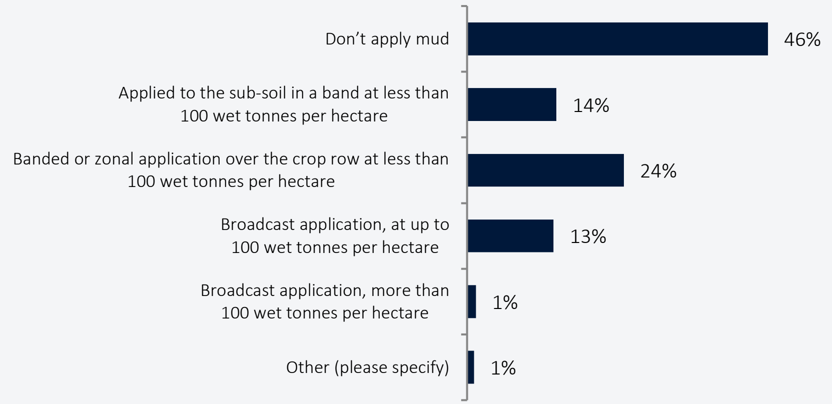


	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
I calculate based on a combination of Phosphorus Buffering Index (PBI) and soil P (BSES) from a soil analysis	55%	45%	43%	64%	46%	29%	48%	60%	53%	60%
I calculate based on a combination of PBI and soil P (BSES) from a soil analysis and with adjustments	20%	14%	9%	13%	12%	13%	11%	19%	21%	15%
I base it on my personal experience	8%	31%	4%	12%	17%	24%	18%	8%	7%	0%
I don't apply phosphorus	8%	4%	20%	2%	11%	17%	11%	3%	3%	7%
Other (please specify)	8%	6%	25%	9%	14%	17%	12%	9%	15%	18%

* Low sample size (n < 30). Results are indicative only.

Description of practice to typically apply mill mud

Q15. Which of the following practices best describes the rate you typically apply mill mud (including mud/ash blends)?
Base: All growers, n = 300

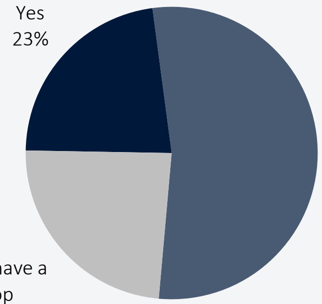


	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Don't apply mud	53%	43%	57%	34%	74%	20%	46%	49%	42%	41%
Applied to the sub-soil in a band	13%	26%	10%	14%	2%	17%	14%	14%	11%	11%
Banded or zonal application over the crop row	22%	11%	25%	35%	8%	41%	22%	27%	31%	37%
Broadcast application, up to 100 wet tonnes per ha	11%	21%	7%	13%	15%	15%	16%	7%	13%	0%
Broadcast application, more than 100 wet tonnes per ha	0%	0%	2%	3%	0%	1%	2%	1%	1%	0%
Other (please specify)	1%	0%	0%	1%	1%	6%	1%	1%	2%	11%

* Low sample size (n < 30). Results are indicative only.

Intention to harvest cover crop as a cash crop

Q16. Do you intend to harvest your cover crop as a cash crop?
Base: All growers, n = 300



	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Yes	13%	6%	39%	16%	31%	72%	17%	33%	34%	40%
No	61%	69%	44%	61%	32%	17%	56%	49%	48%	60%
N/A – don't have a cover crop	26%	25%	17%	23%	37%	11%	27%	18%	18%	0%

* Low sample size (n < 30). Results are indicative only.

Concern about the potential impact of climate change

Q17. How concerned are you about the potential impact of climate change on the sugarcane industry?
Base: All growers, n = 300

6% Very concerned

25% Somewhat concerned

62% Not concerned

6% said they were unsure

	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Very concerned	8%	5%	8%	8%	1%	0%	5%	7%	7%	18%
Somewhat concerned	29%	25%	20%	23%	24%	35%	24%	29%	22%	24%
Not concerned	57%	61%	67%	64%	63%	65%	64%	56%	70%	58%
Unsure	5%	9%	4%	5%	13%	0%	6%	8%	1%	0%

* Low sample size (n < 30). Results are indicative only.

How is climate change impacting farming practices

Q18. How is climate change impacting your farming practices now and what impact do you think they will have into the future?
Base: All growers who provided a valid response, n = 300

66% (n = 197) said there were no impacts for a variety of reasons…

- 35% - No impact / none / nothing
- 23% - Unsure or does not believe in climate change / climate is cyclical, always has been / historical weather patterns
- 7% - Not concerned about the impact / does not worry them / just go with it
- 3% - Government legislation has more impact on our business than climate change

32% (n = 97) reported some impact – a list of the more mentioned is below

- 12% - Rain (no rain, too much heavy rain causing erosion/flooding, unpredictability of the wet season)
- 7% - Variations in the weather being hard to predict / extreme/dangerous events
- 5% - Government legislation/regulations (e.g. nitrogen applications, emissions reduction, fertiliser/chemical usage)
- 3% - Increase in input costs (generally and also government-affected)
- 3% - Temperature (expect it to be hotter)
- 2% - More irrigation infrastructure / having to use more water / purchased more allocation
- 2% - Concerned / Impacts but unsure of exactly what

Some of what growers said (some impact):

“Now: yellow canopy seems to be tied to environmental issues, the price of sugar seems to fluctuate a lot, the weather is extremely variable. Not just rain, my soil dries out hard. Rains 6 months, stops for 6 months, which make is very difficult. Clay grows good crops but timing is everything. Family has moved away. Future: Don't see a future."

"It is getting wetter therefore we are planting later. Serious impact in the future, its not just sugar cane it is global and corn, fruits etc. I'm sure all farmers are feeling the effects. We are changing to accommodate but the climate change is erratic. The seasons are moving back about two months."

"The impact that will be is our social license to operate. It is going to start happening that we will be the ones that will be impacted with the carbon footprint costs of the larger operators like the mills and we have nowhere that we can get our money. Everything will be put on the grower."

"The more distinct variation between our wet and dry season and the intensity of the wet and dry season. If it intensifies, it could drastically change our farming operation. Worst case scenario can prevent us from staying in cane and going into a different enterprise."

"It is getting hotter and I therefore need to irrigate more which with the price of power it costs more. It is meaning that I am going to have to make a huge investment in solar power now and into the future to manage these as it is going to only get worse."

“Now: We are getting very wet harvest and very dry spring periods so the reverse of what we are used to. In the future 20% of my crop has disappeared this year because of changes and will have future economic impacts, reductions in crop & harvest."

“Now: Once in a 100 year flood and once in a 500 year drought, dry soy beans, heat waves. Future: Under sea water, no farming, more hotter/dry extremes of climate. Affecting cash crops now but in future sugar cane."

“We've had a terrible wet season so the weather has impacted. It means less money, the cane was smaller than normal. In the future, it will be the same thing, farmers will go broke if we don't get rain or get too much rain."

"Maybe impacting in terms of changing weather patterns and by that, I mean the onset of the wet season may change in terms of date, perhaps wetter December and dryer June, no impact for us in the future."

“We are not able to use as much chemical as we used to because of reef restrictions and regulations. Sprays are being restricted because of the risk of disease from sprays drifting into residential areas."

“Changes in weather impacts timeliness of harvesting & planting & general farm management. Regulatory restrictions based on changes in weather, water quality & other environment issues."

"Irrigation, scheduling management of irrigation and cover cropping. Also, in the future a lot to do with adoption of different farming practices e.g. more efficient and energy efficient varieties."

"No impact now but concerned about temperature and heavy rain events that might occur that does a lot of damage. And with any plants they don't like too hot weather, they like the milder weather."

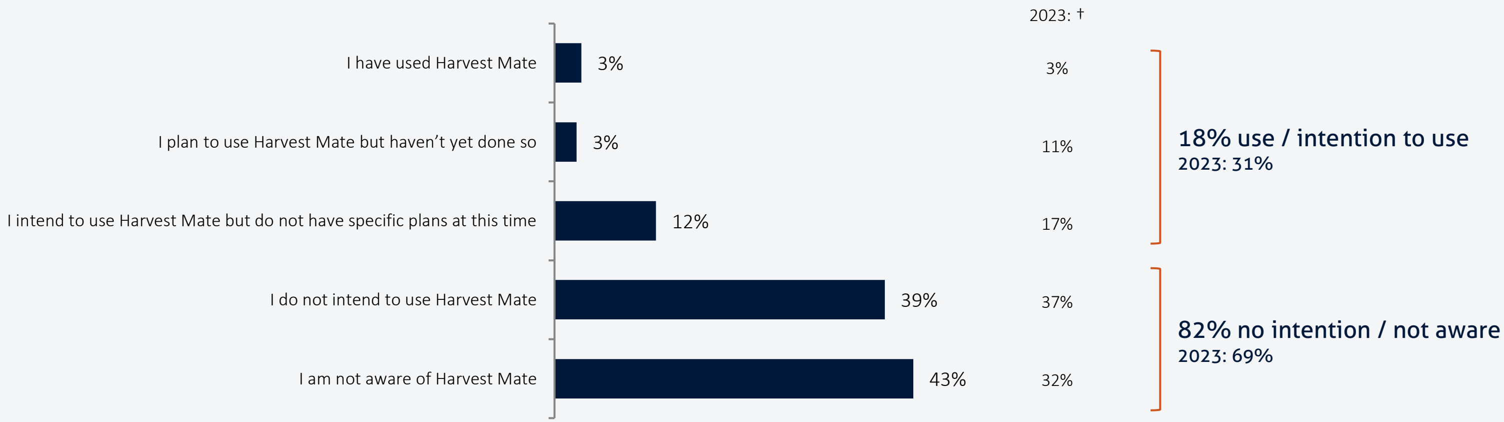
"After Cyclone Jasper and the horror of that event, it has forced me to think about what the climate is doing. I don't currently have an answer for what the impact is now or into the future."

"It is more that we have to manage our cropping cycles a lot closer, its really a management issue, because of weather events / future - depends on how long I stay in sugar or if I retire.”

Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Likelihood to use Harvest Mate

Q19. How likely is it that you will use the Harvest Mate app to improve yield and cane quality and to manage costs during harvesting?
Base: All growers, n = 300



	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
I have used Harvest Mate	1%	15%	0%	2%	2%	0%	4%	2%	2%	12%
I plan to use Harvest Mate but haven't yet done so	3%	9%	0%	2%	0%	0%	4%	0%	4%	0%
I intend to use Harvest Mate, no specific plans	18%	11%	13%	7%	14%	11%	13%	9%	11%	20%
I do not intend to use Harvest Mate	36%	48%	38%	41%	27%	47%	32%	54%	50%	57%
I am not aware of Harvest Mate	43%	17%	49%	48%	57%	42%	48%	35%	33%	12%

* Low sample size (n < 30). Results are indicative only.
† In 2023, the question was "How likely is it that you will use the Harvest Mate app?".

Detailed results

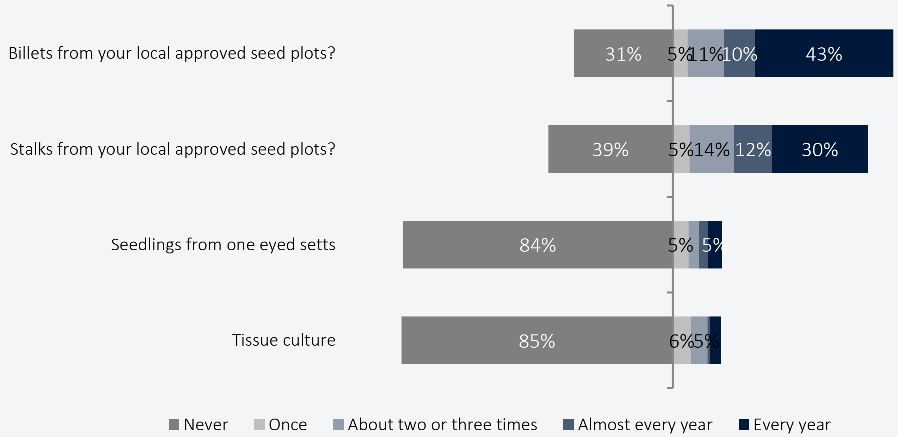
Perceptions about varieties

Frequency of planting methods in the last five years

The next set of questions relate to varieties and SRA's breeding program.

Q20. How often in the last five years have you planted using…

Base: All growers, n = 300



	% almost every year / every year	2023 % almost every year / every year
Billets from your local approved seed plots?	53%	47%
Stalks from your local approved seed plots?	42%	49%
Seedlings from one eyed setts	7%	5%
Tissue culture	4%	6%

Of the four planting methods, % reported using at least once in the last five years:

6%	Used none
46%	Used only one
35%	Used two
9%	Used three
5%	Used all four

	District						Production Size in 2023 Season			
% almost every year / every year	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Billets from your local approved seed plots	26%	60%	87%	49%	42%	83%	49%	60%	68%	65%
Stalks from your local approved seed plots	52%	57%	19%	46%	36%	18%	39%	48%	49%	13%
Seedlings from one eyed setts	5%	7%	3%	9%	17%	1%	7%	8%	10%	4%
Tissue culture	3%	8%	1%	3%	12%	0%	4%	2%	9%	26%

Result labels shown only if 5% or greater.

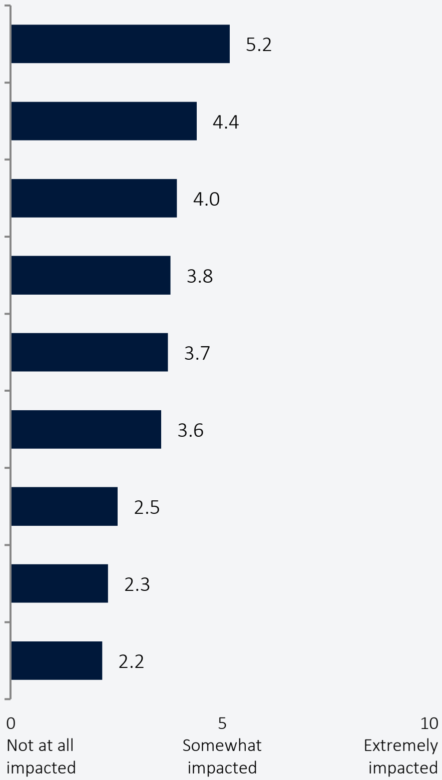
* Low sample size (n < 30). Results are indicative only.

Impacts on decisions to plant new varieties more often

Q21. To what extent have the following issues impacted your decision to plant new varieties more often?

Base: All growers who answered only using a planting method "once" or "never" for at least one of the listed methods (excluding "Can't say" answers), n varies

Growers who answered only using a planting method "Once" or "Never" to any of the four listed previously (97% or n = 292) answered the following...



		2023 Mean	% somewhat impacted (rating 5-10)	2023 % somewhat impacted (rating 5-10)	2022 % somewhat impacted (rating 5-10)
New varieties do not perform better than old varieties (n = 288)	5.2	4.3	69%	56%	65%
Planting new varieties is too high risk compared to old varieties (n = 288)	4.4	3.4	57%	43%	47%
Confusion about which variety to select for soil types (n = 287)	4.0	3.3	52%	39%	52%
Insufficient information about new varieties (n = 289)	3.8	2.8	51%	34%	48%
Available information about new varieties is not clear or useful (n = 287)	3.7	2.6	48%	31%	47%
Supply of cane is limited and may be unavailable (n = 285)	3.6	3.2	45%	41%	51%
Not enough time (n = 288)	2.5	2.5	31%	32%	34%
Planting is physically challenging (n = 287)	2.3	1.7	30%	21%	31%
Cost is too expensive (n = 289)	2.2	2.0	26%	26%	29%

Impacts on decisions to plant new varieties more often

Q21. To what extent have the following issues impacted your decision to plant new varieties more often?

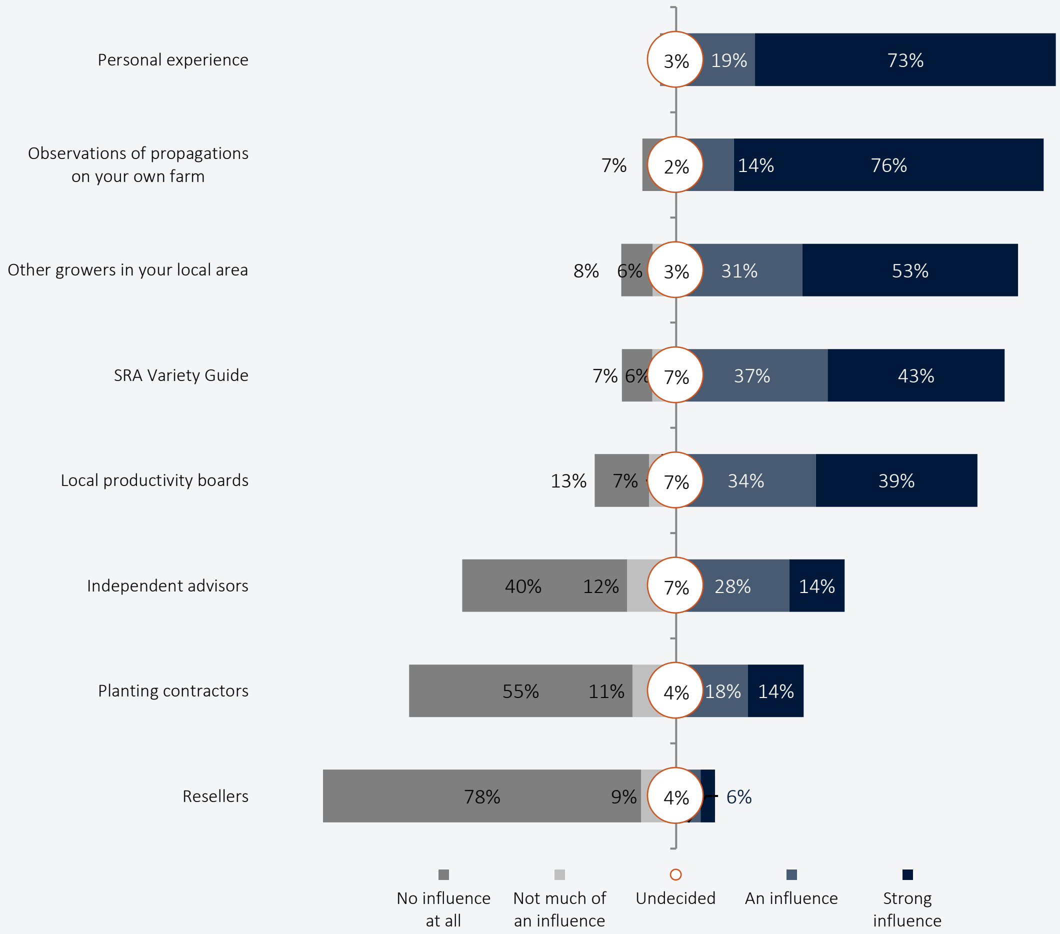
Base: All growers who answered only using a planting method "once" or "never" for at least one of the listed methods (excluding "Can't say" answers), n varies

	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	*53*	*42*	*48*	*84*	*33*	*21**	*123*	*85*	*63*	*13**
New varieties do not perform better than old varieties	5.7	5.9	5.1	5.0	4.5	4.2	5.3	5.1	4.9	6.6
Planting new varieties is too high risk compared to old varieties	4.6	5.3	4.7	4.1	3.6	4.1	4.8	3.8	3.6	3.9
Confusion about which variety to select for soil types	4.6	4.5	4.0	3.4	3.3	3.9	4.1	4.1	2.6	2.8
Insufficient information about new varieties	4.0	4.4	3.7	3.6	3.3	3.6	3.8	3.8	3.3	4.0
Available information about new varieties is not clear or useful	3.6	4.9	4.0	3.4	3.7	2.3	3.8	3.6	3.3	3.8
Supply of cane is limited and may be unavailable	4.7	4.6	3.3	2.7	3.0	3.3	4.1	2.5	3.0	2.2
Not enough time	4.2	2.4	1.8	1.8	3.0	2.4	2.9	2.0	1.2	1.2
Planting is physically challenging	2.7	3.1	1.7	2.0	2.1	2.3	2.4	2.4	1.4	0.6
Cost is too expensive	2.4	2.8	2.1	1.7	2.0	2.3	2.5	1.7	1.5	0.7

* Low sample size (n < 30). Results are indicative only.
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Influences of sources of information on planting new varieties

Q22. How much do the following sources of information influence your decision to plant new varieties?
Base: All growers, n = 300



	% not much / no influence	% some / strong influence	2023 % some / strong influence
Personal experience	4%	93%	95%
Observations of propagations on your own farm	8%	90%	90%
Other growers in your local area	13%	83%	78%
SRA Variety Guide	13%	80%	81%
Local productivity boards	20%	73%	81%
Independent advisors	52%	41%	34%
Planting contractors	65%	31%	27%
Resellers	86%	10%	20%

Result labels shown only if 5% or greater.

Influences of sources of information on planting new varieties

Q22. How much do the following sources of information influence your decision to plant new varieties?
Base: All growers, n = 300

	District						Production Size in 2023 Season			
% some / strong influence	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Personal experience	85%	98%	92%	96%	86%	100%	92%	94%	88%	100%
Observations of propagations on your own farm	84%	89%	98%	88%	92%	93%	89%	93%	85%	88%
Other growers in your local area	84%	82%	74%	84%	93%	83%	85%	82%	72%	76%
SRA Variety Guide	85%	68%	66%	87%	83%	89%	83%	74%	72%	82%
Local productivity boards	62%	70%	78%	79%	70%	86%	70%	83%	71%	79%
Independent advisors	51%	35%	51%	31%	48%	37%	40%	43%	41%	63%
Planting contractors	35%	44%	30%	30%	19%	20%	35%	26%	13%	13%
Resellers	13%	17%	7%	7%	9%	0%	12%	3%	5%	12%

* Low sample size (n < 30). Results are indicative only.

Varieties intending to increase commercial production

Q23. What, if any, new varieties do you intend to increase commercial production of?
Base: All growers who provided a valid response, n = 300

70% - Listed an SRA# variety

- 2% - KQ228
- <1% - SP80-1816
- 1% - SRA2
- <1% - SRA3
- <1% - SRA4
- 1% - SRA5
- 8% - SRA6
- 1% - SRA7
- 12% - SRA9
- 1% - SRA10
- 6% - SRA11
- 1% - SRA14
- 2% - SRA15
- <1% - SRA16
- 4% - WSRA17
- 1% - SRA19
- <1% - SRA20
- 2% - SRA21
- 1% - SRA22
- 1% - SRA22
- 4% - SRA23
- <1% - WSRA24
- 28% - SRA26
- 1% - SRA27
- 14% - SRA28
- 11% - SRA29
- 3% - SRA30
- 1% - SRAW30
- 1% - SRA31
- 8% - SRA32
- 2% - SRA33
- 1% - SRAW33
- 2% - SRA34
- <1% - SRA35
- 7% - SRA36
- 9% - SRA37
- <1% - SRA38
- <1% - SRA39
- 5% - SRA40
- 1% - SRA41
- 1% - SRA43
- 1% - SRA44
- <1% - SRA45

16% - Listed a Q# variety

- <1% - Q124
- 6% - Q183
- 1% - Q200
- <1% - Q204
- 6% - Q208
- <1% - Q219
- <1% - Q231
- 2% - Q232
- 7% - Q240
- 3% - Q253
- 1% - Q254
- <1% - Q288

Other answers provided

21% - None, no plans

4% - Not sure / Don't know

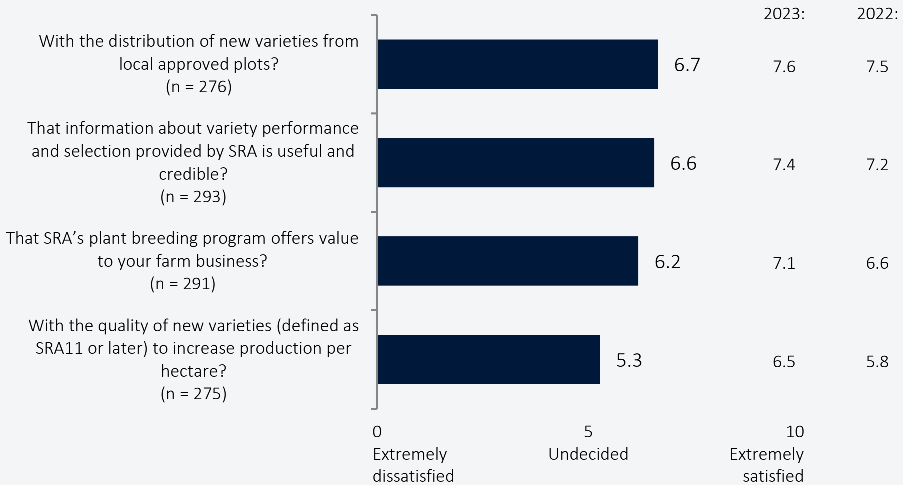
1% - Intend to, but do not recall numbers / codes

Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Satisfaction with SRA’s plant breeding program

Q24. Regarding SRA’s plant breeding program, overall how satisfied are you...

Base: All growers (excluding “Can’t say” answers), n varies



6.2
2023: 7.2
2022: 6.8

Average of the four satisfaction ratings

	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	*52*	*39*	*46*	*79*	*33*	*20**	*114*	*81*	*65*	*12**
With the distribution of new varieties from local approved plots?	5.8	7.0	6.8	6.9	6.5	7.7	6.6	7.1	6.3	7.6
That information about variety performance and selection provided by SRA is useful and credible?	6.8	6.3	6.4	6.5	6.9	7.4	6.7	6.4	6.1	6.3
That SRA’s plant breeding program offers value to your farm business?	6.2	5.7	5.8	6.4	7.0	6.3	6.5	5.8	5.6	5.0
With the quality of new varieties (defined as SRA11 or later) to increase production per hectare?	5.6	4.9	4.6	5.0	6.1	6.9	5.7	4.8	4.3	4.6

* Low sample size (n < 30). Results are indicative only.
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Detailed results

Perceptions about research portfolio

Level of urgency for SRA to fund research addressing priorities

Growers were presented with the following context before answering this section:

SRA has designed a balanced portfolio that includes an appropriate mix of RD&E activities.

In 2024, SRA released its Ten-Year R&D Plan that integrates their investment in research across five programs including: varieties, agronomy and farming systems, crop protection, milling and processing, and adoption.

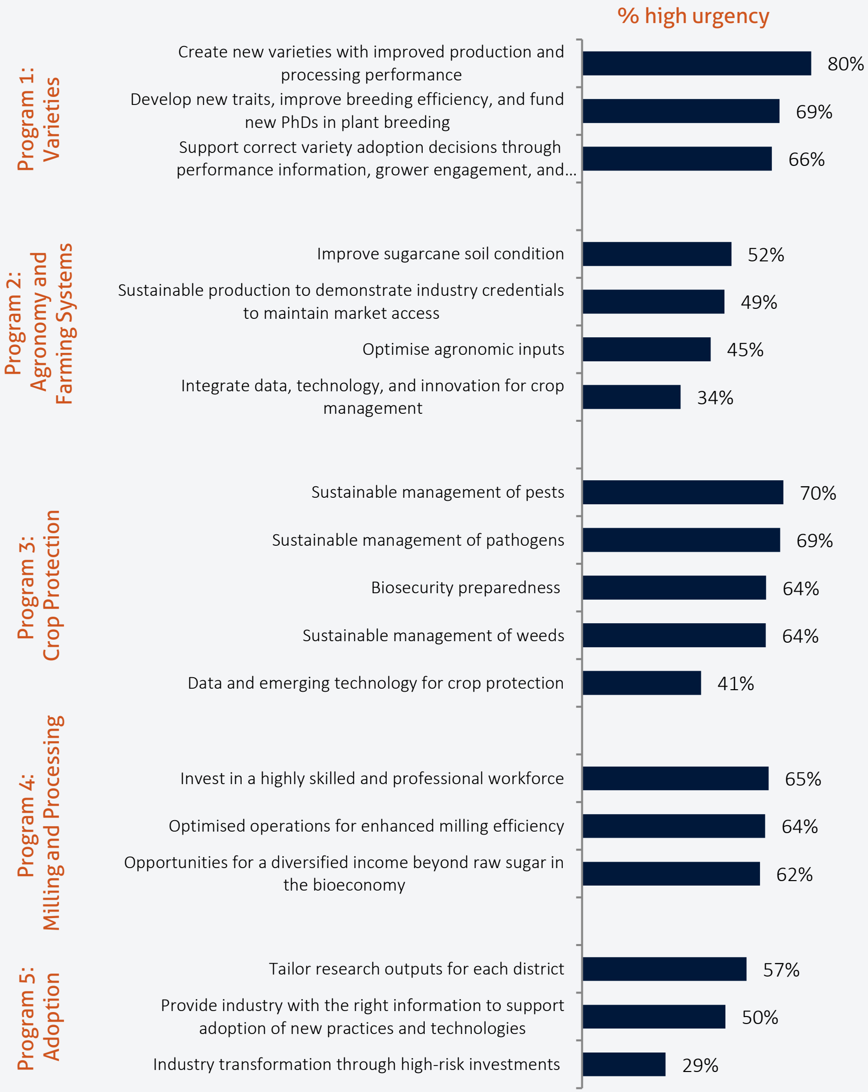
Each program includes research priorities for funding through SRA projects and core programs such as plant breeding and biosecurity.

Please rate the level of urgency with which SRA should fund research to address these priorities considering the value to your farm business and the broader industry.

Growers were then asked to rate the level of urgency with which SRA should fund research to address 18 priorities across the five programs – a summary of the high urgency results is provided here, with detailed results for each priority and program on the following pages.

Average % of high urgency within each program

71%	45%	62%	63%	45%
Program 1: Varieties	Program 2: Agronomy and Farming Systems	Program 3: Crop Protection	Program 4: Milling and Processing	Program 5: Adoption



Level of urgency for SRA to fund research addressing priorities

Average % of high urgency within each program

71%	45%	62%	63%	45%
Program 1: Varieties	Program 2: Agronomy and Farming Systems	Program 3: Crop Protection	Program 4: Milling and Processing	Program 5: Adoption

	District						Production Size in 2023 Season			
% high urgency	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Program 1: Varieties	77%	82%	66%	70%	59%	66%	68%	76%	79%	86%
Program 2: Agronomy and Farming Systems	53%	49%	37%	44%	33%	53%	47%	41%	45%	38%
Program 3: Crop Protection	69%	69%	51%	61%	55%	59%	62%	60%	62%	60%
Program 4: Milling and Processing	65%	63%	52%	70%	62%	57%	63%	65%	57%	73%
Program 5: Adoption	53%	53%	43%	41%	35%	45%	45%	46%	42%	56%

* Low sample size (n < 30). Results are indicative only.

Level of urgency for SRA to fund research addressing priorities

Top five priorities rated by level of high urgency
Base: All growers, n = 300

#1 - 80% - Create new varieties with improved production and processing performance
#2 - 70% - Sustainable management of pests
#3 - 69% - Sustainable management of pathogens
#4 - 69% - Develop new traits, improve breeding efficiency, and fund new PhDs in plant breeding
#5 - 66% - Support correct variety adoption decisions through performance information, grower engagement, and availability of planting material

Far North Queensland (n = 57)

#1 - 85% - Create new varieties with improved production and processing performance
#2 - 80% - Sustainable management of pests
#3 - 78% - Sustainable management of pathogens
#4 - 76% - Develop new traits, improve breeding efficiency, fund new PhDs in plant breeding
#5 - 72% - Sustainable management of weeds

Herbert (n = 44)

#1 - 85% - Support correct variety adoption decisions through performance information, etc.
#2 - 83% - Sustainable management of pathogens
#3 - 82% - Create new varieties with improved production and processing performance
#4 - 80% - Develop new traits, improve breeding efficiency, fund new PhDs in plant breeding
#5 - 78% - Tailor research outputs for each district

Burdekin (n = 51)

#1 - 83% - Create new varieties with improved production and processing performance
#2 - 65% - Sustainable management of pests
#3 - 59% - Support correct variety adoption decisions through performance information, etc.
#4 - 58% - Biosecurity preparedness
#5 - 57% - Develop new traits, improve breeding efficiency, fund new PhDs in plant breeding

Central Queensland (n = 90)

#1 - 80% - Create new varieties with improved production and processing performance
#2 - 75% - Invest in a highly skilled and professional workforce
#3 - 73% - Optimised operations for enhanced milling efficiency
#4 - 70% - Biosecurity preparedness
#5 - 70% - Sustainable management of pathogens

Southern Queensland (n = 36)

#1 - 70% - Invest in a highly skilled and professional workforce
#2 - 65% - Biosecurity preparedness
#3 - 64% - Sustainable management of pests
#4 - 63% - Create new varieties with improved production and processing performance
#5 - 63% - Sustainable management of weeds

New South Wales (n = 22*)

#1 - 80% - Sustainable management of weeds
#2 - 77% - Create new varieties with improved production and processing performance
#3 - 68% - Sustainable management of pests
#4 - 68% - Opportunities for a diversified income beyond raw sugar in the bioeconomy
#5 - 65% - Sustainable management of pathogens

* Low sample size (n < 30). Results are indicative only.

Level of urgency for SRA to fund research addressing priorities

Top five priorities rated by level of high urgency
Base: All growers, n = 300

#1 - 80% - Create new varieties with improved production and processing performance
#2 - 70% - Sustainable management of pests
#3 - 69% - Sustainable management of pathogens
#4 - 69% - Develop new traits, improve breeding efficiency, and fund new PhDs in plant breeding
#5 - 66% - Support correct variety adoption decisions through performance information, grower engagement, and availability of planting material

Small: 8,000 tonnes and under (n = 130)

#1 - 76% - Create new varieties with improved production and processing performance
#2 - 72% - Sustainable management of pests
#3 - 71% - Sustainable management of pathogens
#4 - 67% - Sustainable management of weeds
#5 - 66% - Develop new traits, improve breeding efficiency, fund new PhDs in plant breeding

Medium: >8,000-20,000 tonnes (n = 89)

#1 - 83% - Create new varieties with improved production and processing performance
#2 - 73% - Support correct variety adoption decisions through performance information, etc.
#3 - 72% - Develop new traits, improve breeding efficiency, fund new PhDs in plant breeding
#4 - 67% - Invest in a highly skilled and professional workforce
#5 - 67% - Biosecurity preparedness

Large: >20,000-50,000 tonnes (n = 68)

#1 - 96% - Create new varieties with improved production and processing performance
#2 - 77% - Sustainable management of pests
#3 - 71% - Biosecurity preparedness
#4 - 70% - Develop new traits, improve breeding efficiency, fund new PhDs in plant breeding
#5 - 69% - Support correct variety adoption decisions through performance information, etc.

Extra Large: Over 50,000 tonnes (n = 13*)

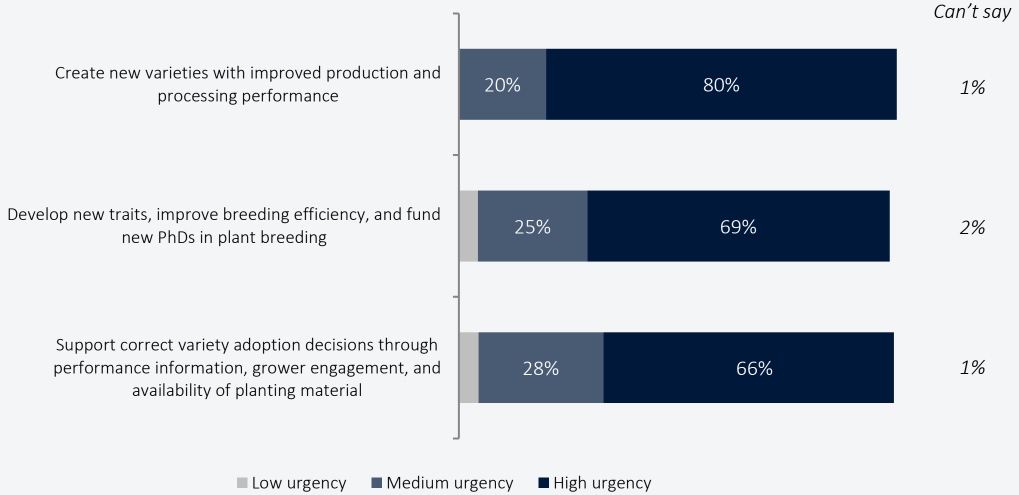
#1 - 100% - Create new varieties with improved production and processing performance
#2 - 88% - Develop new traits, improve breeding efficiency, fund new PhDs in plant breeding
#3 - 82% - Opportunities for a diversified income beyond raw sugar in the bioeconomy
#4 - 76% - Invest in a highly skilled and professional workforce
#5 - 71% - Sustainable management of weeds

* Low sample size (n < 30). Results are indicative only.

Perceptions about research portfolio

Level of urgency – Program 1: Varieties

Q25. Thinking about the value to your farm business and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.
Base: All growers, n = 300



71%

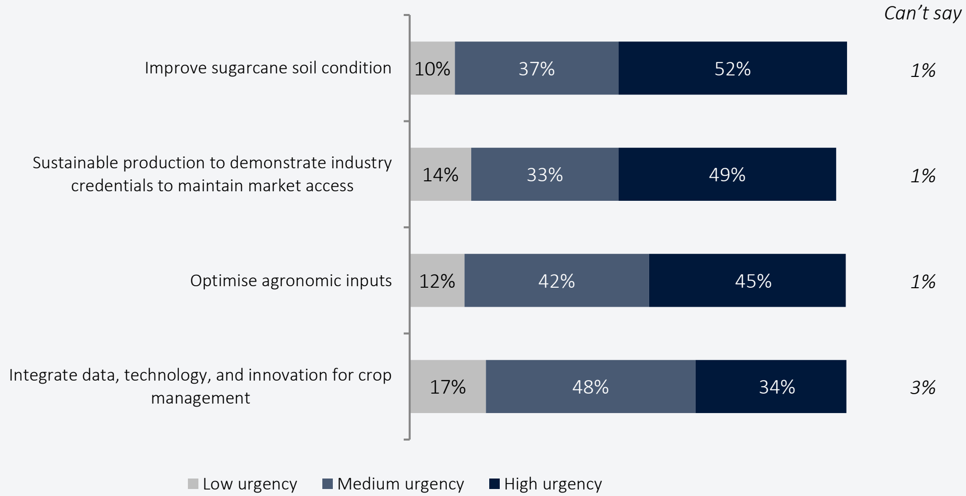
Average % of high urgency within program

% high urgency	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Create new varieties with improved production and processing performance	85%	82%	83%	80%	63%	77%	76%	83%	96%	100%
Develop new traits, improve breeding efficiency, and fund new PhDs in plant breeding	76%	80%	57%	67%	61%	62%	66%	72%	70%	88%
Support correct variety adoption decisions through performance information, grower engagement, and availability of planting material	71%	85%	59%	62%	53%	60%	63%	73%	69%	70%

Result labels shown only if 5% or greater.
* Low sample size (n < 30). Results are indicative only.

Level of urgency – Program 2: Agronomy and Farming Systems

Q26. Thinking about the value to your farm business and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.
Base: All growers, n = 300



45%

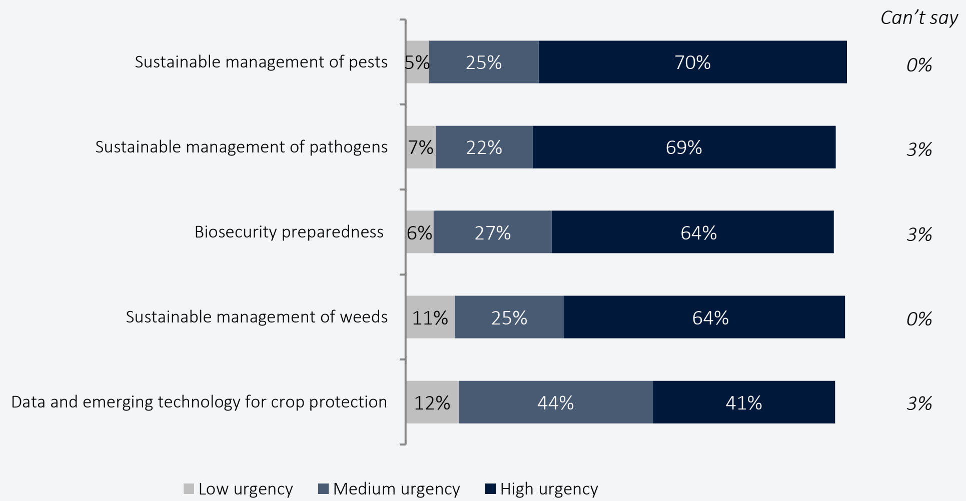
Average % of high urgency within program

% high urgency	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Improve sugarcane soil condition	61%	49%	43%	51%	44%	65%	53%	49%	52%	35%
Sustainable production to demonstrate industry credentials to maintain market access	60%	58%	39%	46%	48%	36%	52%	46%	46%	17%
Optimise agronomic inputs	50%	57%	31%	42%	31%	65%	47%	37%	49%	60%
Integrate data, technology, and innovation for crop management	42%	32%	35%	36%	11%	47%	35%	33%	31%	40%

Result labels shown only if 5% or greater.
* Low sample size (n < 30). Results are indicative only.

Level of urgency – Program 3: Crop Protection

Q27. Thinking about the value to your farm business and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.
Base: All growers, n = 300



62%

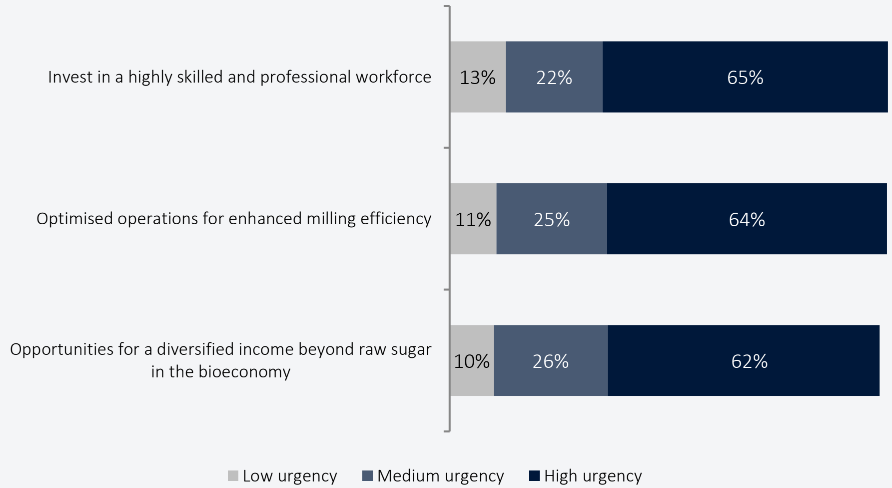
Average % of high urgency within program

% high urgency	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Sustainable management of pests	80%	75%	65%	65%	64%	68%	72%	64%	77%	46%
Sustainable management of pathogens	78%	83%	50%	70%	56%	65%	71%	65%	65%	59%
Biosecurity preparedness	61%	68%	58%	70%	65%	47%	62%	67%	71%	59%
Sustainable management of weeds	72%	73%	48%	57%	63%	80%	67%	57%	60%	71%
Data and emerging technology for crop protection	54%	44%	35%	42%	25%	35%	40%	45%	39%	65%

Result labels shown only if 5% or greater.
* Low sample size (n < 30). Results are indicative only.

Level of urgency – Program 4: Milling and Processing

Q28. Thinking about the value to your farm business and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.
Base: All growers, n = 300



Can't say

1%

1%

2%

63%

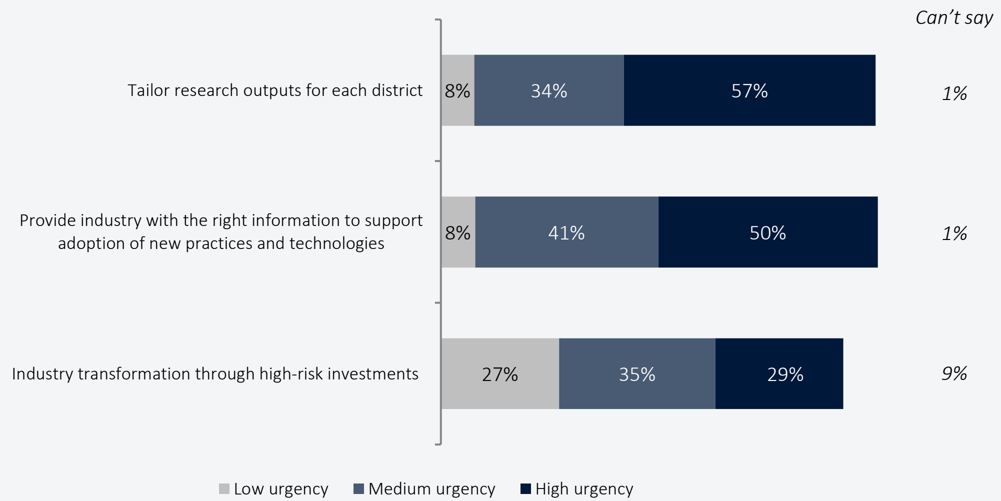
Average % of high urgency within program

% high urgency	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Invest in a highly skilled and professional workforce	69%	55%	53%	75%	70%	46%	64%	67%	58%	76%
Optimised operations for enhanced milling efficiency	60%	65%	54%	73%	59%	57%	64%	66%	55%	63%
Opportunities for a diversified income beyond raw sugar in the bioeconomy	66%	69%	50%	61%	57%	68%	62%	61%	58%	82%

Result labels shown only if 5% or greater.
* Low sample size (n < 30). Results are indicative only.

Level of urgency – Program 5: Adoption

Q29. Thinking about the value to your farm business and the industry, rate the level of urgency for SRA to fund research that addresses these priorities.
Base: All growers, n = 300



45%

Average % of high urgency within program

% high urgency	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Tailor research outputs for each district	65%	78%	51%	46%	46%	61%	58%	55%	56%	58%
Provide industry with the right information to support adoption of new practices and technologies	55%	50%	53%	48%	38%	56%	49%	49%	50%	68%
Industry transformation through high-risk investments	40%	30%	26%	28%	20%	19%	28%	34%	20%	40%

Result labels shown only if 5% or greater.
* Low sample size (n < 30). Results are indicative only.

Comments on the research priorities

Q30. Do you have any comments or suggestions about these research priorities?
Base: All growers who provided a valid response, n = 300

58% (n = 174) could not provide any comments or suggestions about these research priorities.

Of the 42% (n = 126) that could, this is what they said…

- 18% - Focus on growing better varieties / new varieties / better yield
- 6% - More focus on biosecurity (pests, diseases, weeds etc.) and the chemicals involved (keep them, or if legislated out, alternatives)
- 5% - Get the mills running / better upkeep / improvements
- 2% - More research done in specific areas (e.g. local, NSW, climate-affected areas)
- 2% - Nutrition and soil health to increase productivity
- 1% - Less red tape / regulations / legislation
- 1% - Focus on the harvesting side
- 1% - Alternative use of the cane and byproducts
- 1% - More detail around some of the areas
- 1% - Work on sustainability / social licence and perception

Some of what growers said:

"Need to have at least 3 varieties to be successful, at present we only have one, we lack an early variety. They most probably have an early variety in the plots but they haven't found it amongst what they have, a little more of humans looking at the plants and making that assessment rather than relying just on the statistics."

"They do not release enough varieties soon enough. There should be a new variety released each year as it takes a while for us to work where they are best suited for & optimal planting & harvesting. It also takes a while for SRA to work out if it is the same as a previous variety they have released, as in this year."

"To get everybody to do the right thing with their farm e.g. nitrogen inputs. The government should give SRA funding to do multi soil testing and develop a nutrient management plan, and we need better equipment to do this, and this will help with less wastage in terms of fertiliser."

"Facing challenges with as far as chemicals being removed, we need new chemicals e.g. paraquats if we don't hold onto them, we will lose it and it's costing more money, we need chemistry that works and that is affordable, and we need varieties that perform."

"SRA need to work out what they are. Are they a research station, variety propagation or are they a milling company. They are getting confused between their roles are. Are they millers, farmers, allow the people to make decisions and to go forward."

"Breeding plant, that is absolute must. Can't take money away from that. Better varieties for more yield, tonnes of sugar per hectare, and chemicals, we can't skimp on. They need to get the funding, and they need to do their job properly."

"Varieties. Overseas seem to be more resistant to draughts and also into more NIR into the milling sector for fibre and CCS and even contamination of sugarcane NIR testing, everybody's juice is a bit outdated need something new."

"Program 4. Milling and Processing, should be very low priority, they should be more worried about mills crushing cane to make raw sugar in an acceptable crushing season length. We are still going to working past Christmas."

“Get the right varieties for each district, the rest the production will get better. Farmers can do the rest, just make the varieties available. Adopt genetic technology e.g. eliminate the smut gene etc."

"The limitations of P applications are having an adverse effect, and we need to find a way to counteract it. Limiting P is N is detrimental to our productivity. More research to find ways to unlock it."

“The core of everything is getting farm production up as everyone is paid per tonne. We need to not kick varieties out because of particular traits as they may work for farmers in different areas."

"The industry, every district is different, not every variety suits. With SRA insects are becoming resistant to the present chemical we have. More work in that area would be very important."

“How long will it take for something to come through that will benefit growers. It can take thirty years. They need some ideas to make us money. They keep going through three-year cycles"

"Concentrate on varieties and look after our biosecurity and we will do the rest. Don't waste a lot of money on little projects that amount to nothing e.g. harvesting management."

“Weed identification with robotics would be a huge saving, that means you could clean a paddock with half the chemicals and target the weeds. Will open up the industry better."

Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

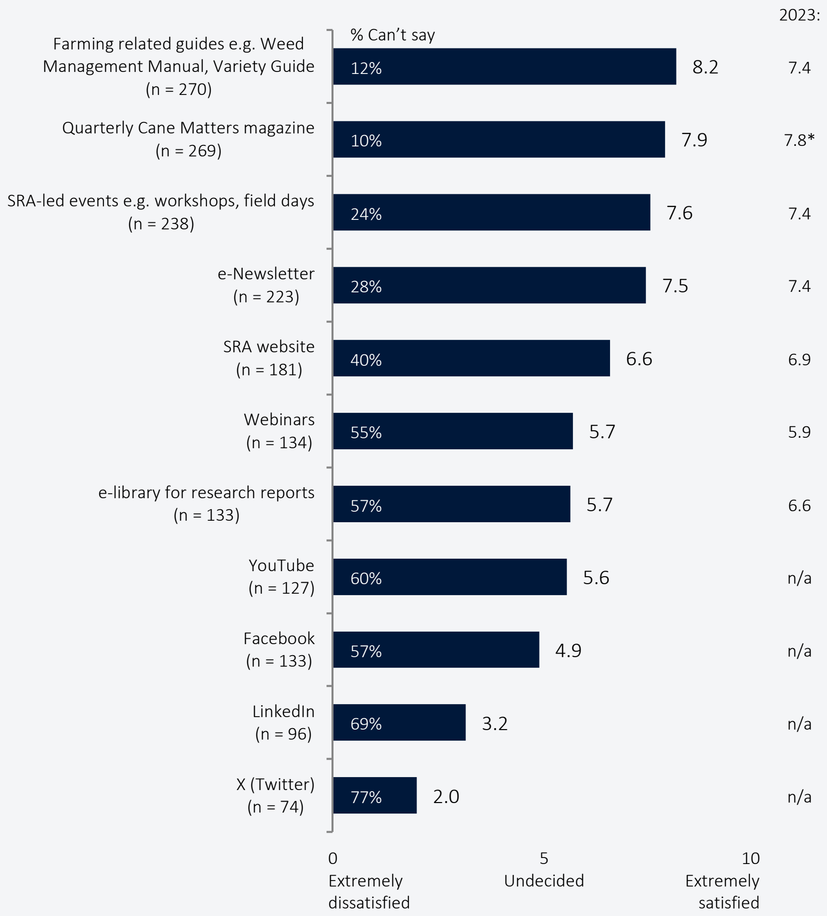
Detailed results

Communication needs and experiences

Satisfaction with SRA channels to access information

Next, we would like to understand how you like to receive information about SRA and sugarcane farming and milling. SRA will use this information to improve how they communicate with sugarcane growers in the future.

Q31. How satisfied are you with the following SRA communication channels to access information about sugarcane farming research?
Base: All growers (excluding "Can't say" answers), n varies



Of the 11 listed channels of communication…

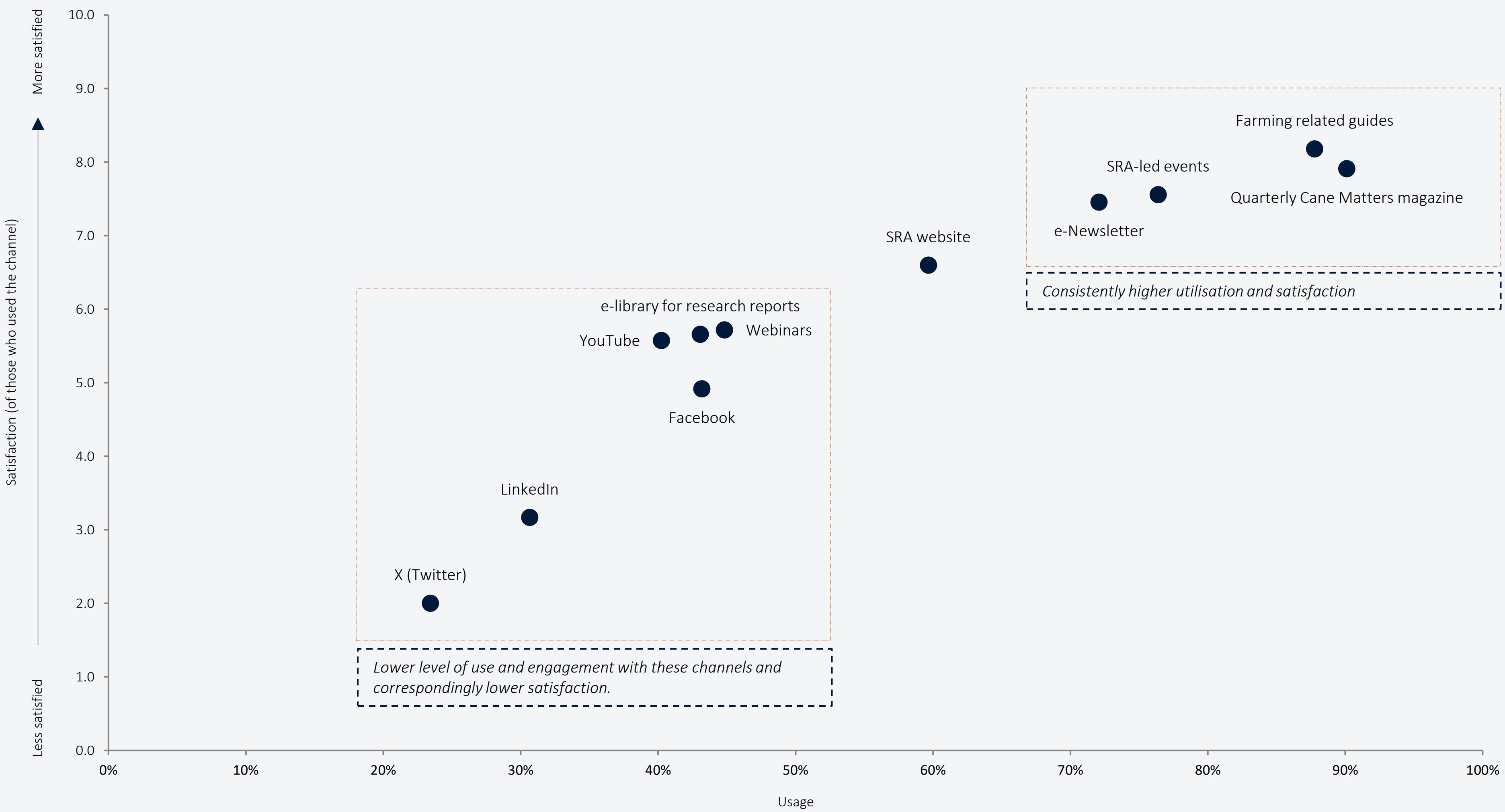
6.1 Average number of sources rated

98% Provided a rating for at least one source
60% Provided a rating for five or more sources
18% Provided a rating for all eleven sources

* Measure in 2023 was "Publications such as CaneMatters".

Satisfaction with SRA channels to access information

Satisfaction with SRA communication channel by usage (defined as those who did not answer "Can't say")



Satisfaction with SRA channels to access information

Next, we would like to understand how you like to receive information about SRA and sugarcane farming and milling. SRA will use this information to improve how they communicate with sugarcane growers in the future.

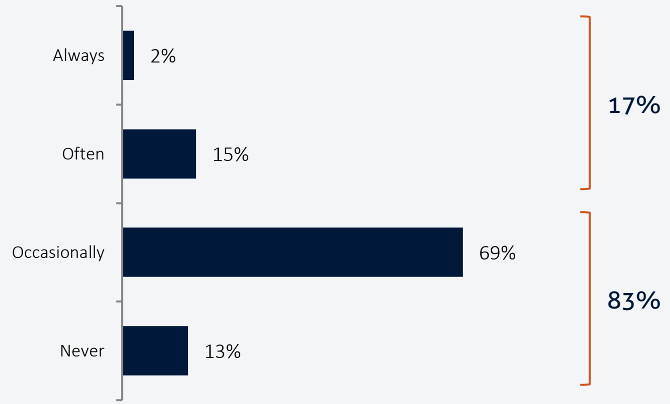
Q31. How satisfied are you with the following SRA communication channels to access information about sugarcane farming research?
Base: All growers (excluding "Can't say" answers), n varies

	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	*14**	*13**	*14**	*17**	*9**	*7**	*30*	*20**	*20**	*4**
Farming related guides e.g. Weed Management Manual, Variety Guide	8.5	7.9	7.1	8.6	8.1	8.4	8.4	7.8	7.7	8.0
Quarterly Cane Matters magazine	8.3	7.4	6.8	8.2	8.1	8.4	8.0	8.0	7.0	6.5
SRA-led events e.g. workshops, field days	7.4	8.1	7.0	7.6	7.8	7.3	7.6	7.7	6.8	7.9
e-Newsletter	7.7	7.1	7.2	7.4	7.4	8.4	7.6	7.3	6.4	8.0
SRA website	6.8	6.4	6.4	6.6	6.4	6.9	6.7	6.5	5.7	7.1
Webinars	6.6	6.4	5.7	5.4	4.3	3.4	5.9	5.7	3.6	5.7
e-library for research reports	5.9	5.5	5.0	6.0	5.1	5.8	5.7	5.7	5.3	6.1
YouTube	5.4	5.8	6.1	5.7	4.8	4.7	5.8	5.4	4.2	6.2
Facebook	4.5	4.7	6.1	4.8	4.9	4.3	4.8	5.4	4.0	6.7
LinkedIn	3.7	2.9	3.9	2.3	3.2	3.9	3.2	3.4	2.7	0.4
X (Twitter)	1.8	3.3	2.0	1.2	1.8	2.1	2.1	2.1	1.4	0.8

* Low sample size (n < 30). Results are indicative only.
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Frequency of use of info from SRA communications

Q32. How often do you use information from SRA communications to make changes to your farm?
Base: All growers, n = 300



	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Always	1%	1%	0%	7%	0%	0%	3%	0%	4%	13%
Often	22%	23%	7%	12%	13%	7%	16%	15%	11%	9%
Occasionally	64%	64%	75%	70%	71%	81%	69%	71%	67%	78%
Never	14%	12%	18%	11%	16%	12%	13%	14%	18%	0%

* Low sample size (n < 30). Results are indicative only.

Reasons for SRA preference or other sources used

Q34. Why do you prefer information from SRA communications over other sources?
Base: All growers who reported “Often” or “Always” at Q32 AND provided a valid response, n = 51

Those who reported “Often” or “Always” using info from SRA comms listed the following reasons why they prefer SRA sources…

- 4% - SRA is a reliable source / provides valid and relevant information / not affected by distributors and re-sellers
- 4% - There is no other source of information / no-one else doing research / they are the industry body
- 3% - SRA is a trusted source
- 3% - SRA information is well-researched / very informative
- 2% - SRA represents the industry and the growers
- 2% - I don't prefer it - use it in conjunction with other sources (e.g. prod board)
- 1% - SRA information is easy to read
- 1% - SRA information is easily accessible

Q33. Where do you get your information from to make changes to your farm?
Base: All growers who reported “Never” or “Occasionally” at Q32 AND provided a valid response, n = 249

Those who reported “Never” or “Occasionally” using info from SRA comms listed the following sources…

- 23% - Other growers / neighbours
- 21% - SRA source (Cane Talk, Variety Guide, SRA staff, etc.)
- 13% - Personal experience / trial and error
- 12% - Agronomist / consultant
- 10% - Local productivity board
- 5% - Magazines
- 5% - Field days
- 4% - Mill / Milling Co-op
- 3% - Workshops
- 3% - Local adviser / knowledge
- 2% - Websites / Google
- 2% - Distributors / Sellers
- 1% - Farmacist
- 1% - Social media
- 1% - Family
- 1% - Trials
- 1% - Local pest board
- 1% - Cane Growers Association / other industry body
- 1% - Look at other industries and their information

Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

SRA communication methods requested

Q35. What methods of communication would you like to see more of by SRA? Please select all that apply.
Base: All growers, n = 300

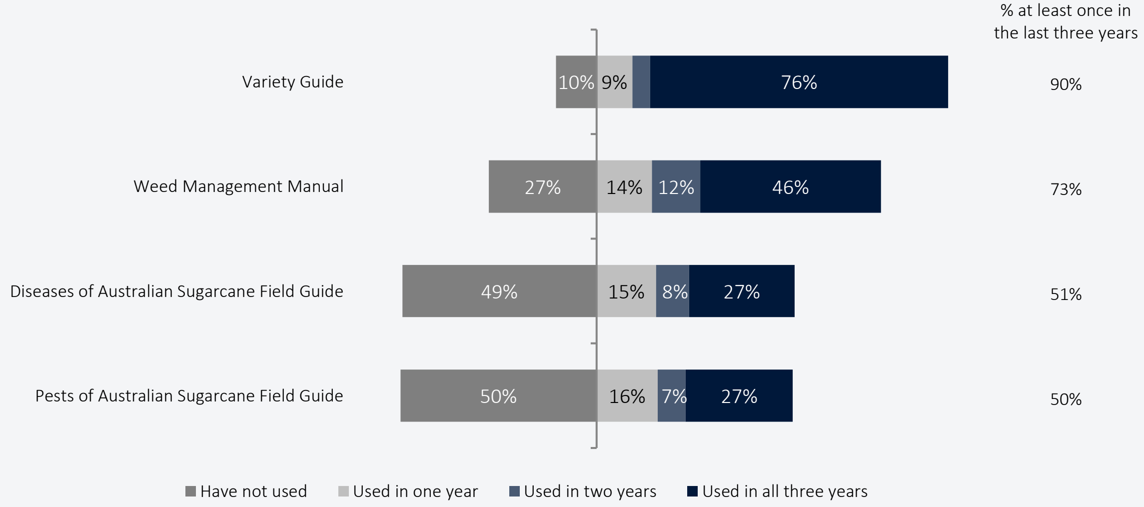
	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Hardcopy in the mail	50%	52%	46%	47%	76%	51%	55%	47%	42%	40%
Email	54%	59%	43%	38%	35%	36%	47%	41%	34%	59%
SRA led events e.g. workshops, field days	46%	68%	36%	34%	37%	37%	39%	52%	38%	65%
Research reports	37%	27%	23%	11%	28%	26%	26%	17%	21%	49%
Website	30%	16%	18%	20%	20%	20%	22%	19%	19%	48%
Information-based videos	30%	21%	20%	15%	23%	24%	22%	20%	18%	34%
Podcasts	14%	22%	22%	19%	2%	6%	15%	20%	8%	41%
Other (please specify)	16%	14%	15%	15%	5%	6%	13%	13%	19%	6%
Don’t know	13%	9%	13%	10%	5%	17%	9%	14%	15%	18%

* Low sample size (n < 30). Results are indicative only.

Use of SRA publications over the last three years

Q36. How often in the last three years have you used the following SRA publications...

Base: All growers, n = 300



% at least once in the last three years	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Variety Guide	90%	92%	69%	97%	87%	100%	88%	93%	93%	93%
Weed Management Manual	71%	83%	46%	81%	74%	70%	74%	74%	56%	70%
Diseases of Australian Sugarcane Field Guide	63%	40%	41%	54%	56%	36%	51%	46%	59%	57%
Pests of Australian Sugarcane Field Guide	59%	41%	44%	56%	48%	33%	49%	51%	52%	63%

Result labels shown only if 5% or greater.

* Low sample size (n < 30). Results are indicative only.

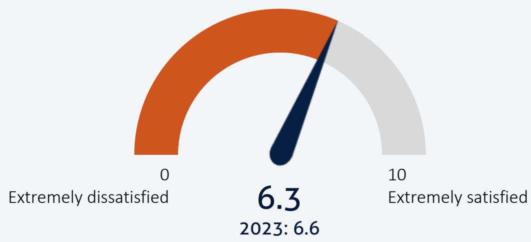
Detailed results

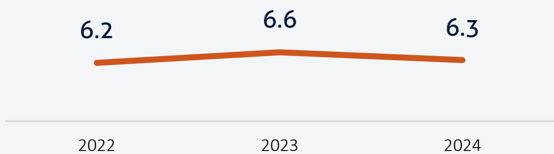
Performance indicators

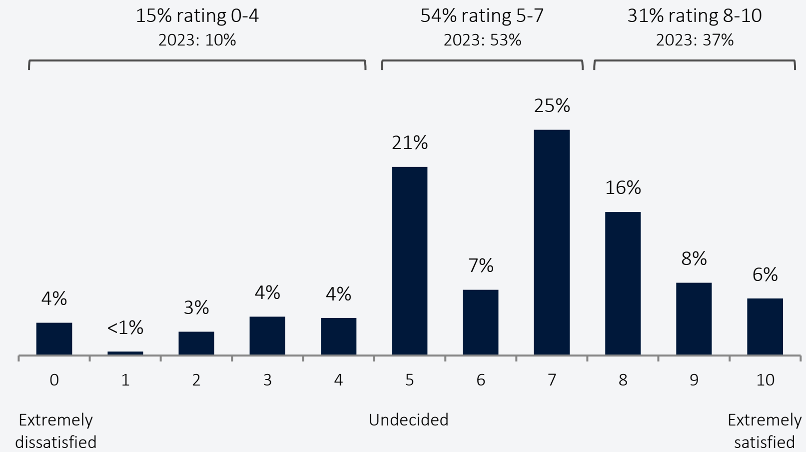
Satisfaction with R&D levy investment

Q37. Overall, how satisfied are you that your R&D levy is being invested to achieve the outcomes you expect?

Base: All growers (excluding "Can't say" answers), n = 276







District

Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales
6.3	6.5	6.1	6.2	6.8	5.8
2023: 6.6	2023: 6.8	2023: 6.5	2023: 7.0	2023: 5.9	2023: 5.9
n = 54	n = 42	n = 44	n = 82	n = 34	n = 20*

Production Size in 2023 Season

Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
6.6	6.0	5.3	5.9
2023: 6.8	2023: 6.3	2023: 5.8	2023: 5.5
n = 116	n = 84	n = 63	n = 13*

* Low sample size (n < 30). Results are indicative only.

Recommendations for SRA to improve their outcomes

Q38. What is your strongest recommendation you would have to SRA to improve the outcomes it achieves through its investment and management of the R&D?
Base: All growers who provided a valid response, n = 300

26% (n = 77) could not provide a recommendation and/or responded they were happy with SRA / that SRA were on the right track.

Other growers provided recommendations as described below…

- 33% - Varieties and plant breeding (better varieties, good varieties, more new varieties)
- 15% - SRA staff and events (more of them, more interaction with growers, come and see me, engage with smaller growers, etc.)
- 10% - Pest and disease control (especially cane grub control and alternatives to Paraquat, also soldier flies and feral pigs)
- 5% - SRA needs to be run better / stick to your core business / stay out of the politics / act on behalf of all
- 3% - Need to see more results / more information from SRA / where do my levies go
- 3% - Local-based research and trials
- 2% - Focus on increasing production / yield / returns
- 2% - Nutrition and soil health / look at fertiliser rates and replacements
- 2% - Milling (get the mills working, better mill performance)
- 1% - Look at alternatives / use of byproducts
- 1% - Separate into a grower body and a miller body / balance the budget

Some of what growers said:

“They will do something, then they do not go back and review constantly, i.e. a new variety will come out and stay 20 years without review or nothing on the paperwork changes, when farmer give the feedback or more information they need to update the reports i.e. SRA26 DNA test showed it can't go near water (not done by SRA), SRA should have done this! Chronic streak is a DNA test they can do in the lab this is not getting done."

"Biggest recommendation is our grub management. We are about to lose a chemical called Suscon and we only have one chemical left which is a liquid Confidor. This chemical is in the US being banned. How long before that happens here? What do we have to fight our biggest enemy the cane grub? Where is it leaving us? Whether we get resistant varieties to cane grub, that's where we need the R&D."

"The variety programs, the information coming out of the program are not accurate and some of the varieties are disappointing. The research that is done need to be done on soil replicated of the district and not in choice soil close to town."

"To invest more in plant breeding or get it right. They haven't produced varieties for many years, they need to get it right. They need to shift attention away from government funding so we can do our own research and not for a third party."

"Align with the productivity services more, we have very frequent weekly contacts with them and any issues or problems get sorted and answered. Can't say that of SRA, I find them very arrogant. They need a compete change in the local area."

"They need to be more focused on their core business from the growing sector and I feel they need to have more cane industry experience people on the board and less focused on a super corporate structure."

"More money spent and more knowledge on herbicide use for weed management. Would like them to spend time on the ground and talk to individual farmers on a one-to-one basis for their unique situation."

"Get back to core business of breeding better varieties to grow better cane. Higher yielding sugar per hectare. Diversifying of income sources from sugar cane. Do something with the waste."

"Shut down the Brisbane office and use the resources at the local level. What is the point of having a research station in Brisbane and the majority of the sugar cane is growing in the North."

"Don't let good people go, SRA good staff are very hard to come by they are worth something to the industry, you have to get some young blood, some are already passed their use by date."

"There needs to be more research to refine the fertiliser usage for different areas & soil types etc. The 6 easy steps is just so basic and people are losing tonnage to tailor for it."

“Get the variety right. Seems to be more influenced by the mills than the growers. The modern varieties don't have a good root system. Bred out but don't know how."

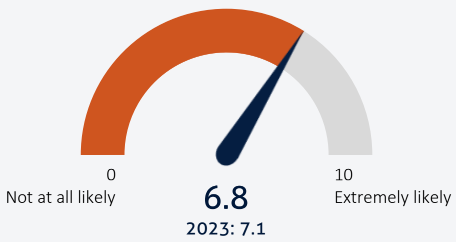
“Got to narrow their focus and concentrate on their core responsibility, pest, disease , varieties and biosecurity and farm practices, absolutely not anything else."

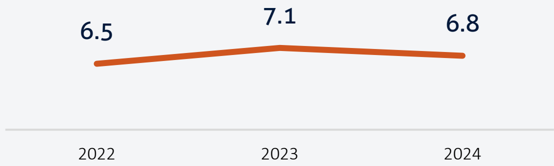
“More field acceptance tests for variations in specific areas, don't get tied up with finding a variety that provides the best disease package rather profitability."

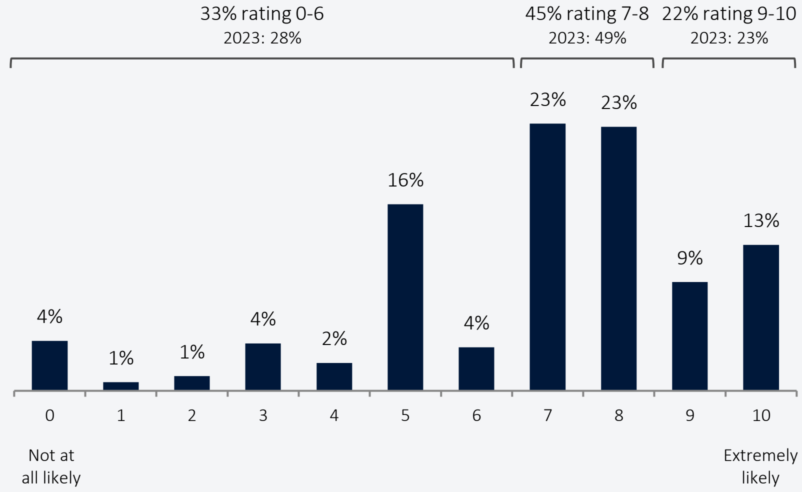
Results above are a subjective coding of the open-ended feedback provided by growers. Results are provided unweighted.
A full list of verbatims is provided in the supplementary Analysis and Verbatim Report.

Advocacy of the services, products and information SRA provide

Q39. How likely is that you would recommend the services, products and information SRA provides to other growers or industry associates?
Base: All growers, n = 300







District

Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales
7.1	6.7	6.5	6.8	6.7	6.7
2023: 7.1	2023: 7.8	2023: 6.1	2023: 7.3	2023: 6.6	2023: 7.2
n = 57	n = 44	n = 51	n = 90	n = 36	n = 22*

Production Size in 2023 Season

Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
7.0	6.5	6.0	7.4
2023: 7.2	2023: 7.0	2023: 5.9	2023: 6.4
n = 130	n = 89	n = 68	n = 13*

* Low sample size (n < 30). Results are indicative only.

Net Promoter Score

Net Promoter Score

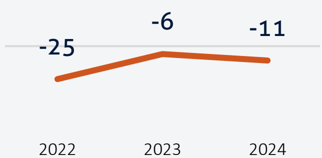
Base: All growers (excluding "Can't say" answers), n = 289

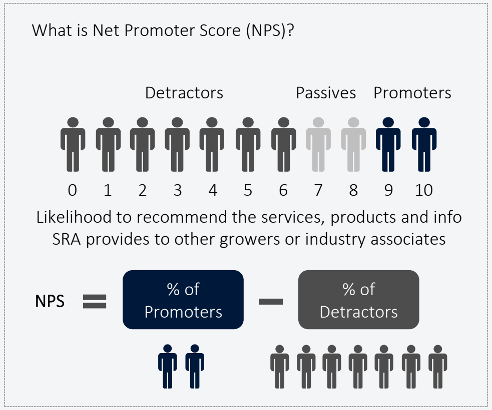
Net Promoter Score

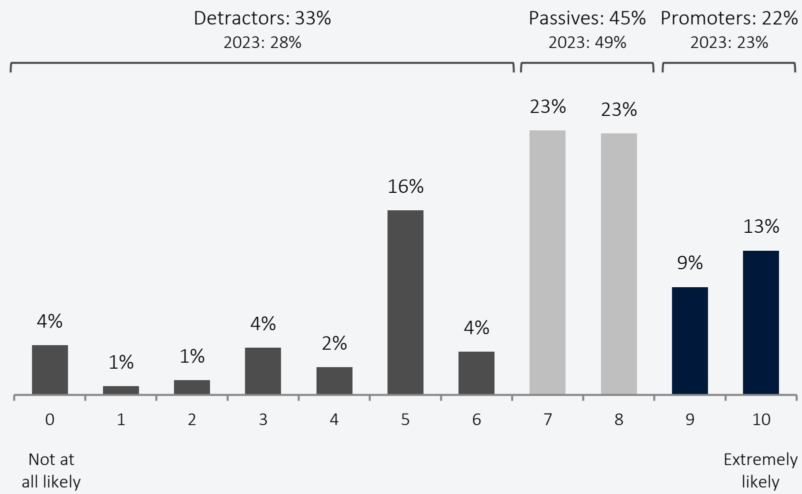
-11

2023: -6

on a scale of -100 to +100







District

+6	**-15**	**-21**	**-12**	**-9**	**-25**
2023: -5	**2023: +20**	**2023: -36**	**2023: +1**	**2023: -10**	**2023: -12**
Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales
n = 57	n = 44	n = 51	n = 90	n = 36	n = 22*

Production Size in 2023 Season

-4	**-22**	**-33**	**-17**
2023: +2	**2023: -19**	**2023: -33**	**2023: -8**
Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
n = 130	n = 89	n = 68	n = 13*

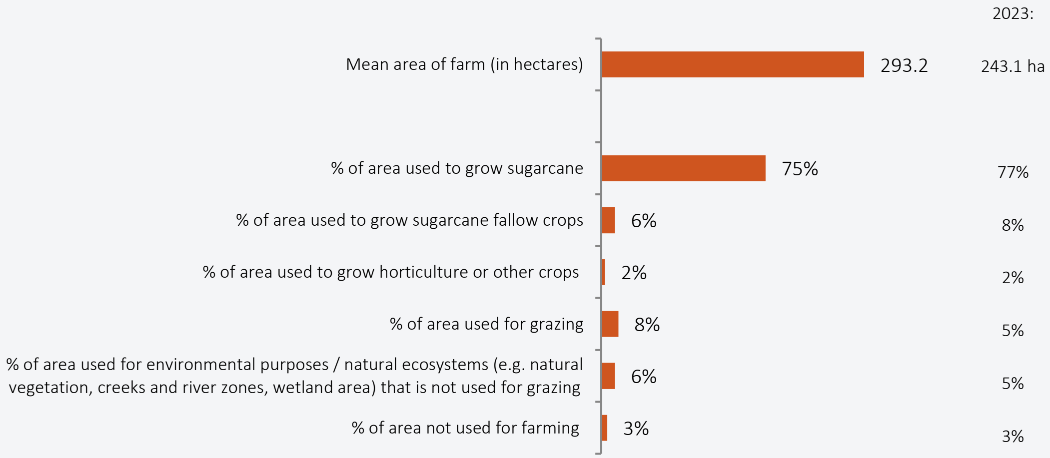
* Low sample size (n < 30). Results are indicative only.

Detailed results

Farm business profile

Area of farm and allocated breakdown

Q42 and Q43. What is the total area of your farm in hectares? And for the 2024 season, approximately how many hectares of your farm was devoted to the following?
Base: All growers who provided a valid response, n = 300



The "% of area" results are an average of the proportion of area each grower reported against their total farm hectares.

This standardisation to a 0-100% scale is done to provide results that are unbiased to growers with a significantly larger area.

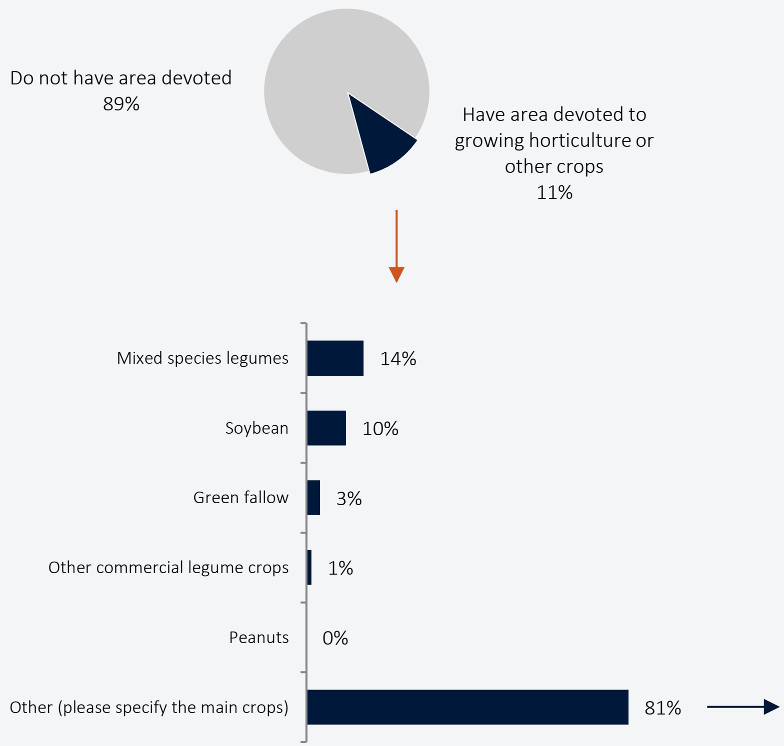
	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
Mean area of farm (in hectares)	218	195	669	274	217	181	183	347	602	2,738
% of area used to grow sugarcane	78%	77%	77%	74%	68%	74%	75%	75%	75%	68%
% of area used to grow sugarcane fallow crops	7%	6%	5%	6%	7%	8%	6%	7%	8%	7%
% of area used to grow horticulture or other crops	4%	0%	2%	<1%	3%	2%	1%	3%	2%	3%
% of area used for grazing	3%	7%	9%	9%	11%	13%	8%	7%	6%	17%
% of area used for environmental purposes / natural ecosystems	7%	7%	4%	7%	8%	1%	6%	6%	7%	3%
% of area not used for farming	1%	2%	2%	5%	3%	2%	3%	2%	2%	1%

* Low sample size (n < 30). Results are indicative only.

Other crops / foods grown on farm during 2022-23 season

Q44. What other crops and / or foods did you grow on your farm during the 2023-24 season?

Base: All growers who reported having area used to grow horticulture or other crops, n = 34



Other crops mentioned:

“Bananas

“Bananas

“Bananas, avocados”

“Citrus”

“Citrus orchard”

“Cacao, also Eucalyptus koala food trees”

“Finger limes”

“Ginger”

“Ginger”

“Hay”

“Hay”

“Hay”

“Hemp”

“Industrial hemp”

“Legume crops for hay production”

“Macadamias”

“Macadamias”

“Macadamias”

“Pawpaw”

“Pawpaw”

“Pecans / Hay”

“Pineapple and pumpkins”

“Pineapples”

“Pineapples”

“Pumpkins and watermelons”

“Watermelons”

Sugarcane harvested, yields and CCS

The next questions relate to your production for the 2023 season.

Q45. Approximately how many tonnes of sugarcane did you harvest and what were your yields in 2023?

Base: All growers who provided a valid response, n varies *

	Mean result across all growers	2023:
Total tonnes of sugarcane harvested (in tonnes, n = 286):	9,855	9,503
Average farm yield (in tonnes / hectare, n = 269):	89	94
Average farm CCS (Commercial Cane Sugar %, n = 281):	13.4	13.0
Yield recorded by your highest-yielding block (in tonnes / hectare, n = 256):	123	128
Yield recorded by your lowest-yielding block (in tonnes / hectare, n = 253):	65	67

	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Minimum base: †	49	38	43	75	31	16*	102	77	62	12*
Total tonnes of sugarcane harvested	9,340	9,410	14,634	10,346	6,901	5,627	4,235	13,284	31,239	93,353
Average farm yield	80	74	118	90	77	97	84	96	99	104
Average farm CCS	12.5	12.7	14.1	13.9	14.4	12.3	13.3	13.5	13.5	13.4
Yield recorded by your highest-yielding block	109	106	156	120	122	146	116	131	145	147
Yield recorded by your lowest-yielding block	62	56	89	65	52	72	62	71	71	67

* Cleaning was undertaken on this data to ensure outlier results, results where growers were unsure, etc. were removed prior to analysis.
** Low sample size (n < 30). Results are indicative only.
† Bases vary between measures – please refer to the Analysis and Verbatim report for bases across each measure.

Intentions with the farm business

Q46. Over the next five years, which of the following options best describes your intentions with your farm business?
Base: All growers, n = 300

34%
2023: 25%
Improve my farm productivity through increased investment

18%
2023: 25%
Improve my farm productivity but not invest heavily

29%
2023: 30%
Maintain farm productivity – keep to current production

4%
2023: 3%
Reduce the area under cane to transition to other cropping and / or grazing

14%
2023: 16%
Transition to retirement and / or wind down operations / selling farm

Intentions for farm business over the next five years

	District						Production Size in 2023 Season			
	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
Base:	*57*	*44*	*51*	*90*	*36*	*22**	*130*	*89*	*68*	*13**
I intend to improve my farm productivity through increased investment (i.e. maximise return on investment)	33%	43%	48%	30%	27%	18%	32%	34%	58%	53%
I intend to improve my farm productivity but not invest heavily (i.e. improve using inexpensive means)	17%	14%	14%	17%	25%	36%	14%	30%	14%	47%
I intend to maintain farm productivity – keep to current production (i.e. hold steady)	39%	24%	24%	33%	20%	17%	33%	23%	19%	0%
I intend to reduce the area under cane to transition to other cropping and / or grazing	2%	12%	0%	2%	4%	6%	5%	1%	3%	0%
I intend to transition to retirement and / or wind down operations / selling farm	7%	6%	14%	18%	25%	23%	16%	13%	6%	0%

* Low sample size (n < 30). Results are indicative only.

Appendices

A profile of results: by District

	Far North Queensland (n = 57)	Herbert (n = 44)	Burdekin (n = 51)	Central Queensland (n = 90)	Southern Queensland (n = 36)	New South Wales (n = 22*)
Satisfaction with R&D levy investment	6.3	6.5	6.1	6.2	6.8	5.8
Advocacy of the services, products and information SRA provide	7.1	6.7	6.5	6.8	6.7	6.7
Net Promoter Score	+6	-15	-21	-12	-9	-25
Nett Sentiment – Future of the sugarcane industry	+56	+43	+71	+31	+79	+100
% believe SRA staff are active or very active in engaging in industry matters and events in your district	45%	66%	59%	61%	51%	39%
Average satisfaction across four aspects of the experience with local SRA staff	6.2	7.0	6.5	6.9	6.7	6.5
Average satisfaction across four aspects of SRA's plant breeding program	6.1	6.0	5.9	6.2	6.6	7.1
Average % rating high urgency within each program:						
Program 1: Varieties	77%	82%	66%	70%	59%	66%
Program 2: Agronomy and Farming Systems	53%	49%	37%	44%	33%	53%
Program 3: Crop Protection	69%	69%	51%	61%	55%	59%
Program 4: Milling and Processing	65%	63%	52%	70%	62%	57%
Program 5: Adoption	53%	53%	43%	41%	35%	45%

Bases reported are the overall base of each cohort. Bases will differ by measure.
* Low sample size (n < 30). Results are indicative only.

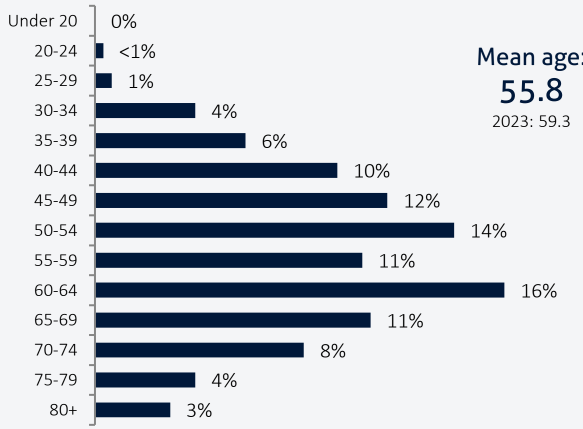
A profile of results: by Production Size in 2023 Season

	Small: 8,000 tonnes and under (n = 130)	Medium: >8,000-20,000 tonnes (n = 89)	Large: >20,000-50,000 tonnes (n = 68)	Extra Large: Over 50,000 tonnes (n = 13*)
Satisfaction with R&D levy investment	6.6	6.0	5.3	5.9
Advocacy of the services, products and information SRA provide	7.0	6.5	6.0	7.4
Net Promoter Score	-4	-22	-33	-17
Nett Sentiment – Future of the sugarcane industry	+56	+50	+54	+54
% believe SRA staff are active or very active in engaging in industry matters and events in your district	58%	52%	40%	88%
Average satisfaction across four aspects of the experience with local SRA staff	6.7	6.6	5.8	7.6
Average satisfaction across four aspects of SRA's plant breeding program	6.4	6.0	5.5	5.9
Average % rating high urgency within each program:				
Program 1: Varieties	68%	76%	79%	86%
Program 2: Agronomy and Farming Systems	47%	41%	45%	38%
Program 3: Crop Protection	62%	60%	62%	60%
Program 4: Milling and Processing	63%	65%	57%	73%
Program 5: Adoption	45%	46%	42%	56%

Bases reported are the overall base of each cohort. Bases will differ by measure.
* Low sample size (n < 30). Results are indicative only.

Respondent profiles

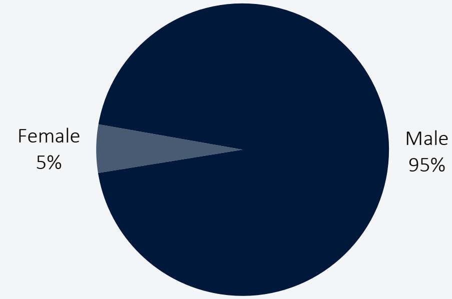
Q1. Which age range do you fall into? *
Base: All growers, n = 300



Mean age:
55.8
2023: 59.3

Age range	2023:
Under 20	0%
20-24	0%
25-29	0%
30-34	1%
35-39	4%
40-44	5%
45-49	9%
50-54	13%
55-59	19%
60-64	15%
65-69	15%
70-74	6%
75-79	7%
80+	5%

Q2. Which gender do you associate with? *
Base: All growers, n = 300



2023:

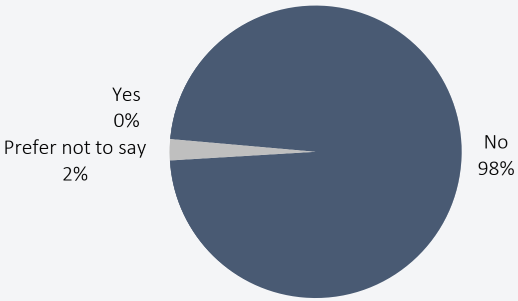
Male:
96%

Female:
4%

Non-binary / Other:
0%

Prefer not to say:
0%

Q40. Are you of Aboriginal, Torres Strait Islander, and/or Australian South Sea Islander origin? *
Base: All growers, n = 300

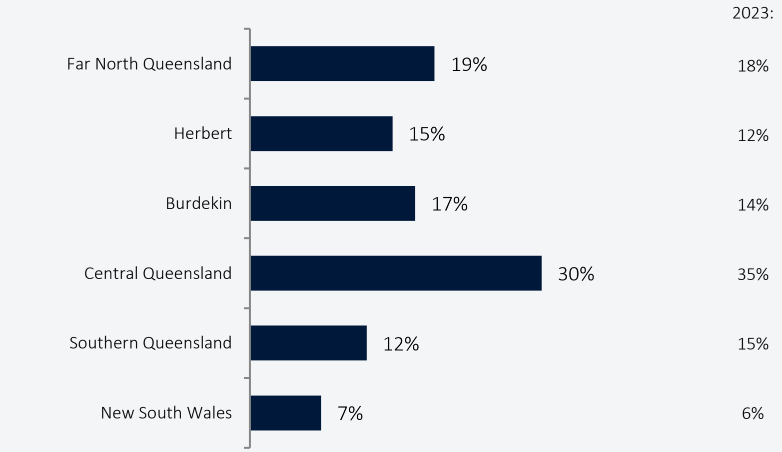


* Results are provided unweighted.

Business profiles

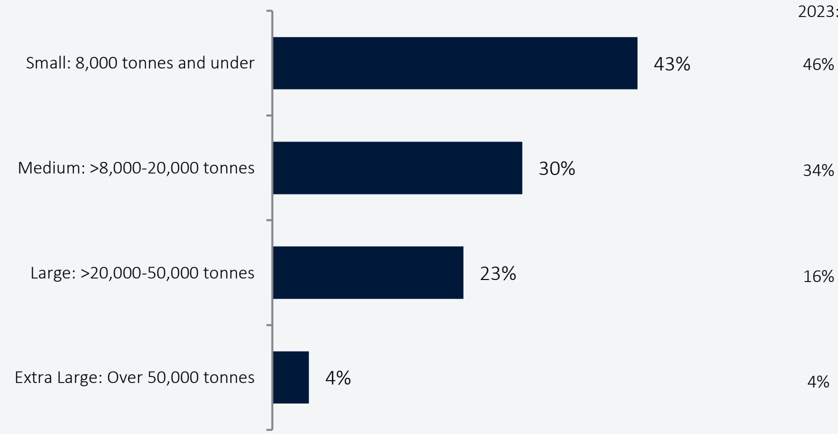
District of business *

Base: All growers, n = 300



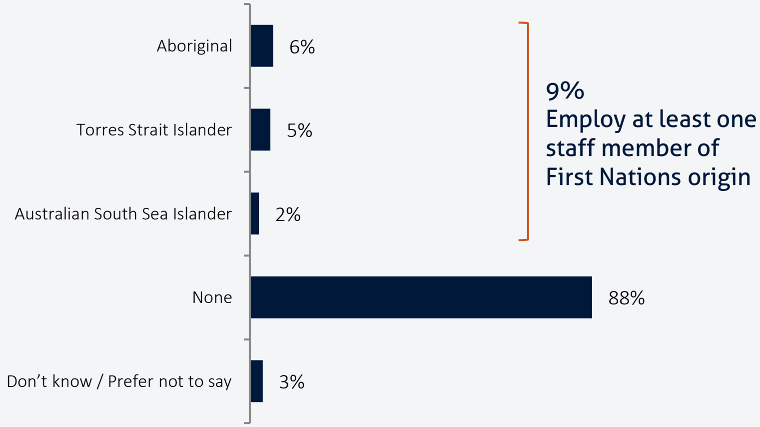
Production Size of business in 2023 season *

Base: All growers, n = 300. Please note that where a grower could not provide their production size from the 2023 season, the sample designation of production size was used instead (affects n = 14 respondents).



Q41. Please indicate if your farm business employs staff of the following origins. Please select all that apply. *

Base: All growers, n = 300



* Results are provided unweighted.

Research design

Research Program

Sugar Research Australia (SRA) invests in evidence-based research, development and adoption (RD&A) activities on behalf of sugarcane growers and millers to meet industry challenges and opportunities. Central to achieving success of the SRA strategic plan is the engagement, support and advocacy of the two key stakeholder audiences, namely growers and millers.

Target Respondent

The 2024 SRA Grower Survey provides another opportunity to stop, listen and reflect on the level of grower awareness and engagement with SRA programs, communications and initiatives and their satisfaction with the outcomes being delivered through the SRA investments.

Questionnaire

The target respondent for this research is levy-paying Australian sugarcane growers. Due to the availability of contact details, this target is limited to SRA members only.

A 30-minute phone survey was conducted with respondents. This survey measured, amongst other things:

- Grower sentiment
- Perceptions of district engagement
- Adoption
- Perceptions about varieties
- Perceptions about research portfolio
- Communication needs and experiences
- Performance indicators
- Farm business profile

A range of Likert rating scale, closed and open-ended questions were used throughout the survey to accomplish this.

Distribution

The survey was distributed to growers via computer-assisted telephone interviewing (CATI). The survey method utilised SRA's internal list with contact details including phone number, District and Production Size.

Response

Throughout the survey period, n = 300 sugarcane growers responded and completed the survey. A breakdown of the total number of completes by District and by Production Size in the 2023 season is provided below.

Overall	District						Production Size in 2023 Season			
Total completes	Far North Queensland	Herbert	Burdekin	Central Queensland	Southern Queensland	New South Wales	Small: 8,000 tonnes and under	Medium: >8,000-20,000 tonnes	Large: >20,000-50,000 tonnes	Extra Large: Over 50,000 tonnes
300	57	44	51	90	36	22	130	89	68	13

Weighting

The data was weighted against the population distribution of the SRA membership base by two factors – District (6 categories) and Production Size (4 categories) for a total of 24 District / Size combinations.

Timing

The survey was open for response on 23rd October 2024 and remained open until 11th November 2024.

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