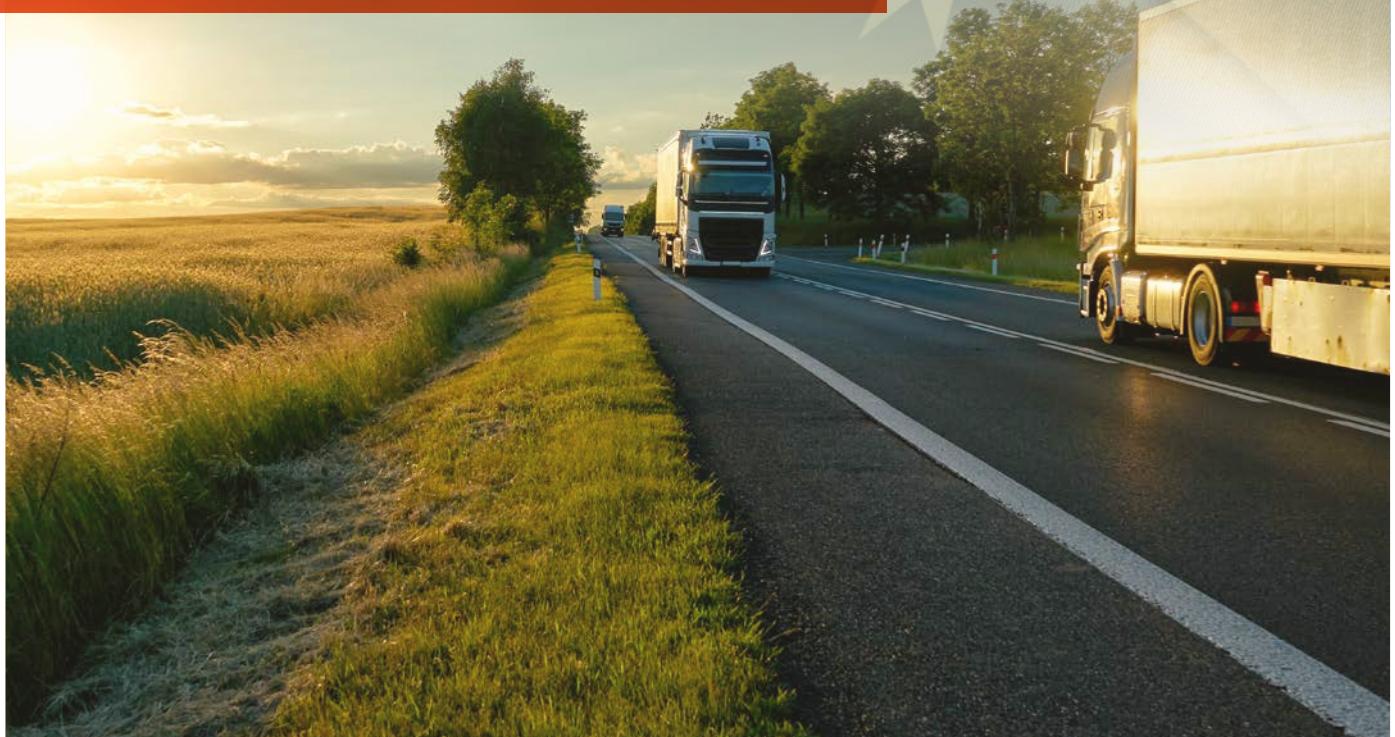


AGRICULTURE COOPERATION BETWEEN AUSTRALIA AND INDIA

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DISCLAIMER.

This document was produced as a result of an expert roundtable meeting organised at Western Sydney University in March 2018. The opinions, views and recommendations in this report represent the views of the author who has summarised the discussions from each of two groups. It may not represent the views of individual participants or any organisation who was represented at this meeting.



Figure 1: A group photograph of participants attending the Round Table meeting, the Indian High Commissioner and University Executive.

SUMMARY

With support from the Indian High Commission and the Commonwealth Department of Foreign Affairs and Trade (via Australia- India Council), a roundtable meeting ‘India-Australia on Agriculture and Agribusiness’ was organised with the purpose of bringing together key stakeholders to analyse key challenges, identify opportunities and recommend solutions to promote bilateral agribusiness and trade.

The participants were reminded of the strong and developing strategic bilateral partnership between Australia and India. It was highlighted that despite strong political support at top levels, progress on the much awaited Free-Trade Agreement (FTA) has slowed, with agribusiness being one of the main constraints. The specific goals of the meeting were to explore and prioritise areas for cooperation to benefit the Agribusiness sector within both countries so the sector can promote bilateral cooperation including the FTA. The participants were tasked with developing strategic priority areas to promote cooperation that would be beneficial for both countries in the short-term, and to identify challenges which would require sustained negotiation for implementation in the mid-long term timeframe.



The key recommendations from the roundtable meeting included:

1. Develop an effective plan for joint technology development and sharing market access for shared prosperity.

There is a significant opportunity for India-Australian partnerships for shared export potential as 60% of the global population are living in Asia, however they only have 30% of global food production means.

2. Identify key niches for trade, policy and development goals in Agribusiness.

Short-term priorities for cooperation in agribusiness identified include;

- Post-harvest infra-structure development in India,
- Further intensification in trade for horticulture products.
- Enhanced trade in emerging markets (e.g. wine, cooking oils).
- Trade of commodity products (e.g. grains, sugar) may remain sporadic given socio-economic reasons in India but a long-term approach can be developed, i.e. creation of reserves (e.g. grains, sugar) for demand-based export.
- Joint innovation and commercialisation of emerging tools (satellite-based, big data, bio-based, climate-smart agriculture) for sustainable increases in farm productivity.



3. Create a network of key stakeholders for continuous scientific and policy advice. Continuous and institutionalised advice on all aspects of agribusiness to ensure frictionless trade. A bottom-up approach was proposed to ensure minimum risk for both policy development and industrial decisions.

4. Use strength of research and trade partnerships in agribusiness to support strategic partnerships in other fields.

Regular exchange of ideas to ensure innovation, technology development, ability to identify and harness opportunities via established leadership forums and institutionalised exchange of personnel.

5. Establish an Australia- India centre of Excellence for Agribusiness to support (1) to (4). Establishment of a bilateral centre for excellence and expertise will ensure delivery on all aspects noted above.

BACKGROUND

India is the world's fastest growing major economy and is an emerging global power. Combined with its geo-location, rapidly growing middle income population and educated and skilled technologists, India offers unprecedented strategic and economic opportunities. This has resulted in many countries expressing interest in developing strategic and economic partnerships with India (Sharma, 2016). Australia's future economic prosperity is linked to Indo-pacific regions and in recent years, it has invested significant political capital to develop strong, strategic bilateral partnerships with India. The current annual Australia-India trade is around \$19.5 Billion with >\$15 Billion of produce being exported to India. Australia exports mineral resources, horticulture products, service and education to India (DFAT, 2018). However, the level of trade can potentially be expanded several fold.

Both Australia and India are engaged in developing

strategic partnerships in various sectors with mutual benefits. Despite strong political support at the top level, the progress on the much awaited Free-Trade Agreement (FTA) has slowed, with Agribusiness noted as being

one of the main constraints. However, a range of areas in Agribusiness offers important opportunities for bilateral business and investment. Understanding socio-economic and cultural aspects

Hon Prime Minister of Australia, Malcolm Turnbull has stated previously “Our two-way trade has doubled in the last decade – but it is a fraction of what we should aspire to given the many points of intersection between our two economies”.

along with prioritising certain areas for cooperation could help in expediting the process. As an example, understanding that most of Indian agriculture is used to support the livelihood of ~70% of its population (>700 Million people) is critical, whereas in Australia, agriculture is mainly commercial in nature. Therefore, identifying opportunities of cooperation with minimum socio-economic negative consequences for trade and development could significantly increase partnerships with beneficial outcomes for both countries.

It is important to note that India has been self-sufficient in the food sector for a number of years, but its growing population and increasing percentage of middle-income earners means that India needs to improve its farm productivity and quality of produce to keep up with growing demands. Additionally, farming systems within India are largely dependent on small holding farms, which experience unpredictable

weather conditions and thus, the population requires a secure supply of produce with appropriate storage facilities to meet demand. These areas may represent opportunities for strong bilateral frameworks to enhance cooperation in agribusiness.

Australia has access to some markets in India including wheat, pulse and horticulture products, but faces stiff

competition for price from international competitors (e.g. from the USA).

THE SCOPE AND OBJECTIVES OF THE ROUNDTABLE MEETING.



Figure 2: His Excellency, the High Commissioner of India Dr A.M. Gondane presented his opening remarks and set key agenda items for participants.

The roundtable meeting was organised with support from the Indian High Commission, Department of Foreign Affairs and Trade and a number of academic, government and industrial organisations with the purpose of creating an informal, flexible, interdisciplinary forum where stakeholders could meet to discuss key challenges, identify opportunities and recommend solutions to promote agribusiness and trade between Australia and India.

The roundtable meeting was organised to analyse the current status of cooperation between Australia-India in agribusiness and identify opportunities, challenges and solutions for future cooperation. The main objectives were:

1. To maximise the potential of stakeholder expertise to analyse and inform policy and support mechanisms across the agribusiness portfolio;

2. To ensure regular and sustainable partnerships to enhance livelihood via increased farm productivity and shared market access;
3. To identify mechanisms for the continual exchange of information and advice through an efficient mechanism (e.g. Centre of Excellence) that can provide forewarning of issues relating to agribusiness and trade between Australia and India;
4. To enable the involvement of industry through open innovation channels in a timely manner to inform policy.

To achieve these objectives, participants were grouped into two groups to discuss opportunities and strategies for strengthening agribusiness and trade links related to 1) policy, socio-economic and culture, (2) research, innovation and commercialisation. These discussions were based around current scientific evidence.

REMIT OF PARTICIPANTS.



Figure 3: Ms Marita Forde from the Commonwealth Department of Foreign Affairs and Trade highlighted priority areas from the Australian Government's perspective.

All participants were encouraged to contribute towards exploring and recommending high level, strategic pathways for developing future partnerships between Australia and India in the agribusiness sector. The main task was to start building a clear picture of recommendations that could be taken to policy advisors and industries for short- and medium term implementation. Furthermore, each discussion group was encouraged to address future initiatives, possible activities and a roadmap to achieve success for long-term initiatives. Participants were reminded that they had been invited to these discussions as a leader and an expert for high level insight, not as a representative of their business or discipline. Participants were requested to frame their discussion within the following contexts when they were identifying opportunities and making recommendations:

- **Differential requirements:** Key trade requirements for Australia is to access international markets and to ensure biosecurity, however for India it is to secure food resources via improved technologies and export excess stock.
- **Differential systems:** Indian farming remains largely small holding, low input, labour intensive and dryland. However, Australian farming is largely mechanised and utilises a high input system.
- **Differential socio-economic and cultural priorities:** Indian agriculture and agribusiness maintains the livelihood for >700 Million people while Australian farming is commercial and export- oriented.

Participants were given the task of marrying the differential needs from both countries to find priority areas for cooperation which can be implemented in the short - medium term.

GROUP 1: TRADE, POLICY AND CULTURAL COOPERATION

Group one focused its discussion on trade and policy, highlighting differences in socio-economic and cultural aspects between the two countries which might constrain free trade for agriculture products. Specifically, this group was asked to:

- Identify priority areas for agribusiness and trade.
- Enlist ways for social and cultural integration in policy and business.
- Identify strategies to ensure continuous and timely advice from academic, industry and trade sectors.
- Propose a plan to ensure engagement is multilayered (bottom-up and top-down).
- Propose ways to strengthen agribusiness within bilateral strategic partnerships.

The group noted that agriculture export to India already accounted for

more than \$2 Billion with horticulture products being the main export items. The key challenge for increased intensive agribusiness trade is based around socio-economic reasons. As outlined above, ~70% of the Indian population is dependent on small-holding farms for their livelihood. If there is enough food produce within India to feed its population, it is difficult for the Indian government to open its market and accept imported commodities due to the socio-economic implications. Culturally, Indian farmers prefer food from their own farms or regions, particularly in rural areas. The group thought that both countries were looking at a maximal approach rather than a mutually beneficially approach for cooperation which is believed to be hindering the progress of the FTA negotiation. However, the group did identify key areas for opportunities in trade of produce and biosecurity which could be enhanced in the short-term which are outlined below.



Figure 4: Discussion group exploring areas of cooperation between India and Australia

STRENGTHS AND NEEDS OF AUSTRALIA AND INDIA IN AGRIBUSINESS.

Australia has a strong technological capacity and expertise in farming, post-harvest technologies, food processing and skills development, all of which India can benefit from in the short-term (Box 1). This provides an important opportunity for Australia - India bilateral trade and investment. However, this is not a one-way street. India can provide critical cutting edge satellite and IT technologies for precision farming in Australia, ensuring that such bilateral trade agreements are mutually beneficial to both countries.

Infrastructure development: Despite self-sufficiency in food production, India needs to modernise its farming systems and post-harvest storage technologies to increase productivity and meet two key policy goals i.e. doubling the income of farming communities and doubling India's share of the global agri-food trade from 1 to 2 % (Sharma, 2016). Additionally, growing economic prosperity and middle income populations are driving significant changes in food preferences i.e. from cereal to animal protein-rich food, fresh food to premium products (products with high nutritional values and low chemical residues). This provides a real opportunity for Australia to forge a long-term partnership with India in the latest agri-technologies, infrastructure

development, investment in post-harvest storage and supply of premium food products targeting the middle-upper income populations of India.

Agri-food export: Australia is already a major exporter of horticulture (vegetables and fruits), wheat and pulses to the Indian market (Figure 5). Analysis by ABARE (Hamshere et al., 2014) estimated that despite doubling the value of agrifood production to US\$574.6 Billion in 2050, the projected increase in Indian food production will

be significantly less than consumption demands. It further estimates that by 2050, India will import vegetable and dairy products worth US\$47 Billion and US\$12.7 Billion, respectively and is expected to import

US\$58.2 Billion of fruit and \$14.8 Billion of wheat. Demand for wine and cooking oils can also potentially increase significantly. Growing demands of these products provide opportunities for Australia, however, may face stiff competition from EU and the USA to access the Indian market if a partnership plan is not put in place now. Australia may need to invest in infra-structure development in India now to benefit from the future demands of agri-produce in India.

BOX 1: Potential areas for further intensification in bilateral trade

- Post-harvest technologies
- Joint development of technologies and commercialisation
- Horticulture products
- Dairy products

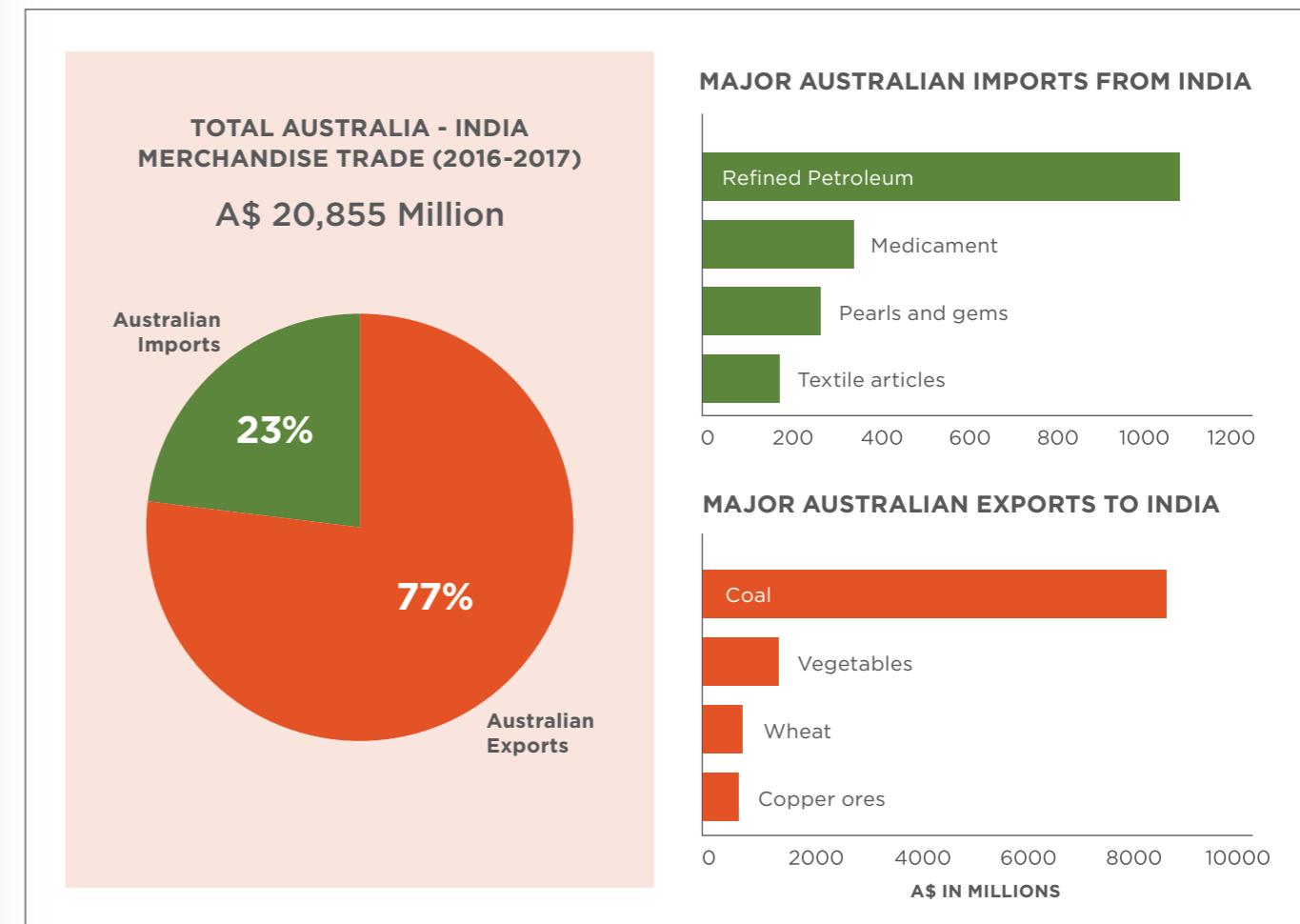


Figure 5: Merchandise trade between Australia and India and major Australian and Indian exports. Data from <https://dfat.gov.au/trade/resources/quia.pdf>

Joint development of technologies and shared markets: One of the key opportunities identified by this group was to develop an effective mid-term plan for joint technology development and shared market access for shared prosperity (to fulfil the stated goal of the current Australian Government). The group considered one major area of potential for India and Australia could be the development of joint agri-technologies to sustainably increase food productivity in both countries and jointly export technologies and produce to South East Asia; 60% of the global population live in Asia, however

this population only has the means to produce 35% of global food production (Rabobank, 2016). The need to import food into Asia will only increase as the population continues to grow whilst production means (e.g. land resources) are being reduced. Both Australia and India would have potentially separate niches in export market given the nature of produce (premium vs commodity) and differences in seasonality. This is something India has done very well particularly for defence technologies and can be replicated here for agribusiness.

GROUP 2: RESEARCH, INNOVATION AND COMMERCIALISATION COOPERATION.

This group was tasked to:

- Review the current status of cooperation in R&I and identified priority areas for future cooperation and commercialisation.
- Explore new mechanisms for cooperation (beyond the AISRF model) to deliver on targeted innovations and their joint commercialisation.
- Propose new integrated research model/s for long-term scientific and knowledge cooperation (natural science/ engineering linked with socio-economics and cultural aspects).
- Identify potential resourcing mechanisms for priority areas (e.g. public-private partnerships).

Discussions began by mentioning the livelihoods of Indian farmers are directly affected by lost crop productivity and

wasted food resources, leading to social and economic stress, exacerbating poverty and potentially leading to food shortages.

A technology-based roadmap for agricultural decision support systems

(DSS) such as a crop calendar linked to climate, soil health, crop genetics and yield will help farmers to co-ordinate their plantings and to produce food to meet demand. Increasing productivity and developing climate resilient farming are key goals for both countries.

This idea fits well with key policy goals of both governments; the India government aims to double its farming income by 2020 and the Australian government aims to make agriculture a \$100 B industry.

There are significant dichotomies in farming systems in these countries which possess significant challenges in cooperation and collaboration. For



Figure 6: Discussion groups exploring areas of cooperation between India and Australia.

example, Indian farming is based on small holding, low input, labour intensive farming and is the primary livelihood source whereas Australian farming is a commercialised system which is heavily mechanised and receives extremely high inputs. However, the group identified a range of areas for cooperation which can bring significant benefits for both countries (Box 2) and identified resourcing options for bilateral cooperation (Box 3).

Digital knowledge to accurately predict weather, farm yields, market supply and demand, and to assist farmers in making informed planting choices while reducing produce-waste due to storage issues, to ultimately improve the livelihood of these farmers.

Integrated water, soil and crop management practices in dryland farming for increasing productivity.

These are key constraints in farming systems in both countries. Australia has developed key technologies and expertise in these areas, which India can benefit from. Australia is seen as a leader in implementing novel management practices, crop breeding, and soil ameliorant strategies that restore landscape health, conserve soil water, and improve soil resilience to environmental stresses. This is a potential area for knowledge exchange.

IOT (Internet of things) – using technology to improve farming-decision making including crop selection, variety selection and market access.

BOX 2: Potential areas for collaboration in research, innovation and commercialisation were identified:

- *Sustainably increase productivity*
- *Climate-smart agriculture*
- *Technology driven farming*
- *Application of emerging technologies (big-data, bio-based solutions)*
- *Protected and Peri-urban cropping*
- *Capacity building across all stakeholders in agribusiness*
- *Horticulture products*
- *Dairy products*

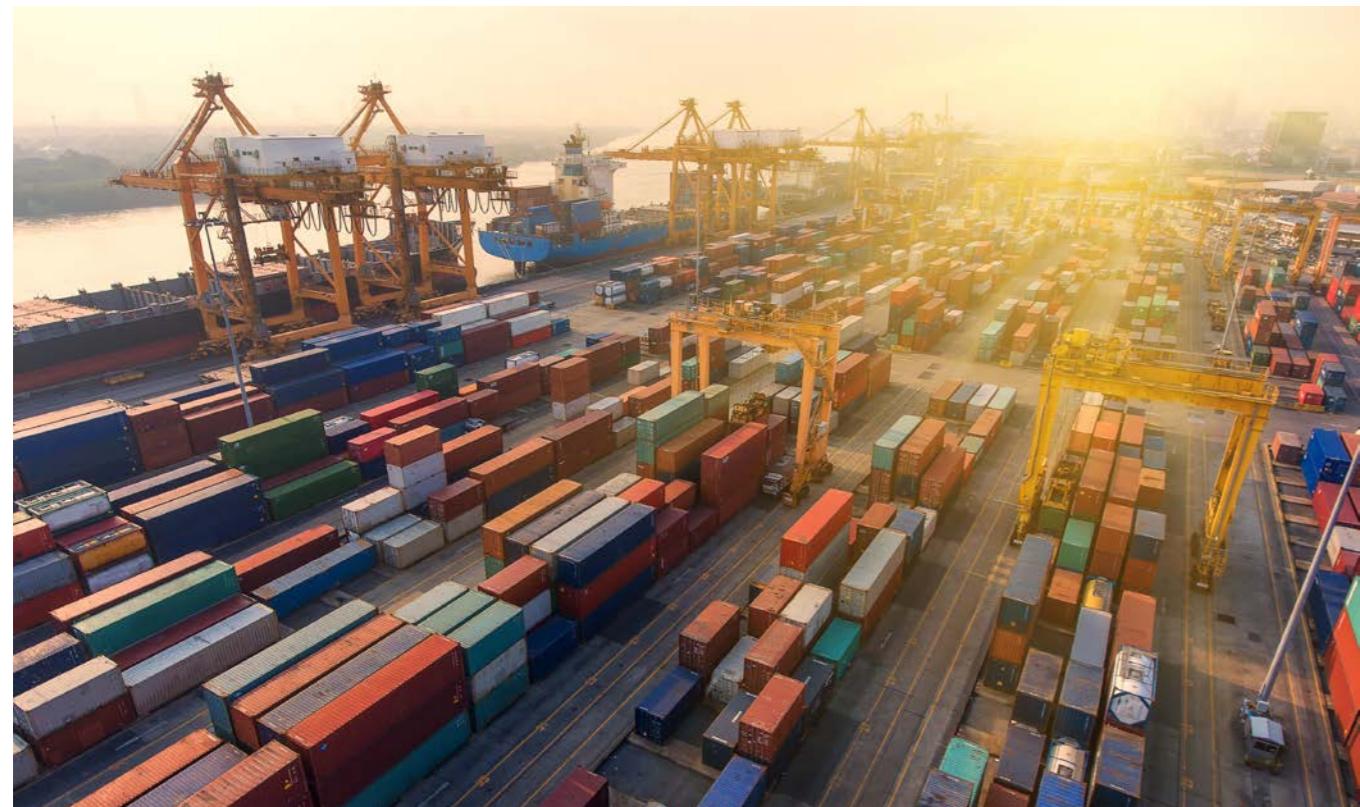
Big / satellite data. Big data will be increasingly used to support DSS. Both countries can benefit from complimentary technologies and expertise. India is a leader in satellite and remote sensing technology which can be immensely beneficial to precision farming in Australia. Similarly, Australia is a world-leader in plant breeding and big data, and can provide key information for developing crop varieties which are climate resilient, nutrient rich and highly productive, contributing to productivity gains in both countries.

Capacity Building in key areas of agribusiness including research, innovation, commercialisation, management, and business through regular and institutionalised exchange of key stakeholders.

BOX 3: Resourcing options for bilateral cooperation.

The group discussed potential resourcing options for sustained cooperation. With mutual agreement between two countries, Australian Centre for International Agriculture Research (ACIAR) no longer funds research activities in India. Consequently, in recent years, there has been a significant decline in joint research and innovation. Funding from Australia-India Strategic Research Fund (AIRSF) is project driven and both industry and policy advisors suggest that it has not delivered products and innovation with significant outcomes and impact.

The group considered a number of models which could support long-term collaboration in this area including Australia-China centre and Australia-India Institute (All; which deals with policy only, not Agribusiness); the UK Government Centre for Expertise (<https://www.climatechange.org.uk/>). Participants felt that a new mechanism was needed, which goes beyond the All model to include all aspects of agribusiness (research, innovation, commercialisation, trade and policies). A joint Centre of Excellence/Expertise was presented as an ideal model to support the bilateral agreement for agribusiness. The Centre of Excellence could be funded exclusively through bilateral arrangements (e.g All), but given its key roles with industries in agribusiness, a public-private partnership for funding was considered the best model to resource this centre.



RECOMMENDATIONS AND PRIORITY ACTIONS

1. Develop an effective plan for joint technology development and sharing market access for shared prosperity.

The Australian Prime Minister has set a goal of shared prosperity for India and Australia. Joint development and commercialisation of new agri-technologies that increase sustainability and productivity in both countries provide a major opportunity for bilateral cooperation and trade. For example, joint trade / export of technologies / produce in South East Asia can provide enormous opportunities given countries in this region will only produce about 35% of their required food by 2025. It is possible that both countries will have separate niches for export markets given their produce types, nature of produce (premium vs commodity) and difference in seasonality. This is something India has done very well, particularly for its defence technologies with Russia and can be replicated here for agribusiness.

2. Identify key niches for trade, policy and development goals in Agribusiness.

Identifying key niches of cooperation that do not compete and/or have minimum socio-economic implications. These may include:

a) Infrastructure development - in terms of new technologies (e.g. AI, satellite, drone, bio-based solution, genomics) could be shared to benefit both countries and potentially exported to a third country as a product or as development assistance (this opens up further cooperation between ACIAR and Indian Council of Agricultural Research). For example, India can immensely benefit from post-harvest infrastructure investment and technologies while Australia can benefit from Indian satellite technologies. Similarly, both countries can benefit from joint innovations in climate smart technologies (including drought tolerant plant varieties), environmental sustainable farming, nutrient rich produce to sell in third countries.

b) Intensification of trade in niche markets - the bilateral trade of horticulture products can be further enhanced (given the difference in seasonality and hence market supply), for example, export of berries and nuts which has growing consumer demand in India. Similarly, mango can be traded by both countries with direct benefits to farming communities of both countries as mango becomes available at different times of the year due to seasonal variability between the two countries. Other commodities (e.g. grains, pulses, sugar) can be exported on

a demand basis. To provide certainty to the Australian farming community and traders, a strategic reserve can be jointly developed by both governments to ensure supply meets demand when needed. However, an economic feasibility study would be required to ensure both countries would benefit from such a strategy. Again, there is a precedent where India and UAE have a strategic reserve for oil supply.

3. Create a network of key stakeholders for continuous scientific and policy advice.

This network would improve bilateral trade potential between the two countries, which is currently lacking. Bottom-up and institutionalised advice will ensure that all aspects of trade and agribusiness is debated, potential future challenges and proposed solutions identified in order to minimise future risks. For example, such a framework can avoid future issues similar to those experienced by the recent export of Australian pulses.

4. Use strengths of research and trade partnership in agribusiness to support strategic partnerships in other fields.

If an initial target of trade in agriculture can be agreed, it has the potential to become a pillar of strength for partnerships in other areas such as security, resource trade, energy & climate change and bilateral cooperation in developmental aid or support to other countries.

5. Establish an Australia - India centre of Excellence/ Expertise for Agribusiness to support (1) to (4).

The aims can drive key innovations and capacity-building required to achieve sustainable increases in trade and agricultural productivity (Box4).



BOX 4: Delivering key outcomes by establishing a Centre of Excellence/ Expertise in Agribusiness.

By fostering long-term partnerships between Australia and India, the Centre will act as a platform to identify current and emerging challenges and to provide solutions to all aspects of agribusiness including trade, policy and productivity. It will further strengthen alliances between industries, policy-makers and researchers and will facilitate long-term partnerships between the two countries.

Initially, the centre will:

- build innovation capacity by establishing integrated interdisciplinary research, education and engagement framework to provide solutions for current and emerging policy, trade and industrial challenges
- establish Australia-India Senior and Emerging Leadership Forum in Agribusiness for continuous and enduring partnership and shared prosperity
- ensure that research and innovation be embedded in socio-economics, human health, business management and government policies
- contribute to the overall performance by partnerships with regional and global innovation corridors, business precincts, growth centres and science parks
- focus on sustainable increases in agriculture productivity, trade of products and technologies embedded in biosecurity and the adaptation to extreme weather (i.e. drought and flooding) frameworks.

Potential approach: The centre will have 3-4 partners from key Australian organisations and a similar number from India. It will facilitate continuous engagement of innovators, industry, policy advisors, and other stakeholders between the two countries. There is a critical need to move from project-based funding (e.g. AISRF) as the Centre needs to provide sustained support for multiple fields in agribusiness. One example is the Australia- India Institute but with a larger remit (All promotes policy discussions only) and the Centre will be the hub for agribusiness, innovation and policy. The resourcing mechanism may explicitly consider a mix of both public and private funding to ensure industrial input for all recommendations but also provide efficient trade commercialisation of innovations coming from the Centre of Excellence. Initial feedback from relevant stakeholders (e.g industries and innovation providers) have been very positive on the Centre's remit and its proposed model.

CONCLUSION

Concluding remarks.

The outlook of India's recent economic growth is robust and India is projected to remain the fastest growing major economy for a number of years to come. This has resulted in many countries wanting to upgrade their strategic and economic relationship with India. Australia has significant opportunities to benefit from India's growth and has taken steps to establish multi-dimensional strategic partnerships with India. One of the cornerstones of this partnership is the Free Trade Agreement (FTA). The FTA negotiation has slowed substantially due to issues linked directly with Agribusiness. Additionally, some recent events (e.g. issues related to chick pea export) has led to additional constraints. The rapid growth of the Indian economy requires a high demand for mineral resources, cutting-edge technologies and improvement of infrastructure, all of which provides Australia with a great opportunity to solidify strategic partnerships with India. The agribusiness sector has the potential to become a key promoter rather than a constraint for this partnership, particularly if socio-economic and cultural aspects of agribusiness are explicitly accommodated. This report recommends 5 steps which can substantially help to achieve these goals.

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APPENDIX

Appendix 1: Workshop Participants

Title	Last name	First Name	Sector
Prof	Allen	Jonathan	Research
Dr	Burgess	Rachel	Government
Dr.	Chand	Asha	Research
A/Prof	Chen	Zhonghua	Research
Prof	Eldridge	David	Government
Dr	Eleonora	Egidi	Research
Ms.	Farmer	Melanie	Service
Mr	Gandhi	Mohan	Government
Prof	Ginige	Athula	Research
HE	Gondane	A.M.	
Dr	Gordon	Josh	Government
Dr	Grinyer	Jasmine	Service
Dr.	Huda	Samsul	Research
Dr	Khan	Aila	Research
Dr	Johnstone	Robyn	Government
Prof	Krishna	Priti	Research
Dr	Casey	Sharyn	Industry
Prof	Maheshwari	Basant	Research
Prof	Mitter	Neena	Research
Ms	Forde	Marita	Government
Prof	Pendall	Elise	Research
Mr	Ridley	John	Industry
Prof	Ruan	Yong-Lian	Research
Dr	Sarkar	Naryan	Research
Prof	Sathasivan	Satha	Research
Prof	Singh	Bhupinder	Government
Prof	Singh	Brajesh	Research
Mr	Singh	Mandej	Service
Dr	Ushi	Hurrychurn	Research
HE	Kumar	S	Government
Dr	Verma	Jay	Research

Appendix 2: Acknowledgements to participating / supporting organisations

The following organisations were represented and/ or supported the Australia-India Roundtable:

- Indian High Commission
- Indian Consulate General Sydney
- Commonwealth Department of Foreign Affairs and Trade
- Commonwealth Department of Environment and Energy
- Australian Centre for International Agricultural Research
- NSW Ministry of Primary Industries
- NSW Office of Environment and Heritage
- NSW Department of Primary Industries
- Hort Innovation Australia
- Converte Pty Ltd
- Western Sydney University
- University of Queensland
- University of Newcastle
- James Cook University
- Deakin University
- University of Southern Queensland
- Vishwa Bharti University, India
- Government of West Bengal, India
- Banaras Hindu, University, India
- Soil Science Society of Australia

The background of the entire page is a photograph of a field of golden wheat ears swaying in the wind. The sun is low on the horizon, casting a warm, orange glow over the entire scene. The wheat stalks are sharp and detailed against the blurred background.

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ROUND TABLE MEETING ON AGRIBUSINESS COOPERATION BETWEEN AUSTRALIA AND INDIA

Prepared by Prof Brajesh Singh

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