



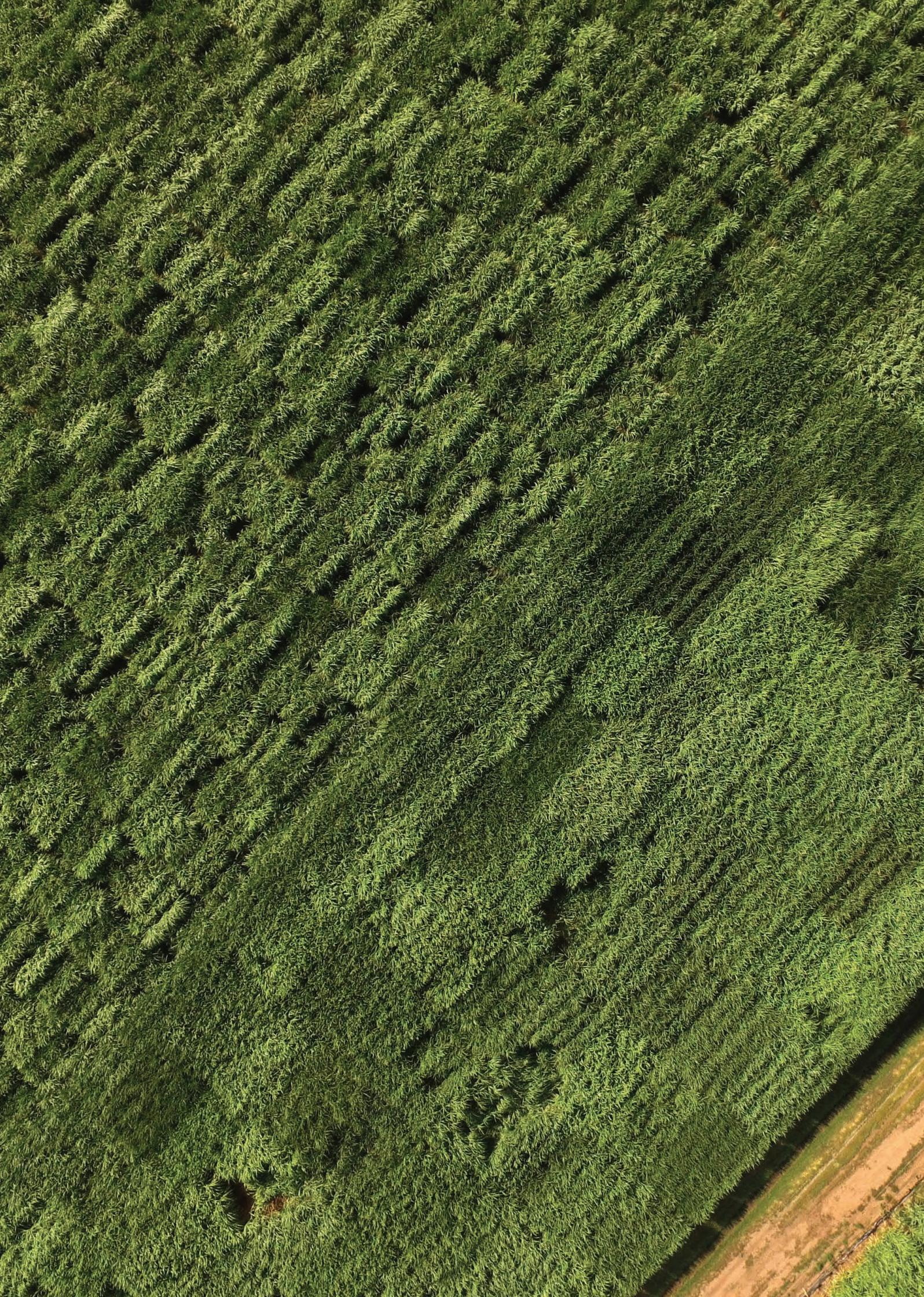
Sugar Research
Australia®

SUGAR RESEARCH AUSTRALIA

STRATEGIC PLAN

2021-2026





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1. INTRODUCTION

A NEW STRATEGY AND VISION FOR SUGAR RESEARCH AUSTRALIA

By Dr Ron Swindells, Chairman, SRA and Ms Roslyn Baker, CEO, SRA



Throughout 2020, SRA worked comprehensively with the Australian sugarcane industry and its stakeholders to co-create a new strategy to retain SRA's place as the engine-room of innovation for the industry.

This strategy development occurred at a critical time for both SRA and the industry. In recent years, our industry has faced a challenging external environment and reached a tipping point where innovation and transformation are required to ensure that this iconic industry remains a centrepiece of economic activity in regional Queensland and northern NSW – and indeed for the entire nation.

SRA has reached a critical tipping point as well. Almost eight years since our creation, the time has come to revitalise our services, lift our engagement with industry and partners, and deliver innovative research based on identified industry needs that offers more value to growers and millers.

With this objective, and through this strategy development, we have established a new vision to guide SRA over the coming five years:

OUR VISION

A trusted partner, shaping the future prosperity of the Australian sugarcane industry and regional communities through innovation and ingenuity.

At its heart, our vision and the supporting strategy are about invigorating SRA to support the revitalisation of the industry.

Innovation-driven and impact-generating research and development will underpin the future of the Australian

sugarcane industry. The world is changing rapidly, and with that change comes numerous opportunities for the Australian sugarcane industry, especially since sugarcane is one of the highest biomass crops in the world. This Strategic Plan is designed to maximise the existing productive value of the industry, while also exploring and igniting fresh value through diversification, including product diversification that leverages the potential of sugarcane as a renewable resource, and R&D that supports market diversification.

Achieving the potential of the Australian sugarcane industry, and successfully extracting value from the complex and rapidly changing world of economics, science, technology and innovation, will require SRA to stretch to a new level of capability.

With this complexity comes the realisation that SRA's sugarcane industry expertise is critical, but it is not sufficient. The challenges and opportunities ahead for the industry are far too complex for SRA to tackle alone. Success will require a multi-disciplinary research response, together with a culture that supports collaboration and commerciality. Therefore, SRA's new strategy will be supported by an operating model refresh to underpin an industry-centric approach to research, an expansion of domestic and global partnerships, and increased opportunities for commercialisation and co-investment.



As a quick snapshot, SRA's new strategy will:

- support a portfolio approach to investment in research, development and adoption to ensure a balance of investments that address both the current-day productivity and sustainability constraints for the industry, while anticipating the future opportunities and challenges ahead. In taking a portfolio approach to our research investments SRA recognises that strategically aligned programs of work are more likely to achieve results than large numbers of discrete projects.
- leverage SRA's internal research capability and regional footprint to increase the awareness and use of research knowledge (including cross-sectoral research knowledge) to improve regional productivity and sustainability, facilitate regional collaboration and partnerships, and boost co-investment opportunities.
- continue to evolve and modernise our world-class sugarcane variety development program to meet the current and future needs of the industry.
- strategically invest in innovative crop protection that uses new science and technology so that the Australian sugarcane industry can lead the world, and exceed community expectations, in protecting our precious natural environment.

SRA can only support this through a new approach to innovation and commercialisation, in a way that secures long-term sustainability for our industry and SRA over the five years from July 2021 to June 2026.

SRA recognises that the future of the industry will be underpinned by innovation and a focus on impactful investment in research and development, together with an industry motivated to adopt and adapt.



(Right) SRA and New Energy Farms (NEF) have entered into a License Agreement to undertake research and development to investigate the potential of the NEF CEEDS technology for the Australian sugarcane industry.



Kalamia sugar mill. Picture by Callun Lund.

2. ABOUT THE AUSTRALIAN SUGARCANE INDUSTRY

The Australian sugarcane industry stretches from Northern New South Wales (NSW) to Mossman in North Queensland, comprising approximately 3600 growers and 22 mills, following recent consolidation of milling capacity in the Southern Region. For the 2020 harvest, the industry produced 31 million tonnes of sugarcane. According to statistics published by the Australian Sugar Milling Council, based on 2018 figures, the Australian industry annually generates \$1.7 billion in raw sugar export earnings, creates a \$4 billion economic contribution, and supports 23,000 jobs in coastal regions of NSW and Queensland.

The Australian sugar industry is a well-established supply chain linking growers specialised in sugarcane cultivation, with dedicated sugarcane milling operations. For over 100 years, the industry has been the primary economic driver of many regional communities and has demonstrated a thirst for innovation and new technology. Australia is proud to be the birthplace of major industry innovations such as mechanical harvesting, green cane trash blanketing, and the application of near-infra red technology.

At its essence, the industry is an interrelated biomass production and processing platform, although one that is currently mostly dedicated solely to accessing a single biomass feedstock to produce essentially a single commodity product—sugar (albeit with coproducts of molasses and bagasse, subsequently used for bioenergy). This 'one feedstock – one product' business model is precariously positioned in the face of an increasingly challenging market outlook characterised by increasing competition from lower-cost sugar producing countries.

Australia's sugar products are mainly directed to the export market and as such the industry is highly exposed to the world

market price for sugar, which has been facing downward pressure for more than a decade. Since sugar is produced globally from either sugarcane (80%) or sugar beet (20%), its price is subject to a wide range of production variables and is strongly affected by the outputs of several producing nations, in particular India, Thailand and Brazil. Since 2008, Brazilian sugar output and therefore world sugar price has been heavily influenced by the fluctuating degree of diversion of the Brazilian sugarcane crop to ethanol production for biofuel use. When the crude oil price is high, biofuel becomes more viable and sugarcane processing is increasingly directed to ethanol production. This in turn causes a drop in Brazilian raw sugar exports and an uplift in world sugar pricing. Thus, the supply-demand-price interrelationships in the oil-ethanol-sugar industries creates significant uncertainty in future price outlook for Australian sugar entering world markets.

There are also increasing threats to social licence due to the industry's location and proximity to the Great Barrier Reef.

While the industry faces significant immediate and ongoing economic, environmental, and social ('triple bottom line') challenges, opportunities for the Australian sugarcane industry to emerge from this period as a multi-product (sugar plus) industry that makes significant positive contributions to the environment are real and attainable.

The sugarcane plant is a tremendous strategic asset for our industry. We produce a resilient and high biomass crop, adaptable to servicing new economies and creating new opportunities.



AUSTRALIAN SUGARCANE INDUSTRY KEY STATISTICS



THERE ARE ABOUT 3600
CANE FARMING BUSINESSES



THE ESTIMATED NUMBER OF JOBS
SUPPORTED BY THE ECONOMIC
ACTIVITY GENERATED BY THE
AUSTRALIAN SUGARCANE
INDUSTRY



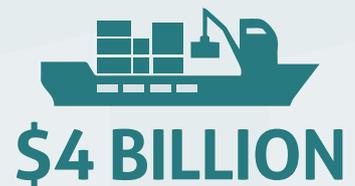
APPROXIMATELY 95% OF
AUSTRALIA'S SUGARCANE
PRODUCTION IS IN QUEENSLAND
AND THE REMAINDER IN
NEW SOUTH WALES



SUGAR MILLS, OWNED
BY NINE MILLING COMPANIES



THE 2020 SEASON CRUSHED JUST
OVER 31 MILLION TONNES OF
SUGARCANE



THE ESTIMATED OVERALL
ECONOMIC CONTRIBUTION OF
THE AUSTRALIAN SUGARCANE
INDUSTRY

3. ABOUT SUGAR RESEARCH AUSTRALIA

SRA is Australia's specialist sugarcane research organisation. We invest in evidence-based research, development and adoption (RD&A) activities on behalf of sugarcane growers and millers to meet industry challenges and opportunities.

SRA was established in 2013 as a sugarcane grower and miller owned company and the declared Industry Services Body for the Australian sugarcane industry. At its formation, SRA was created as part of an amalgamation of the former entities, the Sugar Research and Development Corporation (SRDC) and BSES (formerly the Bureau of Sugar Experiment Stations). Almost eight years on from its inception, SRA is a vital component of the overall sugar industry supply chain, working in close partnership with growers, millers and service providers to deliver meaningful impact on the ground.

SRA is funded through a range of sources, including primarily through the statutory sugarcane levy paid equally by sugarcane growers and millers, as well as through co-contributions from the Commonwealth Government and grants through other government agencies, including the Queensland Government Department of Agriculture and Fisheries.

As the declared Industry Services Body for the Australian sugarcane industry under the *Sugar Research and Development Services Act 2013* (Cth), SRA is responsible for the direct provision of RD&A activities as well as the

ongoing management and investment of funds received from industry levy payers and government, for the benefit of the sugarcane industry and for the wider public good. The core responsibilities of SRA are to:

- deliver cost-effective research and development services to the Australian sugar industry to enhance its viability, competitiveness and sustainability
- carry-out, coordinate and provide investment for R&D activities in relation to the Australian sugar industry
- facilitate the dissemination, extension, adoption and commercialisation of results of R&D activities
- support and develop industry research capacity.

The Australian sugarcane industry has a proud history of research, innovation and ingenuity, a significant part of which has been supported by SRA and its predecessor organisations. This new Strategic Plan builds on this legacy and the strength of our partnerships to deliver significant outcomes and opportunities in the future.

Since its inception, SRA has evolved and matured as a company, particularly through its industry engagement, research investment processes and approaches to adoption. Further evolution is now critical to ensure that SRA can continue to innovate and deliver value for the Australian sugarcane industry.



SRA is unique within the rural Research and Development Corporation (RDC) landscape. As an investor in and a provider of research and development services for its industry, SRA has a significant asset footprint, a much broader range of delivered activities (in comparison to the size of its budget), and complex relationships with industry and its research partners. SRA also provides a significant investment in variety development activities for the Australian sugarcane industry, while also providing a range of other services such as disease diagnostics and near-infrared applied technologies. SRA has a relatively small overall R&D budget, which heightens the need to collaborate and leverage value with other providers and industries.

SRA works together in a shared partnership between growers and millers. This shared partnership and investment is a significant asset for the Australian sugar industry and is testament to the shared future of all industry partners.

SRA's structure and operating environment creates both opportunities and threats for the company, which have been the subject of careful analysis and stakeholder engagement in the preparation of this Strategic Plan.

SRA operates research farms, laboratories, and offices across the Australian sugarcane industry. The SRA research effort extends across the industry and occurs for all growers and millers.

SRA staff operate across the business in a range of roles that support and drive RD&A for the Australian sugarcane industry.

SRA is governed by a skills-based Board who have oversight of governance and the strategic direction of the company. The Board is selected by an independent Director Selection Committee and endorsed by Members at an Annual General Meeting.

SRA's in-house team scientific capability, plant breeding operations, established regional presence and trusted industry relationships provide foundational capability to support RD&A activities for sugarcane production and processing and tropical agriculture in general.

(Over page) SRA Herbert Farm Operations Leader Vince Blanco with SRA Directors Lindy Hyam, Ron Swindells, Peter Russo, Sam Bonanno, and Guy Roth.



4. SRA STRATEGIC PLAN 2021–2026: SNAPSHOT

OUR VISION

A trusted partner, shaping the future prosperity of the Australian sugarcane industry and regional communities through innovation and ingenuity.

OUR RESEARCH MISSIONS

- 1 PROFITABLE AND PRODUCTIVE**
Continuous improvement in farming and milling profitability.
- 2 RESILIENT AND ENDURING**
Position the industry to stay ahead of climate, environmental and biosecurity threats.
- 3 DIVERSIFIED AND ADAPTABLE**
Capitalise on changing consumer preferences, and the growing bio and green economies to develop diversification opportunities.
- 4 WEALTH GENERATING THROUGH LAND STEWARDSHIP**
Position the Australian sugarcane industry as leaders in profitability, environmental sustainability and resource-use efficiency.
- 5 SKILLED FOR THE FUTURE**
Support the development of an adaptable, professional, commercial and entrepreneurial industry and research community.

HOW WE



We actively engage with industry.



We constantly seek opportunities to innovate and improve.



We take a lo

OUR PURPOSE

We keep the Australian sugarcane industry competitive, productive and sustainable through innovative research and product development.

STRATEGIC PILLAR 1 Strong foundations

Evolve SRA to keep pace with the changing industry landscape by developing a capable, engaged, and safe workforce, and a lean, agile and entrepreneurial organisation with an agile and efficient cost-base.

STRATEGIC PILLAR 2 A high-performing research portfolio

Design a focused, balanced and collaborative portfolio of RD&E investments and initiatives that deliver tangible solutions and options to advance the productivity, sustainability, profitability, and long-term growth prospects for the Australian sugarcane industry.

STRATEGIC PILLAR 3 Translation expertise

Translate research findings into tools, products and services that save industry time and money, and improve environmental performance.

STRATEGIC PILLAR 4 World-class sugarcane varieties

Accelerate innovation in variety development to offer varieties that consistently underpin the success of the industry's current and future product objectives, crop production and protection while lowering development costs and shortening cycle-times.

STRATEGIC PILLAR 5 Commercial benefits and rewards

Take our research work and investments to the next level by securing investors and funding and extracting commercial value from our intellectual property, research capability, facilities and strategic partnerships.

OPERATE



Long-term view.



We create opportunities for collaboration.

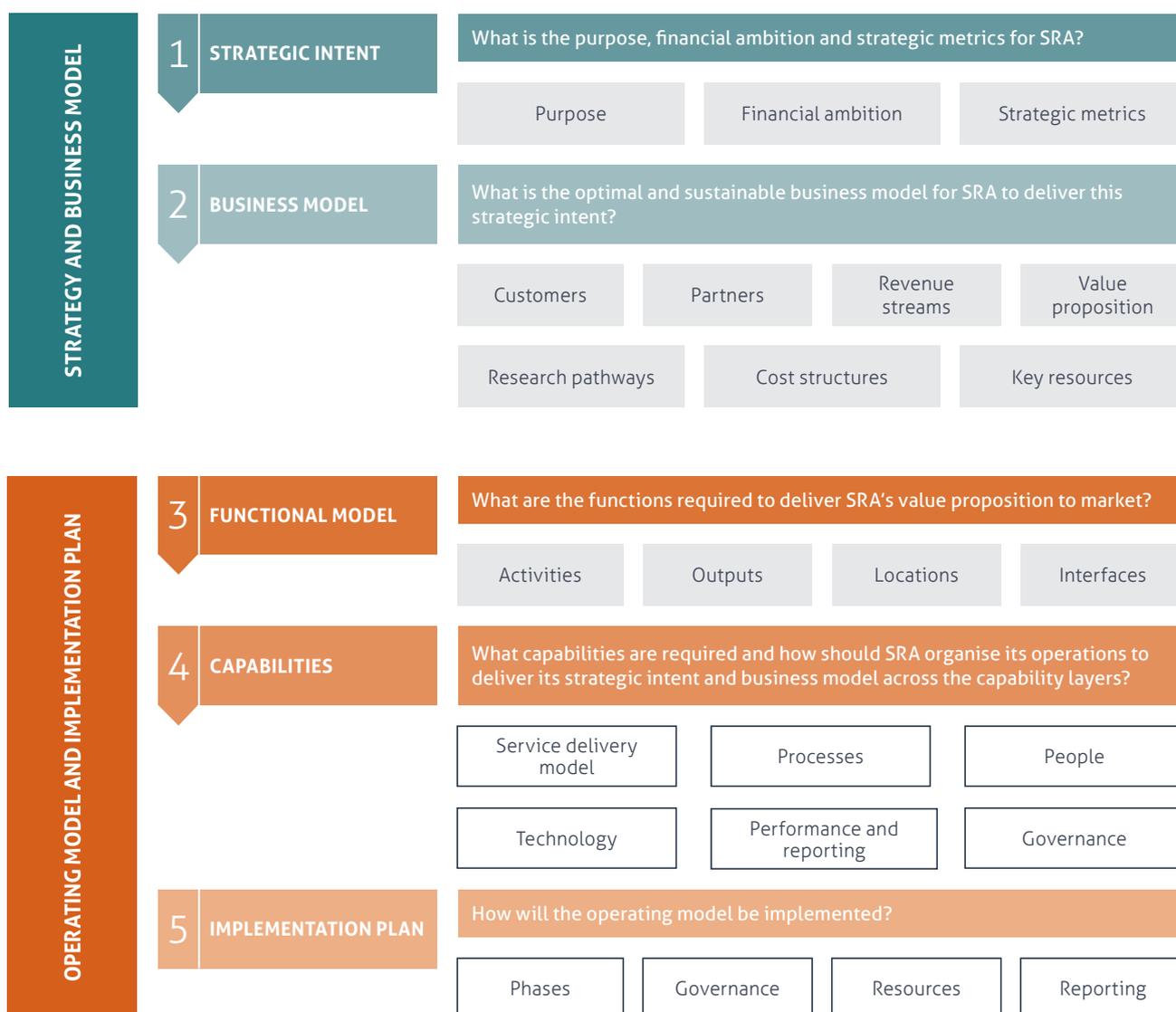


We act ethically and responsibly.

5. DEVELOPING THE PLAN

PLANNING PROCESS

SRA followed a five-step methodology for development of its strategy and operating model, with broad consultation built around each sequential step. In developing the plan, SRA focused on five progressive steps, each with a specific intent to guide and develop our new strategy. By focusing on targeted questions within each step, SRA was able to work with our partners and stakeholders to clearly define our strategy and how it will be implemented. These five steps, the key questions, and the outputs of each step, are described below.



Framework developed by KPMG.

EXTERNAL ANALYSIS

In developing this Strategic Plan, SRA undertook an extensive internal and external review situational analysis of the issues that are critical to the future of SRA and the Australian industry. These included:

- PESTEL (Political, Economic, Social, Technological, Environmental and Legal) analysis, which is a useful tool to assist in understanding the macro-environmental factors influencing the industry and SRA specifically
- megatrends review
- plant breeding review
- portfolio gap analysis and adoption gap analysis.

STRATEGIC DRIVERS

OPPORTUNITIES TO SECURE SUSTAINABLE FUTURES FOR GROWERS AND MILLERS ARE DISCERNIBLE AND ATTAINABLE – BUT REQUIRE A CHANGE FROM BUSINESS AS USUAL WITHIN THE VALUE CHAIN.



LAND UNDER CANE DECLINING, THREATENING MILL VIABILITY IN SOME LOCATIONS.

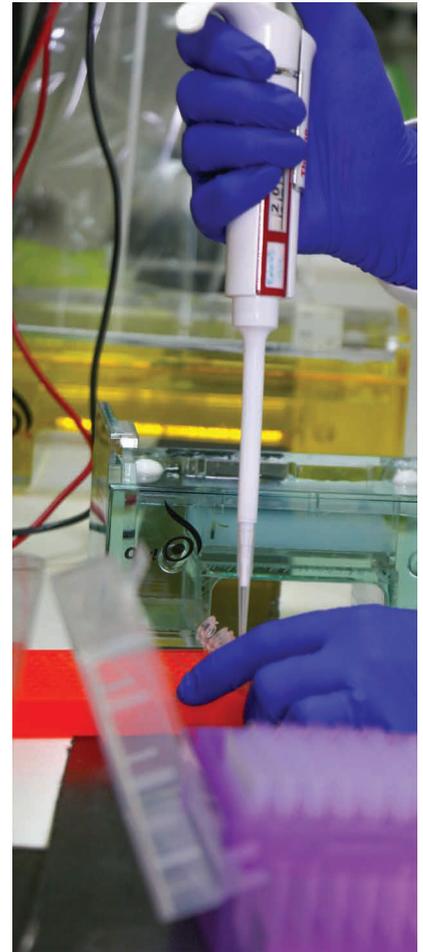
ADVANCES IN SCIENCE AND TECHNOLOGY PRESENT SALIENT OPPORTUNITIES TO INCREASE PRODUCTION, REDUCE COSTS, AND CAPITALISE ON NEW OPPORTUNITIES. THE INDUSTRY NEEDS ASSISTANCE TO ACCESS THESE OPPORTUNITIES.

THE ECONOMICS OF CRYSTAL SUGAR PRODUCTION REMAIN UNDER PRESSURE, WITH RIPPLE EFFECTS THROUGHOUT THE AUSTRALIAN INDUSTRY.

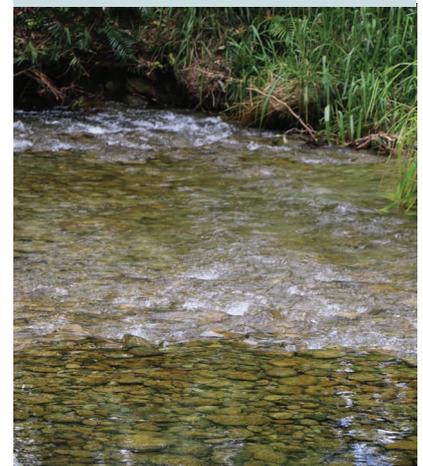


DOMESTIC PRODUCTION IS VERY EFFICIENT BUT ALSO VERY EXPENSIVE.

SUGARCANE BREEDING PROGRAMS HAVE LONG LEAD TIMES TAKING UP TO 12 YEARS TO BREED, TEST AND RELEASE A NEW VARIETY.



ENVIRONMENTAL PRESSURES REMAIN STRONG AND THE INDUSTRY MUST CONTINUE TO DEMONSTRATE ITS SOCIAL LICENCE.



6. CONSULTATION AND SRA'S VALUE PROPOSITION

A PLAN BUILT FROM ENGAGEMENT AND FEEDBACK



PEOPLE JOINED IN
THE CEO LISTENING
TOUR

330

250

STAFF AND
INDUSTRY

JOINED THE
STRATEGY
ROADSHOW IN
NOVEMBER AND
DECEMBER 2020

150

PEOPLE
ATTENDED
WORKSHOPS

ON KEY TOPICS,
INCLUDING
GROWERS, MILLERS,
INVESTMENT
PARTNERS, AND
SERVICE PROVIDERS



NUMBER OF PEOPLE
AT EXTENSION
PROVIDER MEETINGS

60



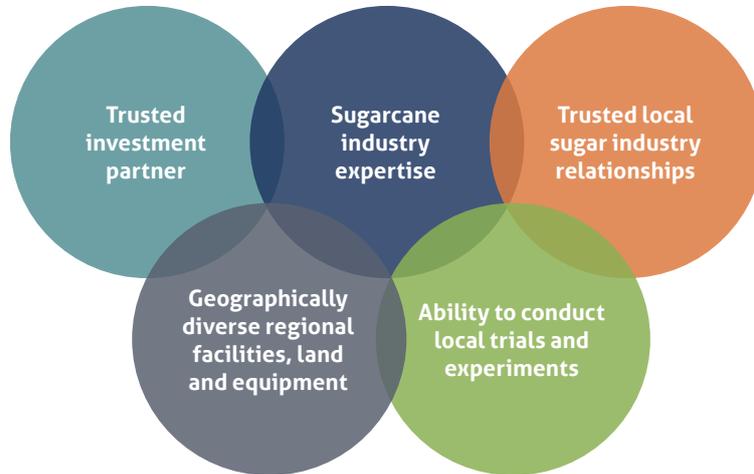
OVERVIEW OF THE VALUE PROPOSITION

The SRA Strategic Plan 2021–2026 has been created to drive enduring prosperity and productivity in the Australian sugarcane industry and help re-position the industry for the future.

OUR VALUE PROPOSITION FOR THE INDUSTRY



OUR VALUE PROPOSITION FOR OUR PARTNERS



OUR VALUE PROPOSITION FOR OUR PEOPLE





7. STRATEGIC PILLAR ONE: STRONG FOUNDATIONS

Evolve SRA to keep pace with the changing industry landscape by developing a capable, engaged, and safe workforce, and a lean, agile and entrepreneurial organisation.

OUR TACTICS

Financial

1. Develop a commercial model and suite of initiatives to enhance SRA's ability to implement agile responses to changing commercial conditions.
2. Implement integrated technology solutions to streamline and automate insights, knowledge capture and reporting.
3. Develop and implement an asset strategy to lower total cost of ownership across all asset classes by 15% by 2026, including optimising SRA's property assets.
4. Work with the industry to develop a levy strategy for SRA.

People and safety

5. Fully implement initiatives within the safety maturity roadmap – achieve level four safety maturity.
6. Implement staff engagement program, followed by a cultural program (including developing an internal customer service program).
7. Revise SRA performance and accountability frameworks, KPIs and corporate and individual reporting frameworks.
8. Create a people plan and leadership capability framework to support SRA's future skills development and diversity goals.

HOW WE MEASURE SUCCESS

- ✓ Cash reserves – forecast v actual
- ✓ Fixed costs % total, indirect overhead % turnover
- ✓ Staff engagement and leadership performance
- ✓ Diversity metrics – % females in senior leadership and Board positions
- ✓ Diversity metrics – Indigenous employees, employees with disabilities and employees from non-English speaking backgrounds
- ✓ Safety performance
- ✓ Investment in innovation delivers automation and savings
- ✓ Progress on transformation initiatives including property divestments

OUTCOMES

Financial security and an agile cost-base

- By 2022, deliver small year-on-year surpluses (measured based on underlying results and not including decisions to strategically invest reserves).
- SRA operates within approved reserves threshold.

Safe, engaged and committed people

- By 2022, achieve progressively improved staff engagement against the SRA leadership index and Aon Hewitt staff engagement index.
- By 2023, achieve safety maturity against safety improvement plans.
- Culture maturity – progress towards cultural attributes of a learning and innovative culture.

A diverse workforce

- By 2022, target gender diversity by ensuring that 50% of senior leadership/ researcher positions within SRA are occupied by women.
- By 2024, target 50% of SRA Board positions occupied by women.
- By 2025, ensure that SRA's workforce demographics are representative of the communities in which we operate in terms of numbers of indigenous employees, employees with disabilities, and employees from non-English speaking backgrounds.

8. STRATEGIC PILLAR TWO: A HIGH-PERFORMING RESEARCH PORTFOLIO

Design a focused, balanced and collaborative portfolio of RD&E investments and initiatives that deliver tangible solutions and options to advance the productivity, sustainability, profitability, and long-term growth prospects for the Australian sugarcane industry.

OUR TACTICS

1. *Deliver higher returns:* pivot SRA investments towards mission-orientated research and programs of interconnected, collaborative and multidisciplinary projects that significantly progress the industry's productivity, profitability and sustainability.
2. *Make bolder investments:* ensure at least 10% of SRA's investment in R&D (excluding plant breeding) is focused on the industry's longer-term differentiation and game-changing opportunities.
3. *Make more informed investments:* implement a gated business-case process to ensure a balanced portfolio of investments justified in terms of strategic direction and the benefits they will deliver.
4. *Become agile decision-makers:* take a holistic approach to evaluating impact from SRA's R&D by tracking the overall value and earned value of the entire pipeline (including variety development, experimental development, screening services and applied research) so that SRA can react to new information and orientate investments and projects.
5. *Involve industry:* revise SRA's investment decision, selection and performance framework, to provide further opportunities for industry involvement throughout the life cycle of research projects and to ensure that a clear impact pathway is identified prior to project selection.
6. *Pursue constitutional change:* for improved industry input into research program strategy and project selection.
7. *Revise SRA's risk appetite:* to ensure informed and appropriate risk-taking.
8. *Review and recalibrate:* to align SRA's existing research investments with the achievement of the research missions.
9. *Improve delivery performance:* to build on SRA's reputation as a reliable partner.

HOW WE MEASURE SUCCESS

- ✓ Achievement of success criteria for research missions
- ✓ % portfolio involving collaboration (excluding investments in plant breeding)
- ✓ ROI on RDE spend
- ✓ Partner/investor satisfaction with portfolio balance measured by survey results
- ✓ Industry satisfaction and awareness (survey measures)
- ✓ Delivery performance (time, cost and quality)

OUTCOMES

- By June 2024, cross-sectoral/multi-disciplinary collaborations represent 50% of the portfolio.
- Impact of research programs on industry profitability, productivity, and sustainability.
- Partner and investor satisfaction with SRA above 80% (measured by survey).
- Annual uplifts in industry's overall awareness of, and engagement in, research and development activities (measured by survey results and response rates relative to a 2022 base year).
- Increases in the total factor productivity growth in sugarcane agriculture over time relative to a baseline year (five-year measure).
- Economic contribution of the sugarcane industry to the regional, state and national economy (indirect measure).

SRA is targeting a research investment framework that recognises industry as the pioneers of innovation and provides a two-way flow of information between researchers and industry.

SRA'S FIVE RESEARCH MISSIONS

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

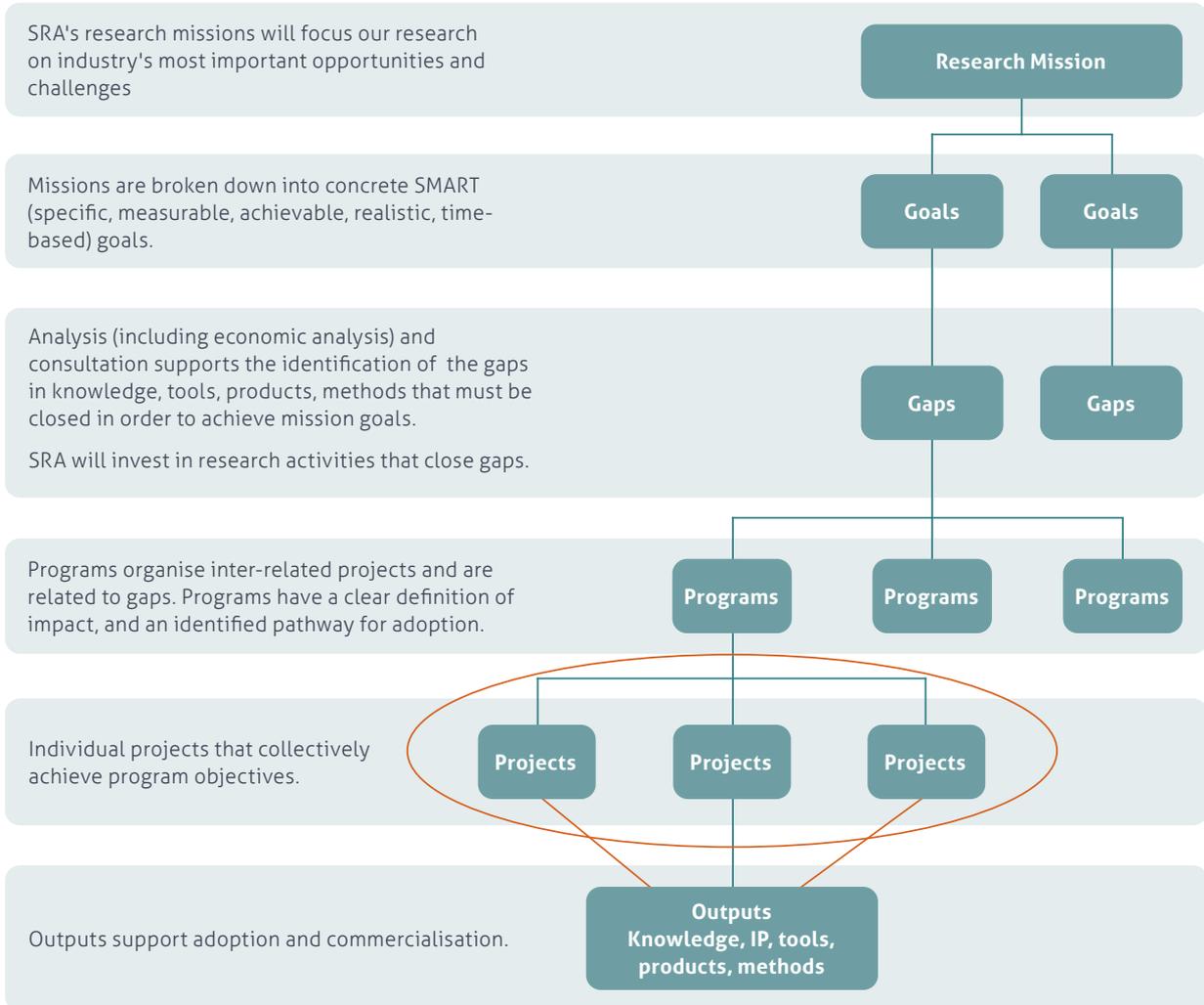
SRA's research missions have been developed in collaboration with industry, and have been developed to define the opportunities and critical challenges for industry in an ambitious way.

Our research missions allow us to focus and coordinate research efforts towards the most significant issues. Using missions to drive innovation for the industry means focusing less on individual projects within discrete research areas, and more on designing research programs that take a whole-of-system approach to tackling the problems that matter.

Importantly, targeting SRA's investments in new strategic areas towards the pursuit of our missions will require greater collaboration across different disciplines and sectors, and will provide opportunities to attract more diverse investments across the public sector and from private-sector investors.

Investment in these research missions will be supported by a Research Strategy which break the missions down into a series of goals, objectives, and outcomes. Gap analysis will support the goal development process and will be used to identify the gaps in research knowledge, tools, extension and technologies required to achieve the outcomes for the mission. Identified gaps will then be the target for SRA's research investments.

FRAMEWORK FOR SRA'S RESEARCH STRATEGY



PROFITABLE AND PRODUCTIVE

Continuous improvements in farming and milling profitability



The objective of this research mission is to increase on-going competitiveness of the Australian sugarcane industry by supporting year-on-year improvements to productivity, in aggregate, and at a regional level.

Through this research mission, SRA will:

1. advance pre-breeding technologies to support efficient development of industry-relevant varieties that are high yielding, meet future industry needs and have pest and disease resistance
2. deliver insights, tools, and packages to support farmers to understand the profitability and productivity drivers of their farm
3. assess major cost and profit drivers to develop tools that support the optimum use of inputs, and reduce productivity losses, for maximum yield
4. explore innovative uses for technology and data analytics that provides productivity insights, enable improved decision-making to deliver higher yields and lower costs including (but not limited to) crop monitoring,

equipment management, precision agriculture, pest/ weed and disease screening, autonomous farming machinery, and milling process innovation.

The success of this mission will be measured by:

1. increased throughput – tonnes per hectare
2. increased sugar per hectare
3. rate of adoption of productivity-enhancing technology
4. number and value of elite varieties
5. reduced development cycle-times for the variety program
6. value of Milling Process Innovation.

RESILIENT AND ENDURING

Position the industry to stay ahead of climate, environmental and biosecurity threats



The objective of this research mission is to minimise and control the risk to production resulting from pests, diseases, weeds and climate/ environmental threats.

Through this research mission, SRA will:

1. improve monitoring and detection of potential, new and emerging pests, diseases and weeds
2. maintain biosecurity planning, capability and risk management
3. develop advanced crop protection and management technologies, including varietal resistance and alternative control methods
4. understand the impacts of climate change on tropical and sub-tropical agriculture and develop methods to protect from climate related threats.

The success of this mission will be measured by:

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

DIVERSIFIED AND ADAPTABLE

Capitalise on changing consumer preferences, and the growing bio and green economies to develop diversification opportunities



The objective of this mission is to deliver research, development and analysis to support the industry in:

- increasing revenue by leveraging the existing resources, brand reputation and supply chain
- remaining profitable during sugar price fluctuations
- finding opportunities to monetise biomass potential.

Through this research mission, SRA will:

1. explore business models to support the industry's product diversification opportunities to uncover opportunities for mills and growers
2. develop technology required to capture value-adding opportunities from sugarcane and its derived products
3. identify and analyse opportunities for diversification into new complimentary products
4. position the sugarcane variety development program to support product diversification opportunities

5. support industry's trade and market goals through research.

The success of this mission will be measured by:

1. percentage of farms and mills generating revenue from alternative products
2. industry contribution to GDP
3. satisfaction with R&D support for the industry's diversification and trade and market access opportunities.

WEALTH GENERATING THROUGH LAND STEWARDSHIP

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



The objective of this research mission is to recognise that the future success of the industry depends on the sustainable use of inputs including land, water, carbon and energy and aims to ensure that the Australian sugarcane industry's practices sustain the natural environment and are profitable for growers and millers.

To focus research and development programs on:

- the identification and adoption of opportunities for farmers and millers to improve their productive enterprise and care for the environment whilst receiving a commercial return for positive environmental practices
- support the Australian sugarcane industry to achieve positive global recognition for its environmental credentials
- transformational solutions to assist the industry to discover new ways to achieve productivity goals with less reliance on traditional chemicals and fertiliser products.

Through this research mission, SRA will:

1. develop methods and encourage adoption of practices that increase nutrient, chemical and carbon capture on-farm and improve soil health and mitigate surface and groundwater contamination
2. identify opportunities for advanced scientific solutions to the use of chemicals and fertilisers
3. develop datasets and tools for growers and mills to participate in carbon programs, renewable energy, environmental stewardship schemes and other green markets
4. conduct regular industry benchmarking and sustainability reporting

5. make it easy for industry to keep records and produce plans to meet compliance obligations.

The success of this mission will be measured by:

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

SKILLED FOR THE FUTURE

Support the development of an adaptable, professional, commercial and entrepreneurial industry and research community



Through this research mission, SRA will:

1. work with industry to support continuing professional development and peer-to-peer learning including the development of business and technology skills
2. work with researchers to develop their understanding of industry's commercial drivers
3. grow staff and industry's awareness of emerging and transferable technologies and innovations from other industries, sectors and regions
4. encourage systems-based approaches to problem solving that bring a diversity of experts, researchers, practitioners, extension providers and industry together to design collective solutions
5. develop skills required for the future workforce across the research-to-adoption value chains, including scientific, agronomy, technological, data science and analytical skills

6. work collaboratively with the industry to improve gender diversity within the industry.

The success of this mission will be measured by:

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

9. STRATEGIC PILLAR THREE: TRANSLATION EXPERTISE

Translate research findings into tools, products, and services that save industry time and money, and improve environmental performance.

OUR TACTICS

1. *Refresh SRA's Service Delivery Model* to ensure SRA works more effectively with local and regional providers to bridge the gap between research and practice to improve district productivity.
2. *Build a deeper understanding of industry* by developing segmentation models and immersion programs to strengthen SRA's knowledge about the cost and value drivers for industry, barriers to change and adoption (including behavioural and economic barriers), and encourage the successful exchange of ideas between researchers, product/service developers and industry to develop project concepts, products/services that address both recognized and unmet industry needs.
3. *Look outside the industry for ideas* and leverage cross-sectoral research discoveries for adaptation and use in the sugarcane industry.
4. *Make it easier for industry* to adopt research by developing user-friendly and relevant extension programs, tools, and products.
5. *Pursue cost-recovery for screening and calibration services.*
6. *Improve adoption of clean seed* to achieve uptake of new varieties to represent 20% of the total production volume.
7. *Improve cost effective access to SRA information and research* by developing digital and self-service products and an industry portal.
8. *Create more impactful experiences* by developing SRA's brand strategy, customer service strategies and refreshing levy payer surveys to improve insights.

OUTCOMES

- By 2026, 75% levy payers are satisfied with SRA products, services, and varieties.
- By 2023, 75% surveyed growers have awareness of SRA's research programs and outcomes.
- By 2026, 75% of industry participants surveyed rate SRA as a trustworthy organisation.
- By 2026, the impact of SRA's industry services activities contribute to industry productivity gains of up to 10% per district.
- Year-on-year expansion of self-serve, digital and automated service delivery options to strengthen engagement and communications reach.
- By 2024, calibration and screening services are cost neutral.
- By 2026, 20% total commercial production is from new varieties (calculated as an average across all regions).

HOW WE MEASURE SUCCESS

- ✓ Overall satisfaction with SRA by levy payer segment
- ✓ Industry Satisfaction with:
 - a. Accessibility of research information
 - b. Quality of SRA communications
 - c. Responsiveness of SRA staff and quality of interactions
 - d. SRA services
- ✓ Satisfaction with district support
- ✓ District productivity growth (measured as tonnes of cane and tonnes of sugar per hectare)
- ✓ Participation in district planning process
- ✓ Number of extension packages delivered to the industry
- ✓ Grower preparedness for bio-security threats
- ✓ New varieties as a % total commercial production
- ✓ Levy payer take-up of digital channels and self-service options
- ✓ Lower cost-to-serve and lower production costs for SRA screening and testing services

Develop a deep understanding of industry's profitability, productivity, and sustainability drivers

ENGAGE

At the grassroots

Local farmers
and millers

Local
representative
bodies

Local extension
providers and seed
distribution

SRA DISTRICT MANAGERS

- Work with local industry and service providers to identify opportunities for SRA's core support team to contribute to local productivity plans.
- Support the development of local productivity plans
- Manage relationships with local Productivity Services Companies for extension support and distribution of clean seed.
- Connect researchers to industry.
- Connect industry innovations to research investment opportunities.



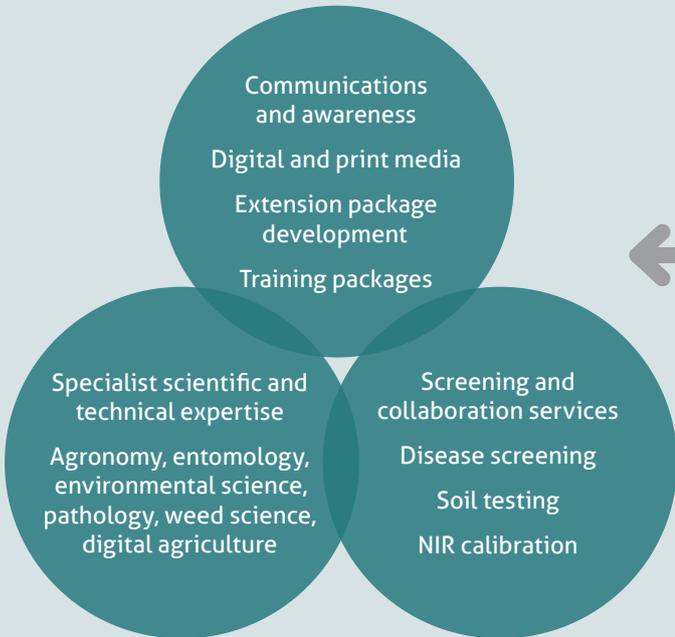
SERVICE DELIVERY MODEL

Making it easy for industry to extract value from research

By working with and through our local extension providers

TRANSLATE, ADAPT AND DEVELOP

Complex science and technology into a compelling product and service offering that is relevant at a local level

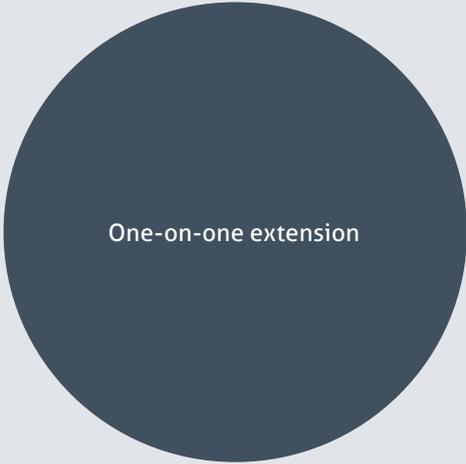


SRA CORE SUPPORT TEAM

- Work with District Managers to support district productivity goals and diagnose productivity issues and threats.
- Consult with broader research community to undertake experimental development and applied research.
- Develop and maintain extension tools and packages.
- Communicate research breakthroughs.
- Provide decision and information support.
- Provide training packages and knowledge dissemination.
- Deliver translation research projects that develop tools, products and methods so that research has practical approach.

DISTRIBUTE

Tools, products, services and scientific expertise to local extension providers



LOCAL EXTENSION PROVIDERS

- SRA's role is to support this function with technical and scientific services and the provision of extension packages and new varieties.
 - » Productivity Services Companies
 - » Drought Innovation Hubs
 - » Private Agronomists
 - » Various state and federally funded projects and organisations providing extension support.

10. STRATEGIC PILLAR FOUR: WORLD-CLASS SUGARCANE VARIETIES

Accelerate innovation in variety development to offer innovative, high-performing varieties that consistently underpin the success of the industry's crop production and protection while lowering development costs and shortening cycle-times.

OUR TACTICS

- *Achieve operational excellence* and sustainable improvement:
 - » Fully embedding the technical transformation program started in 2017
 - » Implement efficiency recommendations in the 2020 SRA Plant Breeding Review
 - » Implementing an activity-based costing model to truly understand development costs for new varieties
 - » Maximise synergy between regional variety development programs
 - » Focus on quality rather than maximum scale at each stage.
- *Leverage advances in science and technology* to revolutionise experimentation and breeding costs and shorten overall cycle times:
 - » Leverage simulation and automation technologies to significantly reduce the cost of experimentation
 - » Implement predictive technologies
 - » Implement DNA markers, drones, genomic selection
 - » Bolder investments in the highest value germplasm.
- *Closely monitor game-changing breeding technologies* to identify novel opportunities for improved yield, resistance, and resilience of cane:
 - » Explore and test technologies such as metabolic engineering technologies to determine the possibility of overcoming genetic limitations of cane
 - » Use gene editing as a novel technology to deliver desirable traits such as increased yield, insect and disease tolerance, and environmental resilience.
- *Build innovation into the supply and distribution channels* for SRA's varieties to ensure availability of clean seed, and information and support for sugarcane growers:
 - » Review SRA's variety distribution and information dissemination arrangements to unlock opportunities to improve availability and support.
- *Plan for the future:*
 - » Plan for future uses of cane and consider the traits that will be of future economic importance
 - » Identify complementary and international markets for SRA's varieties
 - » Explore opportunities to develop a competitive advantage internationally by developing superior genetics.

HOW WE MEASURE SUCCESS

- ✓ Return on pre-breeding activities
- ✓ Genetic gain 2% per annum
- ✓ Number and value of elite clones (in aggregate and per regional breeding program)
- ✓ Cost savings generated from innovation spend (savings as a % of spend)
- ✓ New varieties as % commercial production
- ✓ Proportion of FAT clones resistant to Pachymetra and Smut
- ✓ Commercial returns from breeding activities
- ✓ Grower satisfaction with quality of varieties, distribution mechanisms and information support
- ✓ Variety development cycle times

OUTCOMES

- By 2026, efficient plant breeding program – achieving planned genetic gain at an allocation of 50% industry levies (not including pre-breeding R&D investment), whilst achieving target genetic gain of 2% year-on-year.
- By 2023, SRA is positioned to reduce varietal development costs by 10% from 2020 baseline.
- By 2026, SRA is positioned to reduce variety development costs by 15% from 2020 baseline (5% incremental savings).
- By 2025, leverage SRA's breeding capabilities to develop strategic partnerships and commercial returns.

VARIETY DEVELOPMENT – LOOKING TO THE FUTURE

New varieties contribute productivity growth, novel market opportunities and genetic solutions for farming and processing challenges in plant-based agriculture.

The scale and complexity of the sugarcane genome has defied the classical reductionist genetic research approach that has delivered profound improvements in DNA-based selection methods in other crops.

To bridge this gap, SRA has invested in genomic selection technology which was pioneered in animal breeding and these approaches will soon begin to be applied to improve rates of genetic gain and make fundamental changes to traditional field-based testing and selection systems.

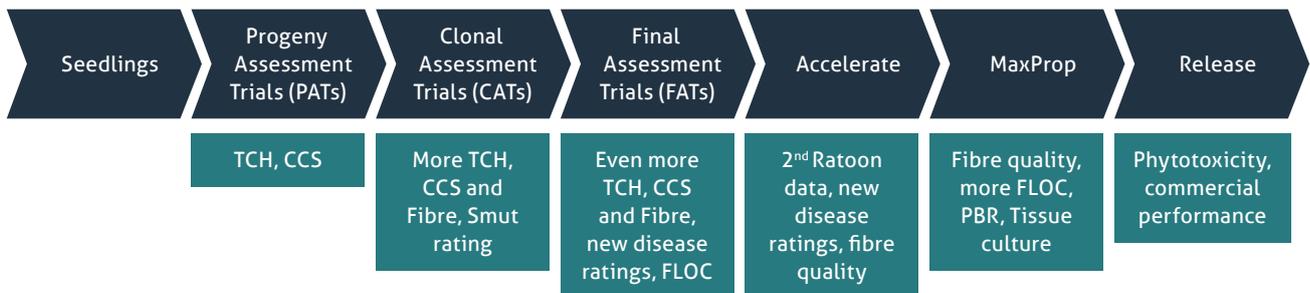
Variety development efforts will continue to be aligned to grower and miller priorities using a sophisticated economic selection index incorporating whole-of-industry value for target traits tuned on a regional basis. SRA will partner with research providers to develop selection technology and new traits to support the prosperity and sustainability of sugarcane production.

The Australian sugarcane industry is yet to establish a value capture mechanism to support commercial investment in plant breeding and SRA continues to operate in this market failure space. The evolution of successful private plant breeding companies in other broadacre crops provides examples for future potential improvement in sugarcane. SRA will form a Variety Development business unit consolidating the management of resources and processes required for plant breeding, allowing commercial discipline to be applied in cost control and in maximising industry return on investment.

ABOUT THE BREEDING PROGRAM

In the early stages of the plant breeding program, large numbers of clones are produced without the ability to predict how they might perform. As the breeding selection process progresses, we learn more about a range of factors that positively and negatively impact variety performance. SRA's Variety Development Managers are responsible for regional selection programs testing new experimental clones from inception through to final assessment on commercial farms. Performance information for elite candidates is presented to Regional Variety Committees, who make decisions on the final stages of the variety release pipeline (accelerate, propagation and release).

Through this strategy, SRA will be working to create innovative solutions to improve the variety development program, improving efficiency, reducing costs, and leading to better varieties for industry, sooner.



Variety development efforts will continue to be aligned to grower and miller priorities using a sophisticated economic selection index incorporating whole-of-industry value for target traits tuned on a regional basis.

11. STRATEGIC PILLAR FIVE: COMMERCIAL BENEFITS AND REWARDS

Take our research work and investments to the next level by securing investors and funding and extracting commercial value from our intellectual property, research capability, facilities and strategic partnerships.

OUR TACTICS

1. *Negotiate commercial deals* to extract value from SRA's in-house sugar industry expertise, intellectual property, and facilities.
2. *Expand funding and investment partners* to develop mutually beneficial proposals by leveraging statutory and levy income.
3. *Commercialise new product and service opportunities* generated from research discoveries.
4. *Establish SRA as a trusted and secure data manager* to develop commercial opportunities for data, insights and record keeping services to the Australian sugar industry.
5. *Expand into new, and adjacent, domestic, and international markets* with SRA's existing products, varieties, and services.
6. *Form commercial partnerships and ventures* with private sector product developers and innovators, to use experimental development to develop distribution rights, licenses, and fee-for-service revenue.
7. *Leverage plant-breeding rights* and explore opportunities to sell high fibre varieties to support the development of international energy markets.

HOW WE MEASURE SUCCESS

- ✓ Net returns from commercial activities per annum
- ✓ Commercial returns % industry levies
- ✓ Consulting/subcontracting income – in-house capability \$ per annum
- ✓ Grant income \$ per annum
- ✓ Revenue derived from variety development (alternate revenue opportunities) - \$ per annum

OUTCOMES

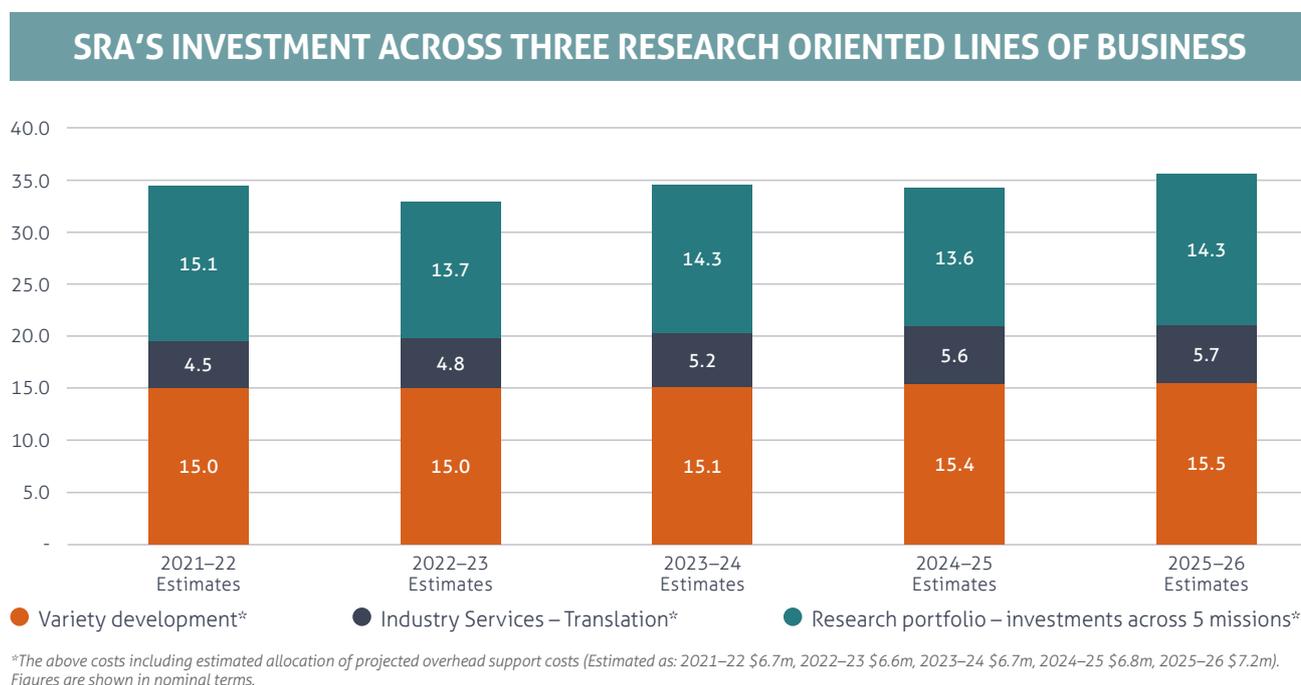
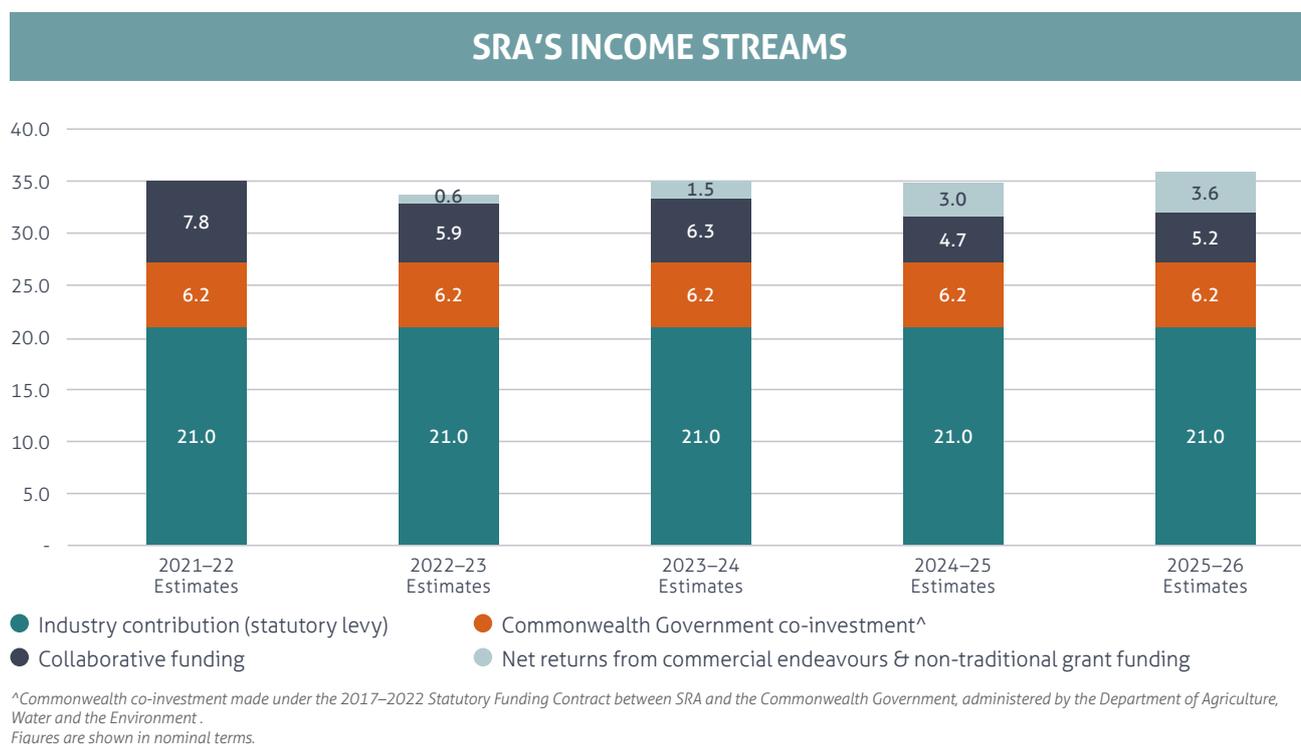
- By June 2026, SRA delivers net returns from commercial activities of at least \$4M per annum.



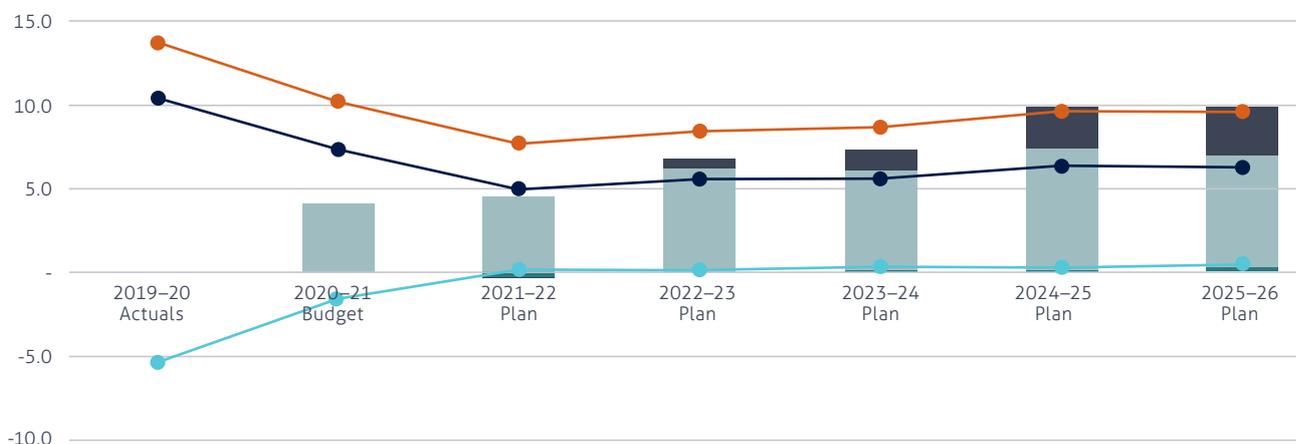
12. FINANCIAL FORECAST

Through a targeted shift in efficiency savings and new revenue streams, SRA is forecasting a future budget scenario that puts the company in a sustainable financial position that is no longer reliant on cash reserves (running a deficit). The five-year projection is based on four key dependencies: Profit from collaborative research consultancy – where researchers consult at commercial market rates; profit from commercialisation opportunities; delivery of efficiency savings - to be largely implemented in FY22; and levies based on 30Mt per annum. These are the elements to SRA delivering a financially sustainable business model into the future. Under the new model SRA plans to:

- invest in our three research-oriented lines of business
- generate commercial returns to support SRA's financial viability over the five-year period
- deliver efficiency savings and effective lean support functions
- achieve small net surplus each year (excluding extra-ordinary one-off items).



GROWTH IN INVESTMENT FUNDED BY EFFICIENCIES AND COMMERCIAL RETURNS



	2019-20 ACTUALS	2020-21 BUDGET	2021-22 PLAN	2022-23 PLAN	2023-24 PLAN	2024-25 PLAN	2025-26 PLAN
R&D Investments & Translation (net of collab funding)	13.7	10.2	7.7	8.5	8.7	9.6	9.6
R&D Investments (net of collab funding)	10.4	7.3	5.0	5.6	5.6	6.4	6.3
Net Result - surplus/(deficit)	-5.4	-1.6	0.2	0.2	0.3	0.3	0.5
Returns: Collaborative consultancy & industry services	-	-	-0.2	0.0	0.1	0.2	0.3
Returns: Commercialisation & non-traditional funding grants	-	-	-0.0	0.5	1.3	2.5	2.9
Efficiency savings	-	4.2	4.6	6.2	6.0	7.3	6.7

Note: Estimated values in the above are presented in real terms (2019-20 base year)

SRA's future budget predictions and assumptions are based on significant targets around diversifying revenue streams and reducing costs.

FORECAST \$ AGAINST NATIONAL SCIENCE PRIORITIES

The key activities laid out in this Strategic Plan respond to the priority challenges and opportunities of the sugarcane industry and the priorities of the agricultural sector, government and the wider Australian public.

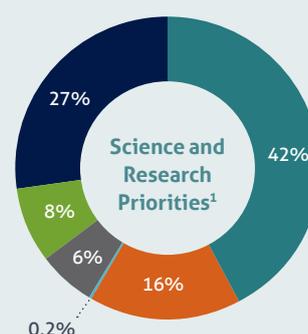
SRA will continue to address the priorities set out in the following strategic documents:

- National Sugarcane Industry Research, Development and Extension (RD&E) Strategy, 2017
- National Science and Research Priorities, Australian Government, 2015
- Rural RD&E Priorities, Australian Government, 2015
- Department Strategic Objectives for funding projects for SUGARCANE, Queensland Department of Agriculture and Fisheries, 2018.

These graphs illustrate the current proportion of SRA's estimated investment for 2020/21 that align with the National Science and Research Priorities and the Rural RD&E Priorities. These figures and estimates will continue to be updated within Annual Operational Plans.

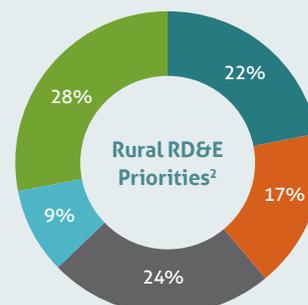
FORECAST EXPENDITURE 2020/21

- Food \$15.6M
- Soil and water \$ 5.9M
- Transport \$16K (0.04%)
- Energy \$56K
- Advanced manufacturing \$2.4M
- Environmental change \$2.9M
- Other³ \$10.1M



FORECAST EXPENDITURE 2020/21

- Advanced technology \$8.2M
- Biosecurity \$6.4M
- Soil/water/NRM \$8.8M
- Adoption \$3.2M
- Other³ \$10.4M



¹ National Science and Research Priorities, Australian Government, 2015.

² Rural RD&E Priorities, Agricultural Competitiveness White Paper, Australian Government, 2015.

³ Other includes unallocated research, R&D investment management, research stations and corporate support.

13. MONITORING AND EVALUATION FRAMEWORK

SRA has established an “impact pathway” framework to support performance monitoring and evaluation across its investments.

Using a program logic model enables tracing of research inputs through to outputs, outcomes and ultimately, industry impacts. Such line of sight allows SRA to improve the monitoring, evaluation and reporting of SRA's RD&A portfolio under its Monitoring and Evaluation (M&E) Framework. It also provides pathways towards quantifying attributable impact and return on investment for our industry and government investors. SRA's M&E Framework has been further strengthened with the development and implementation of a suite of KPIs and tangible targets that will be progressed and monitored through annual operational planning and reporting mechanisms.

SRA is continuing to implement and improve data collection and monitoring processes and tools to specifically measure and track (over the short, medium and long-term) adoption of new technology, practice change and the impact and/or economic value created through the application of our research.

As this performance data becomes available, it will be incorporated into SRA's KPIs and reporting. The primary monitoring, evaluation and reporting mechanisms within SRA's M&E Framework include:

- project milestone reporting
- regular traffic light reporting to the Board on output delivery and achievement against KPIs
- operational (financial, workplace health and safety, and risk management) and strategic reporting to the Board's Audit and Risk Committee

- six-monthly exception reporting to the Board on progress against the Strategic Plan
- reports on performance to the Department of Agriculture, Water and the Environment via six-monthly meetings
- project and program evaluations, including impact and cost-benefit analyses
- annual grower and miller surveys, including practice change and satisfaction with SRA
- Annual Reports and Annual Performance Reports published to demonstrate the performance of SRA's RD&A portfolio and return on investment provided to SRA's industry and government investors
- Independent Performance Reviews, as required under the Statutory Funding Agreement.

Under this new Strategic Plan, SRA will enhance and expand our M&E framework. As a high priority, SRA will expand monitoring and evaluation to include all of our investments and partnership. This includes areas not currently measured and evaluated in the same manner as our external investments. This specifically includes investments such as plant breeding and investment partnerships with external providers. Through this new framework, SRA will be able to fully demonstrate and articulate the value provided to industry and our investment partners.

SRA will continue to regularly communicate with our investors and other stakeholders on our strategic and operational performance and use feedback on our performance to enhance the quality of our research and investment processes, programs and activities.

INDEPENDENT PERFORMANCE REVIEW

As prescribed under both SRA's Constitution and the Statutory Funding Contract (SFC) 2017–2021 with the Commonwealth Government, SRA is required to engage an independent organisation to undertake a comprehensive review of performance every four years.

The Independent Performance Review focuses on reviewing SRA's performance against the provisions of the SFC and the extent to which the company is delivering benefits to its investors. The review includes consideration of SRA's role as both a research investor and research provider and an assessment of SRA's corporate governance; operations; planning, monitoring, evaluation and reporting; and interaction with investors and broader stakeholders. SRA's second Independent Performance Review was completed in late 2020 by independent reviewers Forrest Hill Consulting.

The review findings detailed in the Independent Performance Review Report provide an endorsement of SRA's activities and have also suggested a number of opportunities for improvement and refinement. SRA has responded to these findings with a full response and implementation plan, which includes significant activity associated with this new five-year Strategic Plan.

The Report is available on SRA's website along with the SRA Board's response to the review findings and recommendations. The next Independent Performance Review is scheduled to be undertaken in 2024.



SRA will examine its industry services offering, create improvements, and deliver improved value.

14. ALIGNMENT TO GOVERNMENT PRIORITIES

STAKEHOLDER PRIORITIES	SRA INVESTMENT AREA						
	VARIETY DEVELOPMENT	POSITION THE INDUSTRY TO STAY AHEAD OF CLIMATE, ENVIRONMENTAL AND BIOSECURITY THREATS	CAPITALISE ON CHANGING CONSUMER PREFERENCES, AND THE GROWING BIO AND GREEN ECONOMIES TO DEVELOP DIVERSIFICATION OPPORTUNITIES	CONTINUOUS IMPROVEMENT IN FARMING AND MILLING PROFITABILITY	SUPPORT THE DEVELOPMENT OF AN ADAPTABLE, PROFESSIONAL, COMMERCIAL AND ENTREPRENEURIAL INDUSTRY AND RESEARCH COMMUNITY	POSITION THE AUSTRALIAN SUGARCANE INDUSTRY AS LEADERS IN PROFITABILITY, ENVIRONMENTAL SUSTAINABILITY AND RESOURCE-USE EFFICIENCY	INDUSTRY SERVICES GROUP
National Sugarcane Industry RD&E Strategy – Themes ¹							
1. Products: Expanding uses for sugarcane							
2. Productivity: Achieving significant productivity gains and increasing adoption							
3. Stewardship: Improving environmental performance and industry's social license							
4. People: Building the capability of industry and research							
National Science and Research Priorities ²							
1. Food							
2. Soil and water							
3. Transport							
4. Cybersecurity							
5. Energy							
6. Resources							
7. Advanced manufacturing							
8. Environmental change							
9. Health							
SRA Strategic Plan investment areas ³							
1. Ecosystem leadership							
2. Funding and investment							
3. World-class innovation practices							
4. Strengthening our regions							
5. Next generation innovation platform							
Queensland Department of Agriculture and Fisheries – Theme Areas for Sugarcane Research Investment ⁴							
1. Sugarcane improvement – to improve productivity, quality and production							
2. Sugarcane plant protection							
3. Farming systems broad acre dry land and irrigated, and mixed crop farming systems							
4. Soil health							
5. New market opportunities and processes							
6. Agri-intelligent systems							
7. Breaking barriers to adoption							

¹ National Sugarcane Industry RD&E Strategy, 2017.

² National Science and Research Priorities, Australian Government, 2015.

³ Pillars of Reform within the National Agricultural Innovation Agenda.

⁴ Department Strategic Objectives for funding projects for SUGARCANE, Queensland Department of Agriculture and Fisheries, 2018.



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