

MURRAY DARLING BASIN STATISTICS 2022–23

Production & Farm

- At least 20% (one fifth) of Australia's total milk production (1.53 billion litres of milk)
- Almost 1000 dairy farms with 78% in Victoria and 22% split between South Australia, New South Wales and Queensland
- Worth more than \$1.14 billion (farm gate value) and almost \$2 billion to local community.

Processing & markets

- Process an estimated 30% of Australia's milk into value added products - from milk and cheese to world leading nutritional and supplements.
- Australia's largest regional concentration of dairy processing with more than 40 facilities
- Linked by a \$1 billion freight industry
- 700+ million litres of milk transported to northern Victoria from Gippsland, southwest Victoria, and interstate for processing annually
- 250–300 million litres of MDB milk sent to other states for processing annually
- 85% of Australia's dairy exports pass through the Port of Melbourne
- Adoption of world leading technology and automation is boosting productivity and production of innovative, higher-value products
- Facing competition in international and domestic markets with 25% of Australian dairy now imported.

Employment

- More than 6,862 jobs – 2,848 direct jobs (farm and processing) – 4,014 flow-on jobs (indirect employment)
- A higher proportion of skilled professionals and technical trades than the average for regions and for Australian manufacturing.
- 15% of finished dairy product from MDB processing is sent to Sydney; 11% to Brisbane.

Irrigation & Water Use

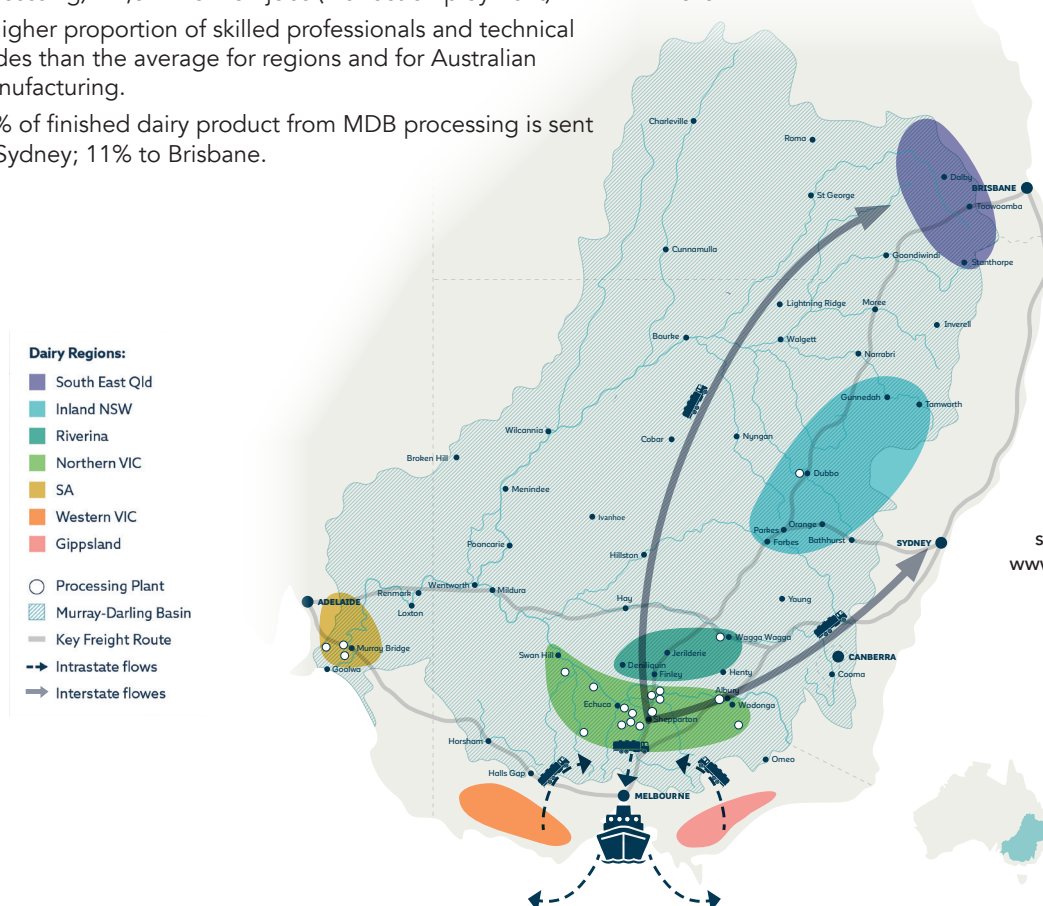
- Underpins irrigation system efficiency as the largest and most stable user of irrigation water in the MDB
- Dairy is the highest value commodity that can temporarily switch out of irrigation, maintain its economic contribution and enable other commodities to survive.
- 60% of all water used by MDB dairy farms is purchased on the temporary market.
- 25% of capital assets for MDB dairy farm businesses are water entitlements
- In the Goulburn Murray Irrigation District, 92% of farmers have upgraded their irrigation systems—the highest of any industry surveyed.

Technology & Innovation

- Rapid adoption of automation and innovation is boosting water, energy, workforce and farm productivity
- More than 70% of MDB farms are generating renewable energy
- 84% of farmers in the Murray region use electronic data capture for individual cow data
- An increasing trend towards robotic systems.

MDB Regional communities

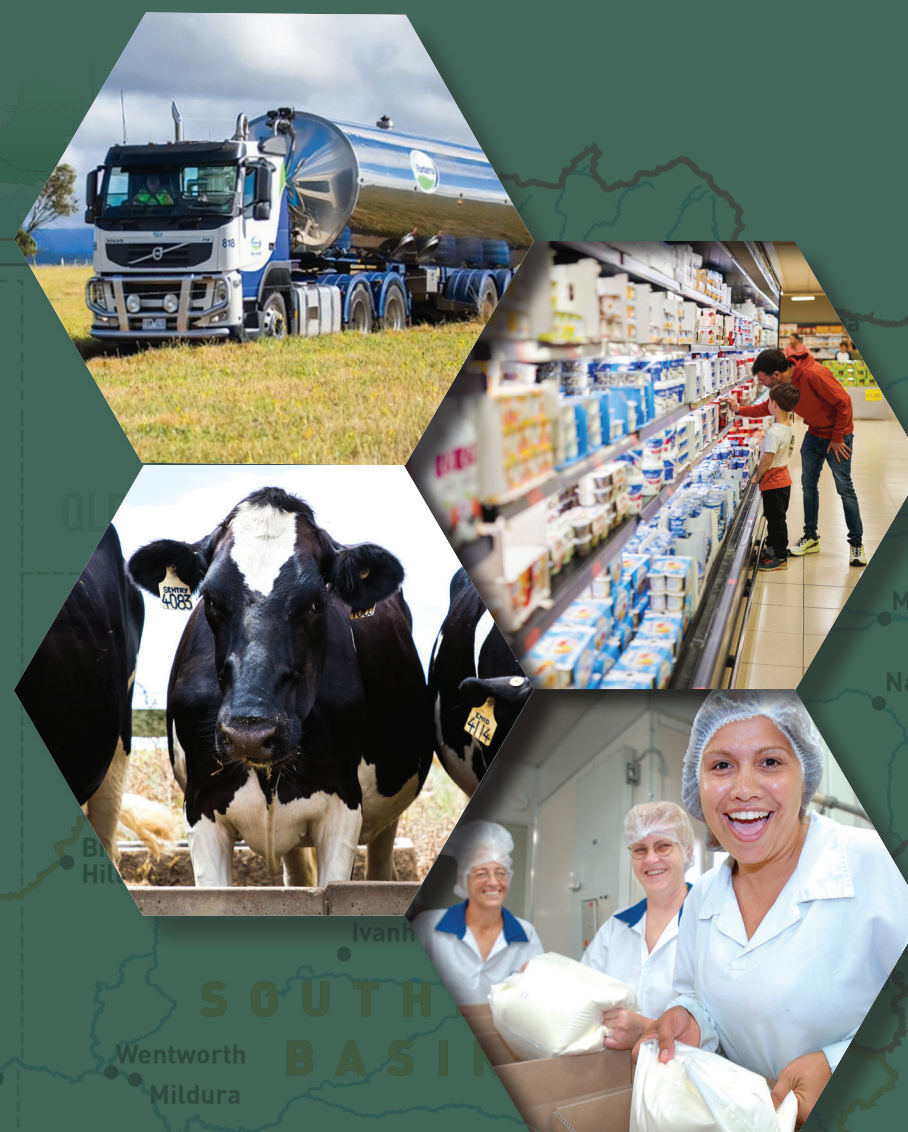
- Injects at least \$1 billion of wages, salaries and spend into regional economies year round
- Growing demand for professional and skilled workforce, trades and services
- Housing and accommodation are in high demand in MDB communities impacting growth of the dairy industry supply chain.



For the full strategic plan scan the QR code or go to: www.gardinerfoundation.com.au



MURRAY DARLING BASIN DAIRY INDUSTRY 2025 STRATEGIC PLAN



The Murray-Darling Basin's end-to-end dairy supply chain working together to drive domestic and international competitiveness and the profitability of the entire Australian dairy industry.

Through trusted data, well-defined priorities and a shared vision of the future, the sector enables local communities, service and support businesses, education providers, researchers and other agricultural sectors across the MDB to succeed and prosper as partners in the sector's success.

KEY INSIGHTS



Australian Dairy needs the Murray-Darling Basin

The heavy concentration of dairy processing and value adding in the Murray Darling Basin anchors the entire Australian dairy industry and its domestic and export supply chains.

MDB milk production is more consistent, stable across the year, and rebounds more quickly than most other dairy production regions. This is attributed to reliable irrigation, the growing investment in climate-resilient dairy operations, and the region's access to local grain and fodder supplies. The more stable base load underpins dairy processors' ongoing investment in the region and employment throughout the dairy supply chain.

The MDB's value adding and processing capacity is strategically located on the national freight network making it ideally placed to receive additional milk volumes from production areas within and outside the Murray Darling Basin, and to move processed product to all domestic and export markets.



Irrigation (and irrigation network users) Needs Dairy

Historically, dairy provides stable, large volume irrigation demand spread across the irrigation season. This boosts system efficiency benefiting smaller volume (horticulture), and opportunistic irrigators (livestock, cropping) and creates valuable opportunities for non-irrigation and environmental water users.

Dairy is the highest value commodity that can temporarily switch out of irrigation and maintain production using a mixture of feed and grazing. As a result, dairy can release water to other sectors including horticulture and cropping while sustaining its contribution to the local and national economy.

If dairy irrigation demand declines, the viability of the entire irrigation networks are in jeopardy and with it, the viability of other agricultural sectors and opportunities for environmental and non-irrigation water users.



Dairy Needs Community

Dairy is the backbone of many regional communities and regional cities. However, this one-way dependence is changing as the dairy sector faces challenges that cannot be solved at a farm, processor or even industry level.

Energy, water, land use, connectivity (digital and transport), workforce and even housing are issues shared with other sectors, co-located industries and are defined by regional, state and national policy settings.

Working on its own the dairy industry can have an impact, but to move at the speed and scale, the industry needs its community stakeholders to lead the delivery of critical services and infrastructure.

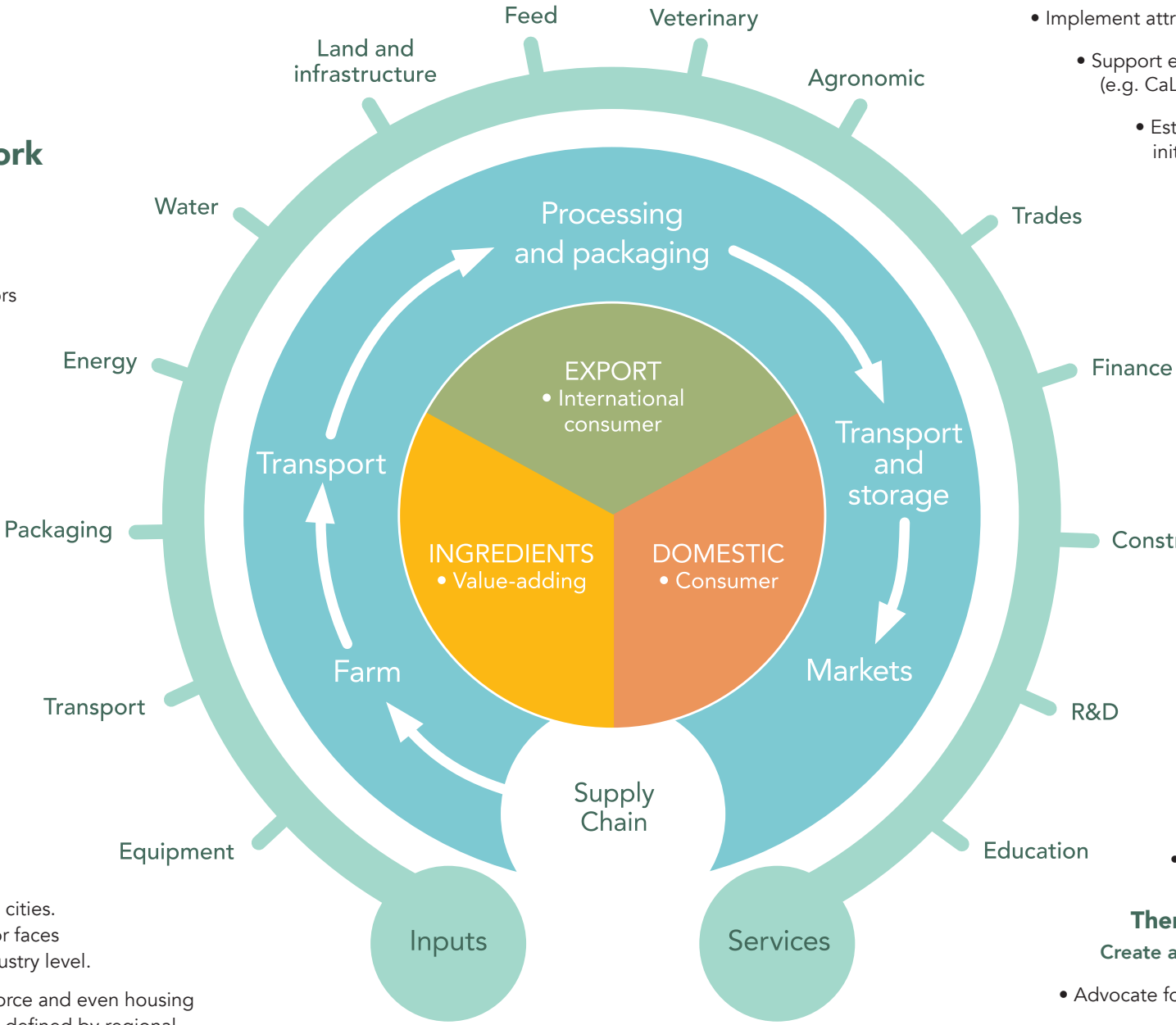
STRATEGIC ACTIONS

Promote

Promote the MDB dairy supply chain and its future needs to all stakeholders and partners. Encourage dairy and non-dairy stakeholders to invest and plan with greater confidence by providing a shared vision for the entire supply chain in the basin that has clear priorities and is backed by quality data and reliable insights.

Connect

Update and strengthen industry forums and networks to improve and accelerate collaboration at each stage and across the supply chain, and to engage a broader range of stakeholders, especially in education, workforce development, research, housing, transport, and energy—challenges that overlap with other sectors and cannot be addressed by the dairy industry alone.



Theme 1: People & Workforce

Build and retain a capable, future-ready workforce

- Map workforce needs and skills gaps
- Implement attraction strategies (e.g. targeting CaLD workers, tech-savvy youth)
- Support employers with systems, training, and workforce diversity (e.g. CaLD employment support)
- Establish pathways (e.g. internships, dairy immersion programs, leadership initiatives)
- Integrate dairy into education and training systems at all levels.

Theme 2: Integrated Sustainability

Lead on sustainability, net-zero transitions, and ESG practices

- Address energy reliability, water efficiency, circular economy, waste, and animal welfare
- Support industry-wide sustainability frameworks (e.g. Dairy Sustainability Framework)
- Promote ESG reporting, particularly Scope 3 emissions
- Enable community-driven initiatives on environment and wellbeing
- Secure investment in regional solutions through cross-sector collaboration.

Theme 3: Research, Innovation & Technology

Strengthen R&D capacity and adoption across the MDD

- Attract investment and build partnerships with research bodies
- Expand RD&E for intensive, climate-smart systems
- Champion evidence-based reforms and technology uptake
- Establish research communities of practice and international linkages.

Theme 4: Profitability & Business Confidence

Create an enabling environment for long-term investment and business growth

- Advocate for energy, housing, and infrastructure investment
- Ensure access to capital and support structural adjustment where needed
- Strengthen supply chain data and risk management capacity
- Promote sustainable and scalable production systems.