ADPF Australian Dairy Products Federation

Australian Dairy Products Federation

Strategic Plan

FY2026-2030

THE a2 MILK COMPANY
a2
FEEL THE DIFFERENCE

acm
Australian Consolidated Milk

ADFC
Est. 2012

Ausfine
FOODS

Australian
Specialist
Cheesemakers
Association

Ballantyne
DAIRY INNOVATION

Bega
GROUP

Bulla

EST. 1886
Brownes
dairy

BURRA
FOODS AUSTRALIA

Fonterra
Dairy for life

GOULBURN VALLEY
Creamery

GIPPSLAND
JERSEY

Kyvalley
Dairy
GROUP

LACTALIS
AUSTRALIA

THE
Little
BIG
Dairy Co.

Maeil
Maeil Australia Pty Ltd.

MAXUM
FOODS

Milk2Market

noumi
Imagining a healthier tomorrow

ProviCo

Saputo

That's
Amore!
CHEESE

THE
YOGHURT
SHOP

Australian Dairy Products Federation

The Australian Dairy Products Federation (ADPF) is the lead policy and advocacy body representing the nation's dairy manufacturing industry, which supports more than 70,000 jobs and generates $18.5 billion in overall economic impact across products and value chains.

Dairy processors are a critical link between farmers and consumers, transforming perishable raw milk into high quality, nutritious and affordable dairy foods Australians trust and rely on every day.

Our members (left) are multinational organisations through to single-plant companies, who work across rural and regional Australia.

They are responsible for processing about 90 per cent of Australia's total milk pool and together represent most of the milk, cheese, yoghurt, butter, ice-cream and dairy ingredients produced and marketed in Australia and sold throughout the world.

ADPF provides a collective and powerful voice to key opinion leaders to ensure the significant economic, social and health benefits of Australian branded and locally produced dairy products, is well recognised and supported by government.

AUSTRALIAN DAIRY PROCESSING: WHERE MILK BECOMES MORE

$18.5 BILLION

Dairy processing generated $18.5 billion in revenue across products and value chains

$6.1 BILLION

DAIRY PROCESSORS EMPLOYED $6.1 BILLION IN CAPITAL & INVESTED $383 MILLION IN CAPITAL PER ANNUM*

3RD LARGEST RURAL INDUSTRY

70,158 jobs

DAIRY PROCESSING'S EMPLOYMENT CONTRIBUTION
20,394 FTE direct employees and 49,764 FTE indirect

56.5% **OF DIRECT WORKFORCE IN REGIONAL AUSTRALIA**

23% **OF DIRECT WORKFORCE IN TWO HIGHEST JOB SKILL CATEGORIES**

More industry data at adpf.org.au

Strategic priorities

01

Lift productivity, value and competitiveness
Accelerating efficiency, innovation, profitability & growth across Australia's dairy farm & processing sectors, through a more connected Australian dairy industry.

02

Build a sustainable & secure supply chain
Strengthening end-to-end dairy supply chains to ensure resilient, sovereign, & climate-smart Australian dairy processing.

03

Develop a future-ready workforce & capability
Attracting, training & retaining the skills & leadership needed to grow & transform Australian dairy processing.

04

Secure strategic market access & global preference for Australian dairy
Positioning Australian dairy processors as trusted suppliers in competitive domestic & export markets.

05

Champion supportive & progressive policy reforms
Advocating for a policy environment that enables sustainable, profitable & innovative Australian dairy processing, & instils dairy's credentials in the diets of our consumers.

06

Strengthen trusted leadership & representation
Foster deep trust & collaboration with our dairy processors, farmers, government, & strategic partners to advance a united & respected dairy sector voice.

Powering the prosperity

of Australian dairy processors and the industry

An industry that matters

Australia's dairy processors are at the heart of our food system, transforming raw milk into high-quality, nutritious products that feed Australian families, support regional communities and supply markets at home and abroad.

We are one of the nation's most important manufacturing sectors — high-skilled, high-impact and essential to national resilience — with a presence in every state and deep roots in regional Australia.

Facing real challenges

Despite strong foundations, the operating environment is becoming more challenging. Processors face rising energy, input and compliance costs, alongside a long-term decline in milk supply.

At the same time, supermarket concentration and growing imports are intensifying competitive pressure, making it harder for Australian dairy to remain cost-competitive and placing food security, local manufacturing capability and regional jobs at risk.

Focused on solutions

The ADPF FY2026–2030 Strategic Plan provides a clear, action-focused response.

It sets out six priorities to grow a sustainable raw milk supply, lift productivity and efficiency, strengthen competitiveness and create long-term value across the supply chain - because few industries deliver such broad economic and social returns as dairy.

Our commitment

ADPF will advocate for policies that make energy and inputs more affordable, promote innovation and investment, and ensure Australia's Dairy Code, nutrition and food labelling, and sustainability frameworks remain fit for purpose.

Above all, we will champion unity. Dairy's future depends on farmers, processors, retailers, consumers and governments working together to keep the industry productive, profitable and proudly Australian. When the dairy industry is strong, Australia is strong.

OUR VISION

A prosperous, sustainable and globally respected Australian dairy industry with strong local manufacturing and resilient supply chains.

OUR GOAL

A competitive, innovative and sustainable dairy processing sector that delivers lasting economic, nutritional, social and environmental value for Australians.

Bold = ADPF lead

01 Drive productivity, profitable growth, value & competitiveness.

How we'll get there

- **Ensure dairy is part of the Australian Government's goals to address food security, productivity, climate resilience, and sovereign supply.**
- **Direct industry and government collaboration and reforms to address the barriers to secure sustainable and profitable milk supply growth, create value and enhance market competitiveness.**
- **Leverage innovation (such as AI, smart technology, data), and investment to deliver dairy processing efficiencies.**
- **Support access to affordable input costs, in particular energy.**

02 Build a sustainable & secure supply chain.

How we'll get there

- Promote and deliver the Australian Dairy Sustainability Framework (ADSF) as the industry's platform for sustainability leadership.
- **Equip members with sustainability preparedness tools and education, towards achievement of targets and credible reporting.**
- Support delivery of a Whole of Industry Emission Reduction Roadmap and workplan.
- **Develop a program to better assist dairy processors with the energy transition.**
- **Continue driving progress towards national packaging and waste reduction targets through industry roadmaps and waste-to-value opportunities (e.g., whey).**
- Support industry coordination to deliver a national dairy animal care assurance program.
- Strengthen national transport networks to safeguard the delivery of perishable dairy products.
- Support continued investment in dairy's biosecurity and quality systems to protect our markets

03 Develop a future-ready workforce & capability

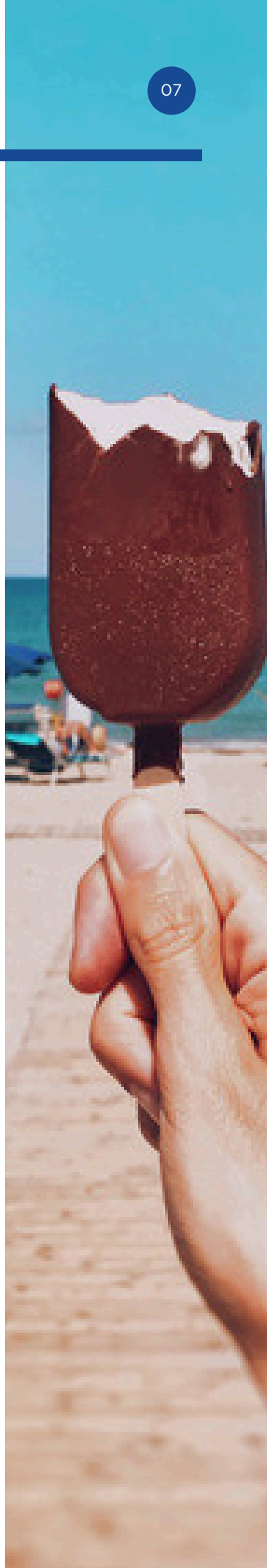
How we'll get there

- **Improve labour access and retention across dairy processing through industry, govt and regional workforce initiatives.**
- **Secure sustainable funding to deliver specialty dairy-processing skills training, such as a Virtual Dairy Centre of Excellence,**
- **Establish pathways to promote Australian dairy processing as a long-term career destination.**
- **Ensure key dairy processing qualifications are included in eligibility lists to support accessible and affordable training, such as TAFEs.**

04 Secure strategic market access & global preference for Australian dairy

How we'll get there

- **Ensure dairy features in the national 'Buy Australia-made' campaign to boost domestic preference and pride.**
- **Strengthen government partnerships to identify and initiate high-value trade deals, aligned with members priorities.**
- **Protect and optimise existing market access arrangements by addressing technical trade barriers and regulatory challenges.**
- **Monitor, assess and defend against import pressures to preserve market integrity and competitiveness.**
- Leverage dairy's sustainability credentials to enhance export advantages and growing demands for responsible production.



05 Champion supportive & progressive policy reforms.

How we'll get there

- **Direct smart, transparent regulation that supports dairy's credibility, growth and resilience:**
  - **Strengthen national nutrition policies by reinforcing dairy's role in the Australian Dietary Guidelines (ADG), including those for older adults.**
  - **Advance truth-in-labelling reforms: improvements to Health Star Rating (HSR); clear labelling of plant-based alternatives and cellular agriculture.**
  - **Shape nationally coordinated sustainability and circulatory reforms across packaging, energy & renewables, and water, to support industry transitions and security.**
  - **Secure a more flexible, commercial Dairy Code through the second review.**
  - Promote a better balance of power between dairy processors and supermarkets, including reforms to Food & Grocery Code.
- **Extend the reach and credibility of the Milk Value Portal (MVP).**

06 Strengthen trusted leadership & representation

How we'll get there

- **Enhance governments understanding and economic value of Australian dairy processing.**
- **Deepen partnerships and connectivity with farmers to extend whole of industry trust.**
- **Unite to strengthen Aust. Dairy Industry Council (ADIC), to drive coordinated, high impact, whole-of-industry advocacy.**
- **Support effective co-investment on initiatives that strengthen the whole dairy supply chain.**
- **Secure better access, and strategic use of government and private funding, for member benefits.**
- **Strengthen cross-sector and international alliances to leverage knowledge and global positionings.**
- Unite to explore the role of an Australian Southern Region Milk-Value Indicator.
- **Continue to build ADPF as a bold, effective and respected member association delivering valued actions**

ADPF AOP FY26

01	**Lift productivity, profitable growth, value & competitiveness**
1.1	Secure & grow milk supply
1.2	Access affordable inputs
1.3	Attract capital & investment
02	**Build a sustainable & secure supply chain**
2.1	Environmental & circularity leadership
2.2	Strengthen supply chains
03	**Develop a future-ready workforce & capability**
3.1	Optimise dairy processing workforce needs & availability
04	**Secure strategic market access & global preference for Australian dairy**
4.1	Advance domestic & international market access, & protect from imports
05	**Champion supportive & progressive policy reforms**
5.1	Effective regulation
5.2	Australian dairy is a product & protein of choice
5.3	Nationally consistent, economically sound sustainability reforms
5.4	Clear market signals on Australian milk values
06	**Strengthen trusted leadership & representation**
6.1	Recognised value of dairy processors
6.2	Trusted farmer partnerships & connectivity
6.3	Partnerships to leverage change
6.4	ADPF is a valued, trusted voice

adpf.org.au | milkvalue.com.au

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