

MAKING MUNGBEANS MAINSTREAM

Australian Mungbean Industry

Strategic Plan | 2025 – 2030+



INTRODUCTION

The Australian Mungbean Association (AMA) is an agile and effective, not-for-profit industry organisation with members from across the spectrum of the mungbean sector.

The AMA provides industry leadership, agronomic advice and training, develops and maintains industry standards to support the industry’s global reputation, co-invests in research and development initiatives to grow productivity and sustainability, and facilitates a mungbean seed production and marketing framework through its member companies.

AMA PURPOSE

TO PROVIDE LEADERSHIP AND DEEP COLLABORATION TO IMPROVE THE PROFITABILITY, RESILIENCE AND SUSTAINABILITY OF THE AUSTRALIAN MUNGBEAN INDUSTRY

Importantly, this plan is not just for the AMA, but the entire mungbean sector. Like the conductor of an orchestra, as custodians of the Australian mungbean industry strategic plan, the AMA provides industry leadership and coordination to help a broad group of industry participants work cohesively together for the advancement of the entire industry.

This strategic plan was developed under the direction of the AMA Management Committee and Secretariat through 2024-2025, including:

- Analysis of key data including Australian and international production and export markets
- Review of the success of the previous mungbean industry strategic plan
- Survey of more than 100 participants in the mungbean industry on key priorities, challenges and opportunities for the industry
- Two-day stakeholder workshop involving growers, seed producers, packers, marketers, researchers and government personnel



Photo: Attendees on day two of the Australian mungbean industry strategic planning workshop in 2024

FOREWORD

Over four decades, the Australian mungbean industry has undergone significant transformation - expanding in both scale and value. What began as a small, niche crop has developed into a robust, export-focused industry now valued at approximately **\$180-\$200 million annually**.

Supported by a strong, collaborative culture across industry and research partners, mungbean production has positively evolved. Today, Australian mungbeans are highly sought after in premium export markets across Asia, the Middle East, Europe and North America.

The AMA acknowledges the vital role that many commercial, industry and research organisations have played in this growth story – such as the **National Mungbean Improvement Program (NMIP)** through the Queensland Department of Primary Industries (QDPI) and Grains Research and Development Corporation (GRDC). The NMIP has consistently delivered improved varieties that are well suited to Australian growing conditions, leading to greater productivity, reliability, and profitability for growers, processors and exporters.

The AMA is pleased to support and partner with the NMIP in the recent **release of new commercial varieties Broлга and Kookaburra**, a milestone that reflects the success of our ongoing collaboration.

Following extensive industry and stakeholder consultation over the past 18 months, the AMA is pleased to release the **Australian Mungbean Industry Strategic Plan 2025 – 2030+**, titled **“Making Mungbeans Mainstream.”**

“*This plan highlights our collective vision for continued growth and outlines the indispensable role of all stakeholders in Australia’s mungbean industry to forge further expansion and deliver profitable solutions for the entire value chain.*”

On behalf of the AMA, I commend this plan to you as a roadmap for industry investment and focus over the next five years - and beyond - and look forward to our ongoing shared success.

James Hunt
AMA President



Photo: AMA President James Hunt



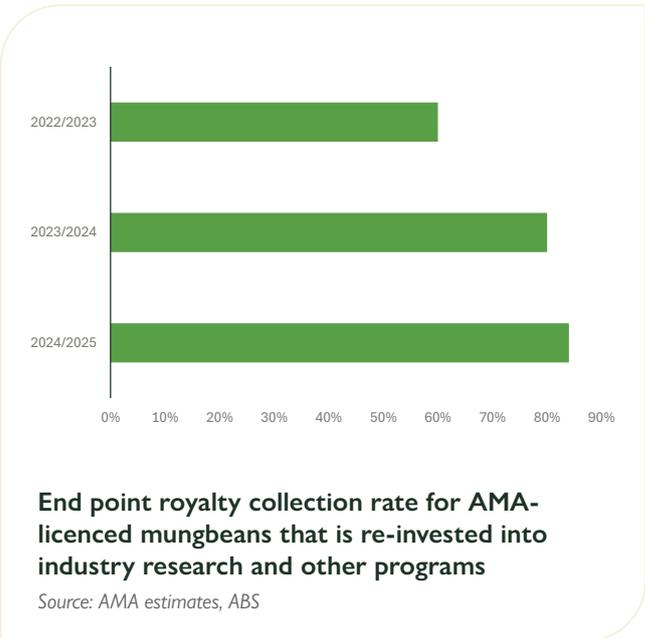
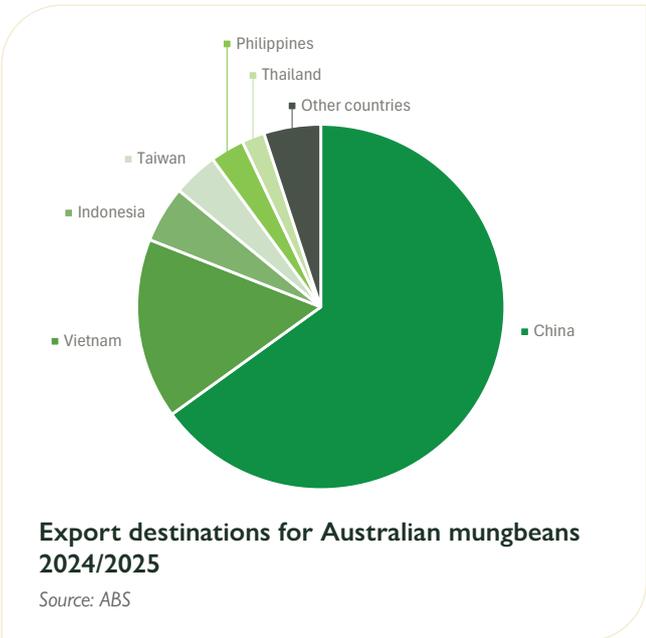
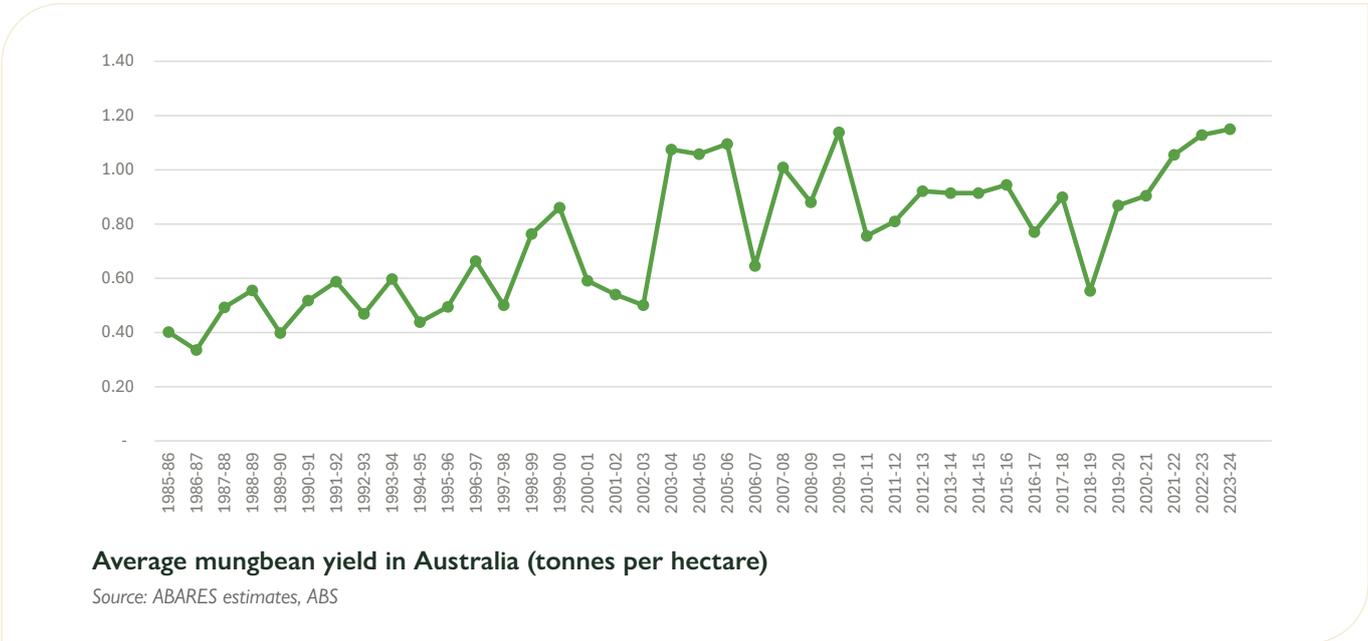
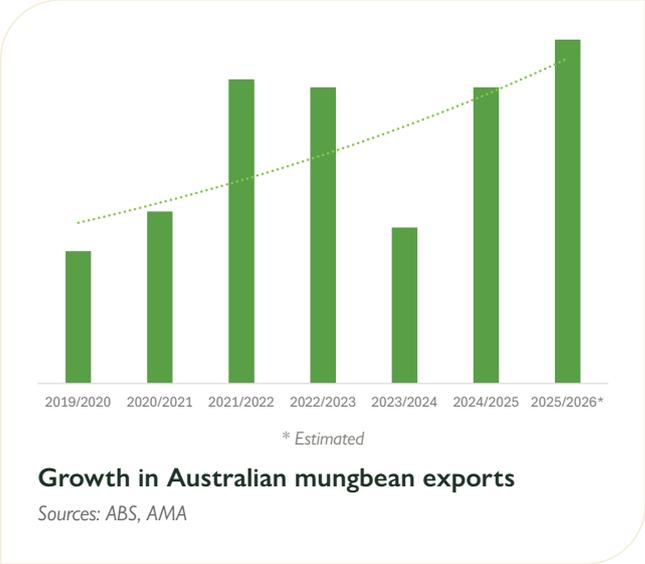
STATE OF THE INDUSTRY

Mungbeans represent 10% of globally-traded pulses (IGC, RaboResearch) with a forecast compound annual growth rate of around 3% over the next ten years.

As a relatively small global producer but significant exporter, the Australian mungbean industry has continued a steady growth trajectory over the past decade – reaching the milestone of planting seed and processing capacity of up to 200,000 MT per year.

The Australian industry is well positioned as a reputable, responsive and high quality exporter that competes effectively with larger global producers and exporters including India, Myanmar and Uzbekistan.

The following charts provide a snapshot of key industry metrics.



STAKEHOLDER PERSPECTIVE

Mungbeans are a sustainably-produced, high protein, low GI, high fibre, internationally-inspired and versatile nutrient source for many Asian markets, with growing segments throughout the remainder of the globe.

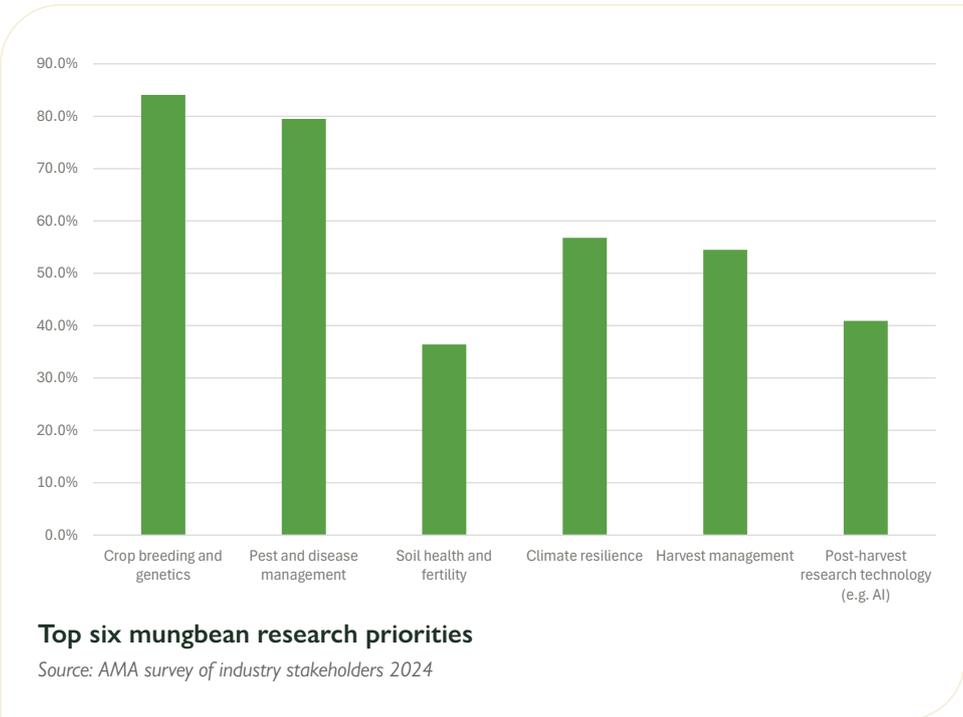
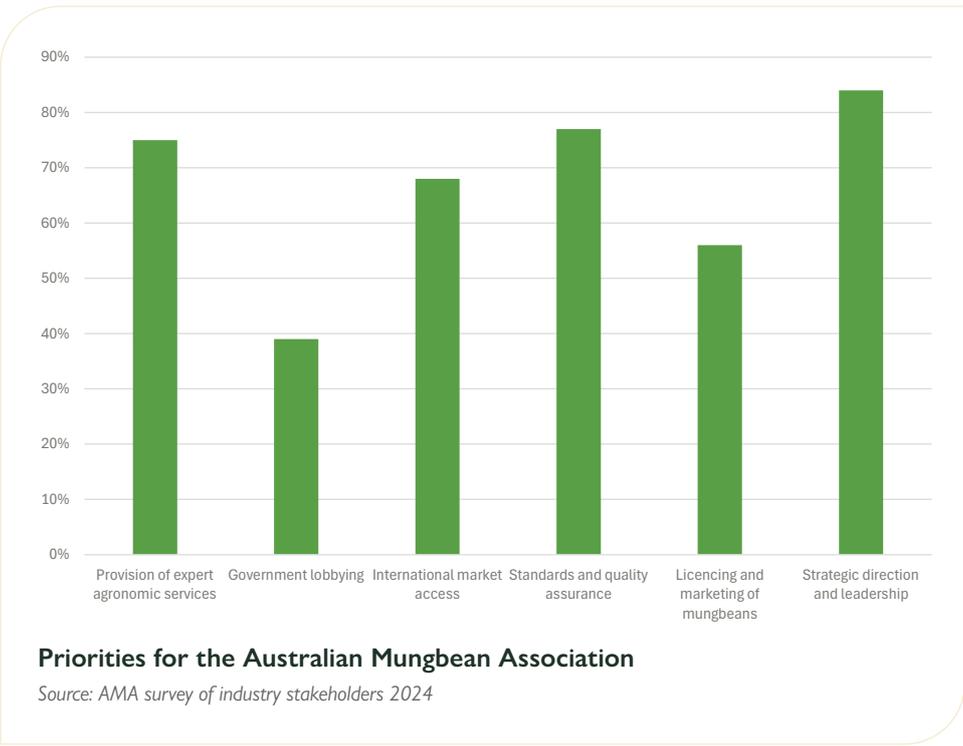
For Australian growers they are seen as a key summer legume crop rotation within a high-performing farming system, or an opportunity crop that can deliver mixed results.

The advantages of mungbeans include nitrogen fixation with benefits flowing to successive crops.

Key challenges include reliability and weatherability under extreme conditions and underperformance in adoption of best practice management.

Survey results

A survey of more than 100 mungbean industry stakeholders produced the following insights.



2020 – 2025 STRATEGIC PLAN SCORECARD

PRIORITY	ACHIEVEMENT
1. Position mungbeans as a Summer Crop of Choice or Pillar crop.	Partly achieved: 5-year average production has increased
2. Maintain and foster key relationships with GRDC and DPI to deliver the National Mungbean Improvement Program (NMIP).	Achieved: Productive relationships maintained with the NMIP
3. Protect the reputation of the Australian mungbean industry as a producer of clean, green mungbean products through education, lobbying and the introduction of robust Vendor Declarations to ensure all export countries maximum residue levels (MRL) are met.	Partly achieved: Grower Commodity Declaration has widespread uptake but can be enhanced
4. Protect the supply chain from adverse market effects by increasing vendor declaration compliance.	Partly achieved: Communication on compliance remains critical
5. Geographic expansion into other growing areas to increase production.	Partly achieved: Some growth in NQld, NT and NSW
6. Design and implement a Digital Imaging tool to deliver improved testing.	Partly achieved: New qPCR halo blight test developed, digital aid for classification on hold
7. Improve the AMA Website for better utilisation and secure position as first point of contact for all stakeholders in the mungbean industry.	Achieved: Relunched website has streamlined information and industry contacts
8. Develop a well-rounded suite of seed varieties that suit geographical regions, market demands and climate.	Achieved: NMIP has produced large-seeded, broadly-adapted and regionally-focused varieties
9. Implement Trademarks and IP protection to protect and add value to our Australian mungbean varieties.	Not progressed in international markets
10. Increase mungbean crop size to target 200,000 tonnes capacity in Australia through better soil nutrition, irrigation scheduling & crop management, agronomy skills, new research, varietal improvement and increased confidence by farmers.	Partly achieved: Planting seed and processing capacity has reached 200,000 MT, while 5-year average production has increased
11. Explore value adding opportunities for the AMA to provide greater value to members and industry in the areas of innovation, food alternatives and human/animal nutrition.	Partly achieved: Some research being undertaken by other agencies
12. Recruit and engage a paid employee within AMA to focus on service and project delivery reducing reliance on volunteer Management Committee positions.	Achieved: Part-time Executive Officer and Secretary/Treasurer successfully engaged

2030+ VISION

PREVIOUS MUNGBEAN INDUSTRY STRATEGIC PLANS HAVE PUT INDUSTRY PRODUCTION OR CAPACITY TARGETS AS THE OVERALL VISION.

While industry value growth continues to be an important target and driver for the industry – rather than include a specific target in this plan the industry's vision for the next five years is:

- To incorporate mungbeans as a profitable short-rotation crop that meets customer expectations globally and is an important part of farming systems across a growing geographic area.

Or simply put,

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STRATEGIC THEMES

The industry has settled on four key themes to help achieve this vision.

Theme 1: Putting the Customer @ the Centre

Theme 2: Invest in R&D solutions to increase productivity, sustainability and profitability

Theme 3: Focus on the Farmer

Theme 4: Engage in market access and development to grow demand



THEME 1: PUTTING THE CUSTOMER @ THE CENTRE

1.1 Utilise emerging technology and ensure the alignment of our industry systems and standards, breeding programs, and production practices with our customer's requirements

- 1.1.1 Conduct a full review of the AMA Machine-Dressed Standards to ensure full alignment between industry and export & domestic customers.
- 1.1.2 Introduce a new grade "M2" to assist industry to more comprehensively segment and describe grain quality and improve market signals within the supply chain.
- 1.1.3 Conduct annual comparative testing and feedback forums with AMA-accredited laboratories to strengthen the provision of consistent testing services to industry.
- 1.1.4 Fully implement systems and information to underpin the safety and integrity of Australian mungbean production (i.e. Grower Commodity Declaration, Hygiene Code of Practice, laboratory testing)
- 1.1.5 Assess the potential for emerging technologies including A.I. to improve the efficiency and accuracy in classification of mungbeans.
- 1.1.6 Scope and evaluate the commissioning of a study to determine the environmental impacts and benefits from mungbean production to underpin further research and industry benchmarking and communication.

1.2 Support education opportunities with our customers and industry organisations to ensure consistent messaging on the quality and nutritional benefits of Australian mungbeans

- 1.2.1 Provide support materials on Australian mungbeans for industry participants for engaging with domestic and export customers.
- 1.2.2 Support researchers, industry and government agencies in exploring and communicating the nutritional profile and utility benefits of Australian mungbeans, including applications as an alternative source of protein.



THEME 2: INVEST IN R&D SOLUTIONS TO INCREASE PRODUCTIVITY, SUSTAINABILITY AND PROFITABILITY

IN DEVELOPING THE STRATEGIC PLAN AN INDUSTRY SURVEY RATED “CROP BREEDING AND GENETICS” AS THE HIGHEST R&D PRIORITY FOR THE INDUSTRY.

2.1 Deliver new varieties with improved yield potential and stability, consistently large seed size, and improved disease resistance through the National Mungbean Improvement Program

Varieties bred by the National Mungbean Improvement Program (NMIP) remain critical to the industry's future and are the only varieties that are commercialised through the AMA-approved seed scheme which aims to ensure high quality, traceable, disease-free seed is provided to growers.

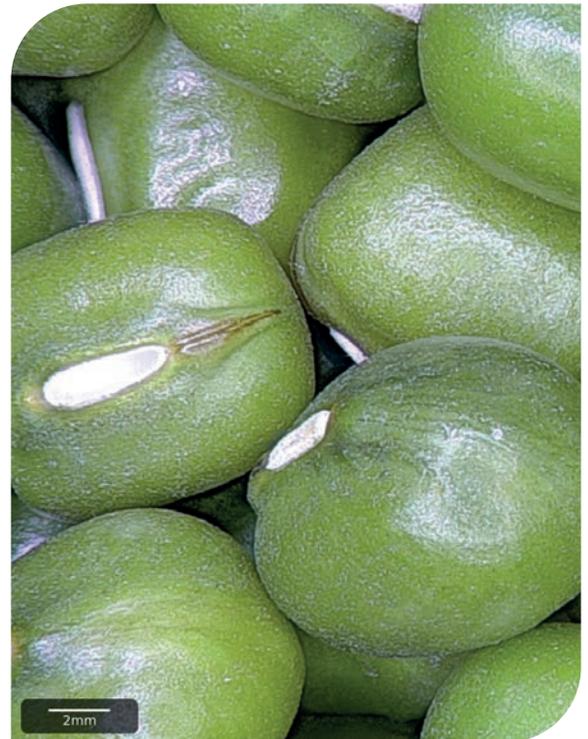
With respect to the AMA's priorities for the next phase of the NMIP, the strategic plan will identify two tiers of priority traits:

Tier 1 includes high-impact priorities for the breeding program such as:

- Yield potential
- Yield stability
- Large, consistent seed size (for large green shiny mungbeans)
- Halo Blight resistance
- Tan Spot resistance
- Resistance or adaptability to Fusarium Wilt

Tier 2 includes medium-impact priorities such as:

- Resistance to Powdery Mildew (which currently has chemical controls available but still presents seasonal production risks)
- Other diseases of concern such as Cercospora
- Potential for suitability for the protein replacement and ingredient sector, as well as high value premium market segments, e.g. consistent large seed size



The industry has also clearly identified heat stress and weatherability in mungbeans as Tier 1 high-impact priorities, with recent seasons demonstrating their effect on achieving mungbean yield potential. This is further reinforced by the observed and predicted impact of climate change on Australian cropping systems which presents both risks and opportunities for the mungbean industry.

The AMA understands addressing heat stress and weatherability may be beyond the scope of the current NMIP however they represent a great opportunity for a multi-faceted research approach across pulse crops and research organisations. These areas should be a focus for collaborative discussion between the AMA, GRDC, QDPI, Universities and other research organisations, as is occurring on other priorities listed.

2.2 Reduce costs, increase productivity and crop resilience

2.2.1 Actively support the inclusion of mungbeans in any pulse-related heat stress projects.



- 2.2.2 Better understand nodulation and symbiotic nitrogen fixation capacity and response across diverse environments.
- 2.2.3 Research and monitoring to develop greater understanding of pathogen biology.
- 2.2.4 Continued work to understand soil health to optimise productivity.

2.3 Investigate the future of our chemical use, including alternative harvest approaches such as swathing

- 2.3.1 Promote ongoing trialling and adoption of alternative harvest management practices including swathing.
- 2.3.2 Secure the availability of safe and effective chemicals for crop protection while continuing to pursue alternative controls and management practices to reduce reliance on chemicals and to capture emerging market opportunities.

2.4 Build capacity and capability in the RD&E sector and member companies

- 2.4.1 Convene a multi-agency research forum to consider current and future mungbean-related investments and projects.
- 2.4.2 Retain and build the RD&E capacity servicing the mungbean sector through education opportunities, conferences, scholarships, PhD support and through the delivery of RD&E projects.
- 2.4.3 Provide AMA-coordinated training for member employees in grain storage and handling, sampling and trading.
- 2.4.4 Establish a 3-year AMA RD&E Fund from AMA reserves to stimulate collaborative investment on mungbean industry priorities.

Example co-investment priorities for the AMA will include:

- **Establishing a baseline for the economic impact of endemic diseases and pathogens**, including yield or area losses to inform future research focus and underpin the development of tools to assist affected growers.
- Continued work on **grain quality standards, testing procedures and technologies, and market access improvements** to ensure Australian mungbeans remain a premium choice for global buyers.
- Supporting growers to **adopt new varieties and best management agronomic practices** that will help safeguard profitability and sustainability.





THEME 3: FOCUS ON THE FARMER

- 3.1 Narrow the gap in yield (and realise profitability benefits) to increase production of mungbeans**
- 3.1.1 Deliver a multi-year extension project targeting the bridging of the gap between potential yield and profitability, and current yield, through greater adoption of best practice management.
 - 3.1.2 Pursue the development and adoption of innovative decision-support tools including apps and other digital-based delivery systems.
- 3.2 Continue AMA's provision of agronomic advisory services and courses to build the capacity, capability and geographic spread of the industry**
- 3.2.1 In collaboration with research and industry experts deliver the AMA agronomy course targeting agronomists, growers and member companies.
 - 3.2.2 Refresh the AMA's list of mungbean agronomists to provide contemporary support to growers and target geographic spread, including growth areas of Northern Territory, North and North-West Qld, and Central and Southern NSW.
- 3.3 Seek greater input from farmers on ways the industry can better meet their needs to help grow the potential and performance of mungbean production**
- 3.3.1 Install at least one member on to the AMA Management Committee with active grower expertise.
 - 3.3.2 Consider a grower/exporter in-market tour to build greater understanding and connection to overseas market opportunities.
 - 3.3.3 Collaborate more closely with farmer-facing organisations including farmer and consultant organisations.
 - 3.3.4 Work through the Australian Crop Breeders to seek legislative change that requires first handlers (grain purchasers) to deduct end-point royalties (EPR) from growers and remit payments to the AMA for re-investment into industry activities.



THEME 4: ENGAGE IN MARKET ACCESS AND DEVELOPMENT TO GROW DEMAND

- 4.4 Conduct a thorough assessment and prioritisation of markets for improved access and market development initiatives**
- 4.4.1 Utilising resources from agencies including Grains Australia, Austrade and Trade and Investment Queensland, list current and potential markets and existing trade barriers or commercial opportunities, ranked by potential for industry influence and value to be captured.
- 4.5 Employ a range of strategies in collaboration with commercial companies, industry bodies and other agencies to protect and build loyalty in existing markets, while seeking greater access to markets where Australian mungbeans are currently excluded or have limitations**
- 4.5.1 Renew efforts for the longer-term liberalisation of market access into India for Australian mungbeans through collaboration with Grains Australia and DFAT.
 - 4.5.2 Support exporters with pre-competitive "Australian mungbeans" information and materials to assist their marketing activities.
 - 4.5.3 Advocate on the mungbean industry's behalf with relevant government agencies including the APVMA and NRS on chemical use and the impact of Maximum Residue Limits (MRLs).
 - 4.5.4 Pursue advancements in seed testing for pathogens, genetic purity/variety and quality to efficiently support growers, seed producers, processors and marketers.



ENABLERS

And finally, some of the enablers that will help get us there:

- good governance, great member service
- effective communication and collaboration with stakeholders
- succession planning in key industry roles
- improved EPR collection to build investment resources

ALIGNMENT WITH OTHER PLANS

This plan acknowledges the industry is but one small part of a larger grains sector in Australia and accordingly has sought to align its strategy with the key focus areas of other industry and government agencies and collaborators - including Grains Research and Development Corporation, Queensland Department of Primary Industries, and the University sector.

EVALUATION AND ACCOUNTABILITY

The AMA Management Committee will review this plan annually in consultation with stakeholders and develop implementation plans with short, medium and longer-term delivery timelines.

What does success look like? That all initiatives are delivered during the timeframe of the plan, while recognising this plan is dynamic and aspirational, and will be revised as new information or priorities emerge.

At the end of this plan the industry aims to be:

- more productive – targeted 5-year annual average production of 120,000 MT
- more profitable
- more geographically spread, increasing production in NSW, NT and North QLD
- more consistent in meeting customer expectations, and
- a preferred short-rotation summer crop option for growers.



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