



Australian Government

Department of Foreign Affairs and Trade

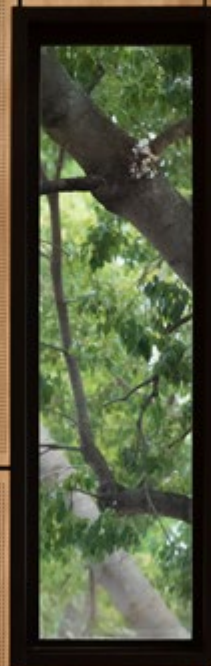
Australian Trade and Investment Commission



Supply Nation

First Nations businesses succeeding internationally

August 2024



AUSTRALIA

Supply Nation together with the Australian Trade and Investment Commission (Austrade) and the Department of Foreign Affairs and Trade (DFAT) acknowledge the traditional custodians of country throughout Australia and the continuing connection of Aboriginal and Torres Strait Islander people to land, waters and community. We pay our respects to all elders – past and present.



Cover image: Scotch College interior by First Nations exporter Decor Systems, see page 17.
Image courtesy of Decor Systems.
These pages: Top End tourism.
Image courtesy of Tourism Australia



Acknowledgements

The research team are grateful for our partnership with Supply Nation, including access to Indigenous Business Direct – Supply Nation’s database of verified Aboriginal and Torres Strait Islander businesses. We acknowledge the many First Nations businesses who are verified by Supply Nation and whose de-identified data we viewed in the Australian Bureau of Statistics (ABS) Business Longitudinal Analysis Data Environment (BLADE).

We also thank the many First Nations businesses who shared their experiences of international trade with DFAT, Austrade and Supply Nation.

We thank members of the research reference group including the Australian Bureau of Statistics, Department of Industry, Science and Resources, Export Finance Australia, Indigenous Business Australia, National Indigenous Australians Agency, NSW Treasury and Tourism Australia. Thank you also to the First Nations businesses Aldridge, Decor Systems, Kakadu Organics, Kirrikin and Voyages for showcasing their international trade experiences in this report.

We also acknowledge the various organisations across Australia that support First Nations businesses’ international trade in goods and tourism activities. These include Entrepreneur Hubs, Foundations, State and Territory Government agencies, First Nations Business Networks and Chambers.

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Foreword from Australia's Trade and Tourism Minister

I am pleased to present, together with Supply Nation, this publication celebrating the success of our First Nations trade and tourism businesses on the world stage.



For the first time, we have a report which highlights the contribution that Australia's First Nations exporters and tourism businesses make to their community, creating more jobs, and driving our nation's growth.

First Nations businesses from all over Australia are sharing their high-quality goods, services and unique tourism offerings with people from all over the world.

In doing so, these businesses typically create more jobs than other First Nations businesses not involved in trade. First Nations exporters also employ around seven times more workers than other First Nations businesses.

That's why our government is working hard to create, promote and celebrate opportunities for First Nations traders. Our shared objective is ensuring First Nations people, businesses and communities are well positioned to reap the many benefits of international trade.

To do this, we've appointed Australia's inaugural Ambassador for First Nations People, Mr. Justin Mohamed supported by DFAT's Office for First Nations International Engagement.

Ambassador Mohamed is promoting the excellent work of First Nations exporters, while identifying new areas of economic cooperation between First Nations communities and international partners, to grow First Nations trade and investment.

We are also incorporating First Nations business interests into our trade negotiations and our global engagement and export growth strategies, including through Australia's Southeast Asia Economic Strategy to 2040.

Australia is proud to be a founding participant of the international Indigenous Peoples Economic and Trade Cooperation Arrangement, which is expanding networks and international trade opportunities for First Nations businesses.

We will continue to showcase the unique offerings of First Nations businesses to international audiences, including at the upcoming 2025 World Expo in Osaka, Japan.

Importantly, through a partnership between Supply Nation and government, we've been able to analyse data in new ways to inform shared decision-making for and by Aboriginal and Torres Strait Islander people.

Ongoing improvements to the data and evidence base for First Nations international trade will only help advance outcomes for the First Nations business sector.

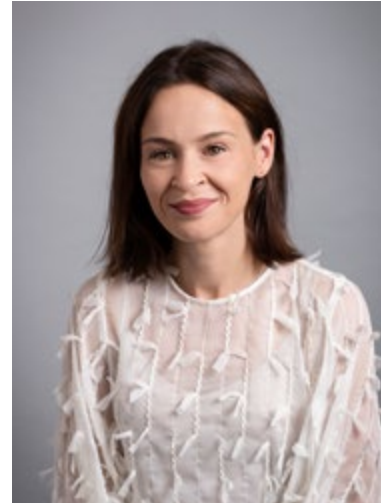
I'd like to thank Supply Nation, and all of the incredible First Nations businesses showcased in this report.

There are so many wonderful stories to share so please enjoy this publication. Thank you.

Senator the Hon Don Farrell,
Minister for Trade and Tourism

Foreword from Supply Nation's CEO

When Kamilaroi man, David Aldridge began exporting his company's railway signalling equipment to Southeast Asia he became part of a tradition that stretches back over 300 years. But our history of trading goes back much farther, with Indigenous groups trading locally since time immemorial.



Aboriginal people commenced trading with Southeast Asia at least as far back as 1700. Each year, hundreds of Makasar fishermen would sail from Sulawesi, in what is now Indonesia, to Arnhem Land and the Kimberleys to catch, boil and dry trepang that were bound for China.

The resulting trade transformed Aboriginal life by introducing calico, tobacco and most importantly metal and dugout canoes.

Today, as this paper shows, international trade continues to transform Aboriginal and Torres Strait Islander lives by creating jobs, boosting opportunities and building the economic base that is essential to our future as distinct, self-determining peoples.

All around Australia, First Nations businesses are involved in international trade in areas as diverse as tourism, information technology, fashion, food and beverage products, as well as logistics and professional services.

The Indigenous business sector is growing. Supply Nation now lists over 5000 verified businesses on our Indigenous Business Direct (IBD) national directory and it's natural that many of these businesses will seek to expand internationally to find markets and develop productive partnerships.

Supply Nation recently established our Export Nation program to support this growth and assist more Indigenous businesses to succeed internationally.

We are also exporting our knowledge of Australia's world leading Indigenous procurement practices by sharing our experiences with our international brothers and sisters to help drive global outcomes.

The Australian Government's commitment to increased internationalisation of Indigenous businesses is evident, with the appointment of Justin Mohamed as the inaugural Ambassador for First Nations People. Ambassador Mohamed's responsibilities include supporting First Nations trade and investment.

The release of this report is another important step forward, as it presents clearly the potential of the Indigenous business sector and benefits of international engagement while at the same time providing guidance on the work that still needs to be done.

Supply Nation commends this research and recommends the report to all stakeholders with an interest in the growth and success of the Indigenous business sector – Indigenous entrepreneurs, employees, purchasing organisations, and policy makers.

Thank you to Austrade, the Department of Foreign Affairs and Trade and the authors for bringing this work to fruition.

Kate Russell
CEO
Supply Nation

Foreword from the Ambassador for First Nations People

In my role as Australia's inaugural Ambassador for First Nations People, I have the great pleasure of regularly meeting First Nations businesses across Australia. Trade has been practised on our shores for thousands of years.

To First Nations people, trade is more than a financial or commercial exchange – it is grounded in reciprocity and relationships and offers opportunity to share knowledge and culture.

Our region is ripe with opportunities for First Nations Australians to leverage our unique cultures and knowledge to drive commercial success. Strong business partnerships enhance our people to people and cultural ties and provide important openings for entrepreneurship to drive social progress. This is important for First Nations people and businesses, but also makes for Australia's broader economic and diplomatic relationships.

Close and genuine engagement with First Nations businesses and organisations is the best way to ensure more information is available for Aboriginal and Torres Strait Islander people to set their own priorities and ambitions for this international engagement. Through our partnership with Supply Nation, this report uses First Nations businesses' data to help build an understanding about the opportunities that international trade and tourism present. It is clear that international trade offers unique pathways for business growth and First Nations economic benefit.

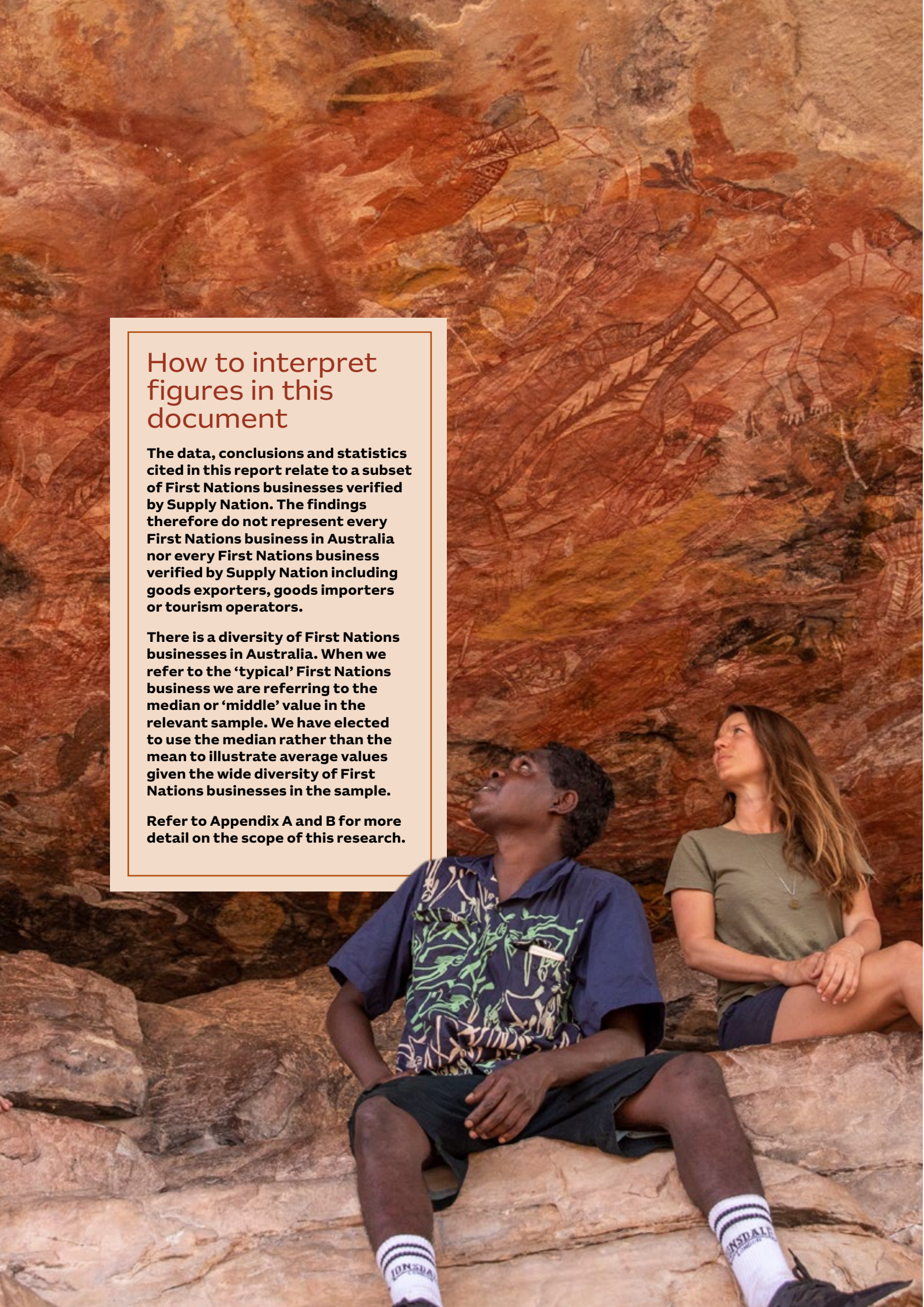


I look forward to continuing work with all First Nations businesses that have an interest in international trade, and to continuing to build data capabilities that can inform richer understandings and stronger decisions.

As the Prime Minister, The Hon Anthony Albanese MP recently said, 'building true and lasting self-determination, requires economic security'.¹

Mr Justin Mohamed
Ambassador for
First Nations People





How to interpret figures in this document

The data, conclusions and statistics cited in this report relate to a subset of First Nations businesses verified by Supply Nation. The findings therefore do not represent every First Nations business in Australia nor every First Nations business verified by Supply Nation including goods exporters, goods importers or tourism operators.

There is a diversity of First Nations businesses in Australia. When we refer to the 'typical' First Nations business we are referring to the median or 'middle' value in the relevant sample. We have elected to use the median rather than the mean to illustrate average values given the wide diversity of First Nations businesses in the sample.

Refer to Appendix A and B for more detail on the scope of this research.

First Nations International Trade at a Glance

We studied 2,609 First Nations businesses in 2022–23 and found:

First Nations exporters of goods:



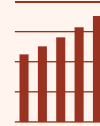
Generated almost \$18 million in exports



Generated over \$670 million in turnover



Employed over 2,300 workers and paid over \$124 million in wages

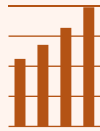


Grew in number by 12% per year over the past five years

The typical First Nations exporter of goods:



Generated over \$14,000 in exports



Recorded over 21% annual growth in turnover over the past four years



Employed 7.5 times more FTE workers than what was typical for all First Nations businesses studied



Generated almost 9 times more turnover than what was typical for all First Nations businesses studied



Generated 0.2% of their business turnover from goods exports

The typical First Nations importer of goods:



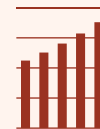
Imported goods valued over \$28,000



Employed 4.3 times more FTE workers than what was typical for all First Nations businesses studied



Generated 4.4 times more turnover than what was typical for all First Nations businesses studied



Recorded over 15% annual growth in turnover over the past five years

First Nations businesses in tourism-related industries:



Generated nearly \$1 billion in turnover from tourists and non-tourists



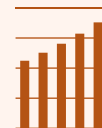
Employed almost 7,000 workers



Recorded employment growth of 10% per year over the past three years



Represented 10% of all First Nations businesses studied



Generated turnover from tourism of over \$200 million, increasing by 38% annually over the past three years

There is a diversity of First Nations businesses in Australia. When we refer to the 'typical' First Nations business we are referring to the median or 'middle' value in the relevant dataset. This provides the best illustration of average values in our sample.

Are you a First Nations business exporting or interested in exporting?

First Nations businesses registered or certified with Supply Nation can access the [Export Nation²](#) platform. This platform provides businesses with access to resources, opportunities and connections to organisations in Australia and overseas, that can provide support, advice and assistance to succeed internationally.

Austrade's Go Global Toolkit is designed to help Australian businesses at every stage of their export journey. Whether you're just starting to explore exporting or you're ready to expand into your next overseas market, the toolkit makes it easier by combining all the information you need in one place.

Australian businesses looking to export are often daunted by deciding on the best market to export to. Finding the right market requires extensive research. The toolkit streamlines data and regulatory information and supplements it with intelligence and commercial insights from Austrade's international network. The toolkit makes it easier for Australian businesses to digest information and build confidence in making decisions about exporting. The toolkit's Ultimate Guide to Exporting can be tailored to your sector providing step-by-step guidance that's relevant to your business.

Visit export.business.gov.au to take your business further, faster.





Executive Summary

First Nations cultural and tourism exports tell our story on the world stage, drawing on more than 60,000 years of tradition and the world's oldest living cultures. Diverse First Nations businesses are combining cutting-edge technology and design with traditional knowledge to give them an edge in domestic and international markets.

Australia's First Nations traders were our first exporters trading goods with Makasar seafarers from Indonesia for hundreds of years. Today these businesses export native plants, design, cyber and clean energy solutions to world markets.

This inaugural report was produced through a partnership between Austrade, DFAT and Supply Nation. It shows the benefits of engaging in international trade. The report finds the 'typical' First Nations goods exporter and importer is larger, employs more staff and generates higher turnover when compared to what was typical for all First Nations businesses studied.

There is significant opportunity for the sector to benefit from reaching more customers through exports. Currently only 1.5% of First Nations businesses studied export goods, and export sales represent a small portion of total sales for most First Nations exporters studied. Tourism is a key component of Australia's international trade agenda and an important source of employment and business opportunities for First Nations people.

This report is a step forward in the Australian Government's and Supply Nation's objective to ensure that all Australians, including First Nations businesses, share in the benefits of international trade. The research contributes to this objective by increasing the data and analysis available on First Nations international trade to inform shared decision making among stakeholders for the benefit of First Nations people.

The research is consistent with the National Agreement on Closing the Gap's reform priorities³ and provides First Nations people with contextual data to guide their business decisions.

Making the sector's contribution to international trade and tourism more visible also helps the sector celebrate success and encourages all businesses to consider international trade as a growth strategy. The findings of the report are based on a sample of 2,609 First Nations businesses from Supply Nation – further details on the methods used are in Appendix A and B.

SNAPSHOT - Who is Supply Nation?

As of July 2024, Supply Nation connects over 5,000 First Nations businesses with more than 800 corporate, government, education, industry associations and not-for-profit organisations to foster connections and drive economic empowerment through business.

Supply Nation is the custodian of Indigenous Business Direct – the largest database of verified Aboriginal and Torres Strait Islander businesses.

Supply Nation also provides support to First Nations businesses through an array of training programs, online tools, resources and events, and has recently launched the [Export Nation](#)⁴ platform to help First Nations businesses sell their products and services outside of Australia.

The Export Nation platform provides businesses with access to resources, opportunities and connections to organisations in Australia and overseas, that can provide support, advice and assistance to succeed internationally.

Supply Nation encourages First Nations businesses who are currently selling, or considering selling products and services outside of Australia, to speak with Supply Nation to learn more about the Export Nation platform and other support services.

Businesses meeting First Nations ownership criteria, in line with the Australian Government's Indigenous Procurement Policy, can obtain Supply Nation registration.

Supply Nation verified businesses operate in a range of industries including construction, food and hospitality, graphic design, information technology and sustainability.⁵ The top six export markets for Supply Nation verified exporters of goods are the United States, New Zealand, the United Kingdom, Singapore, Canada, and France.⁶

For more information visit supplynation.org.au



Introduction

International trade is an integral part of the Australian economy. First Nations people traded across the continent for tens of thousands of years prior to Australia's colonisation, and internationally for hundreds of years with our Southeast Asian and Pacific neighbours and Makasar seafarers from the island of Sulawesi, in what is now Indonesia.

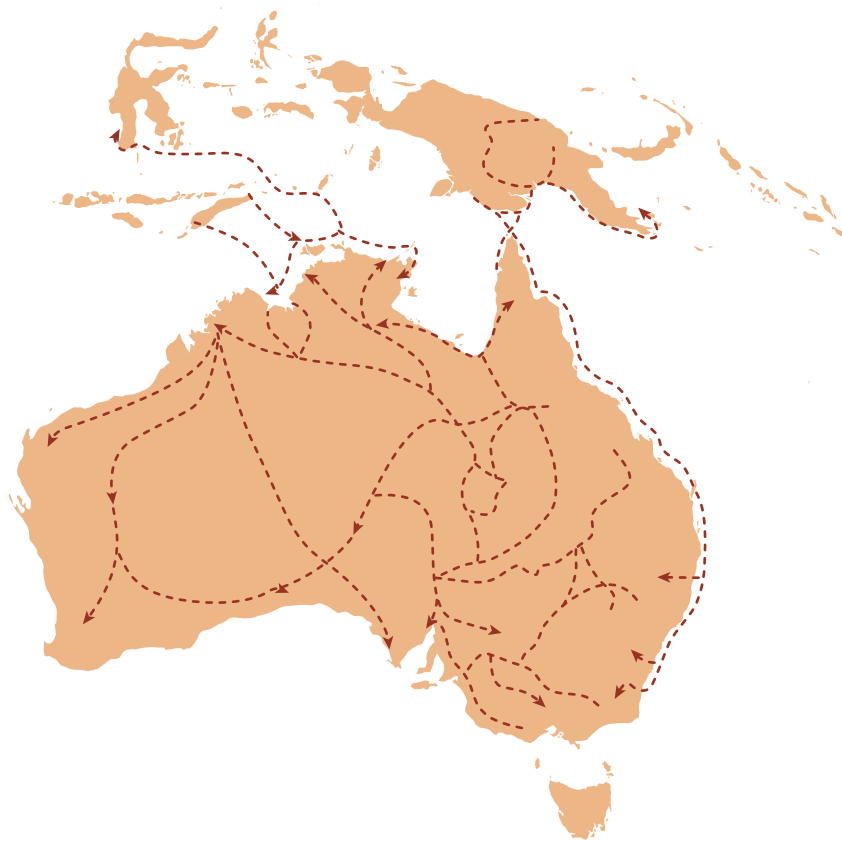


Figure 1A. Australian trading routes pre-colonisation

Sources: Austrade Economics; Map created from McCarthy 1939 (note these routes functioned seasonally)

The ongoing revival of First Nations business in trade represents a significant opportunity in the move towards self-determined economic prosperity for First Nations people and communities across Australia. A strong First Nations business sector has benefits not only for the economy, but also for the community, individual and collective wellbeing. First Nations businesses have substantially better outcomes for First Nations employment than other businesses. Research from the Australian National University finds First Nations businesses are 100 times more likely to employ a First Nations Australian than non-First Nations businesses.⁷ These businesses provide pathways to financial security and autonomy through employment, strengthen communities and provide connection to culture and healing. International trade provides opportunities for First Nations people to maintain and share important cultural practices and traditions.

International trade also provides new market and business opportunities for First Nations businesses. A number of these businesses are already realising these benefits and trade with a variety of countries. Exporting provides Australian businesses with a valuable source of revenue with Austrade analysis showing exporters are more resilient.⁸ Importing provides businesses access to new technologies and a wider range of goods and services. Both importing and exporting enables businesses to access segments of global value chains. Global value chains are supply chains where different elements of production are undertaken wherever the skills and materials are available at the most competitive price and quality. Global value chains present great opportunities. Over 70% of global trade is in intermediate components and services, which later form a final product for consumption by a consumer or business.⁹

Case study – Kirrikin showcasing First Nations fashion

Founded by Hunter Valley Wonnarua woman Amanda Healy, Kirrikin is a Supply Nation registered business that produces luxury clothing accessories using contemporary First Nations Australian designs and sustainable, handcrafted fabrics. Kirrikin is a Wonnarua word that translates roughly to ‘Sunday best clothes’.

Based out of Perth on Whadjuk country, the proximity to Southeast Asia and assistance from the Australian Government have been key factors in expanding the Kirrikin brand internationally. Utilising an e-commerce fashion platform for sales, Kirrikin has seen sales from across Europe and Southeast Asia, including Indonesia, Vietnam, Singapore, Thailand and Malaysia.

Stockists in Australia have also seen high sales from those visiting Australia from the region and wishing to bring authentic First Nations fashion and accessories back with them. Kirrikin is looking for opportunities to take advantage of luxury tastes in the region and to stock its products in Southeast Asian and European markets.

An example of Kirrikin fashion.
Image courtesy of Kirrikin



Expanding the number of First Nations businesses engaged in international trade and the value of this trade is a priority for government and for First Nations stakeholders across Australia.

This report also provides analysis of First Nations businesses in tourism-related industries. These businesses play an important role in supporting Australia’s gross tourism exports, which were valued at over \$39 billion prior to the COVID-19 pandemic.¹⁰

Over the 2020 to 2022 period, businesses had to navigate COVID-19 pandemic restrictions, extreme weather events and adjust to higher air and sea freight costs and disruptions. Therefore, the data analysed in this report may not represent a ‘typical’ six-year period for First Nations businesses verified by Supply Nation given the challenging global business environment at the time. The visitor economy has recovered and presents growing opportunities, noting total visitor spend is forecast to be 33% above pre-pandemic levels in 2024.¹¹

Snapshot of First Nations businesses in 2022-23

This section illustrates the attributes of the 2,609 First Nations businesses drawn from Indigenous Business Direct and analysed in this study.

\$9.6 billion in turnover
\$2.4 billion in wages
59,079 people employed (29,377 Full Time Equivalent Workers (FTEs))

The typical First Nations business

\$696,350 in turnover
\$128,960 in wages
3 people employed (1.4 FTEs)
\$92,225 FTE wage ¹²

Key trends over the period from 2017-18 to 2022-23¹³

The number of First Nations businesses has grown 13% per year from 1,442 to 2,609.
For the typical First Nations business, turnover has grown 8% per year from \$466,994 to \$696,350.
For the typical First Nations business, wages have grown 9% per year from \$83,176 to \$128,960.

Case study – Decor Systems



Decor Systems is Australia's premier supplier of architectural acoustic solutions, and a proudly First Nations-owned family business founded in 1972 by Robert Faulkes, with his son, current CEO David Faulkes, working alongside his own son, Mitchell.

Decor Systems collaborates with top architects, designers, and builders to create world-class acoustic solutions with its portfolio including notable projects such as the Sydney Theatre Company, the Eromanga Natural History Museum and Cairns Convention Centre.



Based on Darug land in Western Sydney, Decor Systems products are manufactured locally, and the company has successfully secured iconic international projects including the Royal Opera House London.

Decor Systems offer tailored solutions to meet diverse design and functional requirements working with international designers in locations such as New Zealand and London to deliver high-quality architectural acoustic products and is actively seeking to increase its international presence.

Top: Royal Opera House, London, above: Green Square Library. Images courtesy of Decor Systems



First Nations businesses in tourism-related industries

Tourism is important to the Australian economy particularly in our regional centres. Tourism can be a powerful way to connect with and share culture on Country. It is also a large source of employment. Ten per cent of First Nations businesses studied operate in tourism related industries.

Businesses in tourism-related industries in 2022-23

This section illustrates the characteristics of the 260 First Nations businesses identified as operating in tourism related industries.

Characteristics of businesses in tourism-related industries

\$999 million in turnover
\$246 million in wages
Employed almost 7,000 workers

The typical First Nations business

\$382,450 in turnover
\$135,344 in wages
Employed 8 people (3.5 FTEs)

Key trend over the three years to 2022-23^{13b}

The number of staff employed by First Nations businesses in tourism-related industries has grown 10% per year from 5,715 to 6,954.

Revenue from tourism

\$201 million in turnover was from domestic and international tourists in 2022-23.
The tourism contribution to turnover has grown 38% per year from \$106 million to \$201 million over the three years to 2022-23. ¹⁴



International visitors participating in First Nations cultural activities

The International Visitor Survey conducted by Tourism Research Australia shows more international visitors are participating in First Nations cultural activities.

In 2023, 15% of surveyed international visitors reported taking part in a First Nations cultural experience compared with 11% in 2019.¹⁵

International visitors	2018	2019	2023
Total Indigenous experiences reported by international visitors	979,163	961,418	970,026
The number of trips to Australia reported by international visitors	8,523,540	8,708,599	6,639,504
% of Indigenous experience to total trips by international visitors	11%	11%	15%

International visitor numbers by activity	2018	2019	2023
Experience Aboriginal art / craft and cultural displays	688,069	701,408	740,808
Visit an Aboriginal site / community	367,611	354,915	176,334
Attend Aboriginal performance	277,762	257,889	118,989
Go on a tour with an Aboriginal guide	n/a ¹⁶	n/a	78,668
Participate in traditional activities such as Welcome to Country, storytelling, smoking ceremonies, and other cultural activities	n/a	n/a	89,143
Have an Aboriginal food experience	n/a	n/a	54,798
Have a camping experience on Aboriginal land	n/a	n/a	37,654

Source: International Visitor Survey (2024), Tourism Research Australia

Case study – Voyages Indigenous Tourism Australia (Voyages)

Voyages is a First Nations business registered with Supply Nation. The company runs the Ayers Rock Resort, Mossman Gorge Cultural Centre and National Indigenous Training Academy (NITA). NITA has been helping young First Nations Australians forge careers in tourism and hospitality since 2011, and to date more than 600 First Nations people have graduated from NITA's courses and gained experience while undertaking an accredited training course in tourism and hospitality,

retail or landscaping. Voyages has employed many of these graduates with its Ayers Rock Resort being one of Australia's largest employers of First Nations hospitality staff.

Working in tourism can help First Nations people to stay on country and earn an income while sharing their culture and traditions. Visitors benefit from authentic immersive experiences they cannot get anywhere else in the world.

THRIVE 2030, the national visitor economy strategy prioritises First Nations participation in the visitor economy and aims to respectfully embed First Nations cultures in Australia's visitor economy experiences.

Uluru Kata Tjuta National Park, Yulara. Image courtesy of Tourism Australia



First Nations exporters of goods

Goods exporting businesses in 2022-23

This section illustrates the attributes of the 40 First Nations businesses identified as goods exporters.

\$670 million in turnover
\$17.9 million in goods exports
\$124 million in wages
2,369 people employed (1,588 FTEs)

First Nations goods exporters represent 1.5% of all First Nations businesses studied.

The top six export markets for Supply Nation verified exporters of goods are the United States, New Zealand, the United Kingdom, Singapore, Canada, and France.¹⁷ These businesses typically export one product to a single market.

The typical First Nations goods exporter

Exported \$14,558 in goods
Generated \$6.1 million in turnover
Paid \$1.2 million in wages
Employed 15 people (10.4 FTEs)
Exported to a single market
Exported one product

In 2022-23

Goods exporters employed more workers. The typical First Nations goods exporter employed 10.4 FTE workers, 7.5 times larger than what was typical for all First Nations businesses studied.
Goods exports represented 0.2% of business turnover for the typical First Nations goods exporter.
Turnover was \$6.1 million for the typical First Nations goods exporter, 8.7 times larger than what was typical for all First Nations businesses studied.

Key trend over the period from 2017-18 to 2022-23¹⁸

The number of goods exporters has grown 12% a year from 23 to 40 exporters.

Key trends over the period from 2018-19 to 2022-23¹⁹

The value of exports for the typical First Nations goods exporter decreased 12.3% per year from \$24,639 to \$14,558. This decrease coincided with an increase in the number of First Nations businesses exporting for the first time over this period.
Turnover has grown 21.2% per year from \$2.8 million to \$6.1 million for the typical First Nations goods exporter.
Wages have grown 25.5% per year from \$476,107 to \$1.2 million for the typical First Nations goods exporter.

Case study – Aldridge Railway Signals

Aldridge Railway Signals is a First Nations-owned and First Nations-run business certified by Supply Nation. This company has been manufacturing innovative railway signals and components since the early 1990s from its base in Western Sydney. As well as servicing the Australian market, Aldridge has supplied more than 8,000 signals and components for rail projects across Southeast Asia.

International trade has enabled Aldridge to access new customers, employ more First Nations and non-First Nations staff and diversify its revenue sources – so much so that in 2022, export markets made up 43% of Aldridge’s turnover.

The company has previously used Austrade’s Export Market Development Grants (EMDG) program to successfully market and promote products and services to customers throughout Asia.

Aldridge attribute its success internationally to its innovative products and services, the diligence of its team, and its investment in forging relationships with prospective clients. The company was named ‘Indigenous Exporter of the Year’ at Supply Nation’s Supplier Diversity Awards in Sydney in August 2023. The Award was sponsored by Austrade.



First Nations importers of goods

Goods importing businesses in 2022-23

This section illustrates the attributes of the 131 First Nations businesses identified as goods importers.

\$1.2 billion in turnover
\$33.4 million in goods imports
\$312.3 million in wages
7,981 people employed (4,192 FTEs)

First Nations goods importers represent 5% of all First Nations businesses studied.

The typical First Nations goods importer

\$28,096 in goods imports
\$3.1 million in turnover
\$444,994 in wages
9 people employed (6.0 FTEs)
\$74,476 FTE wage
1 import market
2 imported products

In 2022-23

First Nations goods importers employed more workers, with the typical First Nations goods importer employing 6.0 FTE workers, which was 4.3 times larger than what was typical for all First Nations businesses studied.
Turnover for the typical First Nations goods importer was \$3.1 million, which was 4.4 times larger than what was typical for all First Nations businesses studied.

Key trends over the period from 2017-18 to 2022-23²⁰

The number of First Nations goods importers has grown 9.8% per year from 82 to 131.
Turnover for the typical First Nations goods importer has grown 15.7% per year from \$1.5 million to \$3.1 million.
Wages for the typical First Nations goods importer has grown 11.4% per year from \$259,462 to \$444,994.
FTE workers for the typical First Nations goods importer has grown 6.2% per year from 4.4 to 6.0.

Conclusion

First Nations businesses engaged in international trade in goods and tourism make a valuable contribution to their local communities and the broader Australian economy. These activities create jobs and positively contribute to Australia's economic activity through international goods exports and attracting tourism.

First Nations goods exporters and importers are typically larger when compared with all First Nations businesses studied, employing more staff and generating higher turnover. This illustrates the benefits of supporting First Nations firms to become 'export ready' and 'go international.'

There is significant opportunity for First Nations businesses to benefit more from exporting. In our sample only 1.5% export goods and goods export sales typically represent a small portion of total sales for most First Nations exporters studied.

Increased international visitor interest in First Nations cultural tourism experiences represents growth opportunities for the sector. These experiences are a drawcard for Australia's international visitors and help sustain our gross tourism exports valued at \$39 billion.²¹ In our sample the turnover generated by First Nations businesses from tourism has grown significantly in recent years, with increased interest from international visitors supporting this trend.

Case study – Kakadu Organics – Landing Pad program

Kakadu Organics is a First Nations-owned company producing a wide range of native bush foods and wellness products. Its product range features native ingredients and traditional knowledge taught and passed down through generations. Kylie-Lee Bradford is the First Nations founder who partners with First Nations farmers around Australia to produce its range of food and condiments which includes native spices, relish jams and pickles as well as native teas.

The Queensland-based company has used Austrade’s Go Global Toolkit to evaluate potential export markets and develop an export strategy. In 2023, Kylie-Lee participated in Austrade’s Singapore Landing Pad Program, where she was able to establish connections that resulted in Kakadu Organics’ first export outcome with Ryan’s Grocery.

The Singapore Landing Pad partnered with DFAT and its Office of First Nations International Engagement, supported by Ambassador Justin Mohamed, to run a hybrid program for nine First Nations companies to assist them with exporting, specifically targeting market entry to Singapore and Southeast Asia.

Kakadu Organics exporting to South East Asia. Image courtesy of Austrade



References

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Appendices

Appendix A: Sample of businesses studied

Our analysis expands upon the methodology of Bernard and Jensen (1999) and Tuhin and Swanepoel (2017) which analysed exporting firms which shared their Australian Business Number (ABN) on their Export Declaration form, and provided their ABN to the Australian Taxation office (ATO) in their Business Activity Statement. By drawing upon this approach we can access detailed financial information and generate the most comprehensive insights on Supply Nation verified businesses who are importers and exporters of goods and tourism operators.

To analyse the performance of a sample of Supply Nation verified businesses, the research team used a combination of data (the combined dataset) from three sources:

Indigenous Business Direct Database

Supply Nation is the custodian of Indigenous Business Direct – the largest database of verified Aboriginal and Torres Strait Islander businesses. Businesses meeting First Nations ownership criteria are eligible for verification and inclusion in the Indigenous Business Direct database. Indigenous Business Direct is supported by the Australian Government.

The ABS's Business Longitudinal Analysis Data Environment (BLADE)

This paper uses data located within BLADE that integrates several administrative firm-level datasets. Within BLADE, the analysis draws on tax data from the Business Activity Statement (BAS), payroll data from pay as you go (PAYG), firm characteristics data from the Australian Business Register and merchandise trade data from the Australian Border Force (ABF) Integrated Cargo System customs database for the financial year 2022-23.

Data linkage occurs by using the Australian Business Number (ABN) as the primary linking variable. This process removed First Nations businesses verified by Supply Nation which did not supply their ABNs in BLADE. For illustration, of the over 4,000 First Nations businesses verified by Supply Nation, only 3,381 were identified in BLADE during the period 2017-18 to 2022-23.

The sample

From the combined dataset, we excluded any nil-turnover firms. Among the 3,381 Supply Nation businesses identified in BLADE, 3,084 reported positive turnover in at least one of the financial years between 2017-18 and 2022-23 with 2,609 reporting positive turnover in 2022-23 and included in our sample. This sample allows the research team to access relevant data on these businesses to support the research objectives.

The specific data items utilised in the analysis are sourced as listed below:

- Business Activity Statement (BAS) – submitted by firms to report their GST obligations; data items include total sales, wages, capital and non-capital purchases.
- Pay as you go (PAYG) – provided by firms as an employer responsibility to help meet end of year tax liabilities for employees; this is used to determine the headcount and full-time equivalency of employment.
- Indicative Data Items – collected through the Australian Business Register for information on industry division, state of operation, and alive status.
- Export goods trade – Free on Board (export) value reported on a firm's Export Declaration.
- Import goods trade – Customs value reported on a firm's Import Declaration.

This analysis excludes First Nations businesses that:

- have 50% or more First Nations ownership but have not sought a Supply Nation registration
- have less than 50% First Nations ownership
- have not lodged a Business Activity Statement in the relevant year
- have nil-turnover in the relevant year

Due to the scope of 'Indigenous Business Direct' and the process of linking datasets using ABNs, the combined dataset understates the true size of the First Nations business sector. Furthermore, challenges associated with collecting services data means First Nations businesses which export or import services only are excluded from the sample. Consequently, this report's findings are not representative of the entire population and caution is required against generalisations.

Appendix B: Methodology

The focus of this analysis is 2022-23, as the most recent year with full financial year data available within BLADE.

Figures are recorded as nominal values and reported annually by financial year. All monetary values quoted in the report are Australian dollar values.

The term 'goods exports' refers to goods which are sent out of Australia permanently.

Unless otherwise indicated, this report cites aggregated data that complies with the ABS's confidentiality requirements and does not draw attention to individual businesses.

2020 to 2022 is a non-typical period for analysis, given the significant impacts of the COVID-19 pandemic on businesses, and the Australian economy overall.

Exporters definition:

In our analysis, we define 'exporters' as firms which have export sales greater than \$2,000 in a given financial year and that supplied an ABN both to the ATO and ABF. Due to problems with collecting services exports data, the data used in this report captures goods exports only. Due to the function of export documentation data provided by the ABF, First Nations export businesses that use a freight forwarder or wholesalers may not be recognised as exporters under this definition.

Importers definition:

In our analysis, importers are defined as those firms which imported more than \$2,000 in a single financial year and that supplied an ABN to the ATO and ABF. Due to problems with collecting services imports data, the data used in this report captures goods imports only.

Tourism-related industries:

Under the ABS's methodology, tourism is implicitly included in the core Australian System of National Accounts but not identified as an industry in the industrial statistical classification. This stems from the fact that industries are classified by the types of goods and services they produce, while tourism is defined based on the status of the consumer being a tourist or non-tourist.

Appendix C shows the correspondence developed by the ABS between tourism-related industries and industries in the Australian and New Zealand Standard Industrial Classification (ANZSIC).

Count of businesses in tourism-related industries:

Appendix D shows the list of industries included in the count of businesses in tourism-related industries. This follows the Business Count Concordance method developed by Tourism Research Australia (TRA).

The Business Count Concordance uses a narrower list of industries than Appendix C. TRA has removed tourism-related industries that had a large number of businesses and tourism contributed less than 5% to the individual industry's gross value added (GVA).

Consequently, the count of businesses excludes the following industries:

- Ownership of dwellings, with tourism's contribution to total GVA representing 2.1% in 2020-21.
- Other road transport, which is mainly private freight services (largely 'truckies') and had a reliance on tourism of 1.6% in 2020-21.
- Education and training, which had only a 0.3% reliance on tourism in 2020-21.

In this report, the Business Count Concordance and Appendix D applies to the tourism business count metric only.

Metrics for tourism-related industries

Unless otherwise indicated for businesses in tourism-related industries, values including turnover, wages and number of people employed pertain to both tourism and non-tourism elements of businesses. The 'tourism contribution' specifically identifies tourism activities of businesses. The tourism contribution is estimated by multiplying turnover, wages and number of people employed by the tourism industry ratio. The tourism industry ratio is based on tourism's contribution to industry gross value added (GVA) in 2020-21.

Median – the middle value

When describing the typical attributes of an exporter or importer of goods or a business in tourism-related industries we have elected to use the median, or 'middle' value, rather than the mean value, to better account for the wide diversity in the cohort. While the vast majority of Supply Nation members are small to medium-sized enterprises, there are a number of large member businesses and using the median is more effective when there are extreme values, either very small or very large. Using the mean for this cohort would have skewed the results upwards, by overweighting the impact from the large businesses.

Disclaimer

The results of these studies are based, in part, on data supplied to the ABS under the Taxation Administration Act 1953, A New Tax System (Australian Business Number) Act 1999, Australian Border Force Act 2015, Social Security (Administration) Act 1999, A New Tax System (Family Assistance) (Administration) Act 1999, Paid Parental Leave Act 2010 and/or the Student Assistance Act 1973. Such data may only be used for the purpose of administering the Census and Statistics Act 1905 or performance of functions of the ABS as set out in section 6 of the Australian Bureau of Statistics Act 1975. No individual information collected under the Census and Statistics Act 1905 is provided back to custodians for administrative or regulatory purposes. Any discussion of data limitations or weaknesses is in the context of using the data for statistical purposes and is not related to the ability of the data to support the Australian Taxation Office, Australian Business Register, Department of Social Services and/or Department of Home Affairs' core operational requirements.

Legislative requirements to ensure privacy and secrecy of these data have been followed. For access to PLIDA and/or BLADE data under Section 16A of the ABS Act 1975 or enabled by section 15 of the Census and Statistics (Information Release and Access) Determination 2018, source data are de-identified and so data about specific individuals has not been viewed in conducting this analysis. In accordance with the Census and Statistics Act 1905, results have been treated where necessary to ensure that they are not likely to enable identification of a particular person or organisation.

Publication enquiries

Please direct any questions on this report to data@dfat.gov.au and EIDEEconomics@austrade.gov.au.

Appendix C: Tourism industry correspondence

Correspondence between tourism-related industries and industries in the Australian and New Zealand Standard Industrial Classification (ANZSIC)

Characteristic and connected tourism industries	ANZSIC code	ANZSIC industry
Accommodation	44	Accommodation
Ownership of dwellings	6711	Residential property operators
Cafes, restaurants and takeaway food services	451	Cafes, restaurants and takeaway food services
Clubs, pubs, taverns and bars	452	Pubs, taverns and bars
Clubs, pubs, taverns and bars	453	Clubs (hospitality)
Taxi transport	4623	Taxi and other road transport
Other road transport	4621	Interurban and rural bus transport
Other road transport	4622	Urban bus transport (including tramway)
Air, water and other transport	472	Rail passenger transport
Air, water and other transport	482	Water passenger transport
Air, water and other transport	49	Air and space transport
Air, water and other transport	501	Scenic and sightseeing transport
Transport equipment rental	6611	Passenger car rental and hiring
Travel agency and information centre services	722	Travel agency and tour arrangement services
Travel agency and information centre services	7299	Other Administrative Services n.e.c.
Cultural services	89	Heritage activities
Cultural services	90	Creative and performing arts activities
Casinos and other gambling services	92	Gambling activities
Sports and recreation services	91	Sports and recreation activities
Automotive fuel retailing	40	Fuel retailing
Other retail trade	39	Motor vehicle and motor vehicle parts retailing
Other retail trade	41	Food retailing
Other retail trade	42	Other store-based retailing

Characteristic and connected tourism industries	ANZSIC code	ANZSIC industry
Other retail trade	43	Non-store retailing and retail commission based buying and/or selling
Education and training	80	Preschool and school education
Education and training	81	Tertiary education
Education and training	82	Adult, community and other education
All other industries		All other industries

Source: *Australian National Accounts: Tourism Satellite Account methodology, 2022-23 financial year* | Australian Bureau of Statistics (abs.gov.au)

Appendix D: Business Count Concordance

Tourism-related industries included in the count of businesses

Tourism-related industries	ANZSIC code
Accommodation	44
Cafes, restaurants, and takeaway foods	451
Pubs, taverns and bars	452
Clubs (hospitality)	453
Rail transport	47
Taxi and other road transport	4,623
Water transport	48
Air and space transport	49
Other transport	50
Passenger car rental and hiring	6,611
Travel agency and tour management services	722
Heritage activities	89
Creative and performing arts activities	90
Gambling activities	92
Sports and recreation activities	91
Fuel retailing	40
Motor vehicle and motor vehicle parts retailing	39
Food retailing	41
Other store-based retailing	42
Non-store retailing and retail commission based buying and/or selling	43

Source: Tourism Research Australia (2024) Business Count Concordance

Appendix E: Data in table format

In this section, n/a denotes that numbers have been suppressed as they do not meet the ABS's confidentiality requirements.

Summary Statistics – First Nations businesses in our combined dataset

Number of unique businesses over FY18-FY23 period: 3,381

	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Number of FN businesses	1,650	1,958	2,324	2,743	3,051	3,048

Summary Statistics – First Nations businesses in our sample

Filter: Turnover >\$0

Number of unique businesses over FY18-FY23 period: 3,084

Turnover >\$0	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Number of FN businesses	1,442	1,686	1,994	2,332	2,616	2,609
Total turnover	\$3,605m	\$4,072m	\$5,017m	\$5,909m	\$8,423m	\$9,573m
Total headcount	26,745	30,283	36,239	46,058	55,820	59,079
Total FTEs	14,109	16,109	18,969	22,335	27,191	29,377
Total wages	\$979m	\$1,124m	\$1,352m	\$1,603m	\$2,028m	\$2,416m
Median turnover per FN business	\$466,994	\$446,398	\$438,076	\$447,151	\$517,619	\$696,350
Median headcount per FN business	2	2	2	2	3	3
Median FTE per FN business	0.93	1.00	1.25	1.27	1.35	1.40
Median wages per FN business	\$83,176	\$85,930	\$87,605	\$90,381	\$102,191	\$128,960

Summary Statistics – First Nations goods exporting businesses in our sample

Filter: Turnover >\$0 and Exports value >\$2,000

Number of unique FN exporting businesses over FY18-FY23 period: 80

Turnover >\$0 and Exports value >\$2,000	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Number of businesses	23	25	26	25	33	40
Total turnover	n/a	\$142m	\$151m	\$140m	n/a	\$670m
Total exports value	n/a	\$5.8m	\$7.2m	\$11.9m	\$7.4m	\$17.9m
Total headcount	n/a	614	815	692	1,240	2,369
Total FTEs	n/a	363	410	360	690	1,558
Total wages	n/a	\$27m	\$32m	\$33m	\$61m	\$124m
Median turnover	n/a	\$2.8m	\$4.0m	\$3.6m	n/a	\$6.1m
Median export value	n/a	\$24,639	\$68,360	\$36,534	\$38,509	\$14,558
Median number of export markets	n/a	2	1	1	1	1
Median number of export products	n/a	2	2	1	2	1
Median headcount	n/a	9	14	14	12	14.5
Median FTE	n/a	7.6	9.7	8.2	7.5	10.4
Median wages	n/a	\$476,107	\$552,313	\$604,303	\$610,623	\$1,180,004

Summary Statistics – First Nations goods importing businesses in our sample

Filter: Turnover >\$0 and Imports value >\$2,000

Number of unique FN importing businesses over FY18-FY23 period: 277

Turnover >\$0 and Imports value >\$2,000	2017-18	2018-19	2019-20	2020-21	2021-22	2022-23
Number of businesses	82	80	94	113	124	131
Total turnover	\$439m	\$312m	\$736m	\$466m	\$1,102m	\$1,222m
Total imports value	\$8.1m	\$7.9m	n/a	\$19.0m	n/a	\$33.4m
Total headcount	3,815	1,724	4,843	2,796	3,718	7,981
Total FTEs	2,241	1,135	2,825	1,479	2,132	4,192
Total wages	\$134m	\$76m	\$197m	\$110m	\$182m	\$312m
Median turnover	\$1.5m	\$1.5m	\$2.2m	\$1.7m	\$3.2m	\$3.1m
Median imports value	\$24,005	\$26,202	\$22,929	\$27,781	n/a	\$28,096
Median number of import markets	1	1	1	1	1	1
Median number of import products	2	2	2	2	2	2
Median headcount	9	7	9	5	12	9
Median FTE	4.42	4.22	5.60	3.56	6.99	5.98
Median wages	\$259,462	\$276,618	\$329,908	\$276,601	\$462,376	\$444,994

Summary Statistics – First Nations businesses in tourism-related industries in our sample

Filter: Turnover >\$0

Turnover >\$0	2020-21	2021-22	2022-23
Number of businesses	254	278	260
Value pertaining to tourism and non-tourism activities			
Turnover	\$689m	\$840m	\$999m
Headcount	5,715	6,750	6,954
FTEs	2,549	3,032	3,329
Wages	\$175m	\$205m	\$246m
Median turnover	\$217,671	\$273,127	\$382,450
Median headcount	7	7	8
Median FTE	2.71	2.93	3.46
Median wages	\$120,870	\$120,908	\$135,344
Value pertaining to tourism activities			
Tourism contribution in turnover	\$106m	\$151m	\$201m

Number of First Nations businesses by state

Filter: Turnover >\$0

Business count	2020-21	2021-22	2022-23
Unknown	19	296	n/a
NSW	710	717	684
VIC	165	159	146
QLD	519	515	473
SA	101	101	93
WA	486	495	457
TAS	12	13	n/a
NT	207	208	195
ACT	113	112	101
Total	2,332	2,616	2,609

Number of First Nations businesses in tourism-related industries by state

Filter: Turnover >\$0

Business count	2020-21	2021-22	2022-23
Unknown	n/a	n/a	n/a
NSW	72	74	65
VIC	27	24	21
QLD	65	64	61
SA	14	13	12
WA	36	38	31
TAS	n/a	n/a	n/a
NT	21	20	18
ACT	n/a	n/a	n/a
Total	254	278	260

Number of First Nations goods exporting businesses by state

Filter: Turnover >\$0 and Export value >\$2,000

Business count	2021-22	2022-23
Unknown	n/a	n/a
NSW	13	16
VIC	n/a	n/a
QLD	n/a	n/a
SA	n/a	n/a
WA	n/a	n/a
TAS	n/a	n/a
NT	n/a	n/a
ACT	n/a	n/a
Total	33	40

Number of First Nations goods importing businesses by state

Filter: Turnover >\$0 and Imports value >\$2,000

Business count	2020-21	2021-22	2022-23
Unknown	n/a	n/a	n/a
NSW	27	26	32
VIC	10	11	n/a
QLD	32	35	30
SA	n/a	n/a	n/a
WA	22	26	27
TAS	n/a	n/a	n/a
NT	11	14	11
ACT	n/a	n/a	n/a
Total	113	124	131

Number of First Nations goods exporting and goods importing businesses by age group in FY22-23

Filter: Turnover >\$0 and Exports value >\$2,000 or Imports value >\$2,000

Age group	Number of FN goods exporting businesses	Number of FN goods importing businesses
Over 6 years old	30	>70
6 years old or less	10	50
Unknown	0	<10
Total	40	131

End notes

1. Economic empowerment for Indigenous Australians - Address to the Garma Festival | Prime Minister of Australia (pm.gov.au) www.pm.gov.au/media/economic-empowerment-indigenous-australians-address-garma-festival
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5. Cairney et al. (2023)
6. Internal analysis conducted by Supply Nation in 2022.
7. Hunter (2014)
8. Austrade (2022)
9. OECD (2024)
10. ABS (2023a). Refers to the ABS's 2018-19 estimate of tourism's direct contribution to international consumption.
11. TRA (2024c)
12. Median FTE wage is calculated by dividing median wage per business by median FTE per business.
13. Refers to the compound annual growth rate. Figures are in nominal terms.
14. Refers to the compound annual growth rate. Figures are in nominal terms. Note total tourism spend in Australia was heavily impacted in 2020 and 2021 by the COVID19 pandemic, see TRA (2024c).
15. TRA (2024b)
16. 'n/a' denotes that these questions formed part of the survey in later years.
17. Internal analysis conducted by Supply Nation in 2022.
18. Refers to the compound annual growth rate.
19. Refers to the compound annual growth rate. Figures are in nominal terms.
20. Refers to the compound annual growth rate. Figures are in nominal terms.
21. ABS (2023a). Refers to the ABS's 2018-19 estimate of tourism's direct contribution to international consumption.

Austrade's Go Global Toolkit - tools and support to help your business export, grow and diversify. Visit export.business.gov.au. First Nations businesses registered or certified with Supply Nation can access the Export Nation (supplynation.org.au/resources/export-nation/) platform for advice on selling products and services internationally.

For further information on DFAT's First Nations trade and investment agenda visit: First Nations Trade | Australian Government Department of Foreign Affairs and Trade (dfat.gov.au/trade-and-investment/first-nations-trade).

