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1.0 Introduction

Agribusiness is a fundamental part of the Macedon Ranges' economy, identity and history. The Macedon Ranges Shire Council recognises this and has made agribusiness[1] a key focus to its Economic Development Strategy (2009-2019).

This document, the Macedon Ranges Agribusiness Plan, is the result of research; industry consultation; and economic modelling and analysis[2]. It is the culmination of ongoing efforts by the Shire to support the agribusiness sector in its endeavours to overcome challenges and make the most of emergent opportunities. The Plan is guided by the principles and actions of the Economic Development Strategy 2009-2019, which, amongst other things, commits the Shire to:

- Assist in establishing a Macedon Ranges agribusiness network;
- Update the type and nature of information available to the agribusiness sector;
- Assist agricultural industries to invest in sustainable new developments with consideration to limiting impacts on residents, landscape quality and the general environment;
- Support value adding to local agricultural produce where possible; and
- Assist agricultural industries meet their employment and training needs.

To achieve this, the Plan focuses on:

1. Summarising the evidence base for identifying constraints, opportunities and priorities for the agribusiness sector and for the role of the Shire and other government agencies in assisting the industry to move forward.
2. A set of prioritised recommendations for the Shire to work with the industry and other government agencies over the next 5 years.

1.1 Background

The Shire's population is expected to grow by another 14,000 residents between now and 2036

Between 2001 and 2011 the Macedon Ranges Shire's population increased from 35,600 to over 41,000 (ABS, 2011) and by 2036 there may be another 14,000 new residents in the Shire (Macedon Ranges Shire Council, 2009). The pace of change has put pressure on the agribusiness community through competing demand for land, infrastructure and services. It also compels the Shire to manage growth effectively and assist all industries and residents to thrive and prosper.

Part of the reason for this rapid local change is the larger-scale transformations that are creating challenges and opportunities for the agribusiness sector, not only in the Macedon Ranges, but globally. These include:

- The growth of global demand for agricultural produce and the global competition for agricultural markets;
- Volatile but generally downward trending profit margins;
- Climate change;
- The move towards more technologically-driven, less labour-intensive agricultural practices;
- Changing preferences for different types of rural living and new employment profiles in regional settings; and
- An ageing agribusiness workforce.

[1] This Plan does not apply to the Equine Industry, which is addressed through a separate document, the Macedon Ranges Equine Strategy (2012).
[2] A regional economic model was developed during this project to estimate the size of the industry sectors in the Macedon Ranges.

Agribusiness is an important part of the Shire's economy, with nearly 500 people employed directly in agricultural related industries and more than $73 million in gross regional product (GRP)[3] (Geografia, 2013). With 85% of the land in the Macedon Ranges Shire zoned for agricultural use[4], it is understandable that any changes in the industry have ramifications for the entire community.

This Plan provides a framework and set of strategic recommendations to benefit the agribusiness sector, and by implication, the wider community.

How the Plan was Developed

Compiling the Agribusiness Plan was a process of data and information gathering, analysis and issues prioritisation and resolution. The three primary sources of information were: existing data and research on the agribusiness sector; Council staff; and the agribusiness community. The process of synthesising the ideas and insights from these three sources into the Plan involved:

Over 1,450 people were invited to participate in the Agribusiness online survey

1. Background research, primarily of policy and research documents, and data compilation to outline the context.
2. An Investment Logic Mapping session[5] with Council staff to clearly identify the issues *from a Council perspective*.
3. A survey of the agribusiness industry to gather views on the constraints and opportunities (refer to Appendix for survey questions and results)[6].
4. A workshop with agribusiness and community members to validate, discuss and expand on the survey findings.
5. The preparation of a draft plan for Council.
6. The public release of the Draft Plan for comment.

The co-operation of the agribusiness industry was essential to the preparation of this Plan. Through the survey and workshop, contributions from the agribusiness community and Council staff generated a range of options and ideas and this Plan is a synthesis of these outcomes.

[3] Gross Regional Product: the sum of all value added by all industries within the Macedon Ranges. As part of this project, a regional economic model was constructed and used to estimate the size of the Shire's economy by major industry sector. The $73million refers to the agriculture, forestry and fishing industry division. Note that it is not directly comparable with the estimate of the size of the equine industry (see Equine Strategy, 2012) as this was composed of an amalgam of different industries and activities.
[4] That is, zoned Farming, Rural Living and Rural Conservation.
[5] This is a methodology developed by the Victorian Department of Treasury and Finance to guide strategic thinking about the benefits of investing in new policies or infrastructure.
[6] The survey and workshop were extensively promoted through existing agribusiness networks and businesses, local radio, print and social media, onsite promotion and via a mail out to 1,454 Macedon Ranges land holders of land that permits agricultural use. 29% of non-equine agribusiness enterprises responded to the survey, providing a very reliable statistical sample that was then validated against independent ABS survey data to ensure the views expressed were a statistically significant representation of industry sentiment.

1.2 The Plan's Objectives

The Shire's Economic Development Strategy recommended the preparation of a Macedon Ranges Agribusiness Plan. The Plan needed to:

Preparation of the Agribusiness Plan was a recommendation of the Shire's Economic Development Strategy

1. Be developed in a way that integrated the views and expectations of the community.
2. Result in a mechanism through which the Council can provide appropriate leadership across the Shire.
3. Contribute to the goal of economic vitality through sustainable principles.
4. Demonstrate responsible governance.
5. Contribute to the Shire's economic development objectives, specifically:
   a. Marketing and promoting the Macedon Ranges' unique identity.
   b. Working with businesses to develop the economy consistent with the Shire's broader values.
   c. Developing an agribusiness network suited to the needs of the sector.
   d. Updating the information available to the agribusiness sector to support its activities.
   e. Assisting the sector to meet its recruitment, education and training needs.
   f. Supporting value-adding activities where possible.
   g. Assisting the agribusiness sector to invest in sustainable new developments that limit adverse impacts on landscape quality and the general environment.

The first step in the process of preparing the Plan involved an Investment Logic Mapping (ILM) session. This session focused on clearly articulating the Council's objectives for the Plan. Figure 1 shows the outcome of this process.

The two equally important priority challenges identified in the ILM process were:

1. The environmental, demographic, economic and technology changes that are threatening the sustainable presence of agribusiness in the Shire.
2. The impact of land fragmentation on agricultural activity.

Five strategic responses for Council were identified. These were (in order or priority):

Council identified five strategic responses that could assist the agribusiness sector to thrive and prosper

1. Understanding the available resources and interfaces between the agribusiness sector and the rest of the community.
2. Determine best use of land in the Shire.
3. Attract new and support existing agribusiness investment in the region.
4. Improve awareness of the benefits of Macedon Ranges agribusiness.
5. Create a Macedon Ranges agribusiness identity.

The development of the recommended actions in this Plan has taken into account these concerns and strategic responses. These have been weighted against the priorities of the agribusiness industry as identified through the online survey and industry workshop. In combination they form the focus of the Plan's objectives and strategic recommendations.

Figure 1
Agribusiness Plan
ILM

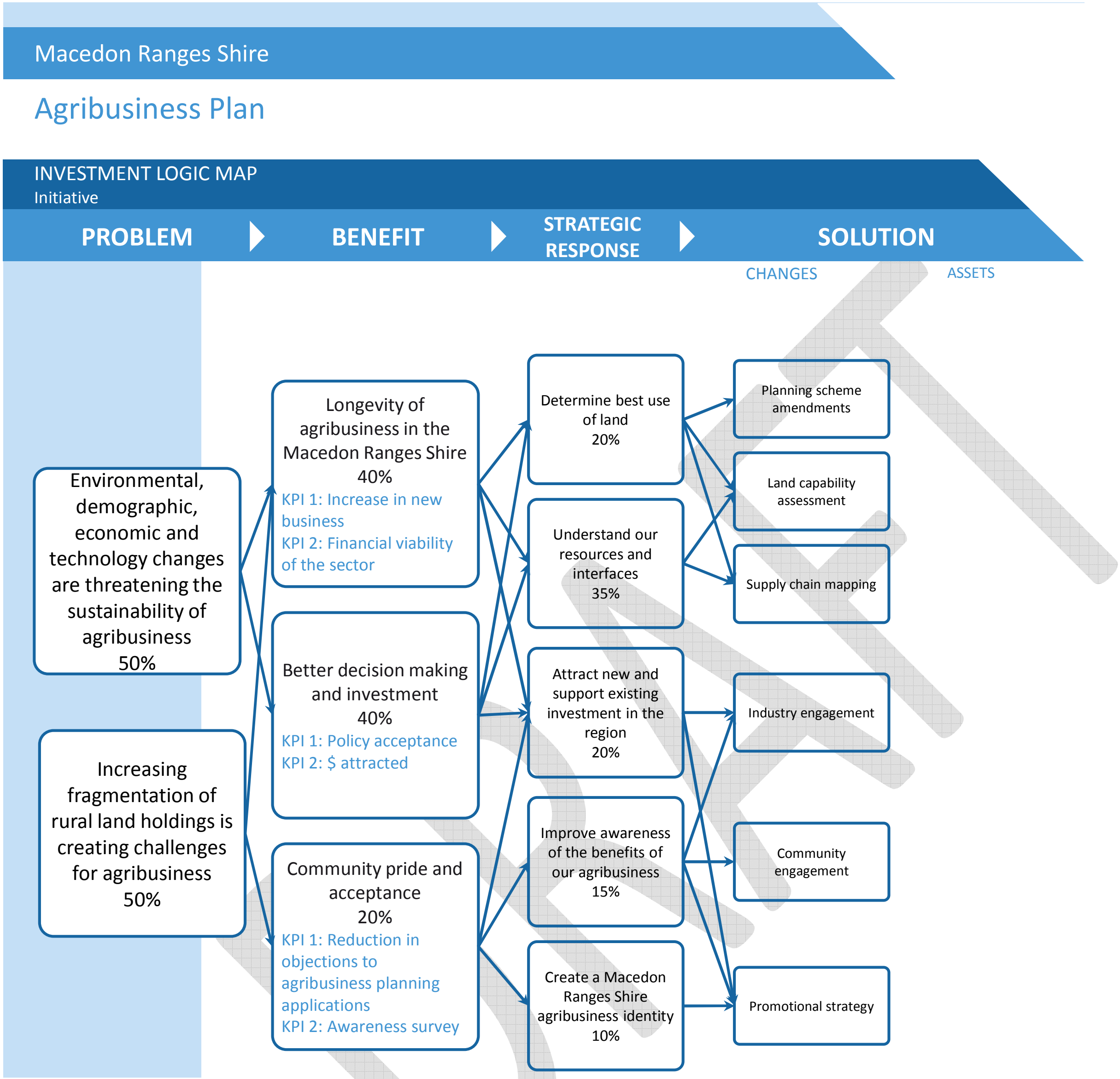

Figure 1 is the investment logic map from the Council project inception problem definition workshop. It is the outcome of a structured session that focuses on the 'problems' the project is intended to resolve. During the course of the project, the issues and priority solutions change in response to industry views. Note that this session was independently facilitated.

1.3 Summary of Findings

Through the process of consultation, analysis and research, a set of clear priorities and recommendations were developed. These have been aligned to a set of four objectives as follows:

1. **A Landscape in Transition...**
   - Although new activities are growing, the agribusiness sector is still dominated by livestock (broadacre) farming. While this is the case, supporting livestock farming should remain a central part of the Shire's strategic planning for agribusiness.
   - Notwithstanding the concerns about the ageing of the workforce and the lack of interest in agribusiness career opportunities amongst young people, currently, *most* Macedon Ranges agribusiness operators do not consider skills or labour shortages (with the exception of shearers) to be a major constraint. However, the imminent retirement of a large (albeit unknown) proportion of the workforce and the growing importance of product diversification and higher productivity creates a medium-term challenge for succession planning and ready access to training, particularly in light of the national policy to significantly increase food and fibre production.
   - With the exception of water availability, most of the main constraints on industry expansion derive from the rapid change in land use in the Shire and the flow-on effect, particularly on land prices. There are also compounding effects relating to weed and pest management, land management compliance, the perceived loss of focus on essential infrastructure provision for the agribusiness sector (e.g. roads, verge management and the Kyneton Saleyards) and subdivision regulations.

2. **Creating Opportunities for New Growth...**
   - The agribusiness sector's supply chain is well integrated within the Shire, with most input suppliers and markets locally-based.
   - There is a growing number of operators moving into the region who are willing to test the viability of new commodities, new production techniques and new ways to market.
   - Most enterprises have low turnover and rely on off-farm income. In most instances, turnover correlates with the size of landholdings. However, this is not so for intensive agribusiness practices (e.g. apiaries and vineyards), which require less land. The access to Melbourne and high rural amenity values are considered competitive advantages for new forms of agribusiness.

3. **Contingent on Effective Information Provision....**
   - As some new farming activities are more land intensive than broadacre, they require different support structures and specific information about farming practices. This requires increased awareness about supply chains, land capability, zoning and other regulatory matters. It highlights the need for good communication networks and information bases.

4. **Requiring Better Communication and Facilitation**
   - Most of the agribusiness community see value in there being a single Macedon Ranges agribusiness forum, even those who are currently not members of any official associations or forums.

Overall, then, the sector see the role of Council to work as a facilitator and as a communication and information broker between industry, the community and government.

2.0 Overview of the Industry

There are three important points to consider about the status of the agribusiness industry:

1. Agribusiness is an important part of the Australian economy and in the Macedon Ranges.
2. Agribusiness has undergone significant change that has affected its nature and its geography.
3. Peri-urban municipalities like the Macedon Ranges are at the coalface of this change and in some respects, lead the policy and physical responses to these changes.

2.1 The Importance of Agribusiness

In 2011 over 32,000 Victorian enterprises generated a gross value of $11.6 billion in agricultural output (ABS, 2011). This was worth 2.6% of the State's GSP[7]. When including off-farm income from agribusiness producers[8] The Macedon Ranges' contribution to this was around 0.8% ($73 million) (Geografia, 2013) and it encompasses about 0.9% of Victoria's total agricultural landholdings (ABS, 2011).

Overall, the agribusiness sector account for almost 9% of the Shire's GRP, which is equivalent in value to the size of the local manufacturing sector, close to construction (at 10%) and almost equivalent to retail and accommodation, food and hospitality combined (Geografia, 2013). At the last Census, agribusiness directly employed over 500 residents or 2.7% of the Shire's workforce. By comparison, manufacturing employed 1,900 residents (of whom about one third were engaged in food and fibre manufacturing) and construction employed 2,200 residents (ABS, 2011).

Almost twice the proportion of Agribusiness workers live and work in the Shire than workers in other industry sectors

There is also a strong association between local jobs and the resident workforce. A higher proportion of agribusiness workers both live and work in the Macedon Ranges than workers in any other industry sector (ABS, 2011). This is called the 'Employment Self-Containment' ratio. For example, while half of the Macedon Ranges' total resident workforce are employed in the Shire (and the rest commute to other municipalities), 93% of agribusiness workers live and work locally. Agribusiness also has twice as many jobs per resident worker in the Shire than other industries (this is called 'Employment Self-Sufficiency').

These and other lead indicators of the economy are summarised in Table 1 (overleaf). They highlight how important agriculture is to the economy and to the working residents of the Macedon Ranges. This makes a strong case for explicit policy and resource support for agribusiness in the Shire, particularly in view of the renewed interest in the sector at the State and National level (see Section 2.3).

For every $1 spent in agribusiness in the Macedon Ranges, $1.96 in economic activity is generated

Agribusiness also extends its importance across the rest of the economy. With an estimated multiplier of 1.96 (Geografia, 2013), for every $1 spent by agribusiness, $1.96 in economic activity is generated. This occurs through transactions with manufacturing; wholesale trade; transport; finance; and professional services as well as directly through the wages of the agribusiness workforce. Even without considering the contribution to rural amenity, agribusiness is an important part of the Shire's economy.

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[7] Gross State Product: the sum of all value added by all industries within Victoria. A similar concept to GRP, but applied to larger areas – in this case the State of Victoria.
[8] This may include income derived from agribusiness properties outside of the Shire and small-scale producers (i.e. under $5,000 per annum turnover).

Table 1 Macedon Ranges Lead Indicators

Indicator	Macedon Ranges	State
Total GSP/GRP	$837.5m	$322,833m
Agribusiness GSP/GRP	$73.2m (8.7%)	$8,220m (2.6%)
Total Enterprises	4,492	2,132,431
Agribusiness Enterprises	654 (14.6%)	135,654 (6.4%)
Total employment (place of residence)	20,210	2,519,993
Agribusiness employment	550 (2.7%)	56,049 (2.2%)
Total employment (place of work)	10,616	2,451,896
Agribusiness employment	506 (4.8%)	55,033 (2.2%)
Total Employment Self-Containment	53%	
Agribusiness Sector	93%	-
Employment Self-Sufficiency	40%	
Agribusiness Sector	82%	-

Data Source: ABS, 2011; Geografia, 2013

2.2 The Changing Global and Local Context

By global standards, Australia's agribusiness industry is efficient and competitive. However, the opportunity to sell into global markets comes with the pressure to reduce production costs to maintain margins. One of the manifestations of this is labour productivity.

Over the last 60 years, the size of Australia's workforce has increased from a little over 3.7 million people to over 10 million at the 2011 Census. As Figure 2 shows, during this period the agriculture forestry and fishing industry workforce declined both in absolute terms (from 493,000 to 249,000) and relative terms (from 13% to 2.5% of the national workforce) (ABS, 2011).

Figure 2 National Agribusiness Workforce 1954-2011

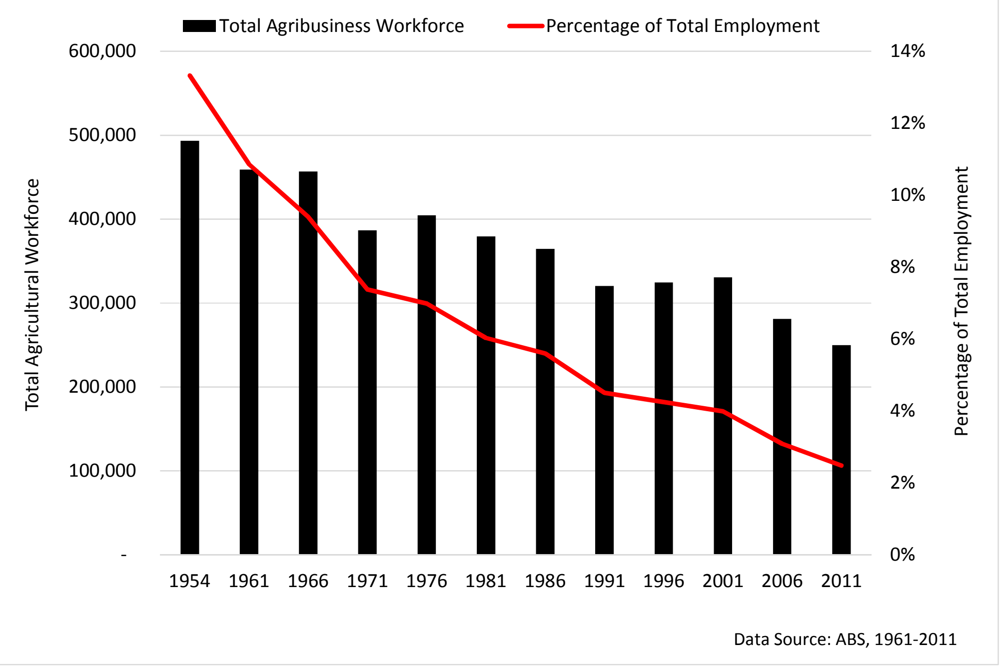


Figure 2 shows the decline in the size of the Australian agribusiness workforce over the last 60 years, both in absolute terms and as a percentage of the total labour force.

This decline has also been experienced in the Macedon Ranges. Between 2001 and 2011, the size of the Shire's resident agribusiness labour force decreased by 18%, even as its overall resident labour force increased by almost 24% (ABS, 2011).

The gross value of agribusiness output has almost tripled in value since 1975

Yet, at the same time as the national agricultural workforce has shrunk, the output and value of the industry has increased (it almost tripled in value between 1975 and 2011). This can be explained by the intervention of technological change that has meant farming has become bigger, more automated and more efficient. So, while profit margins have been squeezed across much of the industry, total output has increased as productivity has responded to global market opportunities.

These changes have had a dramatic effect on the agribusiness landscape. Firstly, there has been a significant amount of research and policy development to assist agribusiness manage its transition to new forms of operation. Secondly, the transition to larger, less labour intensive farming practices has put pressure on regions such as the Macedon Ranges where enterprises have traditionally been smaller and land more expensive.

2.3 Policy and Physical Responses to Change

Agribusiness is constantly evolving in response to challenges. However, there is both State and National recognition that the sector is an important part of the national economic future and, so these changes have resulted in a range of policy responses.

The Current Policy Context

There are a number of recent National, State, regional and local policies that are considering the future of agribusiness. For example:

- The recognition that Asia and the Middle East are burgeoning market opportunities for Australian agribusiness producers but that there is competition from low cost providers in New Zealand, China, Vietnam, Thailand and elsewhere (PMSEIC, 2010);
- Food security is a national issue and there are moves to develop a National Food Plan that places emphasis on maintaining Australia's capacity to feed itself and export food to the world (PMSEIC, 2010);
- The Commonwealth Government is considering establishing a peak body to address succession planning in the agribusiness sector. This is in recognition of the combined impact of ageing, job poaching by the mining industry; and the lack of consideration of agribusiness as a career option (Commonwealth of Australia, 2012);
- There is a goal to double food and fibre production in Victoria by 2030 (Government of Victoria, 2012);
- The Bureau of Regional Sciences have researched the effect of rural lifestylers on farming regions and the importance of working with new residents to ensure their land management practices do not adversely affect neighbouring farms (and *vice versa*) (Bureau of Regional Sciences, 2006);
- The Loddon Mallee Regional Growth Plan identifies Gisborne and Kyneton as future district centres and notes the importance of encouraging high value agribusiness and value adding (DPCD, 2010);
- A 2010 State Government inquiry found that the encroachment of urban development into rural land has resulted in uncertainty for both developers and the agribusiness sector. It recommended a review of existing legislation to ensure it allowed for the sustainable development of both (Government of Victoria, 2010).

The Agribusiness Plan adds to the strategic research by providing specific recommendations for Council action

Much of this analysis has been at a strategic level; identifying the challenges and opportunities and recommending the way forward. The particular focus has been on education and training; assisting with marketing Australian agribusiness output to the world; and finding mechanisms to manage the change occurring in areas making the transition from rural to urban. The Macedon Ranges Agribusiness Plan is intended to take the next step in providing an action plan for Council to address some of these issues.

The Peri-urban Challenge

The Macedon Ranges is in what is called a peri-urban location. This is a transition zone between large urbanised areas and rural, agriculture-focused areas (Barr, 2009). As with most peri-urban locations in Victoria (others include Mitchell to the north of Melbourne and Baw Baw to the east), the local landscape has been experiencing very rapid change. As Figure 3 shows, there are a complex array of variables that are driving this and, in turn there are multiple consequences.

Figure 3 Peri-urban Change Factors Influence Diagram

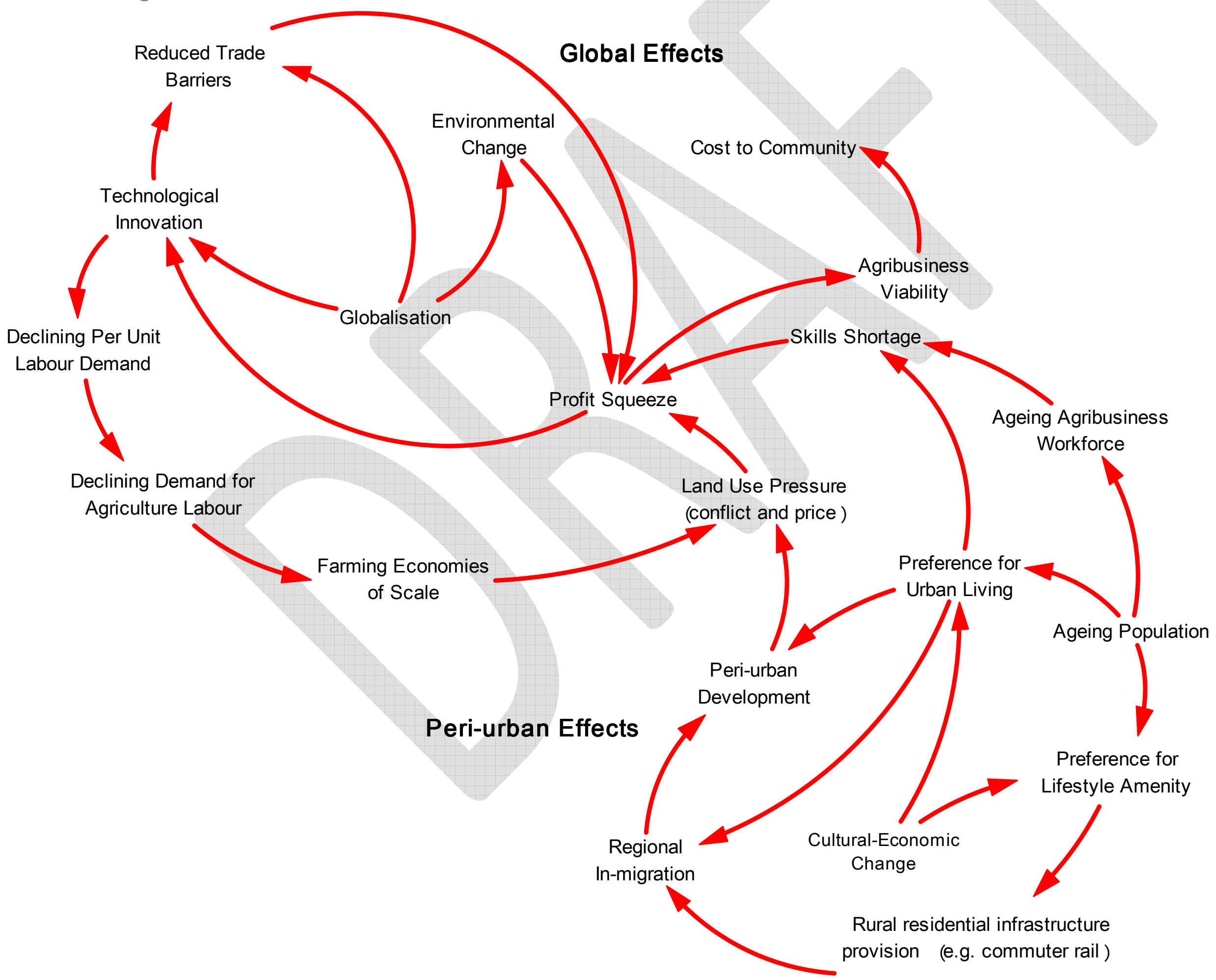


Figure 3 outlines the key factors influencing agribusiness in the Macedon Ranges. It shows the interaction between social/cultural shifts driving peri-urban residential development and global economic and technological changes that are putting pressure on agribusiness to be more efficient and, generally, larger scale.

In summary, a cultural shift has seen a growing desire for rural lifestyle living for some and for others (particularly young families), peri-urban living is seen as a better alternative to outer metropolitan suburbs (Geografia, 2013a). These trends have driven land price increases in places like the Macedon Ranges. In turn, this has stimulated public investment in facilitating infrastructure, such as new schools, health facilities and passenger rail. The increased accessibility and amenity has further driven in-migration. All of this has occurred in a context of diminished agricultural profit margins in which farm amalgamation has been a major mechanism to ensure economic viability. The critical outcome has been a move away from broadacre farming with low returns per hectare towards agricultural activity that generates higher returns per hectare (e.g. equine, viticulture and horticulture).

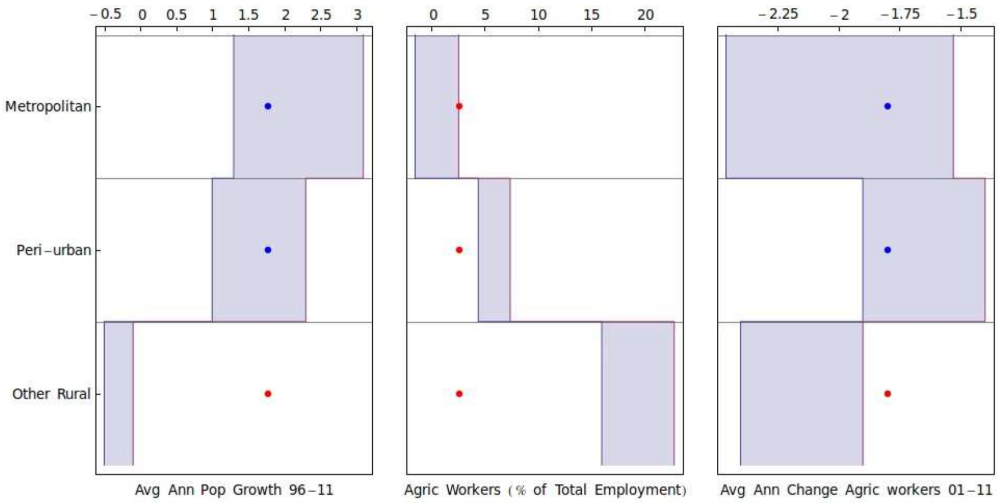
These changes are characterised by identifiable demographic and economic changes. For example:

Between 1996 and 2011, the population in the Macedon Ranges grew by an average of 1.8% per annum; at the upper end of peri-urban growth rates

- As young families and some semi-retirees (lifestyle seekers) have moved out of outer metropolitan areas to peri-urban municipalities, the population has been ageing more slowly than rural Victoria, but faster than metropolitan Melbourne;
- Average annual population growth over the last decade also sits somewhere between fast growing metropolitan Melbourne (averaging between 1.3% and 3.1% per annum since 1996) and mostly declining rural Victoria (averaging between -0.6% and -0.1% per annum) (Figure 4); and
- The size of the agribusiness workforce has declined more slowly than in other parts of rural Victoria, as part of the peri-urban agribusiness sector has moved towards more labour intensive activities (Figure 4).

In view of the changes to both agribusiness practices, commodity mix and changing demographics, the term 'transition zone' is an apt description of peri-urban regions, including the Macedon Ranges. In the current policy and economic context, many of these changes are inevitable and so this must be reflected in the Agribusiness Plan.

Figure 4 Selected Demographic Change Indicators



Data Source: ABS, 2001, 2011, Geografia, 2013

Figure 4 shows several indicators for demographic change in Victoria by location. The blue bands represent the historical range for that part of Victoria and the red and blue dots are what Macedon Ranges experienced. So, for example, the Shire's average annual population growth between 1996 and 2011 falls within the expected range of metropolitan and peri-urban councils and well above rural growth rates. It is important to recognise that the Macedon Ranges reflects characteristics of both metropolitan and rural regions.

2.4 Summary

The context for the Macedon Ranges Agribusiness Plan is defined by:

- Growing global competition, but also market opportunities for agribusiness producers;
- A decline in the size of the national agribusiness labour force, but a significant increase in its output derived through farm amalgamations and technological improvements;
- The emerging preference amongst formerly metropolitan residents for rural lifestyle and/or more affordable semi-rural blocks, driving land price increases and putting pressure on agribusiness viability and capacity to operate;
- A shift away from broadacre farming with low returns per hectare towards agricultural activity that generates higher returns per hectare (e.g. equine, viticulture, and horticulture); and
- A change in the demographic and employment profile of the Macedon Ranges: from a relatively older, stable or slow growing agricultural region to a faster growing, younger and more diversely employed region with close links (e.g. via work commuting) into the Melbourne metropolitan area.

In summary, the Macedon Ranges is in a rural transition zone. Change is rapid and, in some respects, inevitable. Consequently, the Agribusiness Plan needs to take into account the emergence of new economic opportunities and new demands for land, services and enabling infrastructure.

3.0 Consultation Findings

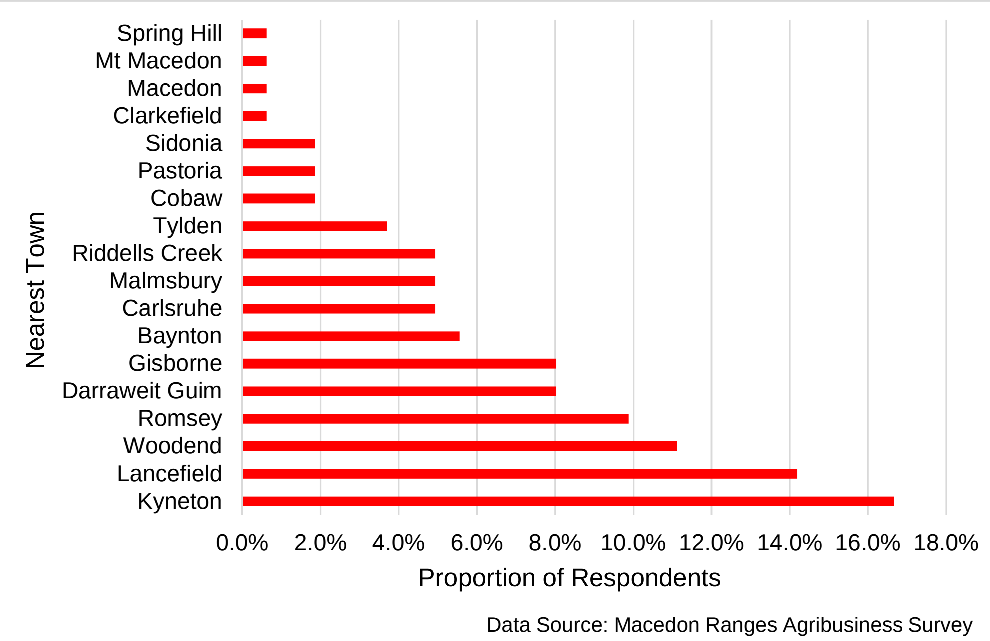
This section summarises the findings from the background research and industry consultation and analysis[9]. The findings are organised under the main themes that emerged from the analysis:

1. The scale and changing nature of the agribusiness industry in the Shire.
2. The industry structure and its market opportunities.
3. The priority constraints that are impeding the industry from maintaining or expanding and diversifying its activity.
4. The opportunities for Council to work with the industry and other government agencies to address these constraints.

3.1 Agribusiness in the Macedon Ranges

As of March 2013, the Australian Business Register indicated there were 654 agribusiness enterprises in the Shire and the combined total of full and part-time jobs was 505[10]. The online survey captured the views of 190 enterprises (or 29% of the registered enterprises). Figure 5 shows respondents by nearest town.

Figure 5 Survey Respondents by Location



Survey respondents were asked to indicate the town their main operations were closest to. Figure 5 shows the results. When compared with the ABS agribusiness survey count, the online survey was a relatively good geographical spread of respondents, albeit with a slight over-representation of livestock farmers near Kyneton.

With respect to turnover, most of the Shire's agribusiness operators report less than $50,000 per annum (Figure 6) and with 88% of respondents indicating they employed fewer than four workers, it highlights the small-enterprise/low labour intensive characteristics of the sector in the Macedon Ranges.

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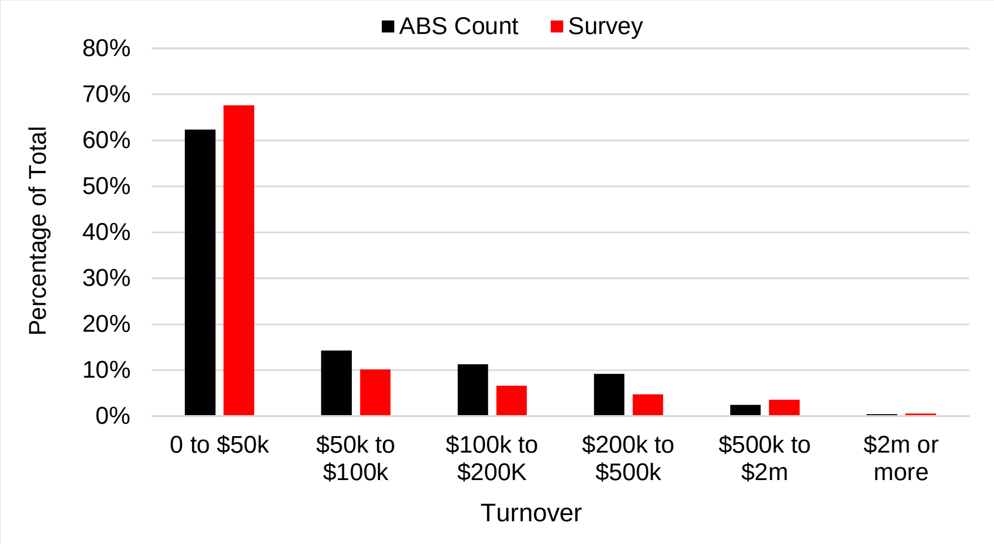
[9] Extended findings from the survey are available in a separate Appendix.

[10] The discrepancy is assumed to come from single operators registering different enterprises for different activities.

Figure 6 Survey Respondents by Turnover



Data Source: Macedon Ranges Agribusiness Survey

In Figure 6, the survey responses of estimated annual turnover are compared with the 2011 ABS agribusiness survey results for the Macedon Ranges. It suggests a slightly higher response from small (0-$50,000) operators, but well within statistical expectations.

Average land holdings in the Shire are 142 hectares and, with the exception of some industries, there is a strong, positive correlation between land holdings and turnover

Agribusiness survey respondents reported farm holdings of 24,000 hectares across the Shire (approx. 16% of the total zoned land). Of those who reported their property size, the average was 91 hectares for the primary property and 26 hectares for the second property (and an overall land holding average of 142 hectares for survey respondents). From the survey results we can assume that 90% of agribusiness operators manage between 93 and 167 hectares of land, at least 70% of which is on a single, main property.

Also reported was that:

- 9% of respondents had properties larger than 200ha, with almost two thirds of these running livestock; and
- There is a strong correlation between property size and reported annual turnover with the notable exception that some activities (e.g. nurseries, specialty livestock and viticulture) have relatively high turnover per hectare. That is, larger farms generally mean larger turnover. However, as is common in peri-urban locations, there are intensive farming activities that buck this trend (Table 2, overleaf).

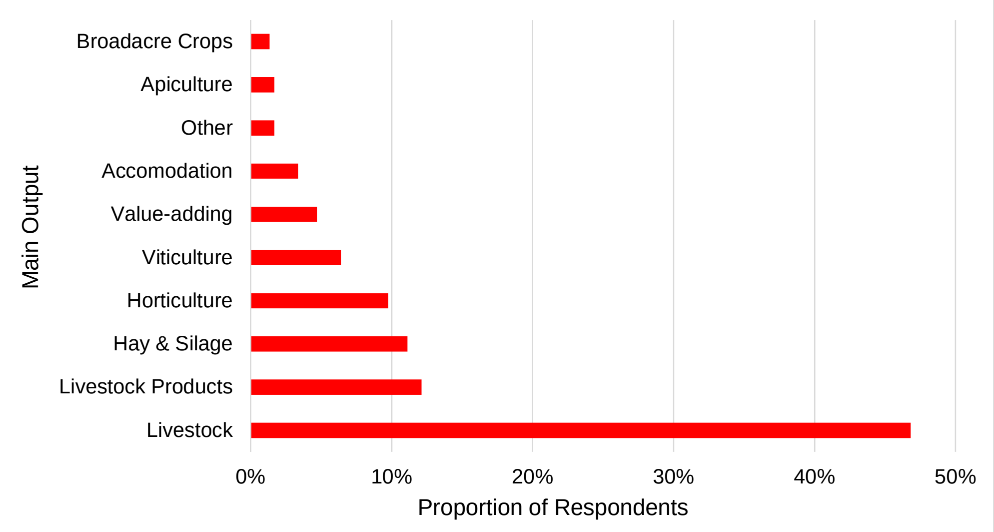
As Figure 7 (overleaf) shows, livestock producers dominated the survey (55% of respondents) and, according to the ABS agribusiness survey (ABS, 2011) account for 70% of the Shire's agricultural output by value. When combined with broadacre crops, livestock products and hay and silage, they make up 65% of agribusinesses in the Shire.

Table 2 Turnover and Property Size

Turnover Range	Average Land Holdings (ha)	Range (ha)
$1m-$2m	1,456	n.a.
$500k-$1m	1,074	210-1,938
$300k-$500k	339.1	21-566
$200k-$300k	296.9	48-526
$150k-$200k	367.7	93-642
$100k-$150k	313.5	134-493
$50k-$100k	139.2	52-87
$20k-$50k	81.6	16-65
<$20k	46.3	15-31

Data Source: Macedon Ranges Agribusiness Survey; Geografia 2013

Figure 7 Survey Respondents by Main Output



Data Source: Macedon Ranges Agribusiness Survey

Figure 7 shows the respondent profile by main output. Slightly over half of the respondents were in livestock (predominantly cattle) or livestock products. The category 'other' included forestry and legal services.

The survey indicated that currently, the Shire's livestock sector predominantly consists of beef cattle and beef/sheep farms (mostly wool and some prime lamb) (Table 3). The industry workshop participants largely mirrored this profile.

Table 3 Livestock Sector Profile Macedon Ranges

Livestock Type	Proportion of Sector
Beef Cattle	33%
Beef/Sheep	20%
Prime Lamb	10%
Wool	24%
Alpacas	4%
Poultry	4%
Goats	3%
Pigs	2%

Data Source: Macedon Ranges Agribusiness Survey

However, the dominance of broadacre beef/sheep and crop farms is declining. For example, in the Shire's 2009 Business Survey, 15% of agribusiness respondents were not involved in any combination of beef/sheep or broadacre cropping. In the 2011 survey, it was 48% of respondents (primarily grape growers), suggesting an increase in the number of non-broadacre agribusiness operators in the region. The open-ended questions in the online survey also identified a number of agribusiness operators new to the region who were looking to experiment and diversify agricultural output into new products.

Almost two thirds of agribusiness producers relied on off-farm income

The agribusiness survey has provided the Shire with a very reliable baseline for the profile of the industry and future surveys will allow comparisons to chart the rate and direction of change. This will be useful for policy reviews to ensure they suit and support the industry as it evolves.

3.2 The Industry Structure and Opportunities

The survey investigated the:

- Role of off-farm income;
- Employment and training;
- Product chains and market destinations; and
- Importance of accreditation and/or formal agribusiness forums.

Off-Farm Income

It was notable that 62% of respondents drew an off-farm income. Of these, almost one third (31%) indicated they drew 91% or more of their income from non-farm activities.

'Multi-farm income are acceptable industry practices. The 40ha Kyneton farm is the high value landholding and the 200ha Wimmera farms supplements this'

Macedon Ranges agribusiness operator

Not surprisingly, on average, off-farm income was important to a greater proportion of enterprises reporting lower annual turnover. For example, of those who said their turnover was less than $20,000 per annum, 55% reported earning 91% of more of their income off-farm. However, even those enterprises earning $200,000 or more per year also reported high proportions of off-farm income (from 10%-60%).

There was no clear trend indicating whether particular producers sourced more off-farm income than others. However, it is worth noting that there were fewer livestock producers with turnover more than $200,000 per annum than would be expected given the number of these enterprises.

Finally, the survey revealed that there is more diversity in output amongst non-livestock producers. For example, for those who said they were mainly livestock producers, they indicated that an average of 75% of turnover was drawn from this activity. By contrast, horticulturalists drew an average of 50% of their turnover from this activity (mixed with livestock and food processing); and viticulturalists a little over 40% (with much of the remaining income sourced from livestock or horticulture).

These findings suggest the sector has a more diverse economic structure than would have been the case a few decades ago. This includes mixed farming; multiple landholdings and dual income households. One stakeholder noted that it was increasingly common for farmers of a smaller, high value property in the Macedon Ranges, supplemented by output from larger, broadacre farms further from Melbourne. The implication being that small farms on high value land are viable for agribusiness, particularly for mixed farming or for multi-farm operations where some landholdings are elsewhere in the State (on more affordable land).

Employment and Training

17% of respondents are engaged in some form of industry training

As noted earlier, 88% of enterprises employ fewer than four people (inclusive of full-time, part-time, casual and seasonal). Almost one fifth of respondents also indicated they participated in some form of training, with 4% saying this was online. The participation in training points to the value of accessibility and, in some respects, informality, in training. For example, Agrifoods Skills Australia has recognised the importance of offering training on an as-needs basis, rather than full courses to time poor agribusiness operators (Agrifoods Skills Australia, 2012).

The use of exchange programs, apprentices or trainees was minimal with between 2 and 5% of respondents indicating some form of trainee hiring program. This is common amongst small to medium enterprises, which make up the bulk of the sector. However, even though access to skilled workers and/or training were not cited as major industry growth constraints (with the exception of shearers), there is sufficient evidence (including in other studies), to say that it will become more important as the industry continues to change and the workforce continues to age (and eventually retire). Consequently, there is merit in pre-emptively addressing this.

Product Chains and Opportunities

84% of respondents source an average of 73% of all inputs are sourced from within the Shire

Almost 84% of respondents indicated their *main* source of inputs were from Macedon Ranges' based suppliers, with 11.5% from elsewhere in Victoria and 3.8% from Melbourne. However, most respondents indicated their inputs were sourced from a range of locations, indicating a complex supply chain (see Table 4). Some workshop participants also said that specialised services (e.g. tractor parts) needed to be sourced from a larger regional town or Melbourne.

Table 4 Source of Inputs

Source	Average Proportion	Range
Within Macedon Ranges	73%	69%-76%
Melbourne	28%	22%-32%
Elsewhere in Victoria	33%	28%-38%
Interstate	17%	13%-21%
Overseas	12%	6%-18%

Data Source: Macedon Ranges Agribusiness Survey; Geografia

According to the survey, slightly over 25% of output from the Shire was sold through local saleyards and another 25% through stock agents (Figure 8). Combined with the dominance of the Shire as an input source, it emphasises the importance of the agribusiness sector to local economic activity – as well as the importance of the Kyneton Saleyards.

Figure 8
Main Sales Outlets

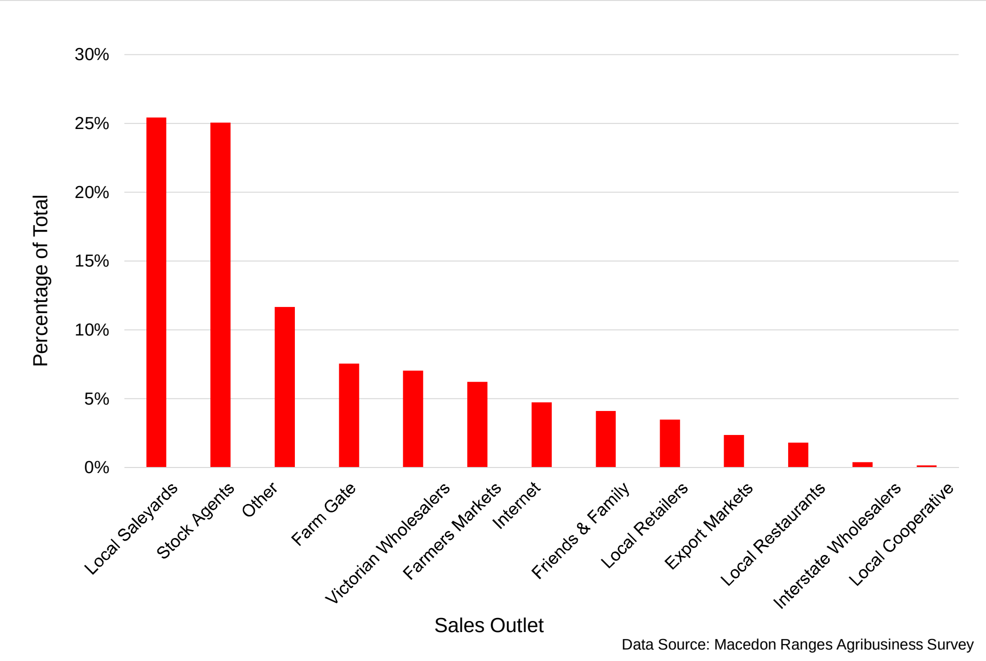


Figure 8 shows the importance of saleyards and stock agents to the local supply chain, accounting for slightly over 50% of all output sales in the Shire.

While the data do not clearly confirm this, it is reasonable to say that livestock farming is relatively self-contained in the Shire, whereas some of the newer, niche activities have more geographically extensive supply chains. At the same time, post-survey stakeholder discussions identified the emerging importance of local supply chain mechanisms (e.g. farm gate sales), particularly to small-scale new operators.

Essentially, the industry supply chain is complex and made up of both local and global links; and not all of which involve economies of scale[11]. It suggests that there

[11] Economies of scale are the benefits that accrue from larger scale activity. For example, input costs per unit of output are smaller as you can buy materials in bulk.

may be opportunities to use existing assets within the Shire to support agribusiness activities in new ways (the Yarra Ranges Regional Food Group's investigation into the establishment of shared kitchen/storage facilities are an example of this). Approximately 2.5% of respondents indicated they made direct sales to export markets. On average, these direct sales accounted for 35% of their output, with 'Asia' as the main destination. However, amongst these direct exporters, some reported exporting up to 90% of their sales directly to overseas markets. These were all in the livestock products sector.

Networks and Forums

One fifth of respondents have some form of accreditation

Almost one fifth of respondents indicated they had some form of accreditation. Amongst other accreditation programs and schemes, these included:

Meat Standards Australia;

- Australian Chemical Users Permits;
- Victorian Farmers' Market Association Accreditation;
- Victorian Farmers Federation Chicken Care;
- Q-Alpaca;
- Livestock Production Assurance;
- Nursery Industry Accreditation Scheme; and
- The Macedon Ranges Shire Food Licence.

Two fifths of respondents belong to at least one industry forum

Over twice as many respondents (42%) indicated they were part of a formal organisation or forum. These included:

- Regional Landcare groups;
- The Victorian Farmers Federation;
- Angus Beef Associations;
- Wool Growers Associations;
- The Macedon Ranges Vignerons Association;
- The Victorian Apiarist Association; and
- The Australian Alpacas Association.

Over half of respondents see value in belonging to a Macedon Ranges forum

Over half (56%) of all respondents saw value in belonging to a Macedon Ranges Agribusiness Forum. Although there was some difference in this response between those who were already a member of an industry forum and those who were not, even amongst those not currently a member of any formal organisation, the majority (61%) saw value in being a member of a Macedon Ranges Forum. This compares with 76% of respondents who already held membership of an industry forum supporting a Shire-wide forum.

3.3 The Priority Constraints

Survey respondents were asked to nominate (in order) their top three constraints that are impeding the capacity to expand their activity in the Shire. Figure 9 shows the results.

Figure 9 Top Three Constraints on Agribusiness Expansion

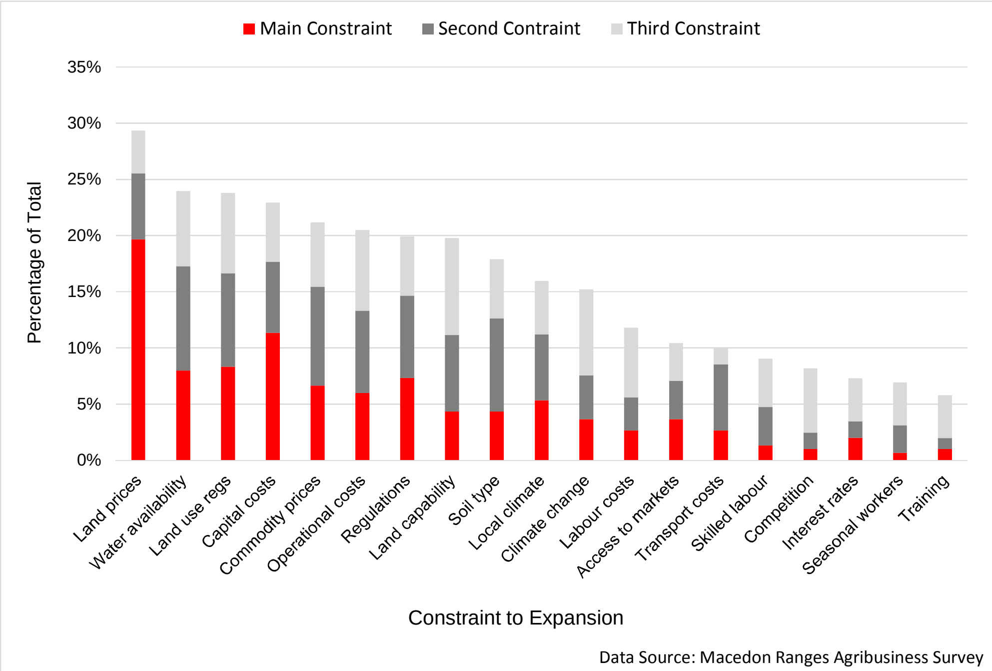


Figure 9 shows the top three constraints for agribusiness producers. 29% of respondents said land prices was either their number 1, 2 or 3 constraint. In fact, land prices, the capital cost of expansion (related to land prices) and land regulations dominate concerns, along with water availability. With respect to where Council can assist, land capability issues, education and training and access to markets are also considered constraints.

In most cases, the responses related to different dimensions of one dominant issue: that of land prices making it difficult to expand in an economically viable way; particularly for broadacre farming.

These constraints were analysed further through an additional survey query about what needed to be done in order to enable expansion and/or diversification. While almost two thirds of respondents indicated they intended to expand in the next 10 years, most also noted it would only occur if several key issues were addressed. The top three issues were:

Better knowledge of land capability; more reliable water access and finding ways to achieve economies of scale will enable expansion

1. Achieving productivity gains through identifying ways to increase stocking rates or other technical practice improvements (8% of respondents);
2. Ensuring security of water access in light of future drought conditions (5%); and
3. Addressing economies of scale issue by accessing affordable land (possibly outside the Shire) (3%).

The functional viability of farming on small lots and the prohibitive cost of local expansion were raised as major challenges in both the survey and the workshop. However, follow-up discussions with local stakeholders stressed that, in some cases, it was possible to farm on small, existing lots. This is particularly the case in areas with higher quality soil and reliable rainfall. This may include horticultural products and specialist livestock breeding. The key was in identifying where this high potential agricultural land is and ensuring it is clearly identified for agricultural production.

These follow-up comments suggest that agribusiness is very viable if high value agricultural land is identified and retained for agribusiness and additional support provided. As a general principle, the key is considered to be consistency in the definition of optimal farmland compared with optimal rural residential land. Several benefits were seen in maintaining this distinction, including:

- The need to provide policy certainty to current and prospective landholders and investors;
- The need to retain buffers to separate rural and urban residential from agribusiness;
- The need to ensure sustainable environmental impacts (e.g. protection of productive soils, waterways and remnant vegetation);
- The need to recognise the public cost of different development policies (e.g. supporting infrastructure for dispersed rural residential compared to infrastructure for viable farming); and
- The need to maintain rural character as a distinctive part of the Shire.

Overall, stakeholders recognised the complexity of farming in areas with increasing land prices; the challenges posed by having a one-size-fits-all approach; and the imperative for meaningful dialogue to address the issue from both a planning and economic development perspective.

A Changing Industry Means Changing Constraints

With respect to the perceived constraints on expansion, it is also worth noting that:

- 8% of respondents indicated that they were new entrants into agribusiness and expected significant growth. The majority of these respondents were not in livestock farming; and
- 3% of respondents indicated they were approaching retirement and did not intend to expand activities.

These factors further emphasise the transition that agribusiness is experiencing in the Shire. This is an important factor as the current 'major constraint' of land prices is particularly important to broadacre farmers whereas many new entrants into the region are looking at more intensive farming or value-adding agribusiness activities where factors other than land price or total land area may be more important.

'Expansion and diversity are the foundation of farming. Always determined by opportunity and cost and profitability and weather and markets and government policy'

Macedon Ranges agribusiness operator

In relation to diversification, the key message is that most enterprises were continuously looking for opportunities to diversify. However, this is, as always, contingent on market conditions, government policy and reliable weather.

The industry workshop mirrored these responses, with over 40% of comments relating to the issue of land prices, land use regulation and the consequences of subdivision (including the sub-optimal land management practices of new landholders). Follow-up one-on-one discussions also confirmed this.

Most notably, participants identified the management of weeds, pests and fire safety compliance by new landholders as a constraint and one in which Council has a particularly important role in helping to address[12].

Also noted were the constraints imposed by reliable water access; uncertain land capability (i.e. knowledge of suitability of land to different agribusiness operations,

[12] There are a range of current weed and pest management programs, including work being undertaken by the Department of Primary Industries.

particularly necessary for new investors); and the condition of the Kyneton Saleyards. Although only livestock farmers expressed concerns about the latter, the Saleyards are major part of the Shire's asset base and generate a substantial return to the local economy. Consequently, consideration of the Saleyards role falls within the remit of the Plan. Follow up conversations noted that, currently, there is no clear vision or asset management plan for the Saleyards. Moreover, with new agribusiness opportunities (e.g. in smaller-scale, niche activity) it is timely to consider the Saleyards' role in the local economy and how it can be aligned with new supply chain mechanisms such farm gate sales, farmers' markets, small-scale cooperatives and 'boutique' processors.

While other matters emerged through the survey, research and the workshop, the fundamental constraints relate to changing land use and the pressure it places on the agribusiness sector trying to operate in a highly competitive global market. With the exception of water availability, most of the other main constraints relate in some way to this process. For example, the matter of weeds, pest and fire control compliance are partially a result of new landholders moving into the Shire at a rapid rate, with insufficient knowledge about land management issues. These are similar to the 'right to farm' concerns raised in the State Government's 2010 study of peri-urban development (Government of Victoria, 2010).

3.4 Partnership Opportunities

The recognised opportunities for Council to assist addressing the constraints to the agribusiness sector focus on communication, facilitation, information and promotion. The agribusiness survey responses are similar to those of the Macedon Ranges business surveys, which between 2009 and 2011 showed a shift away from a call for direct assistance and towards a combination of information and basic service support[13] (Figure 10).

Figure 10
Council's Role

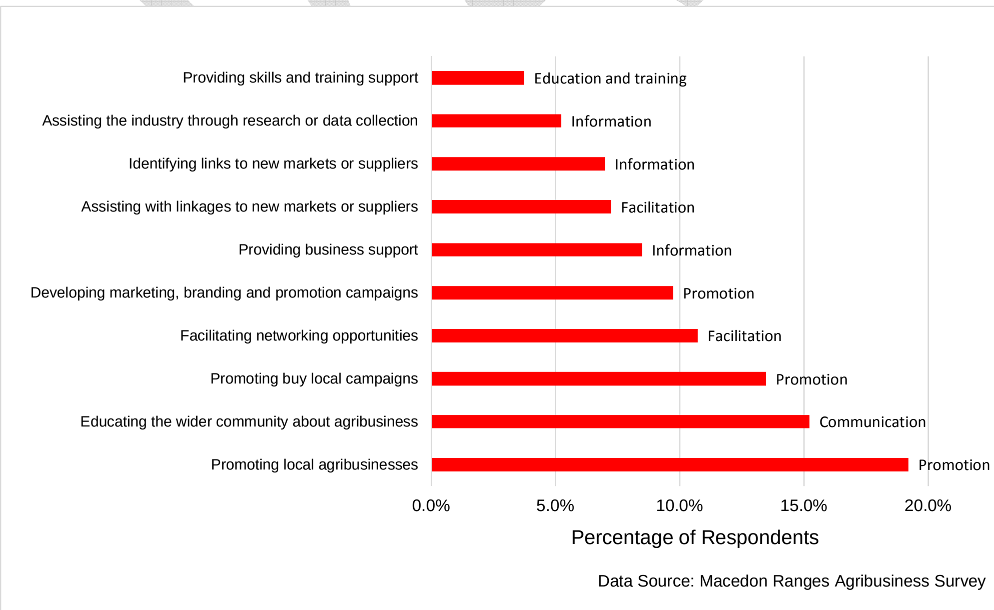


Figure 10 shows the importance the agribusiness sector places on Council providing an information, facilitation and promotion role for the sector.

[13] For example, the proportion of respondents who said leadership and operational support was a key role for Council declined from 8.5% in 2007 to 5.4% in 2009 (Macedon Ranges Shire Council, 2007 and 2009a).

Survey respondents were also asked to comment on the role of Council and Figure 11 shows the words that appeared most often in these comments. Again, they emphasise the importance of first addressing fundamental operational matters such as weed and pest management, road maintenance and consideration of more flexible ratings schemes.

Figure 11 Council's Role Key Words

Climate Council Farmers Government Instead Lamb Land Little Local MRSC Planning Rates Reduce Restrictions Roads Rural Sales Shire Weeds

Figure 11 is a 'word cloud' showing the main terms used by survey respondents when asked where the Council should focus its efforts to assist the agribusiness sector. The larger the word, the more often it occurred. It highlights the importance of basic operational matters.

The industry workshop participants and one-on-one discussions also emphasised the importance of Council's role in helping the industry to manage change, in particular, the opportunities for capitalising on new opportunities for growth, diversity and the 'brand' of the Macedon Ranges. Key messages were:

Macedon Ranges agribusiness has distinct advantages including access to market and quality and diversity of product

- The need to act as a representative body on behalf of Macedon Ranges agribusiness producers in State and National policy discussions;
- The need to carefully address the matter of different land uses and the challenge of balancing agribusiness activity and rural lifestyle objectives;
- The need to work with new landholders to ensure they meet their land management obligations;
- The need to recognise basic operational matters, such as weed and pest management, drainage and road and other essential infrastructure maintenance (embodied in the survey response stressing the importance of educating the wider community about agribusiness); and
- The need to support the Macedon Ranges 'identity' as a viable agribusiness region (e.g. via buy local campaigns and through a mix of mechanisms such as farmers' markets) and focus on the competitive advantages of the Macedon such as its accessibility to market; its diversity of product; and its quality.

These opportunities for Council to work with the agribusiness sector have been addressed through the strategic recommendations in the next section of the Plan.

3.5 Summary

The findings can be framed into a set of four objectives as follows:

1. **A Landscape in Transition...**
   - Although new activities are growing, the agribusiness sector is still dominated by livestock (broadacre) farming. While this is the case, supporting livestock farming should remain a central part of the Shire's strategic planning for agribusiness.
   - Notwithstanding the concerns about the ageing of the workforce and the lack of interest in agribusiness career opportunities amongst young people, currently, *most* Macedon Ranges agribusiness operators do not consider skills or labour shortages (with the exception of shearers) to be a major constraint. However, the imminent retirement of a large (albeit unknown) proportion of the workforce and the growing importance of product diversification and higher productivity creates a medium-term challenge for succession planning and ready access to training, particularly in light of the national policy to significantly increase food and fibre production.
   - With the exception of water availability, most of the main constraints on industry expansion derive from the rapid change in land use in the Shire and the flow-on effect, particularly on land prices. There are also compounding effects relating to weed and pest management, land management compliance, the perceived loss of focus on essential infrastructure provision for the agribusiness sector (e.g. roads, verge management and the Kyneton Saleyards) and subdivision regulations.

2. **Creating Opportunities for New Growth...**
   - The agribusiness sector's supply chain is well integrated within the Shire, with most input suppliers and markets locally-based.
   - There is a growing number of operators moving into the region who are willing to test the viability of new commodities, new production techniques and new ways to market.
   - Most enterprises have low turnover and rely on off-farm income. In most instances, turnover correlates with the size of landholdings. However, this is not so for intensive agribusiness practices (e.g. apiaries and vineyards), which require less land. The access to Melbourne, new infrastructure and high rural amenity values are considered competitive advantages for new forms of agribusiness.

3. **Contingent on Effective Information Provision....**
   - As some new farming activities are more land intensive than broadacre, they require different support structures and specific information about farming practices. This requires increased awareness about supply chains, land capability, zoning and other regulatory matters. It highlights the need for good communication networks and information bases.

4. **Requiring Better Communication and Facilitation**
   - Most of the agribusiness community see value in there being a single Macedon Ranges agribusiness forum, even those who are currently not members of any official associations or forums.
   - The sector see the role of Council to work as a facilitator and as a communication and information broker between industry, the community and government.

4.0 Recommendations

In the survey, almost two thirds of the agribusiness community rated the health of the industry in the Macedon Ranges as Average to Very Poor. At the same time, two thirds said they were likely or very likely to expand over the next 10 years.

The motivation to expand (and to a lesser extent, diversify) is clearly strong in the agribusiness community. However, as discussed in Section 3, there are significant challenges to overcome before this can happen. From the Council's perspective it is essential that these issues are addressed so that the agribusiness industry can be assured of a long-term, sustainable future in the Shire that is endorsed and recognised by the entire community.

4.1 Principles

The recommendations proposed here are designed to guide the Council's effort in assisting the agribusiness industry to overcome its challenges. The recommendations are framed by two fundamental principles:

1. The role of Council as a provider of basic services and support.
2. The role of Council as a facilitator of communication, advocacy and information exchange.

4.2 Actions

The recommendations are targeted at the specific priority issues as outlined in Section 3 and focused on the four strategic themes of:

1. Facilitating Communication.
2. Managing Transition.
3. Providing Information and Facilitating Outcomes.
4. Supporting Growth Opportunities.

The recommendations and their prioritisation were developed through an analysis of the literature and online survey. They were then refined in response to contributions from the industry, through the industry workshop and follow-up discussions. Table 5 summarises the key issues, rationale for action and recommended responses.

Table 5 Strategic Recommendations

Issue	Rationale	Actions	Priority
COMMUNICATION Lack of effective engagement causing miscommunication between industry, government and community	The highest priority constraint/issue relates to the lack of communication between industry, community and government with respect to farm practices, land management, infrastructure maintenance, regulations and other matters. A mechanism to facilitate meaningful, ongoing dialogue between the Shire, other tiers of government, the industry and the rest of the community is essential. It may also lead to the recognition of the need for a dedicated agribusiness officer within Council to work with the sector and the Agribusiness Forum. Facilitating communication is a well-established function of local government. Given that most of the agribusiness industry favour the establishment of a Macedon Ranges Agribusiness Forum, this should be the priority recommendation of the Agribusiness Plan.	1. Facilitate the establishment of a Macedon Ranges Agribusiness Forum	Very High
		2. Continue to facilitate and promote existing weed and pest management programs and liaise with the Agribusiness Forum and other government agencies on their implementation	Very High
		3. Work with the Forum and relevant government agencies (e.g. Agrifoods Skills Australia) to explore the development of a formalised mentoring scheme to assist new agribusiness operators and other land holders in managing land and other aspects of entering the industry	High
		4. Work with the Forum and other relevant agencies to facilitate regular industry workshops and networking opportunities	Medium
TRANSITION Changing industry profile requiring new strategic support and planning	As a peri-urban region, the Macedon Ranges is well along the pathway of transitioning from a predominantly rural, broadacre primary production based place to a more mixed agribusiness landscape overlapping with more diverse and dense residential development. Consequently, the Agribusiness Plan needs to consider the inevitable transition of some aspects of the agribusiness sector into more land intensive production and smaller scale producers.	5. Work with the Forum and other relevant agencies to identify and address transition planning issues (e.g. succession planning)	High
		6. Review operations at the Kyneton Saleyards and consider future planning options	High
		7. Advocate for continued research on future farming operations	Medium

Issue	Rationale	Actions	Priority
		8. Work with the Forum to identify and promote new value adding opportunities, to support, for example smaller-scale farming (e.g. abattoir and meat processing cooperatives to achieve economies of scale)	Medium
INFORMATION AND FACILITATION Gaps in essential information impeding product expansion/diversification and risking long-term food/fibre output	Providing information is also a well-established local government role. The major identified gaps are in the opportunities for product diversification (i.e. what the physical environment is capable of supporting - particularly important for new landholders and investors); the land management responsibilities of existing and new landholders and the regulatory environment in which the agribusiness sector must operate. Council has an important part to play in collecting, validating and disseminating information in each of these areas. Also noted is the importance of promoting the quality, accessibility and diversity of Macedon Ranges agribusiness output.	9. Discuss with other government agencies and the Agribusiness Forum the need and opportunity to further Council's provision of information about land form and character (i.e. the Significant Landscapes Units project)	Very High
		10. Continue to work with local real estate agencies to improve the distribution and promotion of information available to new landholder to communicate opportunities and information and build links between the established and new residents in agricultural areas (e.g. Voluntary Environmental Resource Inventory)	Very High
		11. Work with the Forum to establish and promote Macedon Ranges agribusiness	High
		12. Work with the Forum to promote and provide information on existing assets and infrastructure within the Shire that may be used to support agribusiness supply chain activity (e.g. commercial kitchens)	Medium

Issue	Rationale	Actions	Priority
GROWTH OPPORTUNITIES Global market pressures, product chain processes and profit margins are driving need to find economies of scale and support niche market opportunities	Macedon Ranges has an emerging range of diverse products that require an identity to promote their niche value. Council has both experience (e.g. via tourism promotion) and networks (e.g. State and Commonwealth trade and development agencies) to support this. This can be achieved through supporting existing mechanisms (e.g. farmers' markets) and increasing the local agribusiness presence in buy local campaigns and local business directories.	13. Work with the Forum, market managers and the Victorian Farmers Market Association to identify ways to continue supporting the Farmers' Markets within the Shire	High
		14. Align current Council business surveying to incorporate agribusiness and distribute findings throughout the sector to ensure they are informed of changes in the industry profile and newly emerging opportunities	Medium

Very High	within 1 year of Plan commencement, subject to budget cycle
High	within 1-2 years of commencement, subject to budget cycle
Medium	within 3-5 years of commencement, subject to budget cycle

4.3 Conclusion

Subject to resource constraints, the Macedon Ranges Agribusiness Plan is designed to be rolled out over five years. Given the importance the State Government currently places on agribusiness in Victoria, it is timely to roll out the actions as soon as possible.

The broad timing of the recommended actions have been proposed to respond to the priority concerns identified by the industry, as well as the recognised bottlenecks to agribusiness development. However, if there is one dominant message that has emerged from the study, it is that effective, ongoing communication between the industry, the Council and other stakeholders is an essential precursor to other actions. The priority recommendation, therefore, is to help establish a Macedon Ranges Agribusiness Forum, ideally with representation from across the industry and Shire, the Council and independent experts. This Forum should then be closely involved in refining and prioritising actions thereafter.

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