Macedon Ranges Shire Council

Macedon Ranges

Agribusiness Plan 2013–2018

The Macedon Ranges Agribusiness Plan 2013 - 18

Prepared for: Macedon Ranges Shire Council

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Thank you to the members of the Macedon Ranges agribusiness community that contributed to the development of this plan.

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1.0 Introduction

Agribusiness is an important part of the Macedon Ranges; making an economic, cultural, social and environmental contribution. The Macedon Ranges Shire Council recognises this and has made agribusiness[1] a key focus of 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 part of ongoing efforts by the Shire to support the agribusiness sector in its endeavours to overcome its 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, commit 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[3] 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[4]

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.

The Macedon Ranges Agribusiness Plan represents a major, industry-leading, step in the Council's ongoing efforts to help balance the interests of the agricultural sector, with the needs of other industry sectors, the environment and the broader community. It has been developed to be consistent with other current Macedon Ranges Shire plans and strategies, including the Council Plan, the Equine Strategy and the Natural Environment Strategy.

"Agribusiness, for the purpose of the Plan, is defined as the earning of some, or all, of one's income from agricultural production OR value-adding[5] to locally grown produce in the Macedon Ranges Shire".

[1] This Plan does not apply to the Equine Industry, which is addressed through a separate document, the Macedon Ranges Equine Strategy (2012). It will, however, be implemented in coordination with the Equine Strategy, and other key Council documents.

[2] The economic modelling and analysis involved the Geografia Scenario Planner: Macedon Ranges Economic Model which is a dynamic systems model developed through a software-based tool.

[3] The term 'sustainable' is used in this document in the same manner in which it is used in the Council Plan.

[4] Macedon Ranges Economic Development Strategy 2009-2019.

[5] Value-adding is the process of adding to a raw product to make it more profitable (i.e. wine, jam)

1.1 Background

In the 10 years between 2001 and 2011, the Macedon Ranges Shire gained almost 5,500 new residents, growing from 35,600 to over 41,000 (ABS, 2011). By 2036 this may increase to 55,000 (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 Shire's population is expected to grow by another 14,000 residents between now and 2036

- 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 shift from labour to capital (i.e. technology) intensive agricultural practices;
- Changing preferences for different types of rural living and new employment profiles in regional settings; and
- An ageing agribusiness workforce.

Agribusiness is an important part of the Shire's economy, with over 500 people employed directly in agricultural related industries and more than $73 million in gross regional product (GRP)[6]. With 85% of the land in the Macedon Ranges Shire zoned for agricultural use[7], 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:

1. Background research, primarily of policy and research documents, and data compilation to outline the context.
2. An Investment Logic Mapping session[8] 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)[9].
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, from which revisions were made to the Plan.

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.

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

[6] Gross Regional Product: the sum of all value added by all industries within the Macedon Ranges. This $73m estimate is not directly comparable with the estimate of the size of the equine industry (see Equine Strategy, 2012) as the latter was composed of an amalgam of different industries and activities.

[7] That is land zoned Farming, Rural Living and Rural Conservation.

[8] 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.

[9] The survey and workshop were extensively promoted through existing agribusiness networks and businesses, local radio, print and social media, on-site promotion and via a mail out to 1,454 Macedon Ranges owner /operators of land that permits agricultural use. 190 (29%) of agribusiness 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:

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 sustainability principles.
4. Demonstrate responsible governance.
5. Contribute to the Shire's economic development objectives, specifically:
    i. Marketing and promoting the Macedon Ranges' unique identity.
    ii. Working with businesses to develop the economy consistent with the Shire's broader values.
    iv. Developing an agribusiness network suited to the needs of the sector.
    v. Updating the information available to the agribusiness sector to support its activities.
    vi. Assisting the sector to meet its recruitment, education and training needs.
    vii. Supporting value-adding activities where possible.

The first step in the process of preparing the Plan involved an Investment Logic Mapping (ILM) session. This session, with Council Officers, 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:

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

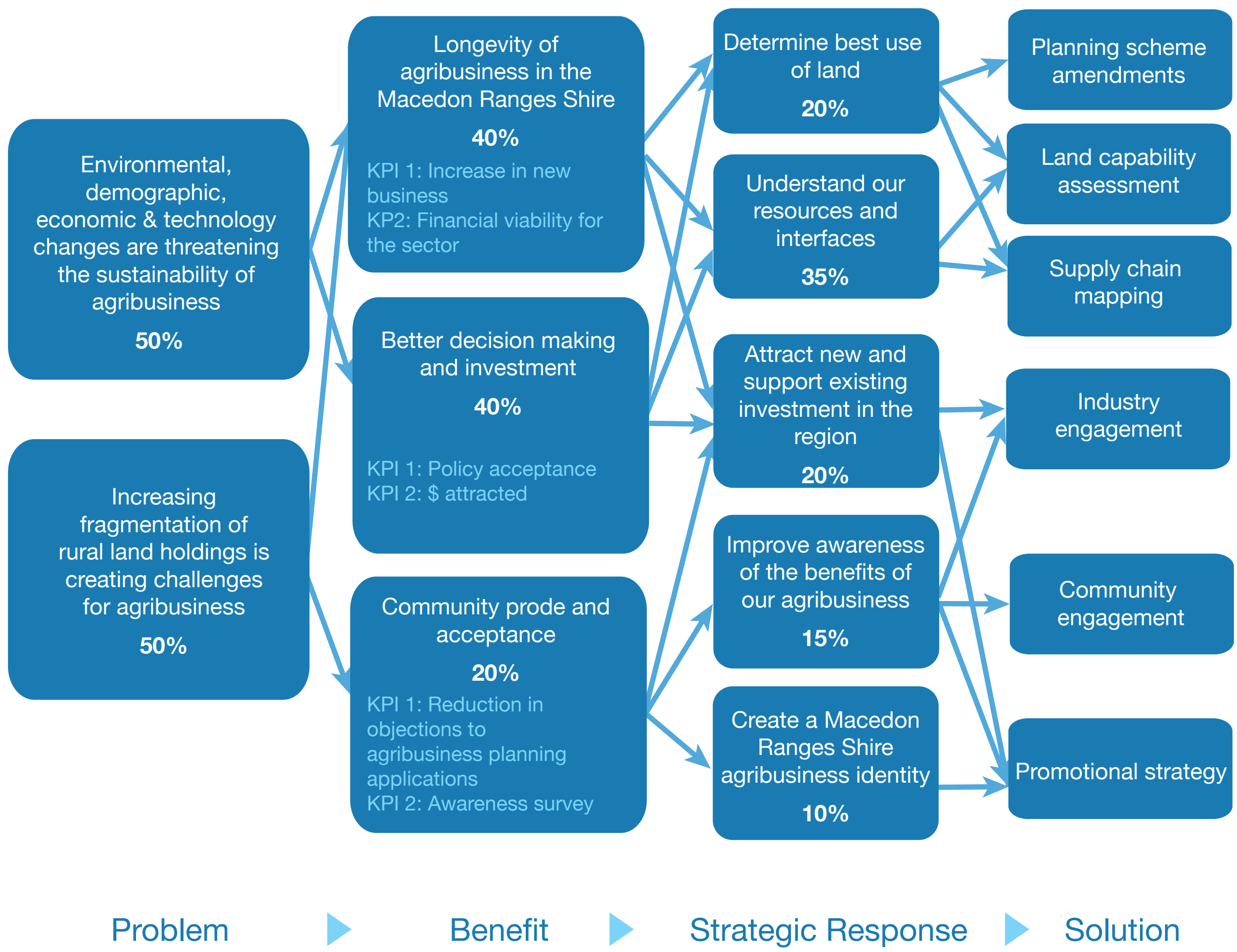
1. The environmental, demographic, economic and technology changes that are threatening the sustainable presence of agribusiness in the Shire.
2. The impact of land fragmentation on agricultural activity.

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

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 survey and industry workshop. In combination, they form the focus of the Plan's objectives and strategic recommendations.

Figure 1 Agribusiness Plan Investment Logic Map



1.3 Summary of Findings

A set of priorities and recommendations were developed through the process of consultation, analysis and research. These have been aligned to the following four themes:

1 Communication

- 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.

2 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, stakeholder consultation identified that 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.

3 Information and Facilitation

- 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.

4 Growth Opportunities

- 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.

In summary, the Agricultural sector sees the role of Council 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.

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

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[10]. When including off-farm income from agribusiness producers[11] The Macedon Ranges' contribution to this was around 0.8% ($73 million)[12] and it encompasses about 0.9% of Victoria's total agricultural landholdings (ABS, 2011).

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. 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).

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[13] 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.

Table 1 Macedon Ranges Lead Indicators

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

[10] 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.

[11] This may include some income derived from agribusiness properties outside of the Shire and small-scale producers (i.e. under $5,000 per annum turnover).

[12] Based on economic modelling and analysis undertaken by Geografia.

[13] Based on economic modelling and analysis undertaken by Geografia.

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 maintain margins through reduced production costs and 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).

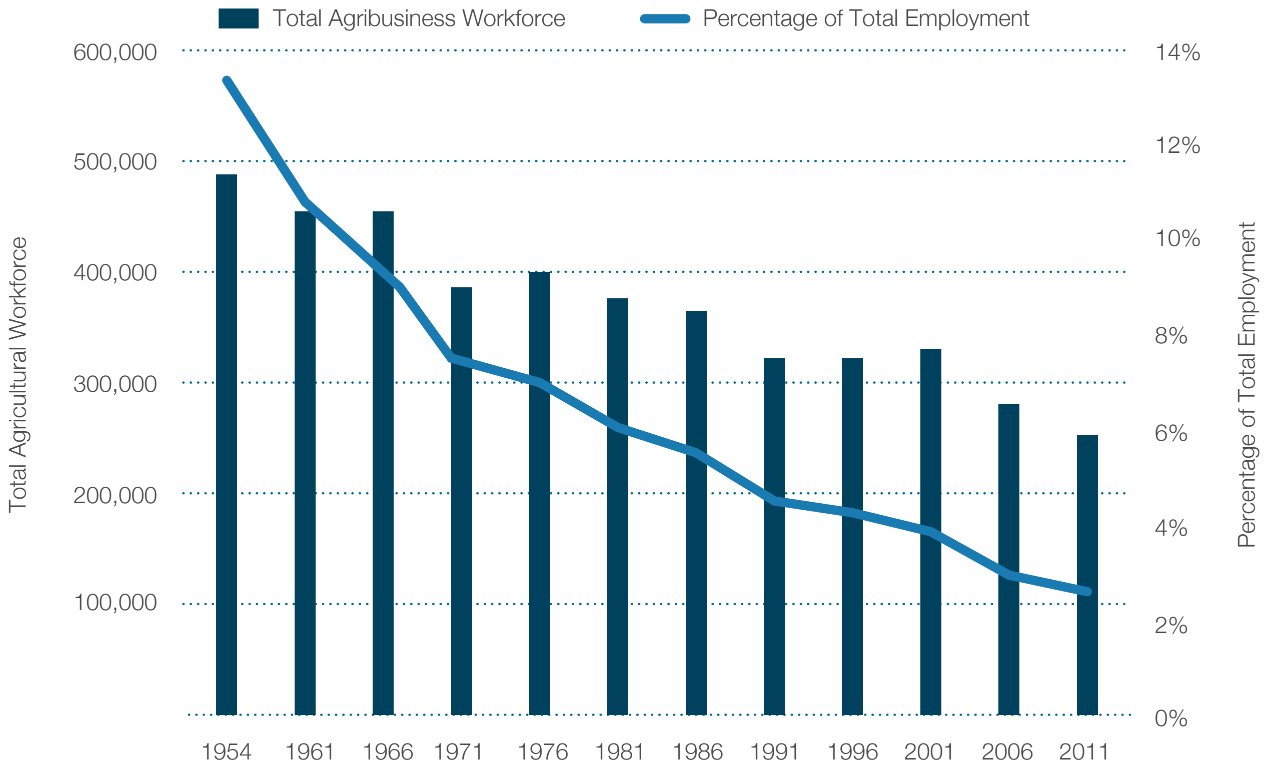
This decline has also been experienced in thez Macedon Ranges. Between 2001 and 2011, the size of the Shire's resident agribusiness labour force decreased by 18%, even as its overall resident labour force increased by almost 24% (ABS, 2011).

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 agribusinesses 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.

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

Figure 2 National Agribusiness Workforce 1954-2011



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:

1. 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);
2. 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);
3. 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 perception that agribusiness has poor career prospects (Commonwealth of Australia, 2012);
4. There is a goal to double food and fibre production in Victoria by 2030 (Government of Victoria, 2012);
5. The Bureau of Rural 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 Rural Sciences, 2006);
6. In the preliminary research for the Loddon Mallee Regional Strategic Plan, Gisborne and Kyneton are identified as future district centres within a high value agribusiness region (DPCD, 2010);
7. 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). It should be noted that, at this stage, there is no consistent high-level policy position on the matter of peri-urban development[14].

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

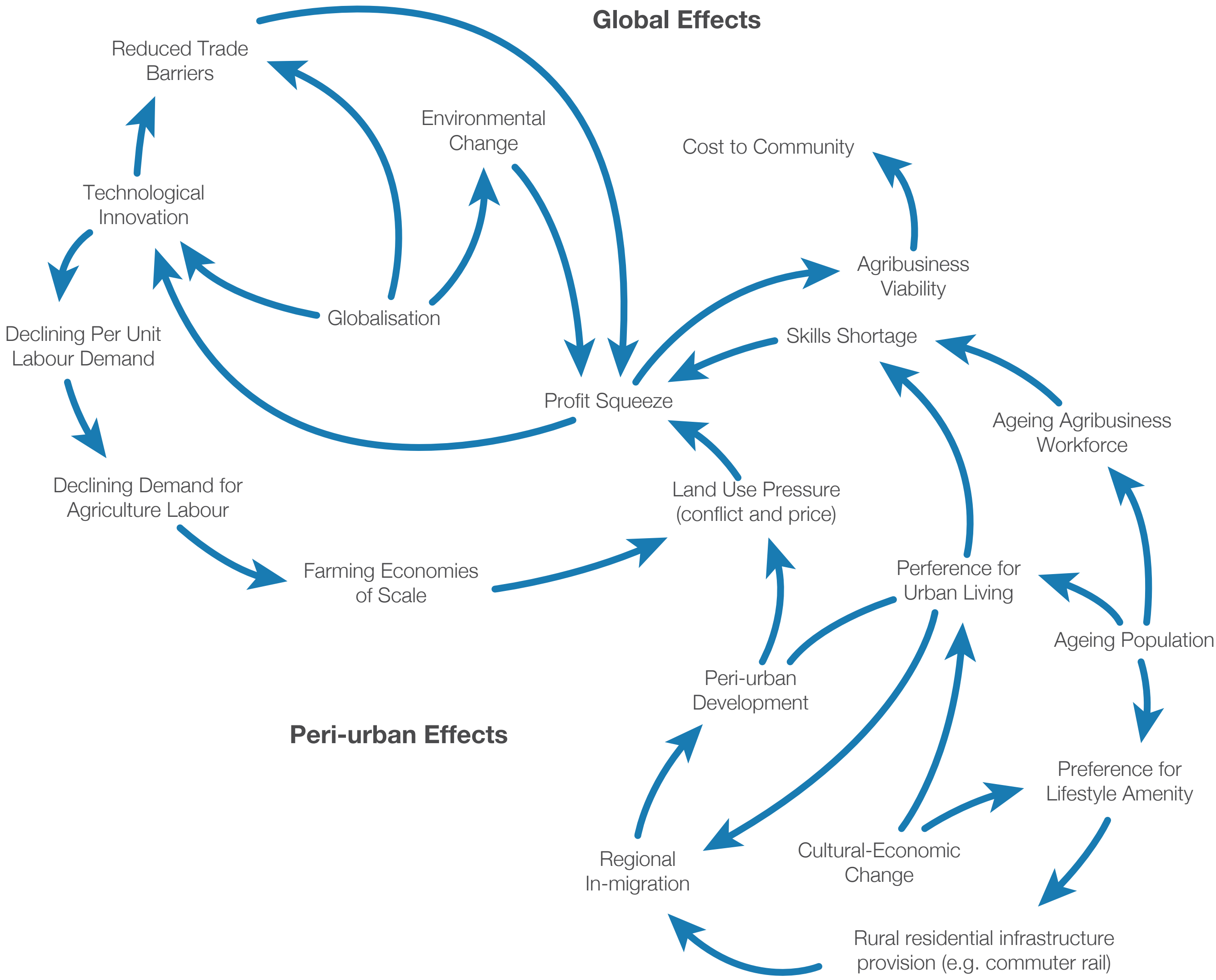
[14] There is extensive material and research in respect to Australia's peri-urban regions. For example, the Bureau of Rural Sciences (2006), Choy et al (2008) and Buxton et al, (2008). Rural Councils Victoria has compiled research and best practice guidelines to assist peri-urban councils with managing development. This work informed the consultation process in this study.

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, the local landscape has been experiencing very rapid change. As Figure 3 shows, there are complex arrays of variables that are driving this and, in turn there are multiple consequences.

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. 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. One of the many outcomes 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).

Figure 3 Peri-urban Change Factors Influence Diagram



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.

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

3.0 Consulation Findings

This section summarises the findings from the background research and industry consultation and analysis[15]. 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.

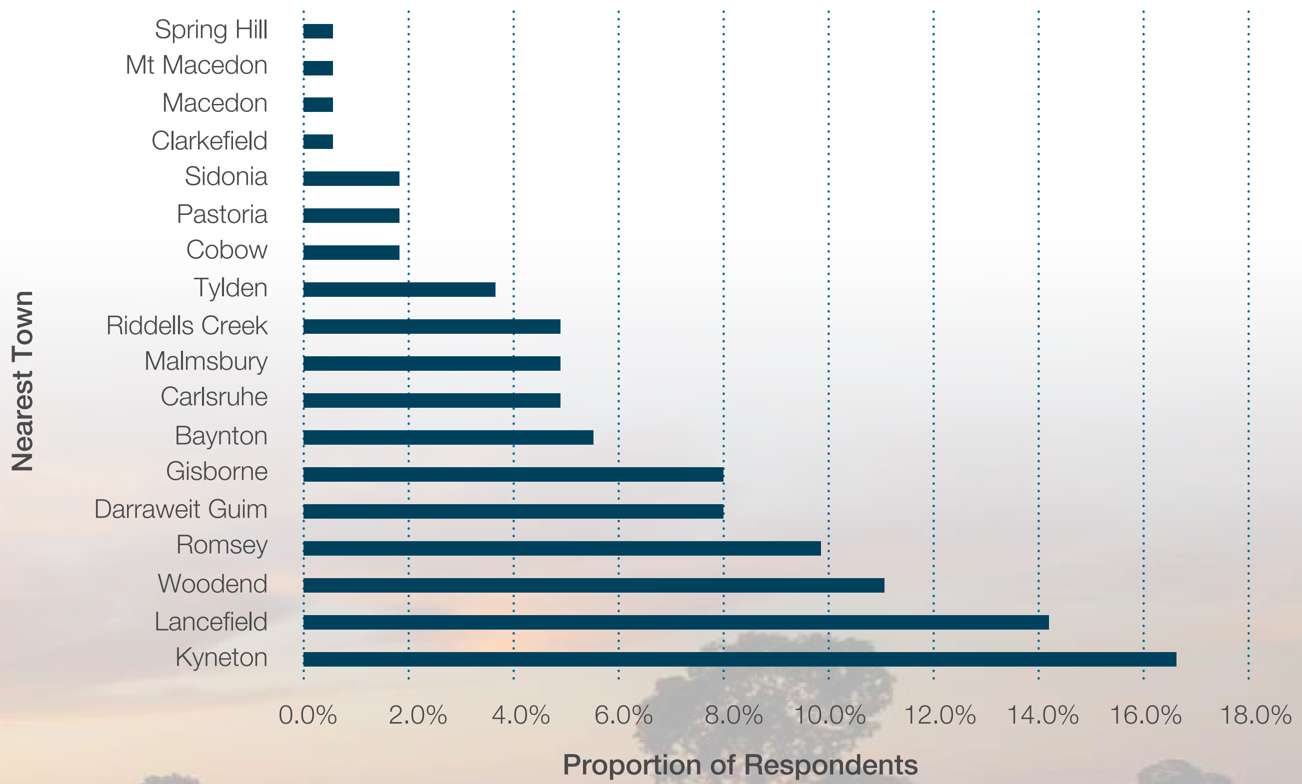
3.1 Agribusiness in the Macedon Ranges

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[16]. The survey captured the views of 190 enterprises (or 29% of the registered enterprises). Figure 4 shows respondents by nearest town.

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.

With the exception of some industries, there is a strong, positive correlation between land holdings and turnover

Figure 4 Survey Respondents by Location



Data Source: Macedon Ranges Agribusiness Survey

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

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.

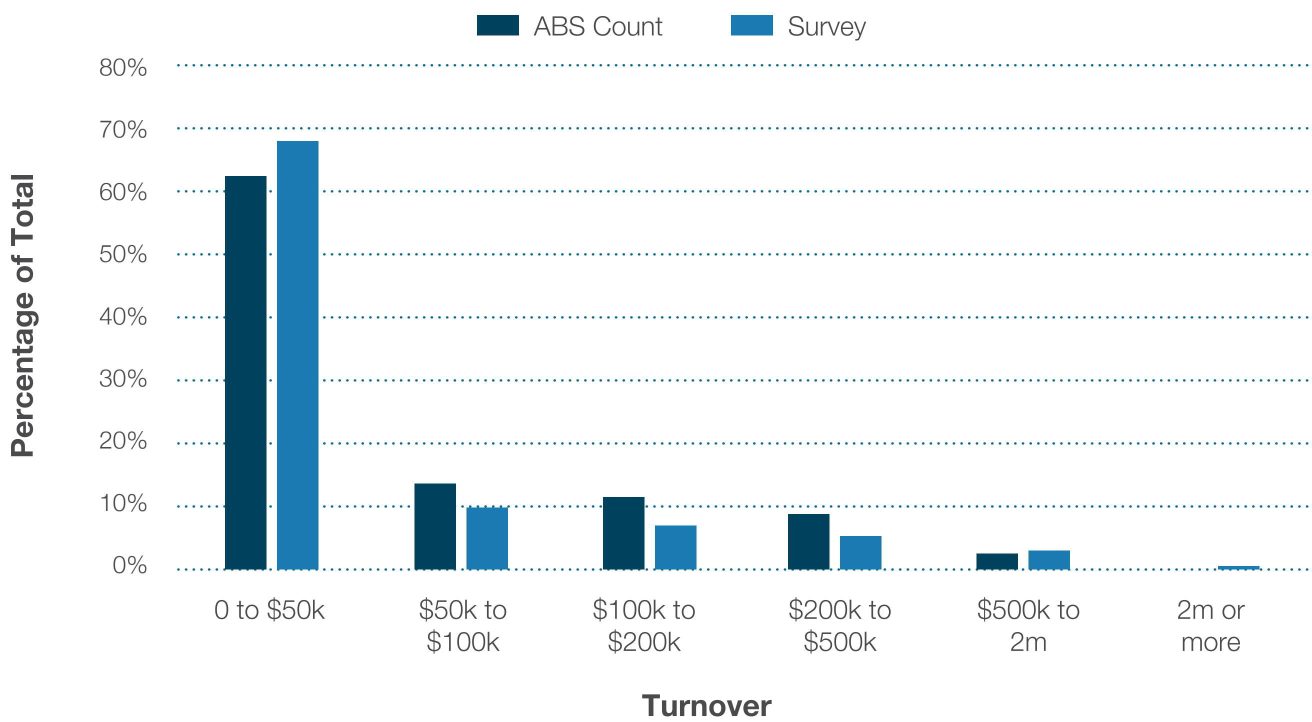
Also reported was that:

- 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).

As of March 2013, the Australian Business Register of agribusiness operators manage between 93 and 167 hectares of land, at least 70% of which is on a single, main property.

As Figure 6 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.

Figure 5 Survey Respondents by Turnover



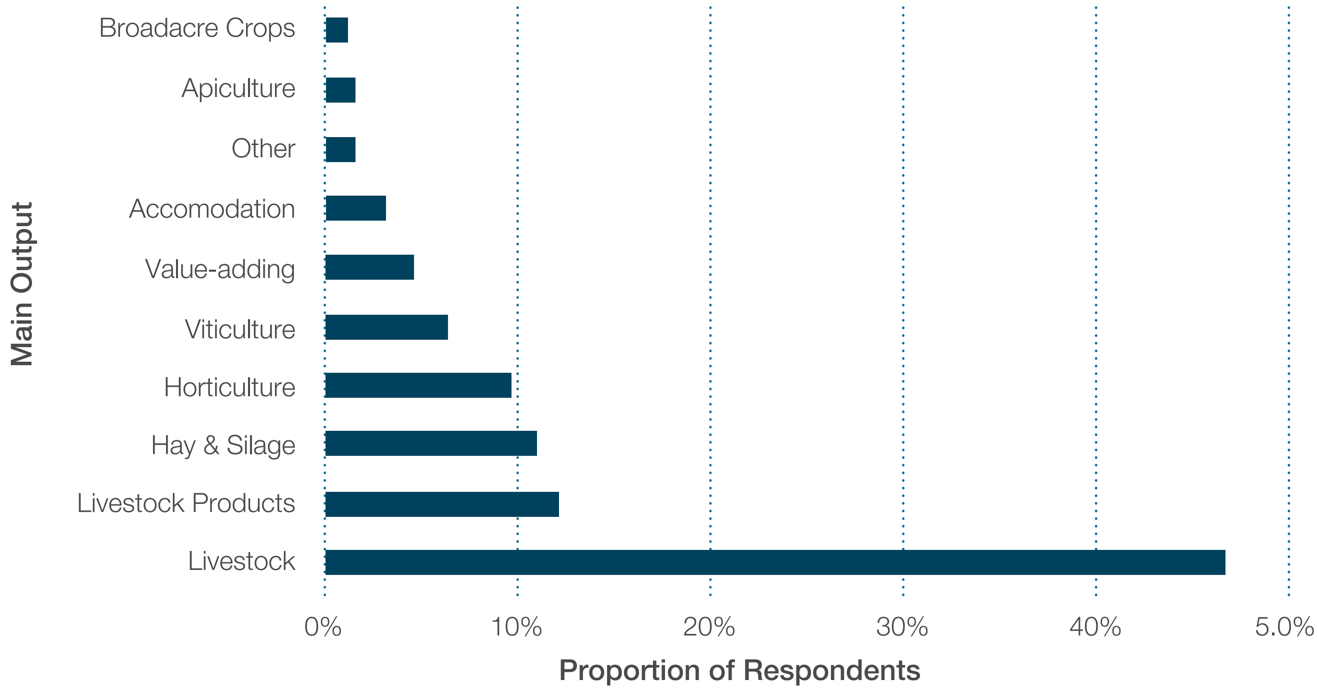
Data Source: Macedon Ranges Agribusiness Survey

Table 2 Turnover and Property Size

Turnover Range	Average Land Holdings	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

Figure 6 Survey Respondents by Main Output



Data Source: Macedon Ranges Agribusiness Survey

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.

However, the dominance of broadacre crop and beef/sheep farms is declining. For example, in the Shire's 2009 Business Survey, 15% of Agribusiness Survey 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 survey also identified a number of agribusiness operators new to the region who were looking to experiment and diversify into new products.

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.

Table 3 Livestock Sector Profile Macedon Ranges

Livestock Type	Proportion of Sector
Beef Cattle	1,456
Beef/Sheep	1,074
Prime Lamb	339.1
Wool	296.9
Alpacas	367.7
Poultry	313.5
Goats	139.2
Pigs	81.6

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

Data Source: Macedon Ranges Agribusiness Survey

3.2 The Industry Structure and Opportunities

In relation to operational matters, 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, while livestock producers drew an average of 75% of their turnover from their primary activity of livestock production, horticulturalists drew an average of 50% of their turnover from horticulture, with the rest from a mix of livestock and food processing. Equally so, viticulturalists drew 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 was 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.

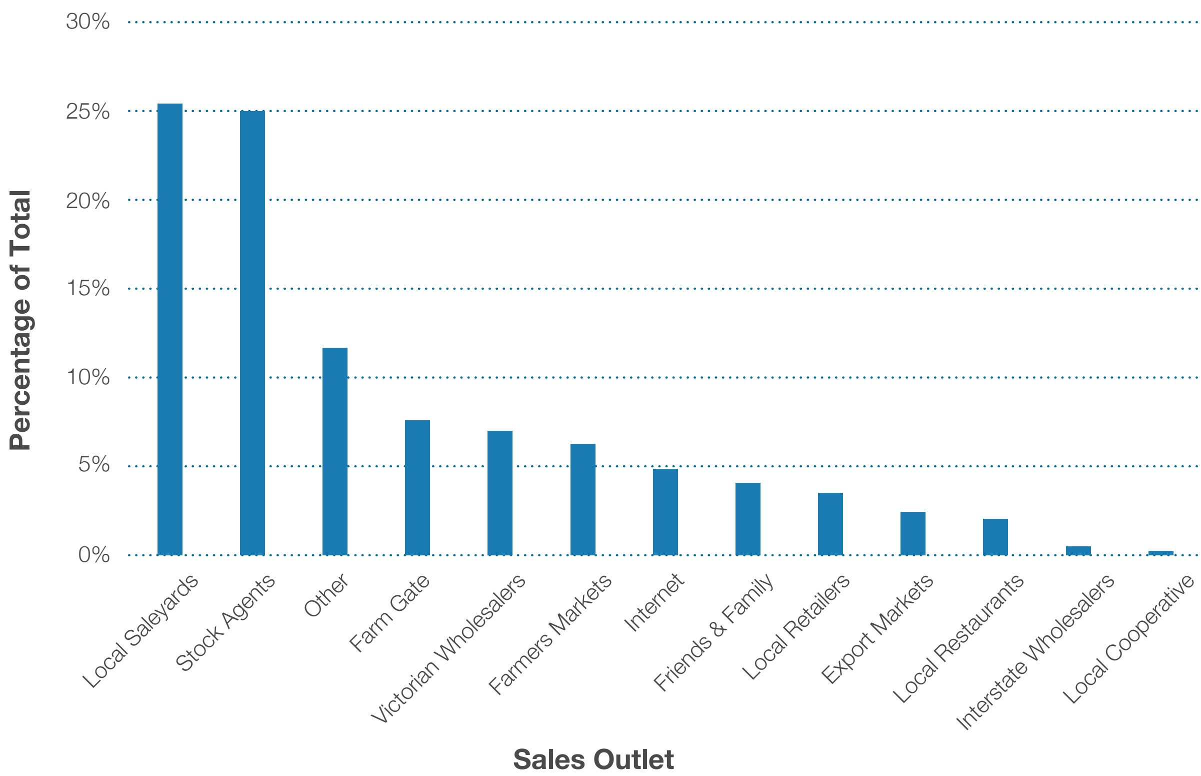
According to the survey, slightly over 25% of output from the Shire was sold through local saleyards and another 25% through stock agents (Figure 8). Combined with the dominance of the Shire as an input source, it emphasises the importance of the agribusiness sector to local economic activity – as well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

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

Figure 7 Main Sales Outlets



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[17]. It suggests that there may be opportunities to use existing assets within the Shire to support agribusiness activities in new ways[18]. 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. Accreditation bodies and schemes included:

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

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, including:

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

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. Amongst those already a member of at least one other forum, 76% acknowledged the benefits of a Macedon Ranges forum. Of those currently not a member of any forum, 61% saw the benefits in being a member of a Macedon Ranges Forum.

[17] 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.

[18] The Yarra Ranges Regional Food Group's investigation into the establishment of shared kitchen/storage facilities are an example of this.

3.3 The Priority Constraints

Survey respondents were asked to nominate (in order) the top three constraints that are impeding their capacity to expand their agribusiness activity in the Shire. Figure 8 shows the results.

The responses largely 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. `

Respondents were then asked whether they intended to expand and/or diversify in the next 10 years and what needed to be done to ensure this would happen. While almost two thirds of respondents indicated they intended to expand, most also noted it would only occur if several key issues were addressed, particularly:

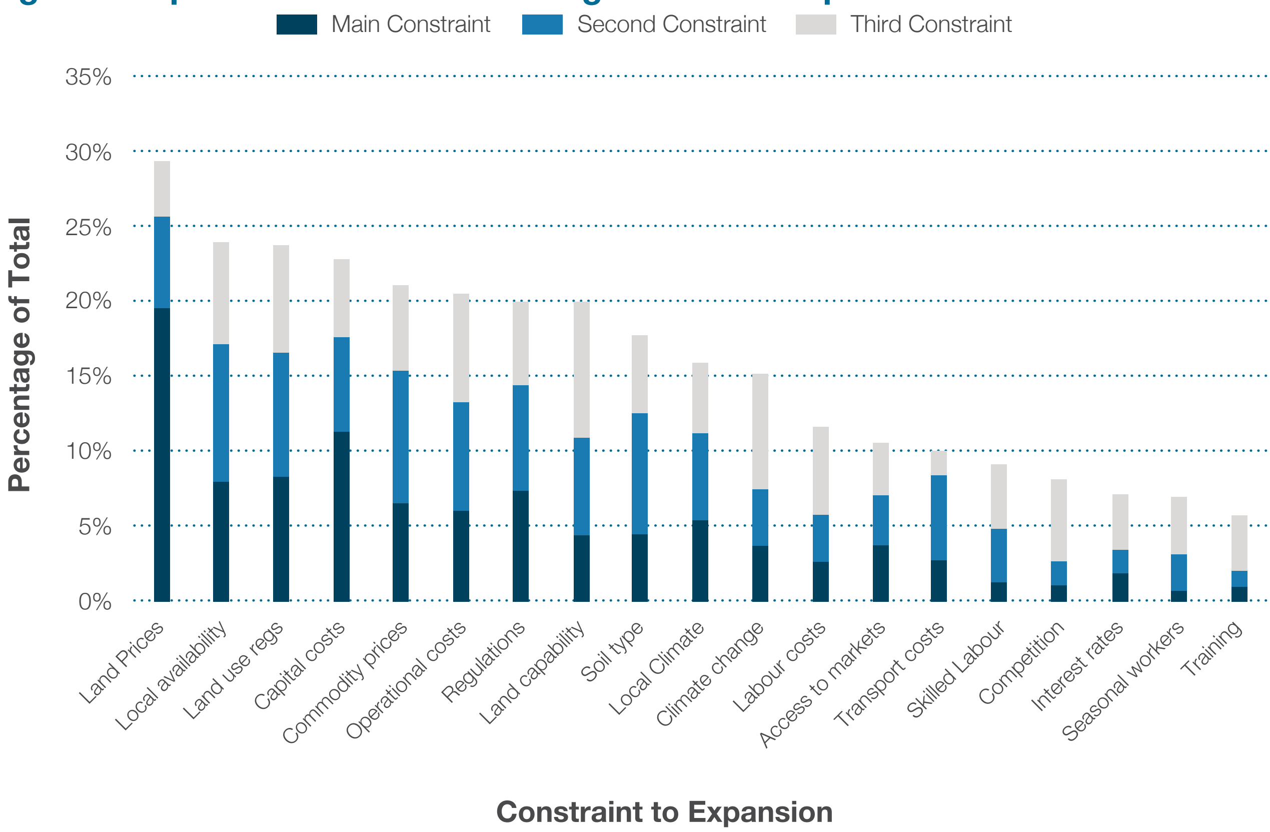
1. Achieving productivity gains through identifying ways to increase stocking rates or other technical practice improvements (8% of respondents);
2. Ensuring security of water access in light of future drought conditions (5%); and
3. Addressing economies of scale issue by accessing affordable land (possibly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

Figure 8 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, along with water availability, land prices, the capital cost of expansion (related to land prices) and land regulations dominate concerns. Also important were land capability issues, education and training and access to markets.

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

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.

Figure 8 Top Three Constraints on Agribusiness Expansion



These follow-up comments suggest that, subject to the identification and retention of high value agricultural land, agribusiness is very viable. Stakeholders noted that, as a general principle, it is important to be consistent 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 the 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 highlight the way agribusiness in the Macedon Ranges in undergoing a transition. 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.

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 the survey 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[19].

Also noted were the constraints imposed by reliable water access; uncertain land capability (i.e. knowledge of suitability of land to different agribusiness operations, particularly necessary for new investors); and the condition of the Kyneton Saleyards. Although only livestock farmers expressed concerns about the latter, the Saleyards are a major part of the Shire's asset base and generate a substantial return to the local economy. Consequently, consideration of the role of the Saleyards 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 how the Saleyards' role may change to accommodate the demands of 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 the rapid influx of new landholders with little experience in land management. This is one of the 'right to farm' concerns raised in the State Government's 2010 study of peri-urban development (Government of Victoria, 2010).

> '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

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

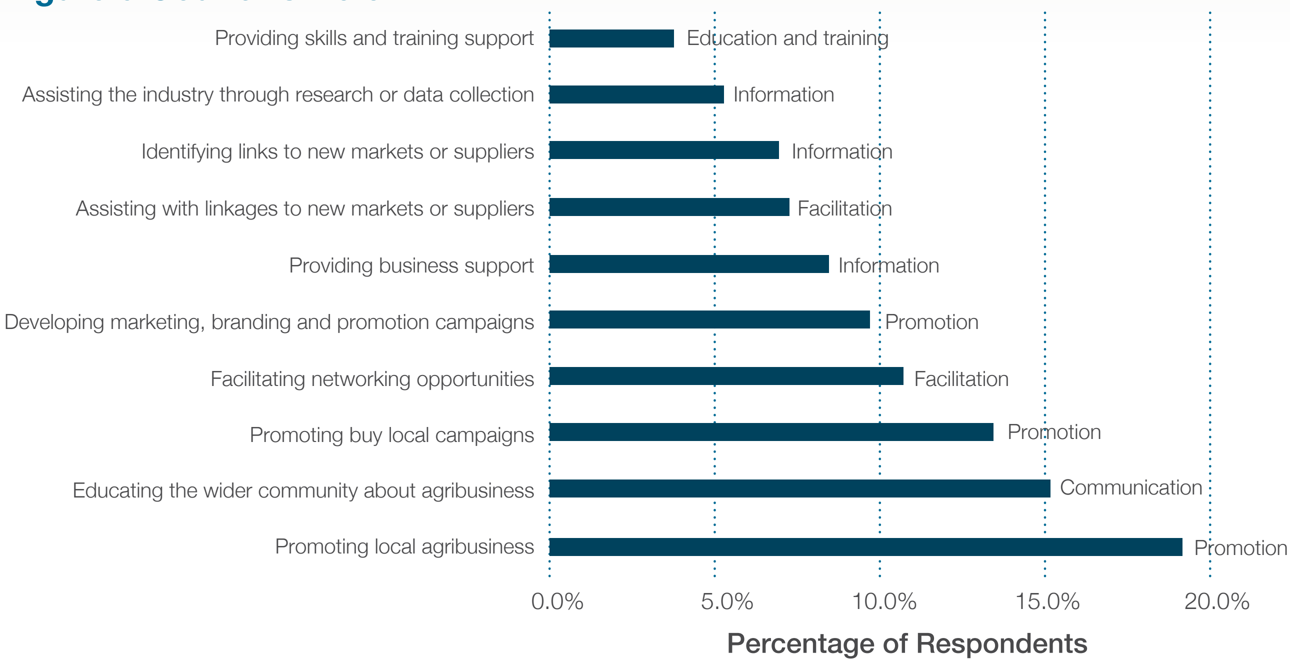
3.4 Partnership Opportunities

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[20] (Figure 10).

Figure 9 shows the importance the agribusiness sector places on Council providing an information, facilitation and promotion role for the sector.

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 9 Council's Role



Data Source: Macedon Ranges Agribusiness Survey

Figure 10 Council's Role Key Words

20 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).

Figure 10 is a 'word cloud' that visually demonstrates the main words used by survey respondents when asked where the Council should focus its efforts to assist the agribusiness sector. The more often it occurred in the responses, the larger the word. 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:

- 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.

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

3.5 Summary

1 Communication

- 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.

2 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, stakeholder consultation identified that 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.

3 Information and Facilitation

- 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.

4 Growth Oppourtunities

- 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. vineyards), which require less land. The access to Melbourne and high rural amenity values are considered competitive advantages for new forms of agribusiness.

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 recognised and embraced 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. While this is an industry-specific economic development plan, the actions should be implemented in compliance with all relevant State and Commonwealth policies and legislation, as well as other Shire Policies and Strategies, including those relating to environmental protection, land and community development.

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 focus on the four strategic themes of:

1. Communication.
2. Transition.
3. Information and Facilitation.
4. Growth Opportunities.

The recommendations and their prioritisation were developed through an analysis of the literature and 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

Theme	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 (e.g. MRSC Weed Management Strategy) 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	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 parts of the agribusiness sector and the Shire into more land intensive production and smaller scale producers. As agricultural production is an important part of the economic and cultural landscape, Council has an important and ongoing role in ensuring, to the extent that it can, that policies and regulations allow the industry to thrive, while still managing for other land use needs.	5. Work with the Forum and other relevant agencies to identify and address planning for transition (e.g. succession and land use planning)	High
		6. Review operations at the Kyneton Saleyards and consider future options for its use.	High
		7. Advocate for continued research on future farming options	Medium
		8. Work with the Forum to identify and promote new value adding opportunities, to support, amongst other things, smaller-scale farming (e.g. mobile butchers or local 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. MRSC 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 landholders to communicate opportunities and information and build links between the established and new residents in agricultural areas (e.g. MRSC Voluntary Environmental Resource Inventory) links between the established and new residents in agricultural areas (e.g. MRSC 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 identify and promote existing assets and infrastructure within the Shire that may be used to support agribusiness supply chain activity (e.g. commercial kitchens)	Medium
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.	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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Appendix 1

Summary of Community Consultation Feedback

Macedon Ranges Agribusiness Plan 2013

The Macedon Ranges Economic Development and Tourism Unit and Geografia, consultants responsible for the development of the Agribusiness Survey and Plan, undertook community consultation for the Macedon Ranges Agribusiness Plan.

The Agribusiness Survey was open from 14 January to 22 February 2013 and included:

- Mailout to 1,454 landholders of land that permits agricultural use (land zoned Farming, Rural Living and Rural Conservation);
- Promotional postcards and posters to over 130 locations;
- Introduction of a QR (Quick Response) code on all promotional material;
- Promotion via community newsletters, local newspapers, local and regional radio, emails and websites;
- On-site promotion at all Farmers Markets and the Kyneton Saleyards;
- Industry support (i.e. Victorian Farmers Federations, Landcare, Victorian Agribusiness Council, local stock agents); and
- Network support (i.e. Daylesford Macedon Produce, Central Victorian Alpaca Association, Macedon Ranges Vignerons Association).

An Agribusiness Plan Community Workshop was held in Woodend in March 2013 to present the findings of the Survey to the community and refine key recommendations to address the opportunities and constraints raised through the Survey. The workshop was promoted through the same avenues as the Survey and was attended by 17 local agribusinesses.

The Draft Plan went on Public Exhibition from 15 April to 10 May 2013. Notification of the public exhibition of the Draft Plan was sent to those who completed the Agribusiness Survey and the various agribusiness networks that supported the Survey. Copies of the Draft Plan were sent to those that participated in the community workshop and were made available at all Council offices and on Council's website.

Promotion of the public exhibition period was advertised in all local community newsletters, local radio, on Council's website and in local newspapers. Local agribusiness networks also promoted the Draft Plan through their own membership base using various communication methods.

A total of 12 submissions were received.

All comments and contributions from the above consultation processes, as well as individual conversations in between, have been considered in the review of the Draft Agribusiness Plan.

A summary of the submissions received, and corresponding actions, is provided in the following table.`

Feedback Received	Action
Kyneton Resident, Via Email 17/04/13	
Under the section *"strategic responses of Council"* the words *"Working to achieve economic sustainability of agricultural pursuits within the shire"* need to be added in order for it provide a straightforward policy position for Councillors and officers to adopt.	Noted. The sentiment of 'working to achieve economic sustainability of agricultural pursuits within the Shire' can be incorporated under **Action 7 (pg.23)** *Advocate for continued research on future farming options.*
There is repeated reference to land prices in the report without recognition that such prices are often the result of planning systems, nor the consequential issue that is directly within the control of MRSC, the cost of rates. There is no reference to the need to set rates based on achieving an economic return from, or a balance of the cost of services provided to, the land concerned.	Noted. Council's adopted rating system is based on local values not on generated income. Council also applies a differential rate to primary producers on land in the Shire however; revised **Action 5 (pg.23)** *Work with the Forum, and other relevant agencies, to identify and address planning issues* and **Action 7 (pg.23)** as above, provides Council with the scope to consider this.

Feedback Received	Action
Kyneton Resident, Via Email 21/04/13	
Draft was a good read.	Noted.
Council needs to be aware of how valuable the land is in the district.	Noted.
There needs to be incentives for people to raise livestock in the region.	Noted. Could be further explored under **Action 7 (pg.23)** *Advocate for continued research on future farming options.*

Feedback Received	Action
Newham Resident, Via Letter 06/04/13	
Agribusiness is not a fundamental part of the Shire's economy (i.e. it is a small part)	Noted. Amended text under **1.0 Introduction (pg.1)** from '*fundamental*' to '*important*'.
Planning controls have slowed down influx of young people which is to the detriment of the community	Noted. Revised **Action 5 (pg.23)** *Work with the Forum, and other relevant agencies, to identify and address planning issues* and **Action 7 (pg.23)** *Advocate for continued research on future farming options* to provide Council with the scope to consider this.

Feedback Received	Action
Macedon Ranges Land Owners Committee, Letter Via Email 07/05/13	
Support the opinion and recommendations of the consultant, specifically the role of Council as a provider of basic services and support and facilitator of communication, advocacy and information exchange	Noted.
Concern with respect to no consideration given to the Equine Strategy	Noted. Additional text added to **1.0 Introduction (pg.1)** The Macedon Ranges Agribusiness Plan *represents a major, industry-leading, step in the Council's ongoing efforts to help balance the interests of the agricultural sector, with the needs of other industry sectors, the environment and the broader community. It has been developed to be consistent with other current Macedon Ranges Shire plans and strategies, including the Council Plan, the Equine Strategy and the Natural Environment Strategy* to better clarify the alignment of the Plan with other Council plans and strategies.

Feedback Received	Action
Romsey Resident, Via Letter 09/05/13	
Omission of any reference to the trotting industry - both in the Agribusiness Plan and the Equine Strategy.	Noted. As trotting is defined as an equine activity, submitters concern has been directly referred to the Council Officer responsible for the Equine Strategy and Equine Network. Additional text added to **1.0 Introduction (pg.1)** *The Macedon Ranges Agribusiness Plan represents a major, industry-leading, step in the Council's ongoing efforts to help balance the interests of the agricultural sector, with the needs of other industry sectors, the environment and the broader community. It has been developed to be consistent with other current Macedon Ranges Shire plans and strategies, including the Council Plan, the Equine Strategy and the Natural Environment Strategy* to better clarify the alignment of the Plan with other Council plans and strategies.
Need to ensure rates and other Council actions support economic viability of agribusiness	Noted, **Action 7 (pg.23)** *Advocate for continued research on future farming options* provides Council with the scope to consider this and to work with other stakeholders to investigate options.
Plan only mentions annual, not net turnover	Noted.
Constraints on broadacre farming where there is no lifestyle component to offset it.	Noted. Revised **Action 5 (pg.23)** *Work with the Forum, and other relevant agencies, to identify and address planning issues* and **Action 7 (pg.23)** as above, *to* provide Council with the scope to consider this and to work with other stakeholders to investigate options.

Feedback Received

Romsey Resident, Via Letter 09/05/13 continued

Broadacre farming 'uneconomical' in some areas due to constraints such as; high operational costs, planning controls and economies of scale that once existed have been eroded away by input costs increasing at a much greater rate than returns.

Allow the land to be used economically for uses such as various horse activities.

Action

Noted. Revised Action 5 (pg.23) as above and inserted additional text to the Rationale for Transition in Table 5 (pg. 23) Consequently, the Agribusiness Plan needs to consider the inevitable transition of some parts of the agribusiness sector and the Shire into more land intensive production and smaller scale producers. As agricultural production is an important part of the economic and cultural landscape, Council has an important and ongoing role in ensuring, to the extent that it can, that policies and regulations allow the industry to thrive, while still managing for other land use needs to make more specific references to land use planning in general.

And Action 7 (pg.23) as above, also provides Council with the scope to further explore the 'uneconomical' situation and to work with other stakeholders to investigate options.

Feedback Received

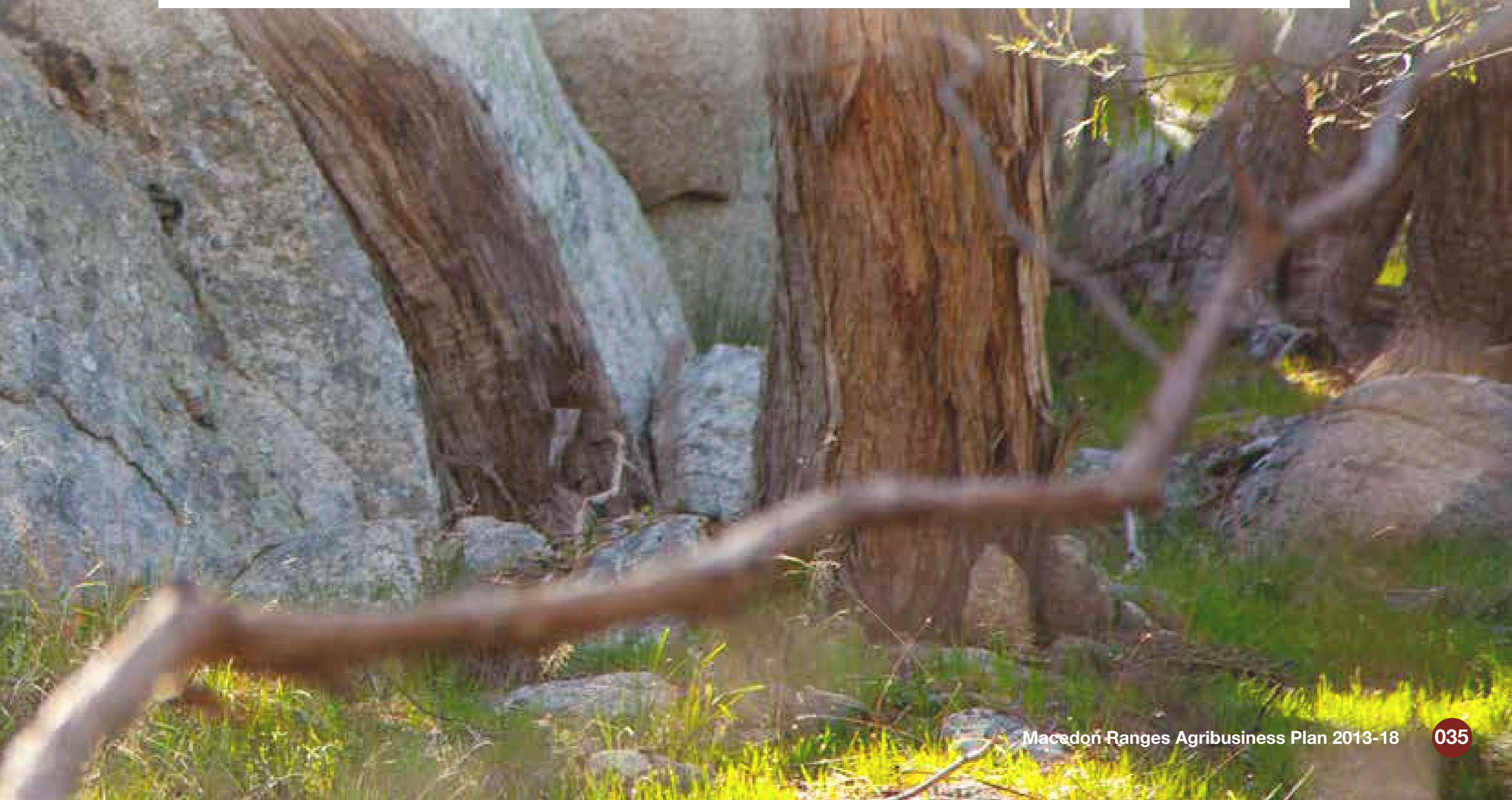
Kyneton Resident, Via Email 09/05/13

Feedback relates to enabling the building of dwellings on land under 40ha in a catchment area. We believe that the current planning restraints be addressed. If the owner can show that an agricultural use can be substantiated, and is able to contain its waste water onsite then this should be permitted.

Action

Noted. Revised **Action 5 (pg.23)** *Work with the Forum, and other relevant agencies, to identify and address planning issues* and **Action 7 (pg.23)** *Advocate for continued research on future farming options* to provide Council with the scope to consider this and to work with other stakeholders, including water and catchment authorities, to investigate options.

Feedback Received	Action
Woodend Resident, Via Email 09/05/13 There was a glaring omission within the plan regarding the protection of prime agricultural land from development. You say that on page 20 that the “follow-up comments suggest that agribusiness is very viable if high value agricultural land is identified and retained for agribusiness”, but the draft plan gives no decisive mechanism as to how this excellent aim can be achieved.	Noted. Revised **Action 5 (pg.23)** *Work with the Forum, and other relevant agencies, to identify and address planning issues* and **Action 7 (pg.23)** *Advocate for continued research on future farming options* to provide Council with the scope to consider this and to work with other stakeholders to investigate options.
1. Page 4, you state BENEFIT- Longevity of agribusiness in the Macedon Ranges Shire. STRATEGIC RESPONSE- Determine best use of land and understand our resources and interfaces. SOLUTION- Land capability assessment and Planning scheme amendments. You have set out the aims but not the tools to achieve these aims. There is no definitive statement as to the mechanisms you could apply to these aims.	Noted. As above, this could be scoped through the revised **Action 5 (pg.23)** and **Action 7 (pg.23)**.



Feedback Received	Action
Romsey Resident, Via Email 09/05/13	
Report thorough and informative.	Noted.
The question becomes for small landowners – what business is going to generate sufficient revenues to be worthwhile. I can see that this big question will be the major anomaly that existing landowners and new landowners have at the back of their minds.	Noted. **Action 7 (pg.23)** *Advocate for continued research on future farming options* will enable Council and other stakeholders to work to investigate possible options.

Feedback Received	Action
Ashbourne Resident, Via Email 10/05/13	
Plan is relevant to the themes from the survey.	Noted.
Interested in the formation of an agribusiness forum and on-going networking opportunities to support our own industry and business with the Macedon Ranges.	Noted.

Feedback Received	Action
Macedon Ranges Residents' Association, Letter via Email 13/05/13 (Late submission)	
Concern with respect to the lack of acknowledgement of the importance of the environment and the cultural value of agribusiness as a sustainable practice with a long history in the Shire. Would like to see more discussion around the past and future of agricultural practice	Noted. The Agribusiness Plan has derived from the Economic Development Strategy therefore it has an economic focus on agri<u>business</u> rather than agriculture. Additional text added to **1.0 Introduction (pg.1)** *The Macedon Ranges Agribusiness Plan represents a major, industry-leading, step in the Council's ongoing efforts to help balance the interests of the agricultural sector, with the needs of other industry sectors, the environment and the broader community. It has been developed to be consistent with other current Macedon Ranges Shire plans and strategies, including the Council Plan, the Equine Strategy and the Natural Environment Strategy* and **Section 4.1 (pg. 22)** *While this is an industry-specific economic development plan, the actions should be implemented in compliance with all relevant State and Commonwealth policies and legislation, as well as other Shire Policies and Strategies, including those relating to environmental protection, land and community development* to clarify that the Plan should be implemented in a way that works with the Shire's environmental and planning policies, including those State and Commonwealth policies that may adhere.
Section 1.0 Introduction (pg.1) makes no distinction between the two definitions of 'sustainable'.	Additional **Footnote (pg.1)** has been inserted to better clarify that the dots points are from derived from the Macedon Ranges Economic Development Strategy and therefore *The Plan uses the definition of 'sustainable' as implied in the Macedon Ranges Council Plan.*
Footnote 1 (pg.1) How can the Equine Strategy not impact on or be discussed in the plan?	As above, additional text added to 1.0 **Introduction (pg.1)** to provide more clarity on how the Plan will be implemented.
Footnote 2 (pg.1) What and where is the 'regional economic model' referred to.	The model is a software-based tool rather than a document and therefore cannot be provided as reference document. A footnote has been added on Pg 1 to clarify this and Geografia 2013 has been removed from the 5.0 References (pg 29).

Feedback Received	Action
Macedon Ranges Residents' Association, Letter via Email 13/05/13 (Late submission) continued	
Concern there is no mention of Planning Policy No. 8	As above, additional text has been added to **1.0 Introduction (pg.1)** and to **Section 4.1 (pg. 22)** to clarify that the Plan should be implemented in a way that works with the Shire's environmental and planning policies, including those State and Commonwealth policies that may adhere. Revision made to Rationale for Transition in **Table 5 (pg. 23)** *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 parts of the agribusiness sector and the Shire into more land intensive production and smaller scale producers. As agricultural production is an important part of the economic and cultural landscape, Council has an important and ongoing role in ensuring, to the extent that it can, that policies and regulations allow the industry to thrive, while still managing for other land use needs* to make more specific references to land use planning in general.
Under 'Strategic Responses', what is the nature of the new agribusiness that is sought for the and how is such an identity proposed to be 'created'?	Noted. Strategic Responses is featured in **Figure 1 (pg.4)** which presents the Investment Logic Map. The map was created through a process with Council Officers to help identify problems and provide possible solutions and to be a reference in the Plan, not a specific action however, **Action 11 (pg.24)** *Work with the Forum to establish and promote Macedon Ranges agribusiness* provides Council with the scope to further explore possible options.

Feedback Received	Action
Macedon Ranges Residents' Association, Letter via Email 13/05/13 (Late submission) continued	
Concerned that the full context of peri-urban challenges are not acknowledged or given historical context.	Noted. Additional **Footnote (pg.9)** has been inserted to acknowledge that *There is extensive material and research in respect to Australia's peri-urban regions. For example, the Bureau of Rural Sciences (2006), Choy et al (2008) and Buxton et al, (2008). Rural Councils Victoria has compiled research and best practice guidelines to assist peri-urban councils with managing development. This work informed the consultation process in this study.*
Geografia 2013a report not publically available.	Noted. Reference Geografia 2013a *Rural Migration Trends and Drivers* is a report developed for the Rural Councils Victoria and has yet to be released publically therefore it, and any reference to it in the Plan, has been removed.
Loddon Mallee Regional Growth Plan referred to but not yet available.	Noted. Incorrec`t reference. Reference to state Loddon Mallee Regional Strategic Plan. Correction made.
No acknowledgement that active steps need to be taken to avoid the negative consequence of land speculation or fragmentation of holdings.	Noted. The Agribusiness Plan has derived from the Economic Development Strategy therefore it has an economic focus on agri<u>business</u> rather than agriculture and land use and this specific concern is referenced in Council's planning provisions however, as above, additional text has been added to **1.0 Introduction (pg.1)** to acknowledge, and consider, the use of all land within the Shire.
One of the Plan's inherent and general weaknesses is the reportage of conditions, as relayed to it by industry practitioners and Councils sources, without any further analysis or thought being given to the next steps that could be planned.	Noted. The Plan was developed in consultation with Council, local agribusiness and other stakeholders with direct input through the Agribusiness Survey, the Community Workshop and numerous individual conversations in between. As with its development, the Plans implementation will be done in collaboration with the agribusiness community (i.e. through the proposed forum) and other relevant stakeholders such as the Victorian Farmers Federation, Department of Primary Industry.

Feedback Received

Macedon Ranges Residents' Association, Letter via Email 13/05/13 (Late submission) continued

Concern as to whether the Plan is to support broadacre or small lot subdivision.	Noted. Plan is representative of all agribusiness models within the Shire with proposed actions flexible for agribusinesses of all sizes.
Word cloud seen as inconclusive.	Noted. Wordcloud refers to various software based applications that create a visual representation of words used by participants in a particular process. As stated in **Figure 10 (pg 20)** *The more often it occurred, the larger the word.*
Section 4.2 Actions (pg.24) Facilitating used twice, supporting, providing and managing once each.	Noted. Amended. *Facilitation* now used once.

Feedback Received	Action
Sidonia Resident, via Email 16/05/13 (Late submission)	
Subdivision size for building. The current subdivision minimum for our area of Rural Farming is (I think) 100 Hectares (250 acres). I urge the Macedon Ranges Shire to increase this to 160 Hectares (400 acres) as this is the Australian Tax Office description of "Agriculture" for tax purposes. If the minimum area of subdivision for building on was 160 Hectares (400 acres) the inflated value would be reduced and thus making it a more viable proposition for succession farming.	Noted. **Action 5 (pg.23)** *Work with the Forum, and other relevant agencies, to identify and address planning issues* provides Council with the scope to consider this and to work with other stakeholders to investigate options.
Weed control. As pointed out in the Draft Report weed control is an issue. We find that in areas of the Macedon Ranges that have smaller landholdings weed control is a major issue. Smaller holdings don't see an issue with weeds and their spread, and my concern is that if our farm is forced to be split up for the above reasons, then weed control would be reduced and over time invasion of the land by weeds and followed by subsequent loss of production.	Weed Management is specifically mentioned in **Action 2 (pg.23)** with additional text added to specify Council's Weed Management Strategy *Continue to facilitate and promote existing weed and pest management programs (e.g. MRSC Weed Management Strategy) and liaise with the Agribusiness Forum and other government agencies on their implementation*

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission)	
Overall there is some good work and information gathering.	Noted.
I am just not sure if I would necessarily interpret the data in the same way, nor agree with some of the formats used.	Noted.
I think establishing an agribusiness forum like the equine and real estate forums is a good idea, but there is not much clarity in the document about the structure and role it would take.	Noted. As with the Equine Network, the structure and role of the Forum will be determined in consultation with the agribusiness community at the point at which it is being established.
I would like to see more written about its links with the tourism industry, the economic development unit, planning department and equine and real-estate networks.	Noted. As with the Equine Network, the proposed forum will endeavour to engage with other networks, associations and stakeholders as and when relevant.
I am also concerned that the strategy seems to be based more on economic development for the shire with little about protection of the environment and amenity required within our very special place.	The Agribusiness Plan has derived from the Economic Development Strategy therefore it has an economic focus on agribusiness rather than agriculture but, must be read and implemented in context of other policies.
Could not see any reference to SPP8 nor our natural environmental strategy. Vision 2025 was not directly referenced either.	Additional text added to **1.0 Introduction (pg.1)** *The Macedon Ranges Agribusiness Plan represents a major, industry-leading, step in the Council's ongoing efforts to help balance the interests of the agricultural sector, with the needs of other industry sectors, the environment and the broader community. It has been developed to be consistent with other current Macedon Ranges Shire plans and strategies, including the Council Plan, the Equine Strategy and the Natural Environment Strategy* and **Section 4.1 (pg. 22)** *While this is an industry-specific economic development plan, the actions should be implemented in compliance with all relevant State and Commonwealth policies and legislation, as well as other*

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
	Shire Policies and Strategies, including those relating to environmental protection, land and community development to clarify that the Plan should be implemented in a way that works with the Shire's environmental and planning policies, including those State and Commonwealth policies that may adhere. Additional text has also been added to the Rationale for Transition in **Table 5 (pg. 23)** *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 parts of the agribusiness sector and the Shire into more land intensive production and smaller scale producers. As agricultural production is an important part of the economic and cultural landscape, Council has an important and ongoing role in ensuring, to the extent that it can, that policies and regulations allow the industry to thrive, while still managing for other land use needs* to make more specific references to land use planning in general.
Our weed management strategy was not referenced, and I was disappointed that unlike the eco development strategy there wasn't a list of associated policies and strategy documents listed that should be read in conjunction with the strategy.	Have amended **Action 2 (pg.23)** *Continue to facilitate and promote existing weed and pest management programs (e.g. MRSC Weed Management Strategy) and liaise with the Agribusiness Forum and other government agencies on their implementation* to specifically reference Council's Weed Management Strategy and included the Strategy in **5.0 References (pg. 27)**.
I am also concerned that the reference documents, and supporting council strategies, are either no longer available on our website, since the change, or have been written by the consultant and unpublished, therefore unable to be viewed by the public that we asked to make comments on.	All supporting Council strategies have been confirmed as being available on Councils website.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
I would like to see the other studies performed by Geographia as an appendix.	Geografia's credentials were researched and qualified during the response to brief process. Others studies can be found at: http://www.geografia.com.au.
We also do not seem to define Agribusiness. Should there be a definition of what we mean at the commencement of the document?	Agribusiness, for the purpose of the Plan, is defined as *the earning some, or all, of one's income from agricultural production OR value-adding to locally grown produce in the Macedon Ranges Shire*. This definition though already stated in the Survey has been inserted into **1.0 Introduction (pg.1)**.
Does our definition of Agribusiness align with that of the state?	There is no definition provided by State Government for Agribusiness however the Australian Agribusiness Association defines Agribusiness as all the various businesses involved in food and fibre production, including farming, seed supply, agrichemicals, farm machinery, wholesale and distribution, processing, marketing and retail sales.
I also could see no reference to the implications of new farming zones. I know that when this document was completed we were unsure about them, but some note could have been made.	As above, **Action 5 (pg.23)** and **Action 7 (pg.23)** provide Council with the scope to consider this and to work with other stakeholders to investigate options.
A great initiative for farmers would be if we could support them in revegetating or protecting native vegetation, like we do through the Kyneton Woodlands project. This needs to be in an ongoing way, rather than on an advocate basis. if we are unable to do this ourselves, then I would like to see some mention of advocating for it. Farmers are keen, as they have approached the Woodlands trust, but many fall outside the mapped area where they are eligible for funding.	Noted. Council currently works closely with all Landcare Groups across the Macedon Ranges as do a number of the Shire's agribusinesses as seen in the Survey responses. Concept can also be further explored by the proposed Forum if a need proves evident.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
Will we now that we know this is happening?	Unsure of question.
There wasn't any strong direction about policy for not rezoning farming land to make it residential and the impact of potentially losing our agricultural output.	As above, **Action 5 (pg.23)** and **Action 7 (pg.23)** provide Council with the scope to consider this and to work with other stakeholders to investigate options.
I am concerned that it is focussing too much on "boutique" business and does not give enough support to broad acre farmers.	Noted. Plan is representative of all agribusiness models within the Shire with proposed actions flexible for agribusinesses of all sizes.
Text within the document gives figures of how important large agricultural pursuits are to the economy of the Shire yet the focus of the strategies do not seem to reflect this. We need to maintain our broad acre farms as they are part of the economic and tourist attraction to the area.	Broadacre farms are recognised as important to the local economy however unless incorporating Farm Stay type accommodation, they are not seen as a stand-alone tourist attraction other than contributing to the rural amenity.
I Fear that through encouraging " boutique" farms they may end up not being viable and a house will be built on the land, and it will then be sold off as a house and land package and no longer used for agribusiness at all.	Noted.
There is no strategic direction to ensure farming land is seen as important and will not be re zoned for non agricultural uses such as housing.	Noted. As above, **Action 5 (pg.23)** and **Action 7 (pg.23)** to provide Council with the scope to consider this and to work with other stakeholders to investigate options.
There is no explanation of the perceived role of rural conservation zones and rural living zones, and their potential agricultural pursuits.	Noted. **Action 5 (pg.23)** and **Action 7 (pg.23)** to provide Council with the scope to consider this and to work with other stakeholders to investigate options.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
Footnote 1: why is the equine industry not included in this study? There are many interactions and contradictions with equine land uses and agricultural land uses, such as competing for land resources, many would see breeding horses as a part of Agribusiness. All council plans shouldn't be considered in isolation but be encouraged to actually consider what has been said in other strategies rather than simply acknowledging their existence and excluding their findings and direction.	As above, Additional text has been added to **1.0 Introduction (pg.1)** and **Section 4.1 (pg. 22)** stating the alignment of the Plan with other Council strategies and plans. Additional text has also been added to the Rationale for Transition in **Table 5 (pg. 23**) to make more specific references to land use planning in general.
Footnote 2: needs to be more information or appendix about this regional economic model.	The model is a software-based tool rather than a document and therefore cannot be provided as reference document. Additional **Footnote (pg.1)** has been inserted to clarify this and Geografia 2013 has been removed from the **5.0 References (pg 27)**.
Says guided by economic development strategy which refers to vision 2025 Would have liked to have seen direct input from 2025 (as this is a desire that the general community had a great deal of input into).	Council plans and strategies generally reference Vision 2025 in their research and development. Given 2025 was developed nearly a decade ago it is essential that we continue to ask the community (and specific industry sectors) for their input, project by project. This has been done extensively through the development of the Agribusiness Plan.
Why 5 year vision when rest are longer term plans? (eco dev 10 years).	As with the Equine Strategy, due to the specific focus of the Plan being on one sector, Agribusiness, rather than an overarching document such as the economic development strategy, a five year timeline is set to ensure the Plan is up to date and takes world changes in to consideration.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
Is there a set time to review the plan?	Progress of the Plan will be reviewed on an annual basis through ongoing reporting processes. Its ongoing relevance and prioritisation will be reflected in the annual budget process. Overall review of the Plan will occur after 5 years.
Footnote 3: How many of the 14500 people invited responded?	As stated on Pg.11, of the 1454 landholders invited to participate in the survey 190 responded. With 654 agribusinesses registered on the Australian Business Register, total response rate = 29%, a very good response from a statistical perspective.
As an aside can you explain why in presentations at briefings do we compare equine figures with agricultural if according to this document they are not comparable.	The Plan does not state that the Equine Strategy and Agribusiness are not comparable but rather that the Equine industry has already been addressed in detail through the Equine economic impact analysis and Strategy. As above, additional text has been added to **1.0 Introduction (pg.1)** to help clarify this.
Footnote 4: why was rural living and rural conservation land included as agricultural use land?	The Agribusiness Survey was sent to landholders of land within the Macedon Ranges that permitted agricultural use. This included Rural Living, Farming and Rural Conservation to ensure that all levels of agribusiness were captured, from broadacre farming to hobby farming and farm gates.
Footnote 5: was this methodology sourced from a document and if so is it listed in the reference list?	As stated on Pg 4 the methodology is the investment logic map from the Council project inception problem definition workshop. It is the outcome of a structured session that focused on the 'problems' the project is intended to resolve. Note that this session was independently facilitated by Cube Management Solutions who work with the Department of Treasury and Finance to assess and make recommendations on major projects.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
KPI 1: under community pride and acceptance: reduction in objections to agribusiness planning applications. Could this mean section 173 to ensure can have use but if stops being an agricultural use won't simply be rural living?	This KPI was in reference to the wider community gaining a better understanding of the agribusiness sector and educating new and potential residents on what to expect when moving into a rural area (i.e. tractors on roads). The approach is to educate rather than regulate.
What planning scheme amendments are we considering when we are determining best use of land? Will these be driven strategically or based on individual land owners desires?	As above, **Action 5 (pg.23)** and **Action 7 (pg.23)** will provide Council with the scope to consider this and to work with other stakeholders to investigate options.
1.3 don't understand sentence on subdivision regulations	Noted.
Points 1, 3 and 4 as they are written are not objectives as such eg: " a landscape in transition..." is not an objective.	Have amended the text to of **1.3 Summary of Findings (pg.5)** and **3.5 Summary (pg.21)** and **Table 5 (pg.23)** to themes in place of objectives.
Important to note most involved in agribusiness live in shire and has twice a many jobs per resident worker than other industries (this is without the so called boutique industries, which may in fact have owners off site whose permanent address is outside the shire). Question: how does ABS define agribusiness and did we use the same definitions?	Noted. See above regarding the definition of agribusiness.
Make sure we continue conversations with Commonwealth gov re peak body succession planning in agriculture. How can we have representation?	Council Officers are already involved discussions with relevant agencies (i.e. Victorian Farmers Federation, Department of Primary Industries, Victorian Agribusiness Council) regarding the future of farming. Action 7 (pg.23) Advocate for continued research on future farming options also provides Council with the scope to consider this and to work with other stakeholders to investigate further options.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
2.3: makes reference to Loddon Mallee regional growth plan- this is only a draft form just up for public exhibition so why is it referenced in this document like it is already accepted policy? How did the consultants gain access to this policy? Why is it not in the reference list on page? did they mean the regional strategy rather than the growth plan?	Incorrect reference. Reference to state Loddon Mallee Regional Strategic Plan. Correction made. Loddon Mallee Regional Strategic Plan is referenced in 5.0 References (pg.29).
Diagram: What does peri urban development mean?	Peri-urban development is reference to developments in peri-urban areas. According to the Department of Planning and Community Development Melbourne's peri-urban region is land outside the Urban Growth Boundary but within about 100 kilometres of the Central Business District. These include; Bass Coast, Macedon Ranges, Mitchell, Moorabool, Murrindindi, Surf Coast, Baw Baw and Golden Plains.
Other parts of the diagram refer to urban living and infrastructure so what form of developments are we referring to?	**Figure 3 Peri-Urban Change Factors Influence Diagram (pg.9)** states Preference to Urban Living and Rural Residential Infrastructure Provision (e.g. commuter rail) therefore unsure of comment.
I find this diagram confusing and does not add anything to the text as it is not self explanatory.	Noted.
What new schools, health facilities and passenger rail public investment?	Text on Pg.10 relates to rural areas generally not specific to the Macedon Ranges: *In summary, a cultural shift has seen a growing desire for rural lifestyle living for some and for others...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* however, Macedon Ranges has seen recent investments in schools (i.e. New Gisborne), rail parking and medical and dental services expanded (i.e. Brooke Street).

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
Why is a semi retiree known as a lifestyle seeker?	Noted. Lifestyle seeker removed.
Do not like change is rapid and in some respects inevitable.	Noted.
What evidence do we have about the shift away from broad acre farming?	The Australian Bureau of Statistics (ABS) 2011 Agricultural Census saw a $7.2mil decrease in the value of agricultural commodities in the Macedon Ranges since the ABS 2006 Census. Studies by State and Federal Government bodies (i.e. Victorian Farmers Federation) have also identified this trend as did participants at the Agribusiness Plan Workshop and Survey respondents.
I think broad acre is continuing along side the newer smaller boutique industries.	Noted.
Footnote 9: where was the separate appendix?	Noted. Survey Results Report will be an Appendix to the Final Plan.
Footnote 10: can we make such an assumption?	The assumption referred in the footnote states: The discrepancy [between number of enterprises and number of operators] is assumed to come from single operators registering different enterprises is based on research undertaken by the consultant and the explanation provided by the Australian Business Register.
Do not like use of the phrase " buck this trend"	Noted.
Where is the reference to "as is common in peri urban locations" or is this phrase just an observation or assumption?	Consultant's observation based upon research undertaken.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
What is value adding?	Additional **Footnote (pg.1)** has been inserted *Value adding is the process of adding to a raw product to make it more profitable (i.e. wine, jam, cheese).*
Although business survey results may show apparent increase in non broad acre farming this may simply reflect number of respondents rather than true number.	Noted.
Mentions Yarra ranges regional food group. Is there a document to reference for this?	The document is ‘A Viable Shared Kitchen/ Storage Facility for Food Processors in the Yarra Valley’ which is available on the Agribusiness Yarra Valley website www.agribusiness-yarravally.com. Details to be added to **5.0 References (pg.27)**.
Over half supporting industry forum was only 56% This to me doesn’t seem that high and if other industries support networks exist is there much value in the shire spending too much money on this network? Could we not spend less through directing people to existing forums? How are we going to minor that this group is achieving its objectives? Are we going to give it set objectives? Will there be people outside of council who chair or are sect retries and council support is via providing venues and officer support about policy?	The Forum is to represent all Agribusinesses in the Shire, rather than industry specific eg. beef, bees etc, and will aim to work in partnership with existing industry based networks (i.e. Angus Beef Association, Wool Growers Association) rather than replace them. As with the Equine Network, the structure and role of the Forum will be determined in consultation with the agribusiness community at the point at which it is being established.
Reduce land re zoning for residential to ensure prices don’t remain high. There is no mention of how council can help with this or a policy direction to support this.	As above, **Action 5 (pg.23)** and **Action 7 (pg.23)** provide Council with the scope to consider this and to work with other stakeholders to investigate options.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
3% indicating retirement 8% new entrants. I wouldn't say this was particularly transitional esp. when Settlement strategy is looking at having such a large expansion in population.	Noted.
Weed and pest management is mentioned on this page but is not followed up specifically within the strategic recommendations.	As above, Weed Management is specifically mentioned in **Action 2 (pg.23)** and MRSC Weed Management Strategy has been included the Strategy in **5.0 References (p. 27)**.
Footnote 13 states decline to 5.4 % showing role of council in leadership and operational support as a key role yet the strategy suggests the importance of a network facilitated by council.	The Forum does not intend on being lead by Council but rather supported by it therefore the reference, as stated on Pg.19 *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* represents the intended provision of information and support.
"the need to carefully address the matter of different land uses and the challenge of balancing agribusiness activity and rural lifestyle objectives" This doesn't seem to be addressed anywhere else.	As above, **Action 5 (pg.23)** and **Action 7 (pg.23)** provide Council with the scope to consider this and to work with other stakeholders to investigate options.
I don't think use of a "word cloud" is particularly useful.	Noted. Wordcloud refers to various software based applications that create a visual representation of words used by participants in a particular process. As stated on Pg.20 *The more often it occurred in the responses, the larger the word.*

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
"and subdivision regulation" what does this mean?	Relates to the planning regulations for subdivision.
Why are we stating a workforce issue when the farmers themselves don't identify this?	The term 'workforce issue' is not stated in the Plan. Possible challenges facing the agribusiness workforce have however been identified.
Points 1 and 3 4 are not objectives they are statements.	Have amended the text to of **1.3 Summary of Findings (pg.5)** and **3.5 Summary (pg.21)** and **Table 5 (pg.23)** to themes in place of objectives.
Perhaps 4 could be To facilitate better communication?	Noted.
I would say community already endorses and recognizes the agricultural use of the land this is why they chose to live here in a rural setting.	Noted.
Can council afford a dedicated agribusiness officer? We can't afford an events coordinator. It seems that sometimes departments/ planners work in silos. If we cant afford a separate officer Could we have a particular officer who's area of expertise it is? Where would the money come from for this agribusiness forum if it isn't in the budget?	The mention of a dedicated Agribusiness Officer is stated as a possible outcome not as an action. Funding for the implementation of the Agribusiness Plan has been allocated in the 2013/14 Council Budget as a New Initiative.
Point 2: Actions about weed and pest management not very specific as all we are doing is facilitating and promoting existing programmes rather than advocating for better programmes and financial support to farmers	Noted.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
Transition: why is there an "inevitable transition of some aspects of the agribusiness sector into more land intensive production and smaller scale producers?	Feedback from the Agribusiness sector indicated that because land prices are high, it's not cost effective to have broadacre farming in areas with high land prices. Agribusinesses need a better return on their investment, therefore more intensive farming.
Feel like point 9 and 10 are there to justify our investment in VERI. We are already doing this so feels like it is there so we can tick it off as an easy achievement yet we are already doing it without establishing a forum.	Noted.
Does having a forum help promote farmers markets as it is more promoting to the general public and tourists to come to the markets that will see more farmers wish to be involved and we already have tourism and economic development strategies for this.	**Action 13 (pg. 25)** states *Work with the Forum, market managers and the Victorian Farmers Market Association to identify ways to continue supporting the Farmers' Markets within the Shire* therefore the ways in which the Forum addresses this action will be determined by the Forum itself and the associated bodies.
5.0 references Two of the references are written by Geografia, unpublished and performed as part of this contract. Could we as councillors have access to these? Would like more information or to see the references/ research in geographic 2013 and 2013a. Also means those of the public who wished to make comment could not access these documents. Should these documents not be made available perhaps as an appendix?	The model is a software-based tool rather than a document and therefore cannot be provided as reference document. A footnote has been added on Pg 1 to clarify this and Geografia 2013 has been removed from the **5.0 References (pg 27)**. Reference Geografia 2013a Rural Migration Trends and Drivers is a report developed for the Rural Councils Victoria and has yet to be released publically therefore it, and any reference to it in the Plan, has been removed.
Could you provide a copy of Macedon Ranges Shire Local Government areas and Towns Population projections 2006-2036 Macedon Ranges Shire Council, Gisborne.	This information is available on Council's website at: http://www.mrsc.vic.gov.au/Council_the_Region/About_Our_Region/Population_Profile.

Feedback Received	Action
Internal response, via Email 30/05/13 (Late submission) continued	
MRSC Macedon Ranges Business survey 2009 has the date of 2001 beside this presume this is a typographical error.	Noted and corrected to state 2011.
I would have liked to have seen things that were more specific to embracing modern methods of land use practices than ensure the long term viability of the agricultural industry.	As an Economic Development initiative, the focus of the Plan is on agribusiness however, as above, **Action 7 (pg.23)** will provide Council with the scope to consider this and to work with other stakeholders to investigate options.
I felt there needed to be a stronger direction ensuring protection of agricultural land use and a means of encouraging farmers and potential land owners to embrace modern farming practices that do not result in destruction of the land, that protect it waterway and native vegetation and , have good animal welfare practices.	As above, **Action 7 (pg.23)** will provide Council with the scope to consider this and to work with other stakeholders to investigate options.
This document should serve to be encouraging our continued role in food production and local manufacturing. It can then feed back to the Loddon Mallee growth plan strongly that we see our role still as having agricultural pursuits, and not simply for housing an increasing population.	Noted.
Has council has any dealings with Taranake farm, within Macedon Ranges, who are investing in new farming practices to protect the land form over use In a smaller scale farming environment?	Officers have spoken with Taranaki Farm on a number of occasions leading up to the development of the Plan, during the Survey and in relation to the Plan and their possible involvement in the proposed Forum.
I am concerned that there were so few submissions to the document, but this may well be due to the multitude of documents currently up for public comment, and those who have had initial input not realizing about the final processes. Did we email or write to all those who attended the forums or answered surveys about the draft being out for public comment?	Notification of the public exhibition of the Draft Plan was sent to those who completed the Agribusiness Survey, and the various agribusiness networks that supported the Survey. Copies of the Draft Plan were sent to all those that participated in the community workshop and made available at all Council offices and on Council's website. Promotion of the public exhibition period was advertised in all local community newsletters, local radio, on Council's website and in local newspapers. Local agribusiness networks also promoted the Draft Plan through their own membership base using various communication methods.

Appendix 2

Summary of Survey Results

Macedon Ranges Agribusiness Survey

Table of Contents

Figures

Tables

1.0 Introduction

This summary provides an overview of the responses to the 2013 Macedon Ranges Agribusiness Survey.

The Survey aimed to assist with the development of a database of agribusinesses in the Macedon Ranges and provide information to guide the development of the Plan and, future Council strategies and plans relating to agribusiness in the Shire.

(Note: Results are only presented where there was a sufficient sample to draw from).

1.1 Methodology

The Macedon Ranges Agribusiness Survey opened from 14 January to 22 February 2013 and was made available online, in hardcopy, in person and over the telephone.

The survey was extensively promoted via a mailout to 1,454 owner/operators of land in the Macedon Ranges that permits agricultural use (i.e. Farming, Rural Living or Rural Conservation zones). It was also promoted through existing agribusiness associations, local radio, print and social media, on-site promotion (i.e. sale yards, Farmers Markets) and Council's online and printed resources.

The survey was comprised of 37 questions under the following six headings:

1. **Your agribusiness** – the nature of the business the respondent is running.
2. **Networks and forums** – extent of participation in forums and organisations
3. **Income and markets** – estimates of income and details on supply chains
4. **Employment and training** – concerns about, or investments in employment and training
5. **Natural environment and sustainability** – environmental issues
6. **The future** – future prospects (for the individual and the industry).

190 landholders (29%) responded to the survey, providing a reliable statistical sample that was then validated against independent survey data (ABS 2011). This process was to ensure the views expressed in the survey were a statistically significant representation of the agribusiness industry.

The size of the survey was sufficient to be confident that, at the aggregated level[21], the responses are a good indication of industry views.

The survey results presented in this summary, and cited in the Macedon Ranges Agribusiness Plan reflect this.

2.0 Main Survey Results

2.1 Location of Activity

Figure 1 and Table 1 show the nearest town to the main location of agribusiness activity for the survey respondents:

Figure 1 Number of Respondents by Location

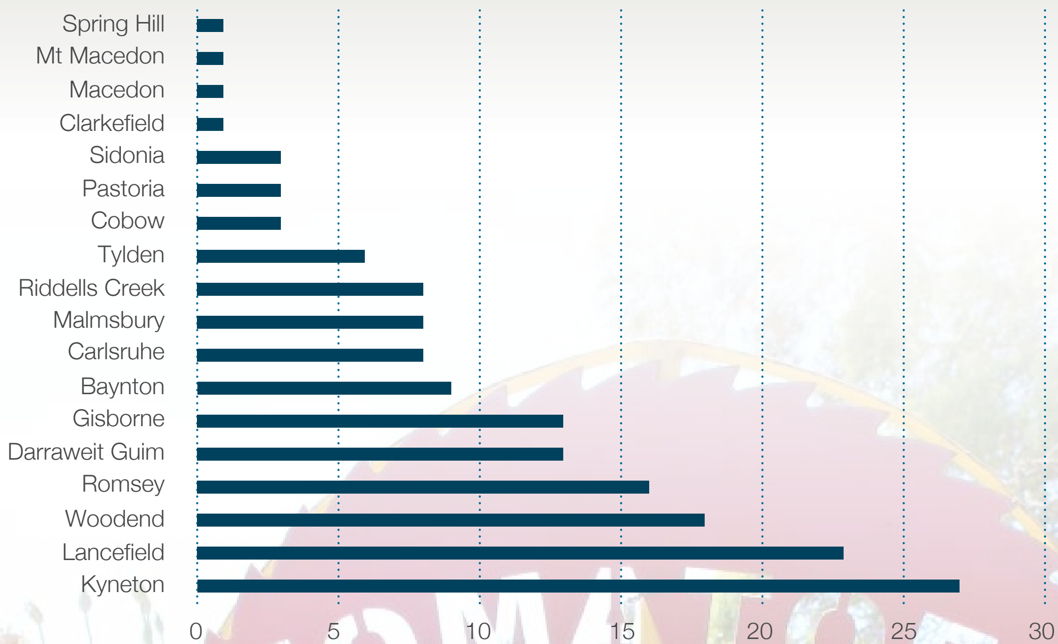


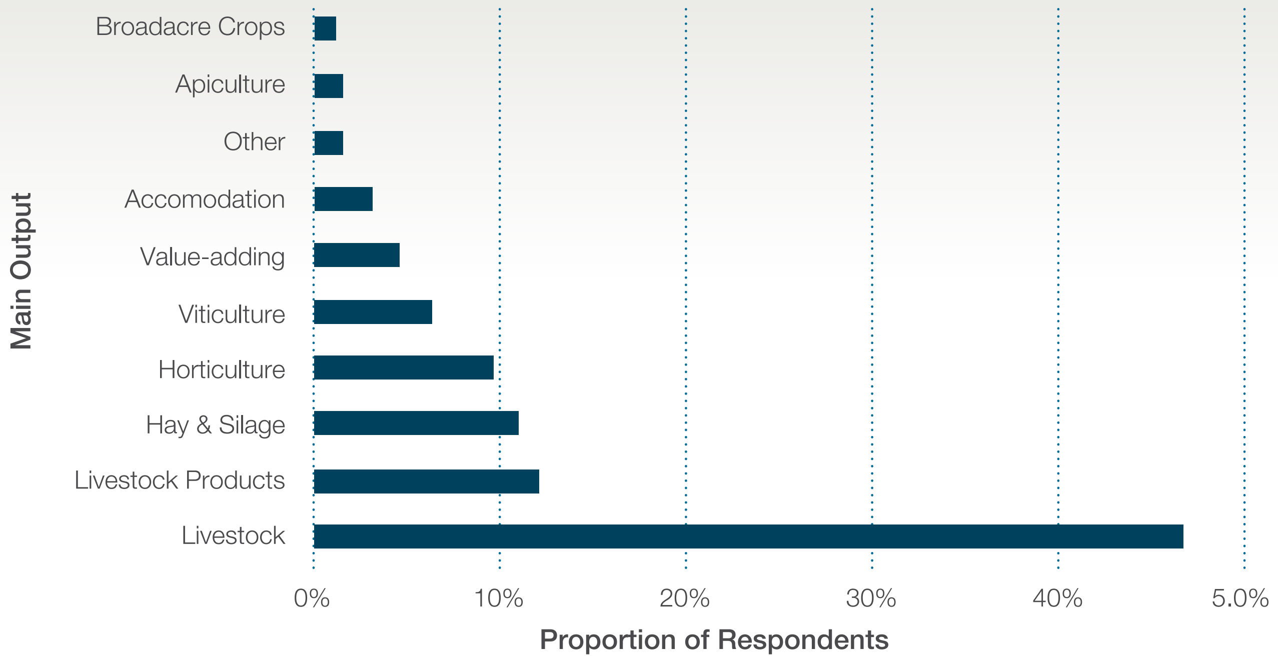
Table 1 Respondents by Location

Location	Number	Percentage
Spring Hill	1	0.6
Mt Macedon	1	0.6
Macedon	1	0.6
Clarkefield	1	0.6
Sidonia	3	1.9
Pastoria	3	1.9
Cobaw	3	1.9
Tylden	6	3.7
Riddells Creek	8	4.9
Malmsbury	8	4.9
Carlsruhe	8	4.9
Baynton	9	5.6
Gisborne	13	8
Darraweit Guim	13	8
Romsey	16	9.9
Woodend	18	11.1
Lancefield	23	14.2
Kyneton	27	16.7
Total	162	100

2.2 Type of Activity

Figure 2 and Table 2 show the main agribusiness activity of the respondents.

Figure 2 Respondents by Main Agribusiness Activity



Data Source: Macedon Ranges Agribusiness Survey

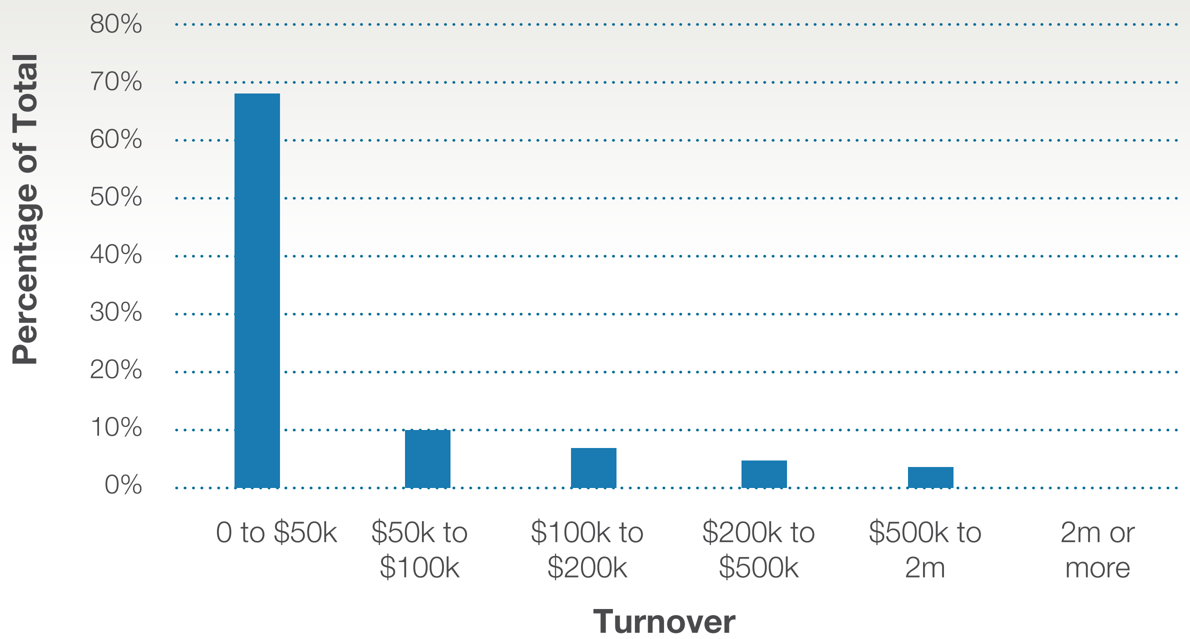
Table 2 Respondents' Main Agribusiness Activity

Main Activity	Number	Percentage
Livestock	139	47
Livestock Products	36	12
Hay & Silage	33	11
Horticulture	29	10
Viticulture	19	6
Value-adding	14	5
Accommodation	10	3
Other	5	2
Apiculture	5	2
Broadacre Crops	4	1
Aquaculture	3	100

2.3 Turnover

Figure 3 and Table 3 show the agribusiness turnover of the respondents:

Figure 3 Estimated Turnover Profile



Data Source: Macedon Ranges Agribusiness Survey

Table 3 Estimated Turnover Profile

Turnover Band	Number	Percentage
0 to $50k	113	72
$50k to $100k	17	11
$100k to $200K	11	7
$200k to $500k	8	5
$500k to $2m	6	4
$2m or more	1	1
Total	156	100

2.4 Property Size

Table 4 show the average property size of the respondents:

Table 4 Size of Landholdings

Main Activity	Total Holdings (ha)	Average Property Size (ha)
Apiculture	17.7	8.9
Horticulture	191.6	12.8
Viticulture	129.4	18.5
Accommodation	39.7	19.8
Hay & Silage	76.9	25.6
Other	362.2	72.4
Value-adding	408.1	102.0
Livestock Products	1443.9	160.4
Livestock	21243.7	177.0

2.5 Accreditation and Participation in Forums

18% of respondents indicated they had some form of accreditation associated with their agribusiness practice. Accreditation bodies cited were:

- Angus Association
- Australian Chemical Users Permit
- Bovine Johnes Disease Mapping
- Cattle Assure
- Department of Primary Industry Accredited Beekeeper
- Livestock Production Assurance
- Macedon Ranges Shire Food Licence
- Meat Standards Australia
- National Assoc. of Sustainable Agriculture Australia
- NILS Accreditation
- Nursery Industry Accreditation Scheme
- Q-Alpaca
- VFF Chicken Care
- Victorian Farmers Federation (VFF)
- Victorian Farmers' Market Association
- Wine producer and wine export licences

Table 5 Membership of Forums

Turnover Response	Yes	%	No	%
Belong to a forum	78	46%	91	53.8%
See value in a Macedon Ranges forum	52	51.5%	49	48.5%
No Value in a Macedon Ranges forum	16	34%	31	66%

Table 5 shows the number and percentage of respondents who are members of forums or associations and/or see value in belonging to a Macedon Ranges agribusiness forum. Association and forums cited were:

- Agroforesters Association.
- Alpine Garden Society
- American Quarter Horse Association
- Angus Assoc
- Australia Certified Organic
- Australian Accommodation
- Australian Alpaca Association
- Australian Highland Cattle Society
- Australian Society of Animal Production
- Australian Stud Sheep Breeders Association Ltd
- Australian Superfine Woolgrowers Association
- Australian Wiltipoll Assoc.
- Best Wool/Best Lamb Group
- Biodynamic Association of Australia
- Breedplan
- Central Victorian Angus Group
- CFA
- Corriedale Assoc.
- Daylesford Macedon Produce
- Dorper Association
- Downunder Recreational Tours
- Grasslands Society of Southern Australia
- Herefords Australia Limited
- Industrial Hemp Association of Victoria
- Jadran Beekeeping Club
- Kondinin Group
- Kyneton Poultry Club
- Kyneton Prime Livestock Producers Club
- Kyneton Transition Hub
- LandCare
- Landscape Industry of Victoria
- Loddon & Campaspe Shiraz & Cabernet Growers Association
- Macedon Ranges Vignerons Association
- Maine-Anjou Beef Australia
- Meat & Livestock Australia
- Mt Macedon & District Horticultural Society
- Murray Grey Association
- North American Rock Garden Society
- Nursery and Garden Industry Association of Vic.
- Otway Agroforestry Network Ltd
- Pasture Society
- Raspberry and Blueberry Association
- Scottish Rock Garden Club
- Southern Farming Systems
- Square Meaters Cattle Association
- Taste of Gold Assoc. Inc.
- Thoroughbred Breeders Association
- Treenet
- Victoria Farmer's Federation
- Victorian Apiarist Association
- Victorian Biodynamic Association
- Victorian Central Region Alpaca Association
- Victorian Farmers Market Association
- Victorian Wine Industry Association
- Welsh Pony and Cob Society of Victoria
- Winemakers Federation of Australia

Cont. over leaf

2.6 Supply Chains and Sales

Table 6 shows the main source of production inputs:

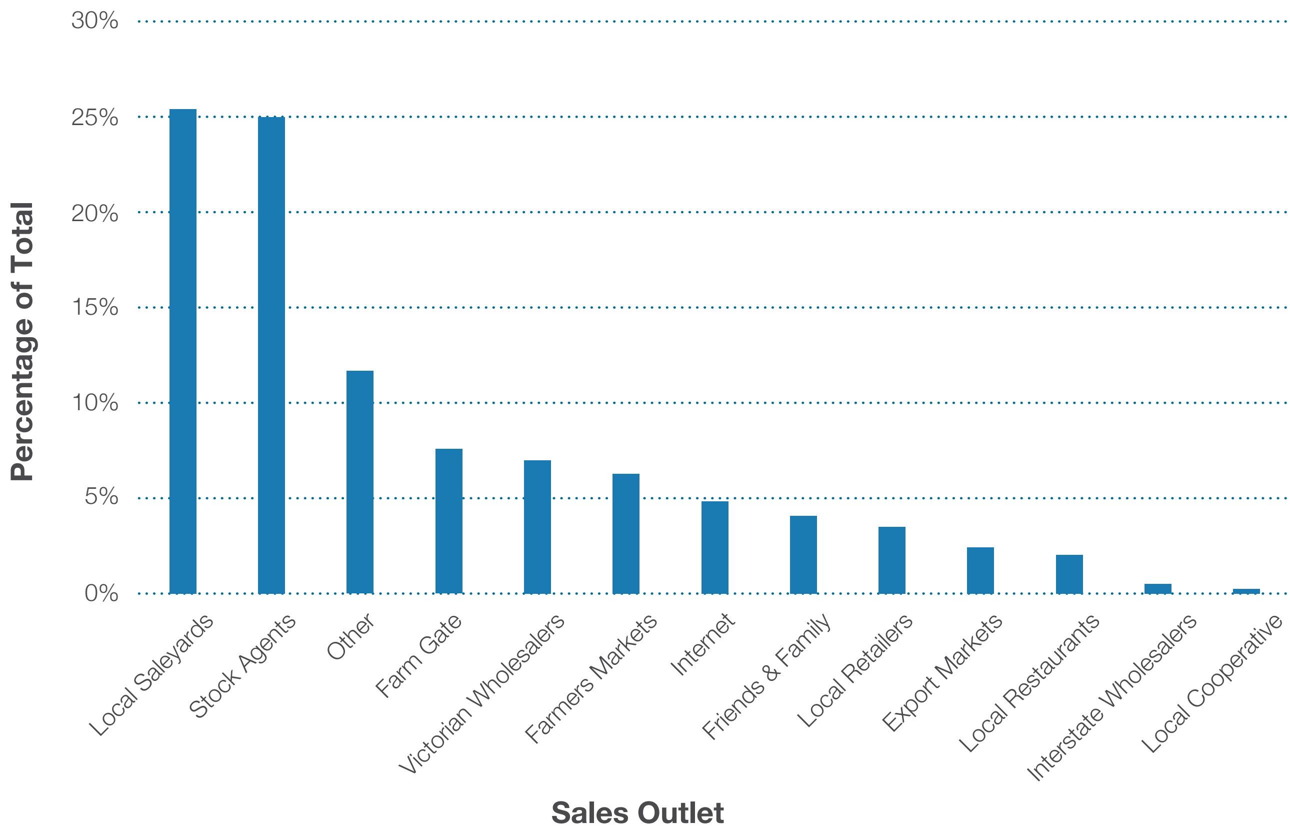
Table 6 Location of Input Suppliers

Location of Input Suppliers	Percentage Sourced
Local businesses in the Macedon Ranges	67.1
Elsewhere in Victoria	18.4
Melbourne-based businesses	8.6
Interstate	3.3
Unknown	1.6
Imported from overseas	1.0

Figure 4 shows the main sales outlets for the respondents' agribusiness products.

An insufficient number of respondents indicated the main destinations of their products (95% of respondents skipped this question).

Figure 4 Sales Outlet



Data Source: Macedon Ranges Agribusiness Survey

2.7 Employment, Education and Training Participation

Tables 7 and 8 show features of the employment, education and training profile of the respondents:

Table 7 Number and Type of Employees

Type	Enterprises with 1-4 Employees	Enterprises with 5 or more Employees
Full time employees	58	4
Part time employees	65	0
Casual employees	23	3
Seasonal employees	10	14
Total	156	21

Table 8 Participation in Education and Training Activities

Activity	Number	Percentage
Training courses	32	17.2
Work experience	11	5.9
Apprenticeships	7	3.8
Online learning/training	7	3.8
Internships	4	2.2
Exchange programs	3	1.6
Traineeships	3	1.6

The survey results also stated that:

- 75% of respondents indicated that 91% of more of them, their family members and employees lived in the Shire; and
- 91% of respondents indicated they had no trouble recruiting employees when needed. Of those who did report difficulties, it was attributed to the lack of willingness to undertake outdoor manual labour, particularly seasonally.

2.8 Off-farm Income

Table 9 shows the proportion of income drawn from off-farm sources for those who indicated they had an off-farm income (62% of all respondents).

Table 9 Proportion of Off-farm Income as a Share of Total Income

Proportion	Number	Percentage
0-10%	3	2
11-20%	10	8
21-30%	3	2
31-40%	6	5
41-50%	10	8
51-60%	6	5
61-70%	10	8
71-80%	10	8
81-90%	17	14
91% plus	38	31
Don't know	9	7
Total	122	100

2.9 Environmental Management

Table 10 shows the number and proportion of respondents who indicated they invested or worked in areas associated with improvements to their farm environment.

Table 10 Environmental Management Participation

Activity	Number	Percentage
Pest, plant and animal management	107	57
Revegetation with native species	81	43
Sustainable soil management	64	34
Native vegetation protection or enhancement	60	32

Cont. opposite

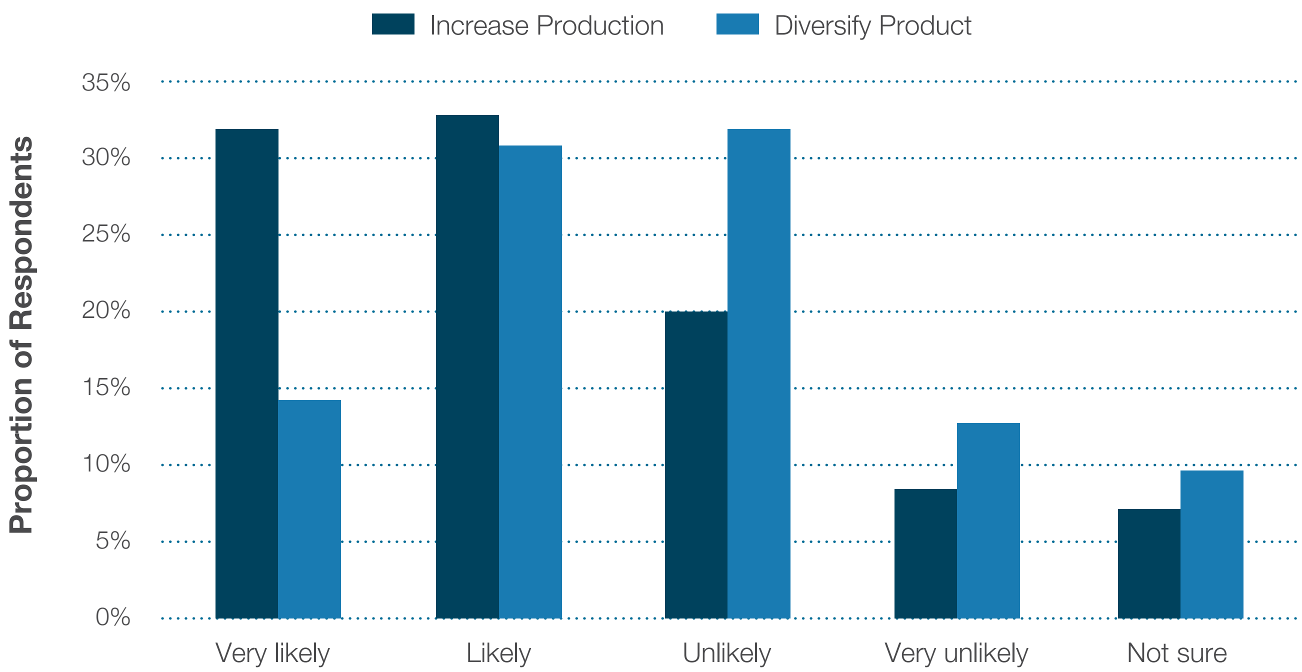
Activity	Number	Percentage
Waterway protection and enhancement	59	31
Water efficiency	56	30
Water reduction and recycling	54	29
Energy efficiency	36	19
Renewable energy production	34	18
Organic farming	26	14
Carbon farming	9	5

Of all of the respondents, 66% indicated they planned to invest to improve the land capability (specifically soil quality) of their property in the next three years (15% were unsure and 6% said no with the remaining not answering the question).

2.10 The Future of Agribusiness in the Shire

Figure 5 and Table 11 shows the expectations of respondents with respect to their plans to expand and/or diversify in the next 10 years.

Figure 5 Ten-year Plans



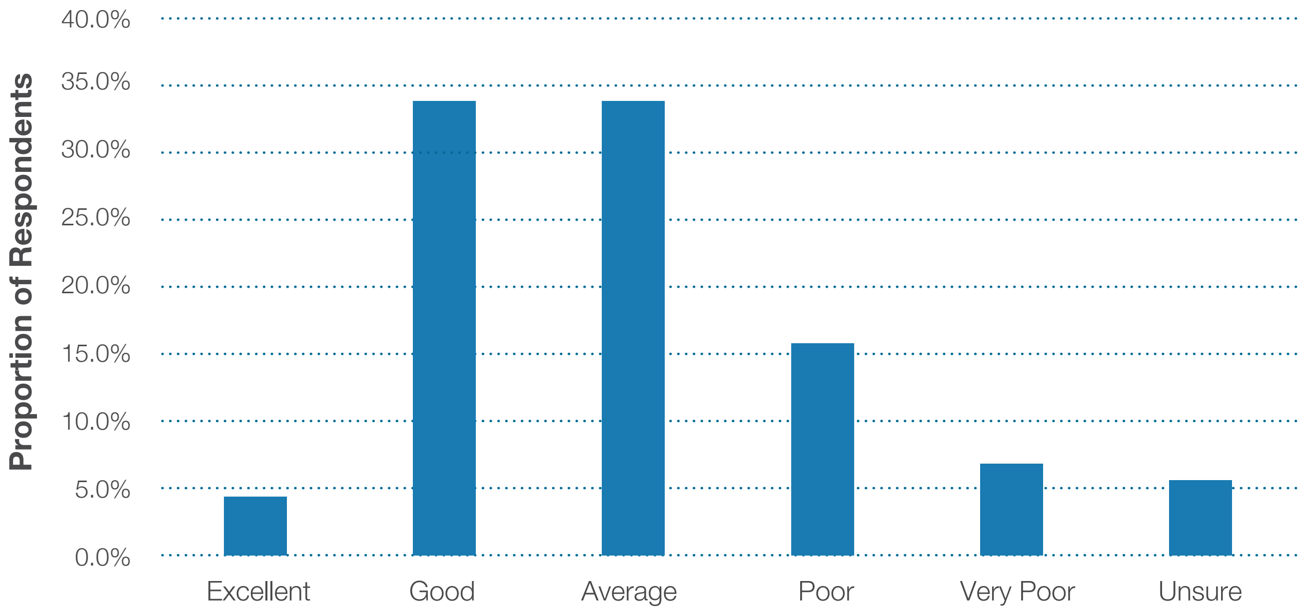
Data Source: Macedon Ranges Agribusiness Survey

Table 11 Enterprise Plans and Industry Prospects

Response	Will increase production	Will diversify production
Very likely	53	24
Likely	54	51
Unlikely	33	53
Very unlikely	14	21
Not sure	12	16

Figure 6 and Table 12 show respondents' opinions about the overall health of the agribusiness industry in the Macedon Ranges Shire.

Figure 6 Health of Industry



Data Source: Macedon Ranges Agribusiness Survey

Table 12 Environmental Management Participation

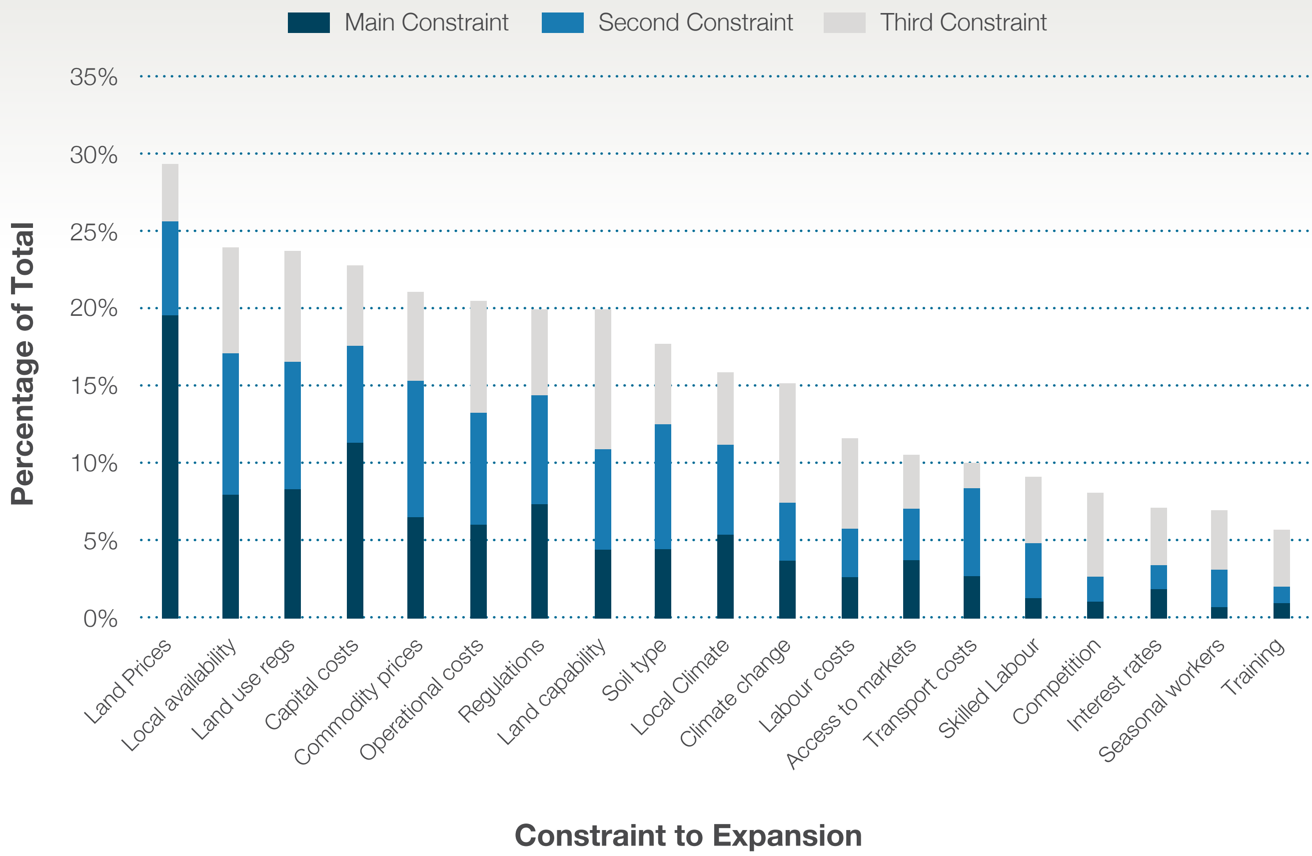
Option	Number	Percentage
Excellent	8	4.8
Good	55	34
Average	56	34

Option	Number	Percentage
Poor	26	15.5
Very Poor	11	6.5
Unsure	9	5

2.11 Constraints on Agribusiness Expansion

Figure 7 and Table 13 show the top three constraints to expansion of agribusiness in the Shire as indicated by the survey respondents.

Figure 16 Top Three Constraints



Data Source: Macedon Ranges Agribusiness Survey

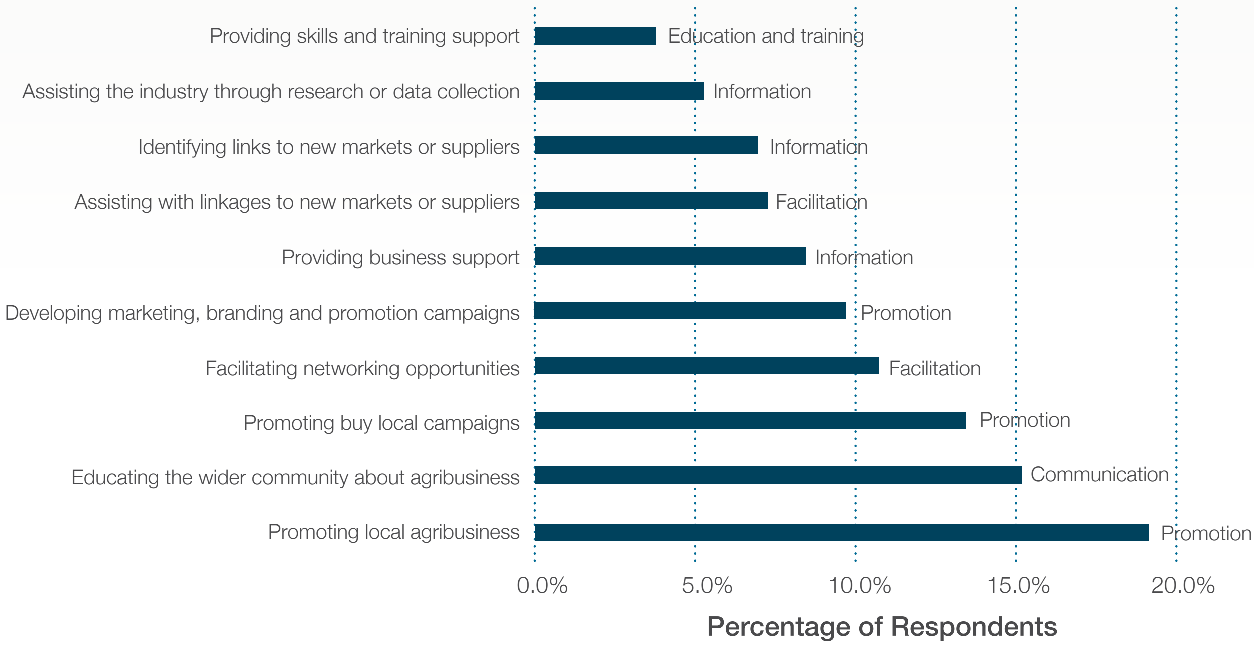
Table 13 Proportion of Respondents Indicating Main Constraints

Constraint	Main Constraint	Second Constraint	Third Constraint	Overall
Land prices	19.7%	5.9%	3.8%	29.3%
Water availability	8.0%	9.3%	6.7%	24.0%
Land use regulations	8.3%	8.3%	7.2%	23.8%
Capital costs	11.3%	6.3%	5.3%	22.9%
Commodity prices	6.7%	8.8%	5.7%	21.2%
Operational costs	6.0%	7.3%	7.2%	20.5%
Regulations	7.3%	7.3%	5.3%	19.9%
Land capability	4.3%	6.8%	8.6%	19.8%
Soil type	4.3%	8.3%	5.3%	17.9%
Local climate	5.3%	5.9%	4.8%	16.0%
Climate change	3.7%	3.9%	7.7%	15.2%
Labour costs	2.7%	2.9%	6.2%	11.8%
Access to markets	3.7%	3.4%	3.3%	10.4%
Transport costs	2.7%	5.9%	1.4%	10.0%
Skilled labour	1.3%	3.4%	4.3%	9.1%
Competition	1.0%	1.5%	5.7%	8.2%
Interest rates	2.0%	1.5%	3.8%	7.3%
Seasonal workers	0.7%	2.4%	3.8%	6.9%
Training	1.0%	1.0%	3.8%	5.8%

2.11 Council's Focus

Figure 8 and Table 14 show the respondents' views on what Council should focus on in order to support agribusiness in the Shire.

Figure 8 Council Focus



Data Source: Macedon Ranges Agribusiness Survey

Table 14 Preferred Council Focus for Supporting Agribusiness

Constraint	Number	Percentage
Promoting local agribusinesses	77	19.2%
Educating the wider community about agribusiness	61	15.2%
Promoting buy local campaigns	54	13.5%
Facilitating networking opportunities	43	10.7%
Developing marketing, branding and promotion campaigns	39	9.7%
Providing business support	34	8.5%
Assisting with linkages to new markets or suppliers	29	7.2%
Identifying links to new markets or suppliers	28	7.0%
Assisting the industry through research or data collection	21	5.2%
Providing skills and training support	15	3.7%
Other (please specify)	0	0.0%

Appendix 3
Macedon Ranges Agribusiness Survey

Macedon Ranges Agribusiness Survey

From bees to beef, grapes to grains

If you are involved in agriculture, horticulture, viticulture, aquaculture, apiculture or value-add to locally grown produce in the Macedon Ranges, we want to hear from you!

Your participation in the survey will help Council develop a plan to secure a sustainable agricultural future for the Macedon Ranges.

By completing the survey, you will also have the opportunity to be entered into a draw for the following prizes:

- A $300 voucher from either Landmark Dwyer Kyneton or Elders Kyneton
- One dozen bottles of local wine

The survey will be open from Monday 14 January 2013 to Sunday 10 February 2013.

If you would prefer to complete the survey by telephone or in person, please contact Gaynor Atkin on 5421 9615 or email ecodevsurvey@mrsc.vic.gov.au.

Please note: Your responses and feedback will be collated by external consultants and all information will be kept strictly confidential. Individual comments and information will not be shared with any other area of Council and will be destroyed once analysed.

Scan this QR Code with your smartphone to enter the survey online

Macedon Ranges
Shire Council

Tel: (03) 5421 9615

Email: ecodevsurvey@mrsc.vic.gov.au

Macedon Ranges Agribusiness Survey

1. Do you earn SOME, or ALL, of your income from agricultural production OR by value-adding to locally grown produce in the Macedon Ranges Shire?

- ☐ a I earn SOME or ALL of my income from agricultural production OR by value-adding to locally grown produce in the Macedon Ranges Shire
- ☐ b I earn NO income from agricultural production OR by value-adding to locally grown produce in the Macedon Ranges Shire
- ☐ c I earn ALL of my income from equine-related activity in the Macedon Ranges Shire

If you selected questions **1.b** or **1.c** this survey unfortunately does not apply to you as it is focussed specifically on agribusinesses within the Macedon Ranges and does not incorporate the Equine industry.

In 2011, Macedon Ranges Shire Council developed an Equine Strategy which can be found on Council's website (www.mrsc.vic.gov.au).

Your Agribusiness

2. In which town is your agribusiness activity closest to?

- ☐ Banyton
- ☐ Carlsruhe
- ☐ Cherokee
- ☐ Clarkfield
- ☐ Cobaw
- ☐ Darraweit Guim
- ☐ Gisborne
- ☐ Kyneton
- ☐ Lancefield
- ☐ Macedon
- ☐ Malmsbury
- ☐ Mt Macedon
- ☐ Pastoria
- ☐ Riddells Creek
- ☐ Romsey
- ☐ Sidonia
- ☐ Spring Hill
- ☐ Tylden
- ☐ Woodend
- ☐ Other (please specify) ____________

3. Which of the following best describes your agribusiness category?

- ☐ Hay & Stillage
- ☐ Broadacre Crops
- ☐ Horticulture
- ☐ Aquaculture
- ☐ Apiculture
- ☐ Viticulture
- ☐ Livestock
- ☐ Value-adding to locally grown produce (i.e. leather, oil, jam)
- ☐ Livestock Products (i.e. eggs, wool, milk)
- ☐ Restaurant or Cafe
- ☐ Accommodation (i.e. farmstays)
- ☐ Other (please specify) ____________

4. Could you please provide an approximate estimate of the percentage contribution of each category to the total value of your agribusiness turnover?

Hay & Stillage	%	Broadacre Crops	%
Horticulture	%	Aquaculture	%
Apiculture	%	Viticulture	%
Livestock	%	Value-adding to locally grown produce	%
Livestock Products	%		
Other: ____________	%		

Macedon Ranges Agribusiness Survey

Your Agribusiness (Continued)

Please select the sub-categories that best describes your agribusiness activities. Leave blank if not relevant.

Sub-categories based on those of the Australian Bureau of Statistics (Cat no. 7121.0 & 7503.0). More than one sub-category can be selected.

5. Hay & Silage

- ☐ Cereal cut for hay
- ☐ Barley for grain
- ☐ Pasture cut for hay
- ☐ Other crops out for hay
- ☐ Pature & cereal cut for silage
- ☐ Other (please specify) ______

6. Broadacre Crops

- ☐ Oats for grain
- ☐ Maize for grain
- ☐ Rice for grain
- ☐ Barley for grain
- ☐ Triticale for grain
- ☐ Oil seeds - Canola
- ☐ Cereal crops for grain
- ☐ Sorghum for grain
- ☐ Wheat for grain
- ☐ Cereal crops not for grain or seed
- ☐ Other (please specify) ______

7. Horticulture (incl. viticulture)

- ☐ Nurseries
- ☐ Cut flowers
- ☐ Cultivated turf
- ☐ Vegetables for human consumption
- ☐ Vegetables for seed
- ☐ Fruit
- ☐ Citrus fruit
- ☐ Pome fruit
- ☐ Stone fruit
- ☐ Other orchard fruit
- ☐ Berry fruit
- ☐ Grapes (for drying)
- ☐ Grapes (for wine)
- ☐ Nuts
- ☐ Olives
- ☐ Other (please specify) ______

8. Aquaculture

- ☐ Fish
- ☐ Crustaceans
- ☐ Molluscs
- ☐ Aquatic plants
- ☐ Other (please specify) ______

9.Livestock

- ☐ Cattle
- ☐ Dairy cattle
- ☐ Sheep
- ☐ Pigs
- ☐ Goats
- ☐ Deer
- ☐ Buffaloes
- ☐ Alpacas
- ☐ Poultry
- ☐ Other (please specify) ______

10. Livestock Products

- ☐ Milk
- ☐ Wool
- ☐ Eggs
- ☐ Other (please specify) ______

Macedon Ranges Agribusiness Survey

Your Agribusiness (Continued)

12. Other. Please provide details of your agribusiness activity if not listed above.

13. What is the size of your agribusiness property? If your business is on more than one property, please list them separately.

You can use hectares or acres, though we ask that you confirm in the next question

Property One

Property Two

Property Three

Property Four

Property Five

14. Are your answers to the question above in hectares or acres?

☐ Hectares ☐ Acres

15. Does your agribusiness have any certification or accreditation?

☐ Yes ☐ No

If you answered 'yes', please provide details below:

Networks and Forums

16. Are you, or your agribusiness, a member of a network, forum, association or cooperative?

☐ Yes ☐ No

If you answered 'yes', please provide details below:

17. Would you, or your agribusiness, benefit from being part of a Macedon Ranges Agribusiness Forum?

☐ Yes ☐ No

Income and Markets

18. Approximately what percentage of your products are sold via the following?

Farmers Market	%	Local Restaurants	%
Local Retailers	%	Farm Gate	%
Internet	%	Friends & Family	%
Local Cooperative	%	Victorian Wholesalers	%
Interstate Wholesalers	%	Stock Agents	%
Local Saleyards	%	Export Markets	%
Other (please specify)			%

Macedon Ranges Agribusiness Survey

Income and Markets (Continued)

19. If you answered 'Export', to the previous question, please indicate where your products are exported.

- ☐ Africa
- ☐ Asia
- ☐ Canada
- ☐ European Union
- ☐ India
- ☐ Middle East
- ☐ New Zealand
- ☐ Oceania
- ☐ South America
- ☐ USA
- ☐ Unknown
- ☐ Other (please specify) ______

20. What was the approximate annual turnover of your agribusiness in the last 12 months?

Please be assured that individual responses will remain confidential.

- ☐ Less than $20,000
- ☐ $20,001 - $50,000
- ☐ $50,001 - $100,000
- ☐ $100,001 - $150,000
- ☐ $150,001 - $200,000
- ☐ $200,001 - $300,000
- ☐ $300,001 - $500,000
- ☐ $500,001 - $1 million
- ☐ $1 million - $2 million
- ☐ More than $2 million
- ☐ Prefer not to answer

21. What percentage of the above is spent on business operating materials?

(i.e. fertilizers, feed, packaging, vet services, stock agents)

- ☐ Less than 10%
- ☐ 11%-20%
- ☐ 21%-30%

Continued above

- ☐ 31%-40%
- ☐ 41%-50%
- ☐ 51%-60%
- ☐ 61%-70%
- ☐ 71%-80%
- ☐ 81%-90%
- ☐ 91% or more

22. What percentage of your business operating materials are purchased via the following?

Total percentages must equal 100%

Local businesses in the Macedon Ranges	%	Elsewhere in Victoria	%
Melbourne-based businesses	%	Interstate	%
Imported from overseas	%	Unknown	%

Employment and Training

23. Approximately how many FULL TIME, PART TIME, CASUAL and SEASONAL employees does your agribusiness employ in the Macedon Ranges Shire?

(including managers and owners working the property)

Full-time		Casual	
Part-time		Seasonal	

24. Including yourself and your family members, who work in the business, what percentage of your employees live within the Macedon Ranges shire?

- ☐ Less than 10%
- ☐ 11%-20%
- ☐ 21%-30%
- ☐ 31%-40%
- ☐ 41%-50%
- ☐ 51%-60%

Continued over leaf

Macedon Ranges Agribusiness Survey

Employment and Training

(Continued)

- [ ] 31%-40%
- [ ] 41%-50%
- [ ] 51%-60%
- [ ] 61%-70%
- [ ] 71%-80%
- [ ] 81%-90%
- [ ] 91% or more
- [ ] Don't know

25. Does your agribusiness participate in any of the following?

- [ ] Apprenticeships
- [ ] Work Experience
- [ ] Internships
- [ ] Training courses
- [ ] Exchange Programs
- [ ] Traineeships
- [ ] Online learning/ training

If your business does not participate in any of the above, is there a particular reason why? (i.e. cost, time)

26. Do you have difficulty in recruiting?

- [ ] Yes
- [ ] No

If 'yes', please explain the difficulties you face:

27. Is 'off-farm' employment required to support the business income?

- [ ] Yes
- [ ] No
- [ ] Other: (please specify)

28. If 'yes', can you please provide an estimate of the percentage of income derived from off farm activity?

- [ ] Less than 10%
- [ ] 11%-20%
- [ ] 21%-30%
- [ ] 31%-40%
- [ ] 41%-50%
- [ ] 51%-60%
- [ ] 61%-70%
- [ ] 71%-80%
- [ ] 81%-90%
- [ ] 91% or more
- [ ] Don't know

Natural Environment and Sustainability

29. With respect to your agribusiness, do you invest or work in any of the following areas?

- [ ] Pest, plant and animal management
- [ ] Revegetation with native species
- [ ] Native vegetation protection or enhancement
- [ ] Carbon farming
- [ ] Waterway protection and enhancement
- [ ] Sustainable soil management (i.e.biodynamic farming)
- [ ] Organic farming
- [ ] Renewable energy production (i.e. wind, solar, hydro)
- [ ] Energy efficiency (i.e. insulation)
- [ ] Water efficiency (i.e. use of recycled water)
- [ ] Waste reduction and recycling

Macedon Ranges Agribusiness Survey

Natural Environment and Sustainability (Continued)

30. Do you plan to invest to improve the land capability (soil quality) of your property in the next three (3) years?

☐ Yes ☐ No ☐ Uncertain

The Future

31. What is the likelihood your agribusiness will INCREASE its production over the next ten (10) years?

☐ Very likely ☐ Likely ☐ Unlikely

☐ Very Unlikely ☐ Unsure

Please provide further explanation below:

32. What is the likelihood your business will DIVERSIFY its product over the next ten (10) years?

☐ Very likely ☐ Likely ☐ Unlikely

☐ Very Unlikely ☐ Unsure

Please provide further explanation below:

33. How would you rate the health of your agribusiness industry in the Macedon Ranges?

☐ Excellent ☐ Good ☐ Average

☐ Poor ☐ Very Poor ☐ Unsure

Please provide further explanation below:

Macedon Ranges Agribusiness Survey

The Future (Continued)

34. What do you believe to be the top three constraints for the agribusiness industry in the Macedon Ranges shire?

	Constraint	Second Constraint	Third Constraint
Soil type	☐	☐	☐
Land capability	☐	☐	☐
Climate change	☐	☐	☐
Local climate	☐	☐	☐
Water availability	☐	☐	☐
Land prices	☐	☐	☐
Operational input costs (i.e. feed)	☐	☐	☐
Capital costs required to expand	☐	☐	☐
Access to skilled labour	☐	☐	☐
Access to seasonal workers	☐	☐	☐
Access to the right training for my staff	☐	☐	☐
Overall labour costs	☐	☐	☐
Transport costs	☐	☐	☐
Commodity prices	☐	☐	☐
Access to markets	☐	☐	☐
Competition	☐	☐	☐
Interest rates	☐	☐	☐
Government regulation	☐	☐	☐
Land use regulations	☐	☐	☐

Macedon Ranges Agribusiness Survey

The Future (Continued)

35. Which of the following do you think the Macedon Ranges Shire Council should focus on to better support the agribusiness sector?

- ☐ Facilitate networking opportunities
- ☐ Providing business support
- ☐ Educating the wider community about agribusiness
- ☐ Provide skills and training support
- ☐ Promoting local agribusinesses
- ☐ Assisting with linkages to new markets or suppliers
- ☐ Identifying links to new markets or suppliers
- ☐ Assisting the industry through research or data collection
- ☐ Promoting buy local campaigns
- ☐ Developing marketing, branding and promotion campaigns
- ☐ Other: (please specify)

36. In THREE (3) words or less, how would you describe agribusiness in the Macedon Ranges?

37. Please feel free to add any further comments about agribusiness in the Macedon Ranges below:

Prize Draw

38. Please provide your contact details below if you would like to go into the draw for one of the following:

- **A $300 Landmark Dwyer or Elders Kyneton voucher**
- **One dozen bottles of local wine**

Contact Name

Telephone Number

Email Address

Please note: Your contact details will not be linked to your survey responses

39. If you are interested in having your agribusiness listed in a future Macedon Ranges Local Producers Directory, please indicate below. Your contact details from the previous question will be used.

☐ Yes ☐ No

One Final Question

40. Thank you for participating in this survey and for taking the time to contribute to a secure and sustainable agricultural future in the Macedon Ranges.

Before submitting your responses, please tell us how you heard about the survey:

- ☐ Local Newspaper
- ☐ Local organisation
- ☐ Saleyards
- ☐ Poster/ Postcard
- ☐ Council Office
- ☐ Council Officer
- ☐ Word of mouth
- ☐ Local business
- ☐ Council website
- ☐ Email
- ☐ Other (please specify)