



# Rural Lands Issues Paper:

## REGIONAL FOOD



CGRC Rural Lands Strategy

**REGIONAL FOOD**

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# 1. Executive Summary

Farmers, producers and manufacturers have the opportunity to position themselves at the forefront of the food and agribusiness revolution driven by the expected global growth of the middle class to 3.5 billion people by 2030. Food production must increase whilst having regard for the need to protect scarce natural resources.

Consumers are placing more emphasis on health and well-being with an increasing willingness to pay for premium products. The Cootamundra-Gundagai Regional Council Local Government Area (LGA) has the opportunity to leverage off Australian's clean and green image and proximity to Asia as well as the LGA's location on major transport routes.

There are a number of emerging food industries and agritourism products suited to the LGA which include value added products, such as paddock to plate experiences and Farmer's markets which provide opportunities for local producers to sell direct to consumers.

An anchor tourism product can transform a regional town into destination. Regional attractions including partnering with neighbouring LGAs and festivals and events would further enhance the growth of the regional food sector in the LGA. Local and regional case studies provide insight into the potential for Regional Food enterprises in the LGA.

## 2. Introduction

Cootamundra-Gundagai Regional Council is the merged local government area of former Cootamundra and Gundagai Shires. The two towns of Cootamundra and Gundagai are the main population centres with a number of villages and rural communities also serving as residential options. All of these residential areas have strong existing and historical connections to the surrounding rural lands and the architecture and wealth of the towns in particular are directly attributable to the agricultural industry.

The total land area is 398,141.7 hectares, home to 11,141 people (ABS, 2016). Agriculture, Forestry and Fishing is the largest employment industry, employing 15.3% of employed persons. Manufacturing (which includes agricultural value add industries) is a close second, employing 10.6% of employed persons. (Census Time Series Profile, 2011)

In 2011 the combined value of agricultural commodities produced from the Cootamundra-Gundagai Regional Council Local Government Area was \$103 million, however this figure does not capture other agricultural outputs such as agritourism, local markets, events and so on.

Figure 1: CGRC LGA



## Rural Lands Strategy Background

The merger of Gundagai Shire Council and Cootamundra Shire Council as Cootamundra-Gundagai Regional Council has stimulated the need for new planning instruments and policies; in particular a Local Environment Plan and Development Control Plan which cover the regional council area. A strategy to deal specifically with the rural lands of CGRC is proposed which aims to analyse agricultural trends and opportunities for the area. This strategy will help to update mapping for the new Local Environmental Plan while also providing rationale and reasoning for zoning and minimum lot sizes in rural areas.

Rural land is often neglected from a planning perspective due to more pressing planning needs in larger centres, however agricultural land often has a disproportionate impact on residential and economic activity when compared to development in a town, with intensive feedlots, quarries, landfills, etc. Furthermore, agricultural activities themselves such as piggeries, vineyards, feedlots and so on have a long-term impact on the use and viability of the site and surrounding lands. Through the strategic planning process, controls and principles of development can be placed on agricultural land to ensure the viability of the land into perpetuity as well as providing opportunities for emerging and new agricultural enterprises to establish in the area.

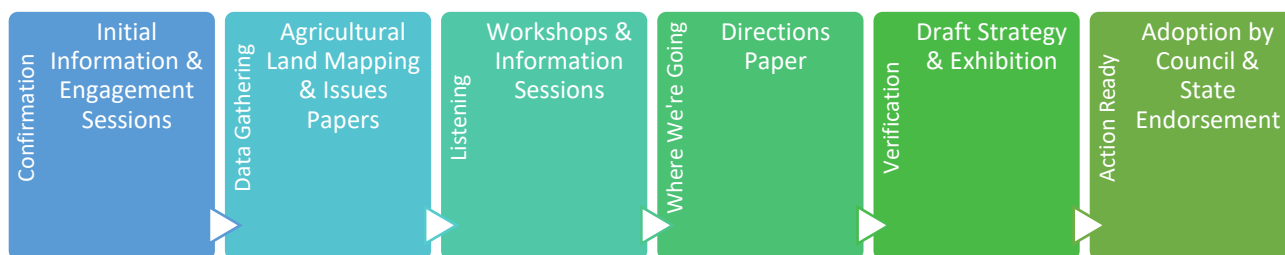
The two former shires have varied terrain and soil quality which makes formulating one course of action or plan for rural land difficult. However, this should be viewed as an opportunity which will make Cootamundra-Gundagai Regional Council more attractive and marketable to residents, visitors and prospective residents as a wide variation of agricultural pursuits can be explored in this single local government area.

It is Council's intention that the Rural Lands Strategy serves not only as a land use planning document, but as a plan for economic success and growth through the shared identity of agriculture. This leverages off what Cootamundra-Gundagai Regional Council does best (agriculture), connections to logistic hubs and routes as well as capitalising on changing recreation and tourism trends.

## Purpose of the Issues Papers

The Issues Papers are integral to the success of the Rural Lands Strategy as they are background documents based on research and science; analysing trends elsewhere and juxtaposing this with the situation within Cootamundra-Gundagai Regional Council.

There are ten Issues Papers which will be produced with the community having shaped not only the overarching theme of each paper, but also having identified a number of existing constraints and opportunities to be investigated. Based on the findings of the Issues Papers and workshops during the “listening” phase, a directions paper will be produced which will list key directions for the Rural Lands Strategy.



### 3. Current and Future Trends in Food Development

As issues relating to food security, climate change and sustainability become increasingly relevant on a regional scale; a new opportunity presents itself for the farmers, producers and manufacturers of the Gundagai LGA, to position themselves at the forefront of the food and agribusiness revolution. Australia increasingly has the chance to supply, sustainably-produced, health-enhancing premium goods to a growing market both nationally and internationally.

By 2030, there will be approximately 3.5 billion people on the planet with middle-class incomes who are willing to pay more for trusted, premium food products.

The opportunity can be contributed to three significant events happening across the globe:

1. **Sustainability** - As the global population continues to rise, a 70% increase in food production will be needed, but at the same time the environmental footprint of the production must halve, including a considerable reduction in wastage.
2. **Health and Well Being** - Food will increasingly be seen as the key to health and wellbeing. This includes:
  - Digestive wellness and microbiome linked to a variety of health-related areas such as weight management invite opportunities of dairy alternatives, bread made from legumes and gluten-free grains as well as fermented foods and soy products such as tempeh and tofu; (*Alexandra Locke, 2017*)
  - Plant-based diets – with a trend in ancient grains such as quinoa, sorghum, spelt; and
  - Inflammation and the health benefits of consuming anti-inflammatory foods such as turmeric. However, a recent study also linked wholegrains as having some of the strongest anti-inflammatory markers out of 37 foods.

By 2020 preventable diseases such as heart disease and diabetes will contribute to 73% of all deaths. Consumers will increasingly demand fresh, tasty and healthy value-added products leading to the demand for foods with a higher level of desirable elements. For example, barley with high fibre content and low glycaemic index or canola with higher levels of omega-3 fatty acids.

3. **Premium Products** – Globally as the middle class continues to expand, the consumer's desire for premium products will also increase. Most importantly the provenance of food products is what will make them premium. Identifying as regional and having authentic traceability will be inherent in the purchase process.



A recent Austrade analysis identified that for the first time the majority of Australia's growth (60%) in food and agribusiness exports from 2013 – 2016, now comes from premium and value-added products. These luxury products, such as truffle-infused oils, beef selectively bred for tenderness, luscious chocolates and seafood from pristine waters, capture and convey some essence of Australia. (Cole & Noakes, 2017)

### 3.1 Horticultural Export Push

Exports are driving Australian horticulture with fresh horticultural exports valued at \$2.01 billion in 2016/17 with an increase in, among others, the export of citrus, table grapes, macadamias and carrots.

In 2015, under the National Research, Development and Extension Framework for Horticulture, NSW DPI committed to an ongoing and major investment in the citrus, blueberry, olive, leafy vegetable, protected cropping and melon sectors, and jointly leads (with the South Australian Research and Development Institute) investment in research development and extension in the wine and (with the Department of Agriculture, Fisheries and Forestry) the macadamia sectors.

They also have a strong commitment, through active research on a wide range of other commodities important to the NSW economy including temperate nuts, bananas, raspberries, apples, cherries and edible oils. New South Wales DPI also retains a linking role in the mango, persimmon, pineapple, tropical fruits, asparagus, pea and sweet potato sectors.

More recently the Horticultural Innovation Australia (HIA) has committed more than \$10.5 million into trade activities towards research and development to grow market access and increase support for current and aspiring exporters. As part of the new export push, HIA worked with industry to set trade targets which were developed in consideration of future production forecasts, building industry capacity and the growing middle class across Asia. (Walmsley, 2017)

A snapshot of the goals includes:

- Increase the value of vegetable exports to \$315 million, or 40 %, by 2020 through relationship building, working with industry to get export ready, boosting supply chain efficiencies and overseas activities;
- Invest an estimated \$31.48 million over the next five years into avocado research and development;
- Export 12,000 tonnes of cherries by 2020/21, an increase of 340% over the 2015 levels;
- Increase almond export sales from 64,000 tonnes in 2016 to 110,000 tonnes in 2022 through the development of improved harvesting techniques and pest management, novel technology to reduce labour costs; and

- In olives, continue to support established and growing high-margin export market opportunities in China and Asia for high-quality olive oil through an anticipated \$2.75 million over the next five years in R&D and extension activities. (*Walmsley, 2017*)

In June this year, the announcement was made of a new joint venture, The Premium Australian Food and Wine Collaboration, a cross-industry partnership comprising Dairy Australia, Meat & Livestock Australia; Horticulture Innovation Australia and Wine Australia, in cooperation with Austrade. The collaboration will embark on a mission to reinforce the nation's position as a premium food source for high-end Chinese consumers.

Austrade Trade Commissioner in Shanghai Karen Surmon said the China-Australia Free Trade Agreement gave greater confidence to Australian producers exporting premium food and beverage products, and improved choice for discerning Chinese consumers and importers. (*Australian Ag Show Credentials to China. 2018*)

Each year, exports from the four agricultural sectors to Greater China contribute \$6.5 billion to Australia's economy. This includes:

- Dairy \$2.76 billion;
- Wine \$1.04 billion;
- Red meat and livestock \$2.05 billion; and
- Horticulture \$633.8 million.

## 3.2 Emerging Food Industries

A number of reports from various bodies including Agrifutures, CSIRO and the NSW Department of Primary Industries have identified various industries emerging at the intersection of having global demand and commercial presence in Australia. The industries with a possible local and regional context are included below.

### Organics

Today the organics industry in Australia is worth an estimated \$2.4 billion, **growing 88% since 2012**, with continued growth of 13% annually and a demand from the rising middle class in Asia looking for clean, healthy produce. Australia owns 53% of the world's organic farmland, an increase of 23% (over 5 million hectares) since 2015. (*Monk, 2017*)

Top domestic organic products include fruit and vegetables, beef, dairy products and grain-based cooking products.

Worldwide, the market for organics in 2015 was worth US\$81.6 billion – a fourfold increase from 2000, according to the *Australian Organic Market Report 2017*. The report stated that Australia’s organic exports increased to all continents in 2016, **growing 17% from the previous year**. About one-third of exports went to the East Asia market – China, South Korea, Hong Kong and Singapore – and another third landed in North America. The top seller was organic beef, but organic fruit and vegetables, dairy and wine were close behind with lamb, pork and poultry products also on the list.

Within a regional context, organic farming includes:

- Grains;
- Vegetables;
- Fruit;
- Table grapes and vine fruit;
- Nuts;
- Berries;
- Prunes;
- Dairy products;
- Beef;
- Pork; and
- Lamb (including grass-fed, pastured and free-range products)

## Free Range Eggs

According to the Australian Eggs Association annual report the farm gate value of eggs had risen to \$739.4 million 2017 FY, with the egg segments displaying a rising trend in the popularity of free-range eggs. In 2009 caged eggs held 70% of the market, in 2017 caged eggs are 49% in volume and 36% in value. Free-range eggs in 2017 are **41% in volume and 51% in value**, largely due to consumers who are prepared to pay a premium for the product. (*Australian Eggs Association, 2017 pg5*)

## Protected Cropping/Commercial Hydroponics

The protected cropping industry in Australia is already worth **\$2 billion in production** and is the fastest growing sector in Australian agriculture. Protected cropping is the production of fruit and vegetables using a sheltered structure such as a glasshouse to modify growing conditions and protect crops from pests and adverse weather.

The Riverina has water security, land, plenty of sunshine and is central to Australia’s biggest consumer markets. Additionally, access to domestic and international customers has improved dramatically. However risky weather patterns continue to rise including frost, storms, hail, wind, untimely rainfall and hugely variable temperatures. The impact of these can be managed in a protected cropping environment.

Commercial hydroponics addresses farming sustainability and water scarcity, with a strong focus on meeting the growing consumer trends of more environmental and health conscious purchase decisions. It promotes superior quality and consistently sustainable higher yields than that of conventional farming.

Available crops for protected cropping:

- Herb, salad and green bunched vegetables;
- tomatoes and other vegetables;
- fruits including berries; and
- cut flowers.

See: On the Ground Case Study – Fresh Technique Farm

## Tree Nuts

Tree nut production in Australia is dominated in scale by almonds and macadamia, with the former representing over 50% of the total area planted. However, there are indications for exponential growth in all areas of nut production. Using walnuts as an example, predictions are that the industry will go from a wholesale value of \$80 million in 2017 to \$300 million by 2028.

Hazelnut production could increase by more than 2,000% according to a report by Rural Industries Research and Development Corporation. The prediction is from the current annual production of 170 tonnes to an anticipated 2,000 tonnes. Ferrero Australasia has identified Australia as a country suitable for hazelnut production, with three trial sites established in 2012 at Yanco, Dareton and Orange, and now forging ahead with 1 million trees on 2,000ha. (*Gottschall, 2017*)

The Australian industry is relatively disease and pest free (compared with other global industries), which increases the marketability of Australian grown nuts. Examples of crops include:

- Almonds;
- Walnuts;
- Chestnuts;
- Hazelnuts; and
- Pistachio.

## Pork

Australia produces around 360,000 tonnes of pig meat a year with 8% of this exported to other countries including Singapore, New Zealand and Hong Kong. While all fresh pork meat sold in Australia is also grown in Australia, around 70% of processed pork products, such as ham and bacon, are made from pork imported from overseas.

In 2017 Australian Pork Limited funded a survey conducted by China Import and Quarantine Association entitled a Window of Opportunity. 88% of importers surveyed said they are interested in Australian Pork due to the Australian meat industry's strong reputation and the Chinese consumers increasing demand for diverse and new products. But first and foremost, they stated health and safety-related factors should be considered. (*Australian Pork Limited, 2017*)

Free range pork and increasingly pastured pork has continued to trend, due to the increasing demand from export markets for clean, healthy Australian products.

## Duck

In Australia, production is rapidly increasing, fuelled by a dramatic increase in the demand for duck meat. By global standards, Australia's commercial industry is still small with major expansions taking place only since the 1970s and 1980s.

It has been estimated that the industry slaughters eight million birds annually and is worth approximately AU\$100 million per annum. Two companies undertake 85% of this production, based in the Sydney Basin and Wimmera, Victoria. An increase in demand could lead to regional opportunities.

## Game Birds

A lack of efficiency, affecting production has impacted on the game bird industry and affected its viability. While the domestic market is solid, regarding export the size of the Australia game bird industry makes it difficult to compete on price with other countries.

Quail is the largest game bird industry with a value of \$25 million and is dominated by one company that processes over 15,000 birds a week. Quail is the only game bird who is not a seasonal breeder, ensuring continual supply.

## Gluten Free Crops

While only a small percentage of farmers are growing gluten-free crops in Australia, there is a rise in the number of farmers investing in niche or alternative crops to try and take advantage of the growing popularity of gluten-free foods.

A recent report by Mordor Intelligence suggests the market for gluten-free foods and beverages in Australia are likely to register a healthy growth during the 2018 – 2023 analysis period. Bread products, cookies and snacks form the largest category of gluten-free foods and beverages consumed, with an estimated share of 26% in 2016. This segment is also slated to maintain the fastest growth in demand over the aforementioned period. (*Mordor Intelligence, 2017*)

Crops currently grown within Australia include:

- Buckwheat (soba noodles). Currently successfully grown within the Blayney Shire;
- Quinoa;
- Millet; and
- Teff.

## Fermented Probiotic Drinks

Booming Kombucha sales across Australia are estimated to top \$100 million this year – and more than \$1 billion in the US. There are reports that drinks giants Coca-Cola Amatil and PepsiCo will release their versions of the health brew.

Examples are:

- Kombucha;
- Kefir;
- Water Kefir; and
- Mead.

## Seed Crops

Established within the region, either as a successful broad acre crop such as canola, or niche crop such as mustard seed, seed crops include:

- Canola;
- Mustard;
- Flaxseed; and
- Linseed.

## Value Added and Gourmet Products

As farmers and regional producers try to maintain the quality of their product, value-adding allows for direct sales and control through the process. In Braidwood a small company, Garlicious Grown produce value-added black garlic products, proving to be a profitable niche market. Black garlic has the claim as a 'superfood' with twice the amount of antioxidants of fresh garlic without the garlic breath.

See: case study – Wag Snag Page 31

## Heritage Farming

Growing heirlooms is not without challenges, not bred for commercial production they often will not stand up to the logistics of growth, distribution and sale as well as commercial varieties. Heirlooms, because they are an older variety and not GM, are more susceptible to pests, they have a lower yield, can split and are hard to transport. Many heirloom growers will supply local markets and farmer's markets to avoid this distribution problem and ensure their produce stays its freshest.

Heirloom varieties include among many:

- Tomatoes;
- Carrots; and
- Melons, sweetcorn and Apples.

## Heritage Livestock Breeds

Seen often as a hobby for large livestock farming operations, heritage livestock breeds retention is regarded as paramount in ensuring and securing Australia's food sources in isolation from the threat of introduced diseases. Genetic diversity is vital to healthy and sustainable food production; rare breeds often provide many traits that have been lost in modern "efficient" hybrid varieties. We may need to call upon these breeds for specific traits to enhance the current industrial stocks, for example, characteristics like longevity, disease resistance, climate adaptability and structural soundness. (*Rare Breeds Trust*)

## Market Gardens

A **market garden**, also called a micro-farm, is a small plot of land, either within an urban rural setting – where fruits, vegetables and flowers are grown and sold to the public. The crops are cash crops, ie grown for profit.

Market gardens are typically from one to a few acres in size. Many consist of large greenhouses, or a combination of plants grown both indoors and outdoors. Most market gardens grow and supply fresh produce through the local growing season. Unlike large scale farms, they generally have a wide range of crops and are less industrially intensive, ie crops are picked or harvested using manual labour, with gardening rather than intensive farming

Market gardens are well placed to offer value through food provenance, and foods' regional identity as well as offering more flavour, freshness and variety. Small operators are in a position to set prices to reflect the individual character and provenance of their food.

This can be achieved through selling produce at farmers' markets, or via the internet. A well-structured website, social media campaign and online store can all boost direct sales of fresh and processed goods.

## Natives

AgriFutures Australia names new and emerging native plant industries such as wattle seed, Kakadu plum, seaweeds, and native pepper as well as newer editions to Australian agricultural flora such as quinoa, hazelnuts and coffee.



## Snackification

In 2017 the snack business grew by US\$3.4 billion globally, and in the US consumers are eating 'on-the-go' snack subcategory to the tune of US\$1.1 billion dollars. In Australia and more than any other time in history the younger generation has far more access to processed and packaged food options, however, their buying habits are changing. (*Booming Snack Sales Highlight A Growth Opportunity in Emerging Markets, 2018*)

Consumers increasingly look for healthy, portable, mindful snacks from labels with a clean, green image. And it's not just snacks; consumers are also thirsty for healthy food drinks (see Kombucha). Products include:

- Dried fruit;
- Nut snack packs;
- Fresh smoothies; and
- Fruit cups. (Morris, 2018)

## 3.3 Collective/Co-operative and Collaborative Farming

Collective, co-operative and collaborative farming can be generally defined as working together for mutual benefit.

The coming together of farmers creates a critical mass which typically provides greater market share. The benefits can include:

- Competitive advantage through reducing costs of production through scale or increasing the price of goods sold through volume marketing;
- A focus on long-term competitiveness rather than short-term costs or gains;
- Combining the expertise, knowledge and capabilities of a variety of generations;
- Sharing costs and resources of machinery, plant, labour, capital, and contracts;
- Establishing quality assurance systems; and
- Growing products that are differentiated in quality, farming practices, community values and environmental benefits to meet the growing markets for different consumer segments.

In 2016, the Australian Government invested \$14 million in the Farming Together initiative, which aimed to provide farmers, fishers and foresters with knowledge, skills and materials on collaborative ideas, co-operative structures and collective strategies. The program finished in June 2018, with many success stories including 30 garlic growers in Braidwood, NSW and the Beechworth Food Co-op, who have tapped into local demand allowing consumers to purchase fresh, locally grown produce with minimal 'food miles'. The Co-op, supplied by about 35 growers, has consistently recorded solid sales growth.

## 3.4 E-Commerce

Research recently released by Roy Morgan shows that over the year to March 2018, 46.8% of Australians (9.46 million) brought something online in an average four-week period, an increase of 590,000 people in just 12 months. This shift in purchasing behaviour opens exciting opportunities for businesses to increase their domestic reach through digital trade. Globally cumulative data compiled by The Enterprise Guide to Global E-commerce, anticipates a 246.15% increase in worldwide e-commerce sales, from \$1.3 trillion in 2014 to \$4.5 trillion in 2021. That's a nearly threefold lift in online revenue.

Maggie Zhou, of Alibaba the B2B online selling giant Melbourne headquarters, stated that the Australian market for value-added, organic and/or clean products has an opportunity for exponential growth, adding that among the most popular Australian products in China were *fresh foods, cereals, beef, dairy and organics*.

However, the ABS report, Selected Characteristics of Australian Businesses revealed that in the financial year 2016 – 17 95% of Australian businesses had internet access while only 50% had a web presence, and 38% a social media presence. Agriculture, forestry and fisheries were the least likely to have a web presence at 12%. (ABS, 2017)

Domestic direct to consumer websites include:

- The ethical farmers;
- The Conscious Farmer;
- Farm House Direct;
- Harris Farm Markets; and
- Your Grocer.

The phenomenon Chinese daigou, is an unofficial network of Chinese shoppers who procure tonnes of supplies for friends, families and contacts. One daigou ships 40 containers of baby food and 60 bottles of vitamins a week. With Chinese customs clearing perishables in 72 hours, a trend in fresh fruit and vegetables has exploded.

HiveXchange – this newly launched trade facilitation platform is an online marketplace for wholesale produce selling into Asia. In Asia’s e-commerce driven supply chain, the HiveXchange offers a comparative advantage to Australian exporters by removing the barriers of distance, market awareness and access. The digital technology allows the industry to sell fresh direct while limiting handling and reducing waste.

Additionally cross-border e-commerce sites – such as [www.jd.com](http://www.jd.com) and [www.kaola.com](http://www.kaola.com) – have given international suppliers, such as organic infant formula and baby food maker [Bubs Australia](#), access to a large and enthusiastic Chinese audience.

Co-operative Selling – an example of which is combining producers/farmers of a high-quality product, Mirrool Creek Lamb. The Hayes family of Mirrool Creek lamb use a select group of the regions finest lamb producers, handpicking the lamb that they then rebrand under Mirrool Creek. They are involved in every step of the process from paddock to plate, with an outstanding reputation for high-quality farm handling, processing, ageing and packaging. They then sell directly to select markets and restaurants.

## 4. Agritourism

Tourism and Agriculture are considered two 'super-growth' areas according to accounting firm Deloitte's 2016 report, *Positioning for prosperity? Catching the next wave*.

Food Tourism (agritourism) encompasses a wide variety of activities and is essentially the act of going to a region to visit a farm or food-related business for enjoyment, education, or to participate in activities and events. For primary producers, it provides an opportunity to supplement their income and market their produce through alternative channels, often attracting a premium price.

Key agribusiness products prominent in food tourism include wine, craft beer and spirits, gourmet foods (cheese, olives, condiments, and confectionary), fruit, vegetables, nuts, and meat. Food tourism activities are many and diverse, and examples include direct shop front outlets with produce tastings, regional markets, farm and winery tours, cooking classes, food and wine festivals, farm stays, restaurants sourcing local produce, self-picking experiences and farm gate sales. (*Deloitte, 2017*)

More broadly, food tourism allows regional economies to showcase what's good about the region, its unique growing conditions and natural resources (pristine air, water and soils) and provides a visitor drawcard from which other regional tourism businesses and experiences can benefit. Agritourism can also provide communities with a more sustainable and resilient future that requires economic diversification. (*Ecker, 2010*)

### 4.1 Food Tourism Statistics

According to data collected over the last five years by Tourism Research Australia, between 2010/11 and 2015/16, the number of agritourists visiting farms or wineries in Australia has grown steadily. Growth is being driven by visitors from Asia and thus represents a significant opportunity if the product offering is right.

- The number of domestic tourists who visited a farm on their trip increased by 9% per annum on average, while the comparable number of international tourists increased by 11% per annum; and
- The number of domestic tourists visiting wineries grew by 13% per annum on average, while the number of comparable international visitors increased by 8% per annum. (*Tourism Research Australia, 2017*)

## Food Tourism to NSW, Destination NSW Year Ending December 2017

In the year ended December 2017, New South Wales received nearly 5 million food travellers who stayed for 59.4 million nights and spent an estimated **\$8.5 billion** in the State. Two million international and domestic visitors had been to at least one winery in the State and spent an estimated **\$2.2 billion**. (*Destination NSW, 2017*).

- NSW received over 1.4 million international food travellers who spent over 45.8 million nights in the State and spent \$5.4 billion; and
- Food travellers represented 34.7% of visitors and 48.5% of nights by all international travellers to the State. NSW received 39.5% of visitors and 29.7% of nights in Australia by international food travellers.

Mainland China (20.5%) was the largest source market of international NSW food travellers. The USA (11.9%) was the 2nd largest, followed by New Zealand at 9.3%. (*Destination NSW, 2017 pg1-3*)

## Wine Tourism to NSW Year Ending December 2017

- NSW received nearly 2 million international and domestic visitors who had been to at least one winery in the State; (*Tourism Research Australia, 2017 pg1*)
- They spent nearly 14.4 million nights in the NSW - up by 4.0% on year ending December 16; and
- Visitors who had been to at least one winery in NSW spent an estimated \$2.2 billion (total expenditure of trip) (including package expenditure by overseas visitors) in the State - up by 9.5% on year ending December 16. (*Tourism Research Australia, 2017 pg2*)

## Riverina Statistics

- The Riverina received 2.7 million visitors to the region year ending March 2018, an increase of 33% since year ending March 2010 and 2.5 million nights in the region, an increase 22.8% change in year ending March 2010;
- Top activities in Riverina 'Eat out, dine at a restaurant or cafe' (52.4%) was the most popular activity undertaken by visitors to the region, followed by 'visit friends and relatives' (39.3%) and 'pubs, clubs, discos etc' (24.6%); and
- 25.3% cited a holiday as the reason for visiting the region, while 34.9% visiting friends and relatives. (*Destination NSW, 2018 pg1-4*)

## 4.2 Agritourism Opportunities

As people become more knowledgeable about and engaged in food and wine, regional destinations need to offer relevant experiences. International buyers buy travel as a packaged product, which offers a range of activities, venues and experiences.

Tourism Research Australia placed the Riverina as sixth in the Top 10 NSW destinations, with key drivers to the region identified as:

- Food and Wine Experiences, National Parks and Heritage Buildings (historic buildings, sites, and monuments).

Along with:

- A reputation for unique offerings including wine-tasting and purchases, meals and local produce sampling. The more dedicated visitor enjoys tours, special events, master classes and dinners;
- Quality customer service;
- Range of accommodation offerings; and
- And critically, a convenient way of organising and planning the entire event, such as a dedicated website.

While distance also factored as a reason to visit a region and is identified as a barrier for many regional tourism operators, statistics show that this can be overcome through the delivery of a great service experience.

An increase in international and domestic visitation can be supported through developing **packages** that expose the visitor to a number of agritourism experiences. Just as important is partnering with tour providers to ensure ease of planning and booking. CGRC's proximity to Canberra and Wagga Airports, as well as highways, gives a competitive edge when coupled with providing products that are attractive to the international market.

Australia is ranked as second in the world (first for countries such as China and the US), for food and wine experiences. This is underpinned by seven pillars that bring to life the culinary experience:

- Wine;
- Food and wine trails;
- People – winemakers, chefs;
- Produce;

- Restaurants;
- Experiences; and
- Events. (*BDA Marketing for Tourism Australia, 2015*)

## 4.3 Regional Opportunities Identified

As people become more interested and increasingly knowledgeable about and engaged in food and wine, regional destinations need to create authentic experiences.

Millennials are the next wave of travellers; their intense global demand for travel experiences that resonate on a deeper emotional level is also driving travel brands to develop a product that is more adventurous, more personalised, and more attuned to local culture. Regional Australia is well-placed to capitalise on this trend.

- **Anchor tourism product** can transform a regional town into a destination. An example of where the council, community and business worked closely together is Coolamon Cheese; a unique education, tourist and production facility;
- **Development of regional attractions** to round out the experience such as food and wine trails, which allow for the cohesive marketing of a variety of experiences;
- **Partnering with neighbouring shires** for a packaged visitor experience, such the Canola Trail of Coolamon, Junee and Temora and Taste Riverina;
- **Paddock to Plate** - Growing health awareness is also influencing the food and beverage choices of Australian consumers and is in-step with global trends. Within food, this has been reflected in the focus on natural ingredients, organically grown produce and concerns around ethical and sustainable food production, driving interest in a desire for genuine paddock to plate food and wine travel experiences; and
- **Memorable Experiences** - Increasingly Australia's wineries, breweries and distilleries are not simply venues to taste and purchase products, but they offer a memorable experience featuring quality restaurants, accommodation, tours, and exciting behind the scenes experiences. They allow visitors to interact with the product and production process and enjoy first-hand, the rich diversity that Australia offers. (*Tourism Australia, 2017*)

## 4.4 Farmer's Markets

*The Australian Farmers Market Association (AFMA) defines farmers' markets as those that are 'predominantly fresh food markets that operate regularly within a community, at a focal public location, that provide a suitable environment for farmers and speciality food producers to sell farm-origin and associated value-added speciality foods for human consumption and plant products, directly to customers'. (para 1)*

Farmer's markets provide many unique benefits that give them a strong competitive advantage and distinct identity over other mainstream food retailers. This status is critical to ensure benefits continue and accrue for farmers and value-add food producers, for customer loyalty and a sustainable trading environment.

As more people become aware of the societal and environmental benefits of buying food closer to its source, farmer's markets are also providing an important link between rural and urban communities and promoting sustainable food choices. Many consumers are turning to markets to find a greater range of fresh food including organic, free-range and heirloom produce.

Farmer's markets can offer local communities, consumers and farmers significant economic, environmental, health, and social benefits:

- **Economic benefits** for farmers through the provision of a ready-made low-cost marketplace to sell their produce direct with greater profit margins and opportunity for food business incubation using on-site cost-effective market research;
- **Environmental benefits** through reduced packaging and 'food mile' transportation, and greater opportunities for farmer knowledge transfer and collaborative environmental on-farm activities, eg: shared composting, Landcare;
- **Health benefits** through public food and nutrition education, community-based food security programs and consumer incentive to increase fruit and vegetable and other nutrient-dense food consumption, and a guaranteed fresh food product; and
- **Social benefits** through the revitalisation of towns and public spaces and facilitation of interaction between consumers and producers and increasing consumer satisfaction knowing they can support 'local'.

The farmer's market sector encompasses farm businesses, value-added food makers, market operators and managers, state-based farmer's market associations, and consumers.

Successful Regional Farmers Markets Include:

- Riverina Producer's Market – Wagga Wagga;
- Leeton Farmer's Market; and
- Capital Region Farmer's Market – Canberra



## 4.5 Agritourism Festivals and Events

Consumers increased appetite for knowledge regarding where the food and beverages they are consuming come from present an opportunity for regional towns in the form of food and beverage festivals and events. Here they are able to showcase within a day, weekend or month the full scale of regional produce on offer, along with offering to the consumer events such as:

- Meet the producer/farmer;
- Cooking and wine tasting demonstrations; and
- Local attractions and music.

Examples of successful regional festivals and events are:

- The Batlow Ciderfest – Batlow;
- UnWined in the Riverina – Griffith; and
- Beers and Gears – Wagga Wagga.

## 5. Local Case Studies

### 5.1 Buronga Organics

In late August 2018 Buronga Organics, David and Mary Booth welcomed their seventh grandchild and sixth grandson into the world. It might be dry, cold and sleeting outside but inside phones are ringing, hot tea and freshly baked cake are on offer, and there are smiles all around.

Buronga Organics is owned and operated by the Booth family. The farm is located about 10 minutes from Cootamundra and covers an area of just over 1,600ha (4,000 acres), of which about a third is dedicated to private native vegetation, featuring ironbark and red gum communities.

The core business for the farm is quality organic meat, along with crops of wheat and certified organic spelt, wheat and rye. The organic philosophy is central to the Booth's farm management practice as well as what differentiates their products.

Currently, under increasingly dry conditions the Booths have reduced their Dorper sheep and Boer goat stock to almost half of the normal 1,300 head of each to ensure the remaining livestock have good quality feed, low-stress levels and remain disease free. They also run 150 Angus Black cattle and four bulls. Traditionally they use healthy pastures, plenty of space to graze, diversity of stock and rotational grazing methods to differentiate their product.

The Booths are a hardworking agricultural family and have seen close to 40 years of challenges on the land. These challenges include:

- Increasingly unpredictable weather;
- Lack of infrastructure and availability of skilled labour;
- On-farm biosecurity specifically relating to organic certification; and
- Marketing skills in a quickly changing digital environment.

The loss of the Cootamundra abattoir has meant the Booths are now unable to value-add their lamb, goat and beef products. Rather they now transport them, by bulk for cost-effectiveness, to either Junee or Gundagai - with Gundagai Meat Processors being the preference for lamb. This, in turn, has led them, for the time being, to step away from the more niche market of direct to the consumer products, with minimal handling from paddock to plate. They instead sell directly to Arcadian Meat Co.

The Booths drove preliminary investigations, supported by the CGRC, into developing a cooperative multi-species abattoir. Unfortunately, it proved too costly for many of those interested, quickly exceeding \$20 million. However, with the region renowned for its exceptional livestock, the idea remains the pinnacle of what could be achieved. From David's point of view a multi-species micro abattoir, to suit local demand and labour market, would be most relevant for the town. David mentioned that during the investigation it was identified that semi-retired skilled labour (working part-time to supplement their pension), could be sourced from those who remained after the abattoir closure.

Another barrier to selling direct to butchers is the confusion, within the market, regarding the difference between organic and free range. Butchers prefer to purchase, at a lower wholesale price, free range meat and sell it to the consumer for the same markup price as organic. A consumer and business-to-business (B2B, such as butchers) education marketing program has been discussed within the Australian Organic association, which the Booth's feel is vital to show the comparison.

Value-added products have always been an integral part of the Booths business sold under the Buronga Organic brand and direct to the consumer, local butchers and farmers markets. In the past, they attended farmers markets in Sydney and Canberra. However it was not only time consuming, but there was stagnant growth, especially with the increase in speciality food businesses such as Harris Farm Markets.

They have scaled back using their organic spelt, wheat and rye under their brand, except for several local suppliers, now selling the bulk of the product to larger multi-national companies. This has allowed them more time on the farm, and a reduction in labour requirements.

## Agri-Tourism

The Booths have looked at the possibility of farm stays, previously and more recently, with the thought of using an existing cottage on the farm. However, they feel that without a local tourism strategy diverting traffic to the town or actively bringing tourists in from larger regional and city centres that it makes more financial sense to rent permanently to a local family. They continue to be open to the possibility.

<http://burongaorganics.com.au/>

## 5.2 Highfield Farm and Woodlands

Highfield Farm and Woodlands is a small-scale farm owned by David and Louise Glut, previous Sydneysiders, who purchased the 820 acres in 2012. The property sits almost in the middle of the boundary between CGRC and Snowy Valley LGAs. From the highest point of the property you access incredible views to the hills around Gundagai in one direction and the hills around Tumbarumba and off to the Snowy Mountains in the other.

As is often the case with small-scale farming David and Louise work the majority of the land, livestock and their value-added products themselves. They are passionate and dedicated conservationists who, through Highfield Farm combine ethical and sustainable farming practices with the conservation of critically endangered Box Gum Grassy Woodland. They farm one-third of the property, with the remaining two-thirds left as protected woodland.

The farm's predominant business is Dorper sheep, a breed developed in South Africa from Dorset Horn sheep and Black-headed Persian sheep that produce a much sought after marbled lamb. They are purely grass-fed, bred with low-stress stock handling techniques and not forced weaned.

The meat is processed at the Gundagai Meat Processors (GMP)<sup>1</sup>, who Louise and David emphasised have been a great partner and then cut by a local butcher in Gundagai, resulting in the paddock to plate experience that small-scale farmers can provide.

The property also runs a mini-herd of Dexter cattle for dual-purpose providing milk and meat and as supply filler for the lamb. The beef is grass-fed, and occasionally for sale with the aim to expand so that they can offer the product weekly at the local Farmers' Markets. They are also in the process of finalising details for pastured poultry production.

David and Louise lack access to a local abattoir for goats, beef and pastured poultry that allows for the similar process of their value-added lamb product. Previously they used Cootamundra Abattoir before its closure and now transport their beef to Junee for processing and are looking at Canowindra for the closest poultry processing. They agree that small-scale abattoirs who take private kills should be supported and encouraged through Council as an essential element in heightening food tourism within the region.

David and Louise have a commitment to diversification, which not only reduces risk commercially but is better for the environment. They also have a commitment to supplying great regional food to the region; which is why they do not attend either the Sydney or Canberra markets, with a strong belief in low food miles and authenticity of the product – which comes from owner/supplier control and minimal handling.

Their point of view and one shared by many is that agritourism and ecotourism are reliant on small-scale farmers rather than the traditional large-scale, traditional marketing farming businesses.

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<sup>1</sup> GMP is undergoing a \$30 million expansion and recently announced that they would provide DEXA (Dual Energy X-Ray Absorptiometry) lamb carcass measurement, along with the appointment of leading meat scientist Dr Michelle Henry. These developments will provide key animal welfare, health and production efficiency benefits to processor clients and farmers.

Highfield products are available at:

- Riverina Producers Markets in Wagga Wagga;
- Albury Wodonga Markets;
- Yass Community Markets;
- Murrumbateman Village Markets; and
- By delivery to speciality stores, cafes, local markets, and farm stays in Gundagai, Tumut and Adelong region.

Products include:

- Grass-fed Dorper Lamb – as traditional cuts, gourmet sausages (gluten and preservative free) and occasionally Lamb small goods;
- Eggs – pasture raised and stocked at 1,000 birds per hectare;
- Pickles and Ferments – from their market garden;
- Salts – flavoured salts using salt from the Murray River;
- Mustards – Wholegrain mustards;
- Soaps – utilising the suet (made to tallow) from lambs; and
- Shortly – Pastured poultry.

## Agritourism

David and Louise are consulting with a builder on the design for farm stay accommodation. They will be applying for dollar for dollar funding through the Regional Tourism Product Development Program grant.

They feel there is untapped potential for visitors to the region through traffic on the Sydney and Melbourne route, visitors from Canberra and Wagga Wagga as well as the interest in the 'Dog on the Tuckerbox'. They have also identified three segments in which they will market the farm stay to including:

- Intimate getaway for couples (disconnect);
- Young families (farm stay); and
- Bird Watchers and Bushwalkers (conservation).

Louise has registered the farm with the website Visit My Farm and also with Youcamp, a website which lists camping places on private land that connects travellers with the owner's property. A Council newsletter informed local properties of the opportunities with Youcamp, which Louise responded to but have never received a reply.

Highfield is in a perfect picturesque location, with the added value of the creek and able to offer not only camping ground, and hopefully, farm stay accommodation but a number of value-add tourist products such as:

- Farm animal activities – meeting sheep/cattle, their Maremma dog, collecting eggs, and feeding baby lambs;
- Indigenous Heritage – introducing visitors to the physical evidence of the Wiradjuri Heritage on Highfield;
- Free walking tracks and bird spotting; and
- Highfield produce - packaged up in convenient baskets and packs.

## Conservation and Agritourism

Two-thirds of Highfield is under a conservation covenant protecting one of Australia's rarest habitats: Box Gum Grassy Woodland. Highfield protects one of those precious fragments of woodland with a recorded 115 different species of birds, including the critically endangered Regent Honey-eater and other classic woodland birds such as the Crested Shrike-tit, Brown Tree-creeper, Hooded Robin, Speckled Warbler and Diamond Fire-tail. Wildflowers once common in these woodlands are now returning to the forest floor. Highland's efforts have been in partnership with the Nature Conservation Trust of NSW.

<https://www.highfieldfarmwoodland.com/>

## 6. Regional Case Studies

### 6.1 Fresh Technique Griffith, NSW – Protected Cropping/Commercial Hydroponics

In 2016 Danny Monteleone and Grace Ruberto broke away from a stagnant industry of viticulture and reinvented their business model in a direction that captured the latest market trends and innovation. It is evident when touring the operation that this is the highly sophisticated future of food production.

From the beginning Danny and Grace have sought techniques to control their production systems, their marketing and value chain processes and flexibility to ride the variability of consumer demand.

Fresh Technique uses state of the art technologies on their now established 1ha Cravo retractable-roof greenhouse with a fully equipped on-farm processing facility that manages all of their products from seed to harvest and beyond, guaranteeing absolute freshness, and most importantly achieving 48 hours from harvest to consumer.

Products include fresh herb, salad and green bunched vegetable products including:

- Kale;
- Watercress;
- Lettuce varieties;
- Spinach; and
- Wombok.

The Fresh Technique model combines the latest in industry technology for production, zero agricultural run-offs and maximised water efficiency – crucial in today's climate of limited water. Included is an on-farm value-add facility, significantly reducing time in the value chain, from raw product to finished (shelf-ready) healthy meal options. A retail shop front is located on site for locals and visitors alike to purchase the product direct.

The family owned, and operated company employs 16 full-time and part-time staff. Vital to their operation is the continual assessment of the market climate, issues in agricultural production, consumer demands and industry performance to ensure they forward plan while growing the industry and sustaining the environment for generations to come.

While the technology can be controlled, regional labour supply both skilled and unskilled is a growing concern. For the Griffith LGA, this piggybacks onto low local unemployment and the lack of affordable housing options for people moving to the area.

On a more national scale, this July the DPI's Protected Cropping and the NSW Planning & Approvals Process held a review which identified that the majority of the planning issues from a proponent's perspective were related to the National Construction Code (NCC). From this HIA is funding a project to identify how best to address the construction issues in the NCC. It has engaged an engineering consultant to prepare a nationally recognised greenhouse construction standard within the framework of the NCC. The review also identified that from a proponent's prospective delays in the planning and approvals process were often due to limited knowledge of protected cropping by Council staff.

<http://www.freshtechnique.com.au/>

## 6.2 Coolamon Cheese – Food Tourism

An early dinner of blue cheese gnocchi and tour of Coolamon Cheese's state-of-the-art facility was both delicious and inspiring. The front retail section is an assortment of not only high-quality cheeses, but an assortment of Riverina produce, showcasing the region perfectly within 50 square metres. The tour guide, cheesemaker Adam Pappriell was enthused, knowledgeable and very well received by the caravanning group who were travelling through the region.

A viewing corridor allows visitors to experience cheese making tours, from milk to end product, while the front-of-house is a cheese kitchen where cheese lovers can enjoy tasting cheese inspired meals matched with regional produce. You can also watch cheese being handcrafted and matured or take a cheese-making workshop.

Regarding the success as an anchor tourism product in transforming a small regional town into a destination, Coolamon Cheese is the pinnacle. It is an interesting story of a community coming together and using crowdfunding as a source of business funds.

In the last seven years, the Coolamon Shire Council has worked together to shift the focus of their largely agricultural LGA to a weekend destination. They have effectively used, events including celebration events, and a seasonal events calendar that encourages shire residents to invite family and friends to visit and encouraging day trips to the region at event time.



The proactive tourism strategy was already in place when the Council and community saw the opportunity to attract the cheese factory which needed to move from a nearby university. The Council also participated in a Riverina Regional Tourism product development initiative in 2014 that saw them mentored with successful regional business people. Coolamon Cheese now offers:

- Tours in the cheese factory;
- Modern restaurant;
- Retail shop – cheese and regional produce; and
- Events and regional dinners.

<https://www.coolamoncheese.com.au/>

## 6.3 Strawberries and Cream – Food Tourism

The Cashen family have worked closely with council for approval to start their pick-your-own strawberry agritourism venture. The 14.1ha landscape, close to the Wagga Wagga CBD, has a proposed strawberry patch of 3ha that will be home to 84,000 individual strawberry plants with the potential to produce a minimum of 42 tonnes per year.

The strawberry growing season is from October through to April, so the Cashens aim to offset planting to ensure they have a constant supply of quality fruit over this period and cash flow. The strawberries will be grown in coir fibre grow bags attached to troughs that are 1.2 metres to 1.3 meters off the ground to allow for ease of picking and agronomy.

The strawberries will be grown hydroponically, using portable water that is more expensive but reliable and safe. Cost recovery will happen through water efficiency on farm, using any runoff to irrigate pasture.

Not only will visitors be able to pick their fresh strawberries, but they will also be able to tour the integrated processing facilities, enjoy a relaxing cafe experience and have fun in a park area. Portions of the strawberries will be processed into ice cream, jams, sauces and strawberry themed dessert options that will be sold on site, with the family interested in value adding produce into other desirable and longer shelf life products.

## 6.4 Wag Snag – Ardlethan – Food Niche and Value Adding

The Clemson's property near Ardlethan is a traditional 2,430ha dryland cropping and livestock property growing canola, wheat and legumes. Running a herd of 350 Blonde d'Aquitaine-Blue-E cattle, initially for weed clean up purposes and selling the grass-fed cattle direct to the abattoir; they found the loss of traceability for the niche product disappointing. In turn, the decision was made to value-add, by using a local butcher and branding the sausages which are hormone, antibiotic and pesticides free.

In a The Weekly Times interview, they explained the economies of scale as; you go to the saleyards and receive \$7/kg carcass weight for a beast, but we are selling the meat as a value-add premium sausages at \$15.99/kg, and they cost \$2/kg to make them.

## 6.5 Borambola Wines – Food and Wine Tourism

Borambola Wines and Homestead is located 25km east of Wagga Wagga in the Gundagai wine growing region of NSW. The boutique winery's philosophy is to grow the best grapes and to make the best quality wines with regional expression. They utilise organic and environmental best practice, combining the traditional 'old wine world' winemaking methods with the technology of the 'new wine world'.

The vineyard was planted in 1995 and is one hundred per cent estate grown producing a range of white and red wine products as well as the Tuckerbox Hoppy Lager beer range and Apple Cider.

Borambola combines sustainable and value-added products with a cellar door experience, which showcases local produce (in the form of a simple, cost-effective ploughman's platter), along with tourist drawcard events such as, meet the winemaker.

## 6.6 Other Noteworthy Regional Examples

**Piccolo Family Farms and Limone Restaurant** – The Piccolo Family Farm is a fully functional farm that supplies the Piccoli's family owned restaurants with fresh produce daily. Sitting on 20 acres just outside of Griffith, the farm produces the majority of the herbs, garnishes, fruits and vegetables. They use sustainable farming practices, with all the produce harvested by hand and free of chemicals and pesticides. A farm to fork approach is central to the ethos of both Limone and Miei Amici, with their menus reflecting the availability of local and seasonal produce.

**Riverina Oils & BioEnergy** – Riverina Oils crush and refine over 200,000 tonnes of oilseeds a year through their manufacturing facility sourcing raw materials from local farms to produce oils and vegetable protein meals. It is one of the largest value-added investments in the Agri-Food processing sector in regional Australia

**Whispering Pines Organics** – Betina and Robert Walker produce flour and rolled oats in tandem with prime lamb and cereal crops on their 202ha property at Barellan in southern NSW. All produce is certified organic and sold under the Whispering Pines Organics label. In 2012 they produced just one tonne each of flour and rolled oats. In 2016 they produced 150 tonnes of spelt flour, 100 tonnes of unbleached white and wholemeal flour and 70 tonnes of rolled oats. The flour and rolled oats are milled daily.

**Murray Cod Australia** – produces premium, pond-grown Murray cod. Based in the Riverina, New South Wales, the business has a vertically-integrated approach for breeding, growing and supplying. They grow high-quality Murray cod in **open ponds** (or dams) on the Murray-Darling Basin river system – the fish’s native environment. Driven by a commercial fishing ban on wild Murray cod and an increasing appetite for the iconic fish in culinary circles they use a **land-based aquaculture model**, resulting in one of the lowest environmental footprints in the industry.

## 7. Local and Regional Food Linkages and Key Contacts

Company	Key Contact
Grains Research and Development Corporation	GRDC.com T (02) 6166 4500
CSIRO	CSIRO.com T 1300 363 400
Regional Development Australia – Riverina <a href="https://rdariverina.org.au/">https://rdariverina.org.au/</a>	Margaret Couch Project Officer M 0428 922 570 E <a href="mailto:po@rdariverina.org.au">po@rdariverina.org.au</a>
AusIndustry <a href="https://www.business.gov.au/">https://www.business.gov.au/</a>	Nicola James Regional Manager T (02) 6921 1828 E <a href="mailto:Nicola.James@industry.gov.au">Nicola.James@industry.gov.au</a>
ICI Industries (protected cropping) <a href="http://iciindustries.com.au/">http://iciindustries.com.au/</a>	John Cobden T (02) 6964 7299
Destination Riverina Murray <a href="https://riverinamurray.com.au/">https://riverinamurray.com.au/</a>	Sarah Hope M 0409 763 789 E <a href="mailto:sarah.hope@destinationrm.com.au">sarah.hope@destinationrm.com.au</a>
Graham Centre for Agricultural Innovation (CSU) <a href="https://www.csu.edu.au/research/grahamcentre">https://www.csu.edu.au/research/grahamcentre</a>	T 1800 334 733
Destination NSW <a href="https://www.destinationnsw.com.au/">https://www.destinationnsw.com.au/</a>	Gabby Brown T (02) 9931 1148 E <a href="mailto:gabby.brown@dnsw.com.au">gabby.brown@dnsw.com.au</a>

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