DENCH McCLEAN CARLSON
Corporate Advisory

RMCG

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FINAL
Sustainable Agribusiness Strategy for the G21 Region 2017 - 2022

Enterprise Geelong

CITY OF GREATER GEELONG

G21 GEELONG REGION ALLIANCE

Regional Development Australia
BARWON SOUTH WEST

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Contents

1 Why agribusiness?

1.1 A proud history

The G21 Region has a proud history in agribusiness. The wool stores on the Geelong waterfront are a reminder of Geelong's pre-eminent role in a previous era when Australia "*rode on the sheep's back*". The fact that these buildings now house a modern and internationally recognised university is evidence of the profound changes that have occurred in our regional economy since that time.

Like Geelong and its waterfront, agribusiness in our region has changed enormously since the wool stores were active. The region now boasts a huge diversity of production; including grain, beef, lamb, wool, dairy, chicken, pork, viticulture, floriculture and other horticultural products; and a thriving transport and logistics sector, food processing sector, farm inputs sector, agritourism sector, and research, education and service sector. These "*post farm-gate*" sectors not only service the regional agricultural production sector, but also the agricultural production sector of a large part of south eastern Australia.

The diversity of the industry and the breadth and depth of its sectors is one of its key strengths. A rapidly growing population and a large visitor economy means that our regional landscape is changing and so is our industry. These changes present a unique set of opportunities and challenges for the future, which we want to harness and utilise to facilitate growth of the industry.

1.2 Facilitating growth

The purpose of the strategy is to provide a framework that will guide both government and private sector investment decisions on how best to assist ongoing growth and development of the agribusiness sector.

Thus, the strategy is designed to facilitate growth. Growth in output, income, value-add, exports and local sales. A growing industry will add vitality to our region and provide new and exciting jobs for our community.

1.3 What is agribusiness?

Agribusiness is more than just farming. Farming is one step in a supply chain that includes:

- The **inputs** into agriculture, such as agronomists, chemical suppliers, machinery companies and transport to name just a few.
- **Primary production,** or farming, including forestry, aquaculture and fisheries.
- **Manufacturing** activities that process the primary products, such as abattoirs, milk factories, wineries, food manufacturers and sawmills.
- **Wholesaling** the primary, or processed products, such as grain storage and export through the Port of Geelong.

Agribusiness is also a significant contributor to our **visitor economy**, with our rural landscapes, wineries, harvest trails, farmers' markets and small scale food producers contributing enormously to the attraction of the region to our large number of domestic and international visitors.

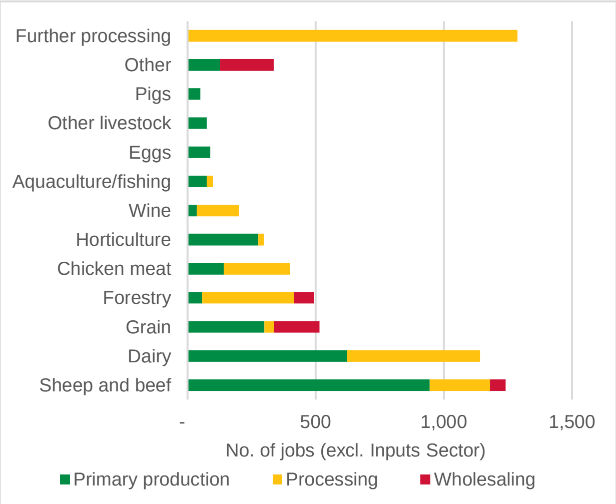
2 A significant industry in G21

2.1 A billion-dollar industry

Agribusiness in the G21 Region produces $1,091 million of value-add and directly employs 8,600 people across the supply chain. $753 million of this value-add and 5,800 of the jobs are generated beyond the farm-gate. Thus, agribusiness in the G21 region is dominated (approx. 70%) by businesses that support, process or wholesale farm production from both within the region and from right across south-eastern Australia. This does not include its contribution to the visitor economy and other service sectors, e.g. finance and insurance.

Sector	Value-add	Jobs
Inputs	$326 M	2,400
Farming	$338 M	2,800
Processing	$371 M	2,900
Wholesale	$56 M	500
Total Agribusiness	**$1,091 M**	**8,600**
% of G21 Region	8.4%	8.7%

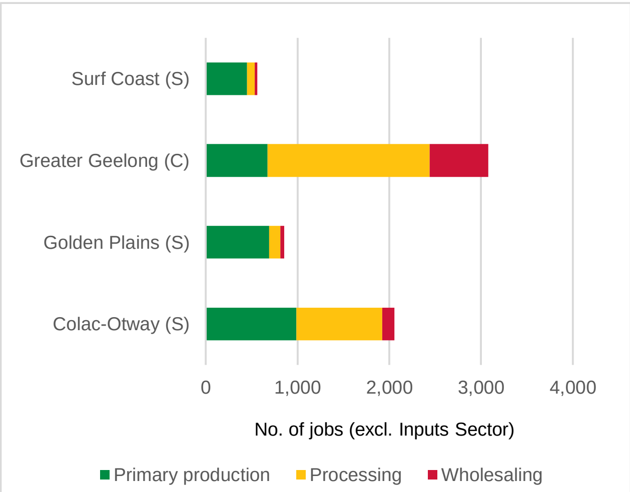
2.2 A diverse industry



Agribusiness in the G21 Region is a diverse industry with jobs spread across a wide diversity of sectors. Further processing (e.g. bakery products, smallgoods), red meat (sheep and beef) and dairy account for most jobs (approx. 60%). The mix of employment between the primary production and processing functions varies by sector, with employment in the sheep and beef sector being mostly primary production, and employment within the forestry, chicken meat and wine sectors being mostly in the processing sector. The grains industry has a significant number of jobs in wholesaling (approx. 34%), reflecting a strong transport, storage and logistics function, especially around the Port.

2.3 An urban based processing industry

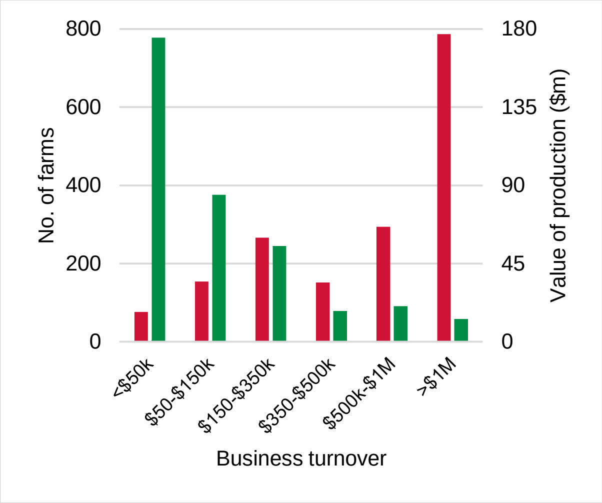
Agribusiness processing in the G21 Region is largely based in the urban areas of Geelong and Colac. Processing and wholesaling dominates (approx. 78%) agribusiness employment in the City of Greater Geelong, whilst the split between pre-farm-gate (48%) and post farm-gate (52%) in Colac-Otway Shire is much more even. There is only a small amount of processing and wholesaling in Surf Coast and Golden Plains Shires and, as a result, the total number of jobs in agribusiness is far less, and dominated by primary production.



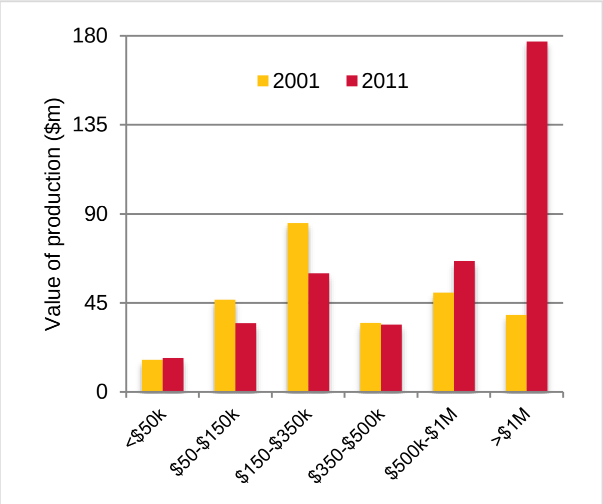
3 A diverse and changing landscape

3.1 A wide divergence in farm scale

The farming landscape in the G21 Region has changed enormously and continues to change. There is a wide divergence in farm scale in the region. 48% of farms have an annual turnover of less than $50,000 each and, between them, only produce 4% of the total value of our primary production. Conversely, 4% of farms have an annual turnover greater than $1 million each, but produce 45% of all value. In the middle, between these two extremes, is 48% of farms, which produce 51% of the value. Thus, our landscape is dominated by small farms, but the economy of our farm sector is dominated by a small number of large farms.



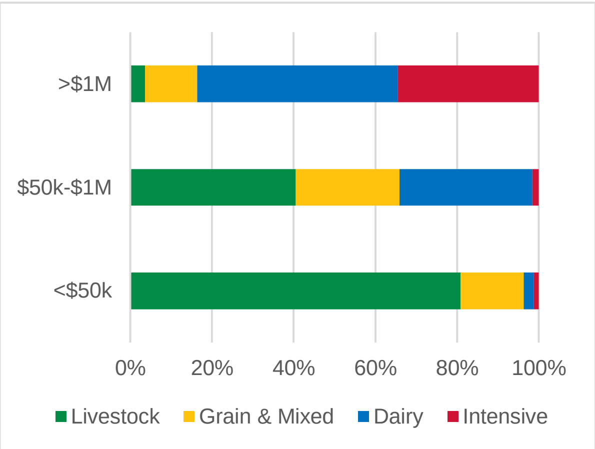
3.2 The divergence is growing



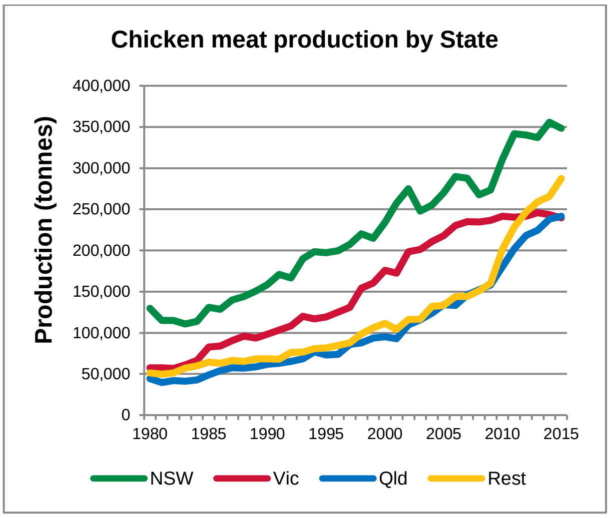
This divergence has grown and is expected to continue to grow in the future. The value of primary production generated by these large farms with over $1 million of annual turnover grew more than fourfold in the decade between 2001 and 2011. At the other end of the scale, the number of small scale farms has grown over this time, particularly around Geelong, the Bellarine and in the hinterland of the Surf Coast, however their direct contribution to the value of primary production in the region has not changed. The contribution of our medium scale farms has declined by about 10%, from $217 million to $195 million, over that same period.

3.3 Their enterprises differ too

The divergence in farm scale also applies to the enterprises they run too. Our small-scale farms are dominated (81%) by livestock (i.e. cattle and sheep), whilst our large-scale farms are dominated by dairy (49%) in the south-west of the region and intensive animals (35%) in the north-west of the region. There is a much more even spread of livestock (41%), grain & mixed (25%) and dairy (33%) farms amongst our medium-scale farms, which is more representative of our traditional view of agricultural production in our region.

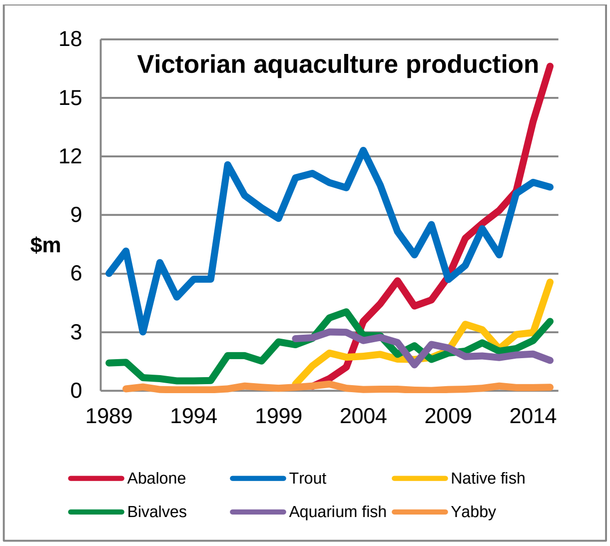


4 A few key trends



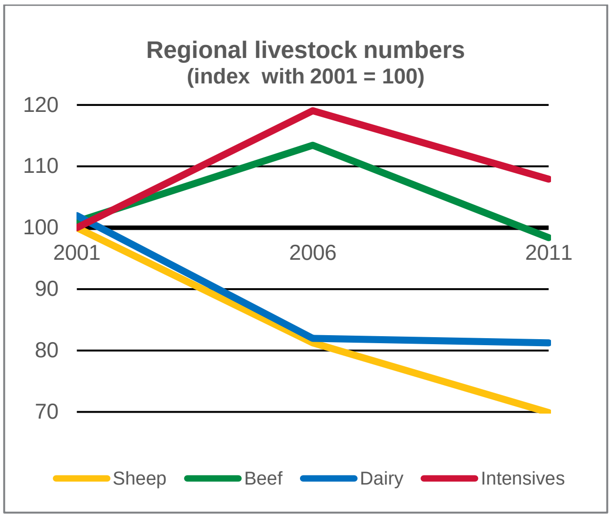
Chicken meat production is growing:

- National growth averages 4% p.a.
- Yet growth in Victoria has stalled since 2010
- Chicken meat production is one of our region's largest agribusiness sectors
- We need to support it, as it is significant element of the region's agribusiness industry



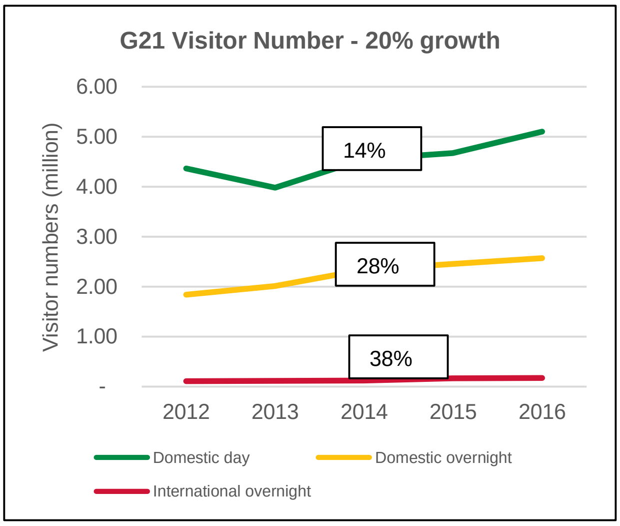
Victorian aquaculture production value by sector:

- Abalone dominates Victorian aquaculture and is the fastest growing aquaculture sector
- There is strong growth in native fish and bivalves also
- The G21 Region is well placed to take advantage of this growth



Our region's livestock industries have changed:

- The intensives (poultry and pork) have grown
- Sheep and dairy numbers have declined
- Beef numbers are stable at best
- More recent data (2015) on beef and sheep numbers for the Corangamite CMA region shows that these trends have continued



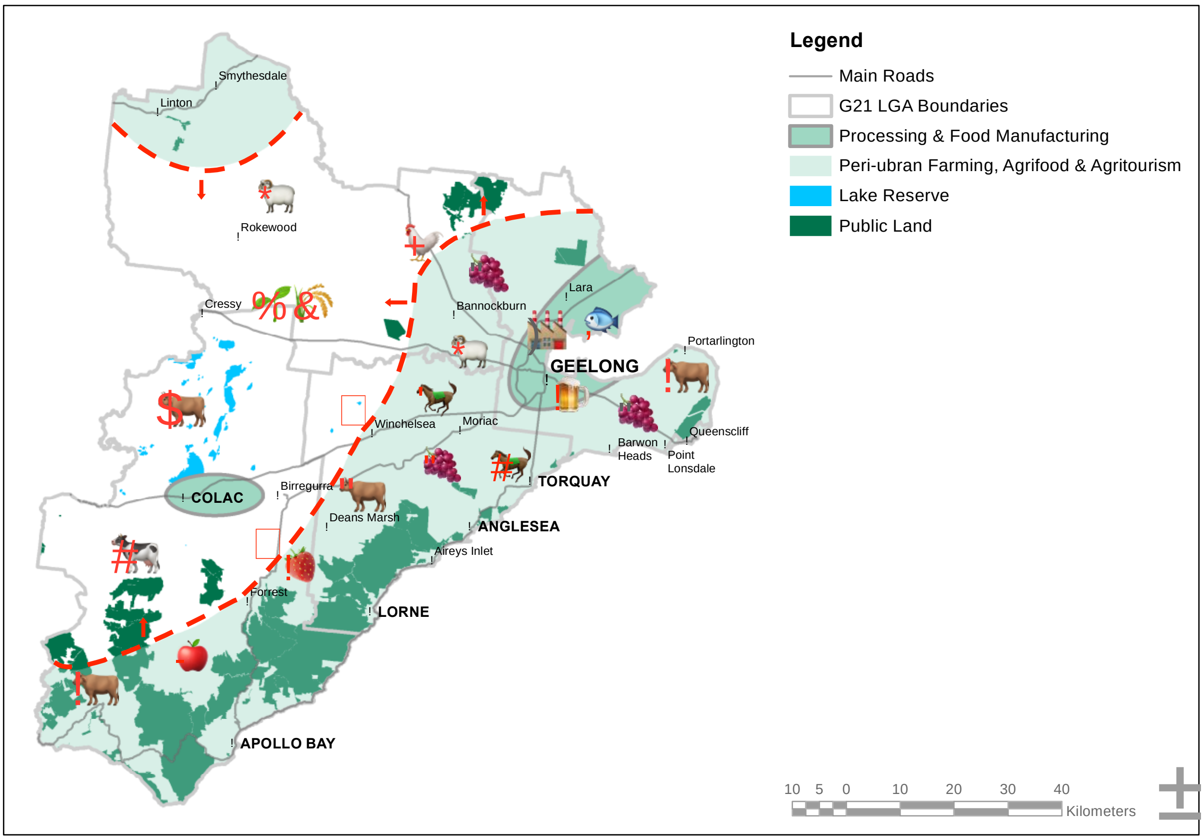
Visitor numbers to the G21 Region have grown:

- The region had 7.8 million visitors in 2016 – an increase of 20% since 2012
- 5.1 M (65%) were domestic day visitors and 2.6 M (33%) were domestic overnight visitors
- 2% of 176,000 were international visitors
- Our market is largely a domestic market, which is fertile ground for our food and wine.

5 Implications for the future

5.1 What our industry looks like

- A $1 billion industry that is significant to the G21 economy and its community.
- Dominated (approx. 70%) by businesses that support, process, or wholesale farm production from both within the region and from right across south-eastern Australia.
- A diverse industry with jobs spread across a range of sectors, but most jobs (approx. 60%) are in further (or secondary) processing (e.g. bakery products, smallgoods), red meat (sheep and beef) and dairy.
- Spread across the region, but most of the jobs are in the City of Greater Geelong and Colac-Otway Shire because that is where most of the processors and wholesalers are based.
- Responsible for managing a diverse and changing landscape where a large number of small farms dominate the landscape, but a small number of large farms dominate the economy of the farm sector.
- Witnessing continual growth in the divergence of farm size, which is driven by an increasing number of lifestyle farms at one end and the growth of the intensive animal industries at the other end.
- A thriving service sector, especially around the large number of small farms, which are service hungry.
- A key plank in the region's offer to visitors is through the combination of food, wine and related experiences it provides through local cafes, wineries, providores, and farm-gate experiences as well as the agricultural landscapes.



As a result of the changes occurring in our industry, the Bellarine Peninsula and the hinterland of the Surf Coast and Otway Ranges are predominantly occupied by lifestyle farms and small agrifood or agritourism businesses, whilst production agriculture is largely confined to a shrinking area in the west of the region. The processing and wholesaling sectors of agribusiness are largely located within the urban areas of Geelong and Colac.

5.2 SWOT analysis

STRENGTHS	WEAKNESSES
▪ The diversity of the industry and the depth and breadth of its sectors ▪ Cheap land and shedding for processors compared with Melbourne ▪ A skilled manufacturing workforce ▪ A large and diverse visitor economy (GOR and the Bellarine) with a large number of visitors ▪ Water supply not constrained at present ▪ A diverse and growing intensive animal industry ▪ Diversity of land types and proximity of land to markets ▪ Growing local demand as the population grows ▪ Access to high quality, internationally renowned research and education providers, e.g. the Australian Animal Health Laboratory, Deakin University and Marcus Oldham College.	▪ A perceived lack of collaboration across the industry, a common goal and a clear strategy ▪ Cost of access to the Melbourne container port ▪ The ability of the existing housing supply to support workforce growth in centres outside of Geelong, e.g. Colac ▪ The low yield from visitors ▪ Low value agriculture priced out of the water market when water supply is constrained ▪ The compliance cost of establishing intensive animal industry operations ▪ Lack of reputation as a significant wine and food region relative to other regions ▪ Availability of capital for expansion and growth ▪ Availability of workers for expansion and growth
OPPORTUNITIES	**THREATS**
▪ Development of industry networks and great use of industry clusters – collaboration ▪ Freight hub in Geelong to reduce the cost of access to the Melbourne Port ▪ The development of the Bay West port and Avalon Airport ▪ Leverage the Great Ocean Road and visitor economy and grow the visitor yield ▪ Expansion of our food trails and farm gate sales businesses ▪ Pursue renewable, resilient and affordable energy systems ▪ Foster climate change resilience ▪ Use of recycled water from Black Rock and/or the Western Treatment Plant ▪ A collaborative approach with industry to facilitate further investment ▪ Greater connectivity between “growers” and local businesses ▪ Appropriate land use planning ▪ Extend local supply chains ▪ Sizeable investment is occurring as abalone farms expand to meet growing Asian and domestic demand ▪ Further growth and employment in the service sector, especially for small “lifestyle” farms, which are service hungry	▪ Lack of collaboration leads to the loss of opportunities and businesses ▪ Loss of logistics and freight industry to Melbourne ▪ The development of the new Melbourne Port at Hastings ▪ Retaining investment in the intensive animals’ industry ▪ Loss of intensive animal producers and processors to other regions or States ▪ Land use conflict in rural areas, i.e. residential or lifestyle vs commercial farming, and urban areas, i.e. residential encroachment on industrial areas ▪ High energy costs and concerns about security of supply ▪ Biosecurity

6 Strategic framework

6.1 A focus on collaboration

The opportunities and challenges facing the region's agribusiness industry requires a strategic response that builds on our existing knowledge and focuses on providing a framework that will guide decision-making and facilitate the growth and development of the sector.

The strategy does not seek to replace or duplicate the strategies, programs or plans of individual businesses, industry, organisations or government agencies within the region and at a State and National level. It focusses on those issues and actions that are within the control and influence of the key stakeholders that have collaborated to prepare this strategy.

It also is recognised that individual businesses will have their own goals and priorities and that the farm sector has its own industry development programs (e.g. WestVic Dairy, Southern Farming Systems). However, this is an industry-wide strategy for the region. It does not cover everything, but it does seek to focus on those things of value to us all, where our priorities overlap and there is advantage to be gained from everybody contributing and collaborating to achieve our objective.

6.2 Strategic priorities and goals

The strategy has five strategic priorities and goals. They are:

1. Grow our markets
    - Work together to grow our existing markets and initiate entry into new markets
2. Develop our people and their businesses
    - Build our people's capability to add value to their business, their industry and their region
3. Encourage innovation and collaboration
    - Create an environment that encourages innovation and collaboration across the supply chain to improve productivity and attract investment
4. Build enabling infrastructure
    - Co-operate and advocate at a regional level to ensure appropriate infrastructure investment to facilitate industry growth
5. Implement the strategy
    - To ensure the efficient, effective and transparent implementation of the Strategy

The fifth strategic priority is an enabling strategy. It responds to the overwhelming desire within the industry to see action. It recognises that there is more work to be done to ensure that the strategies and actions presented in the following pages are actually implemented and evaluated for their effectiveness. It should seek to leverage relevant strategies and programs at a regional, State and National level.

6.3 Priority 1 – Grow our markets

Goal: *Work together to grow our existing markets and initiate entry into new markets.*

<table>
<tr><th>Issues</th><th>Strategies</th><th>Actions</th></tr>
<tr><td rowspan="3">
▪ We have one of the fastest growing markets within our region, due to the rapid growth of our population.
▪ Geelong, The Bellarine and the Great Ocean Road also have very high levels of visitation, which provide an opportunity to expand our offerings to these visitors and promote our products to new markets, where these visitors come from.
▪ Agribusiness is a key plank in the region’s offer to visitors through the combination of food, wine and related experiences it provides through local cafes, wineries, providores, and farm-gate experiences, as well as the agricultural landscapes which underpin the physical experience our visitors enjoy.
▪ Our processors, especially those that have significant sales within the region, also recognise the importance of growing visitation to the region and fostering greater expenditure by visitors.
▪ There are also opportunities to pursue growth in domestic and export markets beyond our visitor economy, which require research, skills and investment.
▪ Developing our “reputation” will be a key contributor to this growth, especially with food and wine. For example, “Geelong” does not have the reputation for wine that “Yarra Valley” or “Mornington Peninsula” have.
▪ Therefore, building brand recognition will be a crucial ingredient for success in the market place, but we need to be smart. Regional branding may not be the answer, but support for group (e.g. Bellarine Taste Trail) and/or business (e.g. Otway Pork) branding may be a better investment.
</td>
<td>1. Promote the value of the sector, its educational and career opportunities, and the potential for further investment to the regional community, government and the private sector.</td>
<td>1.1 Develop and maintain relevant collateral to promote the agribusiness industry in G21, including relevant case studies and the use of digital media.
1.2 Promote the range of agribusiness investment opportunities within the region to Invest Victoria, other relevant government agencies and the broader private sector.</td></tr>
<tr><td>2. Promote the availability of quality local produce to the regional community.</td>
<td>2.1 Promote the presence of local producers, “food trails” and “farmers’ markets” as a source of local fresh and quality produce.</td></tr>
<tr><td>3. Grow the reputation of our food and wine in domestic and international markets.</td>
<td>3.1 Collaborate with the Regional Tourism Organisations, Geelong Wine and the region’s Food Trails to promote the accessibility and quality of our local food and wine.
3.2 Investigate the opportunities and value of a collaborative export program for our producers.
3.3 Support the development of appropriate group and/or destination branding, rather than whole-of-region branding.
3.4 Leverage key regional and State events, e.g. AFL Country Game, to showcase and promote local food and wine.</td></tr>
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6.4 Priority 2 – Develop our people and their businesses

Goal: *Build our people's capability to add value to their business, their industry and their region.*

<table>
<tr><th>Issues</th><th>Strategies</th><th>Actions</th></tr>
<tr><td rowspan="5">Our industry is typified by large-scale processors and producers, and small-scale agrifood and agritourism ventures, whilst our landscape is increasingly managed by a large number of small-scale lifestyle farmers. They all need to develop their capabilities, but the capabilities they need differ.
Our small-scale agrifood businesses often do not have the skills, capability or networks to develop their markets and businesses beyond their current "micro" level. Many come from different skilled or professional backgrounds and their "hobby" or passion has potential to grow into a "business". Thus, they are seeking support to develop their skills, capability and networks.
A key area of need for these small-scale agrifood businesses is compliance with regulations that have been designed for larger businesses with the skills and capacity to comply more easily.
Many lifestyle farms choose to keep livestock on their farms for amenity, recreational and/or commercial reasons. When these operators do not have the required skills, experience or understanding to manage these livestock and the landscape in a way that is consistent with community standards (e.g. animal health and welfare) and or industry practices (e.g. biosecurity), there are threats to the wider agricultural community, small agrifood businesses and our visitor economy.
Our processors often report that getting new or additional workers and/or developing their workforce can be challenging.
There is help available, e.g. the value of the Geelong Region Investment Fund (GRIF) is recognised, but there is frustration with the effort required to access other forms of grants.</td><td>4. Promote training and development for our business owners and land managers.</td><td>4.1 Increase the capability of producers, processors and suppliers by facilitating access to relevant business and/or industry training programs.</td></tr>
<tr><td>5. Promote responsible animal, chemical and land management to our increasing number of new "farmers".</td><td>5.1 Work with agricultural agencies and training providers to offer relevant animal management, sustainable land management and compliance training, including with biosecurity requirements.</td></tr>
<tr><td>6. Foster the workforce capability required by the agribusiness sector.</td><td>6.1 Develop an industry workforce development plan.
6.2 Promote workforce opportunities.</td></tr>
<tr><td>7. Facilitate access to existing business development funding programs.</td><td>7.1 Develop a virtual hub, including a database of agribusinesses in the region, to provide access to relevant industry information, including (but not limited to) available funding, contacts, training programs, projects and events.</td></tr>
<tr><td>8. Facilitate industry sustainability.</td><td>8.1 Undertake actions to foster climate change resilience within our businesses.
8.2 Identify and promote, renewable, resilient and affordable energy systems for agribusiness.
8.3 Acknowledge and promote agribusiness that are undertaking landscape restoration for agriculture, aesthetics and ecological outcome.</td></tr>
</table>

6.5 Priority 3 – Encourage innovation and collaboration

Goal: *Create an environment that encourages innovation and collaboration across the supply chain to improve productivity and attract investment.*

<table>
<tr><th>Issues</th><th>Strategies</th><th>Actions</th></tr>
<tr><td rowspan="4">▪ Our producers and processors recognise the importance of innovation to improve their productivity and competitiveness, but we need to further encourage their collaboration across the supply chain to strengthen our industry and attract investment.
▪ Our local producers established Southern Farming Systems twenty years ago to drive innovation in broad acre farming and the region has reaped the benefits of the improved productivity this collaborative effort has achieved.
▪ The G21 Agribusiness Forum is currently undertaking a project (Innovation Roadmap) to identify specific agribusiness supply chains where collaborative innovation and entrepreneurial practices can generate growth in employment and income. It wishes to learn from these examples and develop a roadmap to facilitate broader adoption.
▪ Furthermore, a significant level (~$300M) of the inputs sourced by our food processors are sourced from outside of the region. Thus, an opportunity exists to replace some of these inputs from within the region, especially service related inputs.
▪ There is also an opportunity for greater collaboration amongst our processors (both large and small) to develop greater capability with respect to establishing export markets and growing the reputation of the region in these markets.
▪ The intensive animal industries have been our fastest growing agribusiness sector in recent years. The continued growth of this sector is threatened by prohibitive compliance costs and ageing processing capacity, which needs to be replaced. Government and industry need to work together to resolve these complex and difficult issues to retain and grow this investment.</td><td>9. Encourage innovation and entrepreneurial practices.</td><td>9.1 Support the G21 Agribusiness Forum’s Innovation Roadmap project and examine ways to further support its implementation and facilitate adoption of its findings.
9.2 Investigate options for improved collaboration between existing agribusiness groups via the leveraging of resources (both staff and infrastructure) and a formal network to support the implementation of the strategy.</td></tr>
<tr><td>10. Promote the extension of local supply chains.</td><td>10.1 Investigate a suitable process for developing a greater understanding of the range of local producers and their products.
10.2 Identify and promote opportunities for increasing the use of local providers of goods and services by regional agribusinesses.
10.3 Foster business models that enable smaller producers to distribute their goods to markets beyond the region.</td></tr>
<tr><td>11. Foster export development.</td><td>11.1 Identify opportunities within existing government and industry trade facilitation processes, which connect buyers and agents with export ready agribusinesses.
11.2 Support international delegations to showcase local produce and capability.</td></tr>
<tr><td>12. Foster collaboration between government and business to secure long-term investment.</td><td>12.1 Promote private sector investment and government support for the development of competitive manufacturing facilities in the region.</td></tr>
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6.6 Priority 4 – Build enabling infrastructure

Goal: *Co-operate and advocate at a regional level to ensure appropriate infrastructure investment to facilitate industry growth.*

Issues	Strategies	Actions
REGULATION ▪ We need to actively build a culture and environment that attracts and retains investment in agribusiness. ▪ Agribusiness needs rural land to produce, and industrial land to process. It plays a vital role in managing our landscape and providing amenity value to our community and our visitors. ▪ However, conflict can occur where competing land uses abut, or neighbours do not understand each other's needs. For example, the interaction of lifestyle farms with larger commercial farms can sometimes be problematic. ▪ Similarly, the encroachment of residential areas on traditional industrial areas can cause disputes over traffic, noise and odour, which can lead to restrictions of business operations. ▪ Businesses need efficient and timely planning and regulatory approval processes to reduce unnecessary delays and access to key infrastructure, such as ports, energy and water. ▪ Often the regulatory environment has evolved in response to one type of business development and/or community need, but has not changed at the same pace as business practices. This can result in regulation that has a "one size fits all" approach even though the needs and practices of different scale businesses may differ significantly. ▪ This approach can stifle innovation and impose prohibitive costs on businesses, especially small and medium size enterprises that have limited excess capacity and/or slim margins.	13. Mitigate land use conflict.	13.1 All Councils in the region need to do the relevant strategic and policy development work (similar to that done on the Bellarine Peninsula by COGG) to better manage the planning challenges associated with the changes to the State-wide farming zone. 13.2 Support the development of the Surf Coast Shire's Hinterland Futures Strategy and seek to learn from its experience and apply these learnings to similar areas in neighbouring municipalities.
	14. Streamline planning approvals.	14.1 COGG and Geelong Manufacturing Council collaborate to develop a mechanism that facilitates communication between food manufacturers and planners that increase the understanding of each other's needs. 14.2 Promote the Victorian Government's Agribusiness Development Facilitation Model to help proponents understand and navigate the development approval process. 14.2 Investigate the efficacy of streamlining the number of local planning schedules in the planning scheme to simplify planning policies and processes. 14.3 Advocate to State Government to revise and update the industry codes of practice related to intensive animal production, including relevant biosecurity buffers. 14.4 Advocate to State Government to broaden the definition of farm-gate sales in the farming zone to facilitate the growth of small agrifood and agritourism businesses.
	15. Streamline compliance requirements.	15.1 Investigate opportunities to rationalise and simplify the environmental health compliance requirements of State and Local Government for food production and sales.

<table>
<tr><th>Issues</th><th>Strategies</th><th>Actions</th></tr>
<tr><td rowspan="3">INFRASTRUCTURE
The provision and management of livestock saleyards has long been a responsibility of local government, however a number of issues have been identified with the Geelong Saleyards including financial viability, sale throughput and OH&S, which have led to its partial closure.
COGG commissioned Mecardo to undertake a research project to gather information about the strategic priorities related to COGG continuing to offer a livestock selling facility and that report is now public.
Our region has strategic advantages for processors, however access to the Port of Melbourne is problematic and costly. Short-term solutions using freight hubs and/or direct rail access are needed to reduce the cost of getting goods to market, whilst the long-term solution of developing a new port occurs.
Access to the Port of Geelong is problematic for both large road transport and larger load shipping. This increases costs for exporters (refer to the Geelong Port-City 2050 Strategy).
The Geelong Economic Futures Report identified the opportunity for a project based on securing high-value farming and food services through delivering low-cost and reliable water supplies.
There are largely untapped resources of recycled water at Black Rock and Werribee, which could be utilised to expand our agribusiness industry. However, recycled water is expensive.
Our intensive livestock industries are a significant and growing sector of our industry. The nature of their business leads to the production of high volumes of effluent. This effluent can be valuable to other agricultural producers as fertilizer, however demand for this use can be highly variable. Therefore, the industry needs access to reliable, economic and acceptable alternative disposal options to ensure its continued growth.</td><td>16. Support the options of the Mecardo report into the trends and future of livestock sales in the region.</td><td>16.1 Further pursue the options presented in the Mecardo report.
16.2 Support a cross-regional process to develop a preferred outcome for small scale producers including a transition plan.</td></tr>
<tr><td>17. Improve access to export and other markets.</td><td>17.1 Advocate for the development of Bay West as the location of the State’s new container port.
17.2 Advocate and assist the development of Avalon Airport as a port of entry for international tourists and a port of exit for international air freight.
17.3 Investigate the feasibility of establishing a freight hub in the Geelong area to reduce the costs associated with accessing Melbourne’s container port.
17.4 Improve access to the Port of Geelong, including:
a) more direct road access to the Port;
b) increase the number of approved routes for HPVs;
c) deepening the shipping channels in Corio Bay to facilitate larger shipping loads.
17.5 Advocate for the timely completion of the Drysdale Bypass and the extension of the Geelong Ring Road to the Bellarine Highway.</td></tr>
<tr><td>18. Encourage recycling of key resources to create value-added opportunities for the agribusiness industry.</td><td>18.1 Identify potential development sites and assess the initial feasibility of using recycled water for agribusiness.
18.2 Investigate alternative disposal options for waste from intensive animal operations.
18.3 Encourage re-use of water and effluent on farm.
18.4 Investigate the feasibility of extending reticulated water to rural areas to facilitate growth of the agribusiness industry and climate change resilience.</td></tr>
</table>

6.7 Priority 5 – Implement the Strategy

Goal: *To ensure the efficient, effective and transparent implementation of the Strategy*

<table>
<tr><th>Issues</th><th>Strategies</th><th>Actions</th></tr>
<tr><td rowspan="2">▪ The diverse and complex nature of the agribusiness industry has led to the development of a Strategy that has many actions.
▪ The complex nature of some of the issues these actions seek to address requires a response from multiple government agencies with overlapping responsibilities.
▪ This Strategy also seeks to leverage many other strategies, which are under the control of other agencies or organisations, e.g. Regional Tourism Organisations, the Victorian Wine Industry Strategy, G21 infrastructure priorities, Council Economic Development Strategies, agricultural industry specific strategies.
▪ Therefore, effective implementation of this Strategy will be complex. It is critical that all involved collaborate to define and allocate responsibilities at the start, otherwise it will be too easy to “hand-ball” responsibility and nothing will happen.
▪ Similarly, there are many voluntary or membership-based agribusiness related organisations in the region, e.g. Agribusiness Forum, Food Trails, Geelong Wine, which each have part-time executive support.
▪ A centralised full-time position in industry or government is not necessarily a better solution, but the key stakeholders need to collaborate to define a model, which will ensure the best use of the available people to implement the Strategy
▪ Finally, ongoing support for the implementation of the Strategy will depend on what it achieves. Therefore, the impact of delivery must be regularly monitored and evaluated. This should include accessing and updating relevant data, which can also be used to develop relevant business cases in the future.</td><td>19. Define and allocate responsibilities for the implementation of the strategy.</td><td>19.1 The Project Steering Committee convene a meeting of key stakeholders to determine an appropriate implementation framework that includes:
a) a group to oversight the implementation and evaluation of the Strategy;
b) identify the available funds and people to implement the Strategy;
c) an annual operating and communications plan, which identifies the lead agency for each action; and
d) an appropriate evaluation framework.</td></tr>
<tr><td>20. Monitor and evaluate the impact of the Strategy on the growth and development of the G21 agribusiness industry.</td><td>20.1 Update the characteristics and trends of the G21 agribusiness industry when the relevant data is available from the 2016 ABS Census.
20.2 Utilise the outcomes of other relevant strategies and projects (e.g. Innovation Roadmap Project, SCS Hinterland Futures Strategy) to update this Strategy and revise its actions.
20.3 Develop an agreed assessment framework to measure and report on the impact of the Strategy on the growth and development of the G21 agribusiness industry.</td></tr>
</table>

7 References

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- Great South Coast Food & Fibre Strategy (2015 – 2020)
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- Victorian Aquaculture Strategy, 2017 – 2022 (2017)
- Victorian Food and Fibre Sector Strategy (2016)
- Victorian Wine Industry Development Strategy (2017)
- Western Victorian Dairy Industry Strategic Plan, 2014 – 2019 (2014)

8 Consultation list

- Ahmed, Brian — Egg producer
- Ashton, Emma — President Otway Harvest Trail
- Austin, Scott — Austin Wines and Chair of Geelong Wine
- Baillie, Keith — Surf Coast Shire
- Barrow, Mike — Golden Plains Shire
- Bell, Cr David — Surf Coast Shire and Farmers' Market operator
- Blackett, Corinne — Drysdale Cheese
- Bold, Peter — Advanced Mussel Supply
- Bolitho, Felicity — Golden Plains Shire
- Boyle, David — G21 Agribusiness Forum
- Brockett, Robin — Scotchman's Hill
- Brown, Graeme — Mixed farmer and President of Bellarine VFF
- Bryant, Lindsay — Livestock producer
- Bullen, Alan — Poultry farmer and President of the VFF Chicken Meat Council
- Carbines, Elaine — G21 Regional Alliance
- Charles, Helena — Golden Plains Shire
- Clark, Ramon — Westside Meats
- Coad, Russell — Victorian Farmers Federation and Chair of the G21 Agribusiness Forum
- Cochrane, Craig — GrainCorp
- Connell, Michael — Southern Bay Brewing
- Conroy, Fiona — Livestock producer
- Corless, Jason — Bellarine Rural & Garden Centre
- Cosgriff, Mick — Golden Plains Shire
- Currie, Phil — Regional Development Victoria
- Desborough, Ian — G21 Agribusiness Forum
- Dingle, Tom — Nuchev
- Duke, Cr Martin — Surf Coast Shire
- Ferguson, Lindsay — WestVic Dairy
- Foard, Kevin — Geelong Manufacturing Council
- Fyfe, Judy — Livestock producer
- Goldsworthy, Cr Clive — Surf Coast Shire
- Goodman, Ray — Livestock carrier
- Goonan, Dinny — Dinny Goonan Wines
- Gugger, Geoff — Livestock producer
- Hamilton, Stewart — Mixed farmer
- Healey, Adrian — Colac Otway Shire
- Hearn, Leanne — Agricultural teacher and lifestyle farmer
- Hellsten, Tim — City of Greater Geelong
- Herni, Derek — Sage Beef
- Holder, Rosemary — Lighthouse Olive Oil

▪ Hood, Allan	Bulla Foods
▪ Horniblow, Chris	Pennyroyal Farm & Otway Preserves
▪ Hose, Karen	Surf Coast Shire
▪ Humpage, Mandy	Wes Eggs
▪ Hurse, Jessica	City of Greater Geelong
▪ Jenner, Lenny	Borough of Queenscliffe
▪ Jongebloed, Terry	Clyde Park Wines
▪ Kelly, Ian	Chair Geelong Saleyards Users Advisory Committee
▪ Kelly, Mark	G21 Agribusiness Forum
▪ Kemp, Tez	La Madre Bakery
▪ Kerr, Richard	Farm Foods
▪ Kos, Julie	Kossie Free Range
▪ Kuc, Simon	Baie Wines
▪ Lean, Christine	Tuckerberry Hill Blueberries
▪ Livingstone, Simon	Marcus Oldham College
▪ Loone, Simon	Surf Coast Shire
▪ Mackenzie, Rowan	Surf Coast Shire
▪ Malone, Claire	Colac Otway Shire
▪ Mannix, Laurie	Victorian Farmers Federation
▪ Mantzaris, Steven	Mantzaris Seafoods
▪ Manzi, Henry	City of Greater Geelong
▪ Marchant, Alison	Garlic and berry producer
▪ Marshall, Stewart	Tall Tree Poultry
▪ Mason, Jason	Bellarine Smoked Fish Co
▪ McDonald, Graeme	Livestock producer
▪ McDonald, Janet	Livestock producer
▪ McGregor, Cr Carol	Surf Coast Shire and livestock producer
▪ McKenzie, Melinda	City of Greater Geelong
▪ McKiterick, Cr Brian	Surf Coast Shire
▪ Mifsud, Michael	Farmers Harvest
▪ Moran, Jamie	Londsdale Tomato Farm
▪ Morgan, Peter	Barwon Water
▪ Mutsaers, Jeff	Regional Development Victoria
▪ Nash, Gordon	Agriculture Victoria
▪ Newman, Nicole	The Food Purveyor
▪ Nicholls, Rod	Golden Plains Shire
▪ North, John	Lifestyle farmer
▪ O'Brien, Peter	Golden Plains Shire
▪ O'Reilly, Sean	Incitec Pivot
▪ Peart, David	Geelong Manufacturing Council
▪ Peel, Ewen	Mixed farmer
▪ Perryman, Trevor	Malteurop

▪ Potter, Cr Chris	Colac Otway Shire
▪ Price, Stewart	Organic Dairy Farmers of Australia
▪ Renyard, Simone	Dairyfarmers and Chair of WestVic Dairy
▪ Riches, Graeme	Colac Otway Shire
▪ Riordan, Jim	Riordan Grains
▪ Routley, Sam	Routleys Bakery
▪ Ryan, Anne-Maree	Geelong Regional Local Learning and Employment Network
▪ Ryan, Daniel	Livestock producer
▪ Salan, Rance	Surf Coast Shire
▪ Satkunarajah, Vigi	Colac Otway Shire
▪ Sharkey, Eric	Mixed farmer
▪ Sharp, Lindsay	Leura Park and Jack Rabbit
▪ Shay, Anthony	Livestock producer
▪ Shelton, Vicki	City of Greater Geelong
▪ Smith, Cr Chris	Colac Otway Shire
▪ Smith, Dale	Australian Lamb Company
▪ Smith, Gareth	Colac Otway Shire
▪ Street, Wayne	Geelong Food Cluster
▪ Taylor, Matt	Surf Coast Shire
▪ Thierry, David	Geelong Citrus Packers
▪ Trethowan, Adam	Adelia Fine Foods
▪ Trethowan, Amelia	Adelia Fine Foods
▪ Tsoumanis, Kon	Barwon Foods
▪ Turner, Chris	Turi Foods
▪ Van Oirschot, Megan	Freckleberry
▪ Vicary, Shane	AKD Softwoods
▪ Walker, Dr Jude	Geelong Regional Local Learning and Employment Network
▪ Waller, Tim	Golden Plains Shire
▪ Warrener, Garry	Colac Otway Shire
▪ Wellington, Cr Heather	Surf Coast Shire
▪ Whinney, Paul	Livestock producer
▪ White, Dennis	White Fisheries
▪ Wilding, Anna	Wildings Pantry Essentials
▪ Wilkinson, Sue	Colac Otway Shire
▪ Winter, Bill	G21 Agribusiness Forum