Australian Capital Region Food Hub Introduction

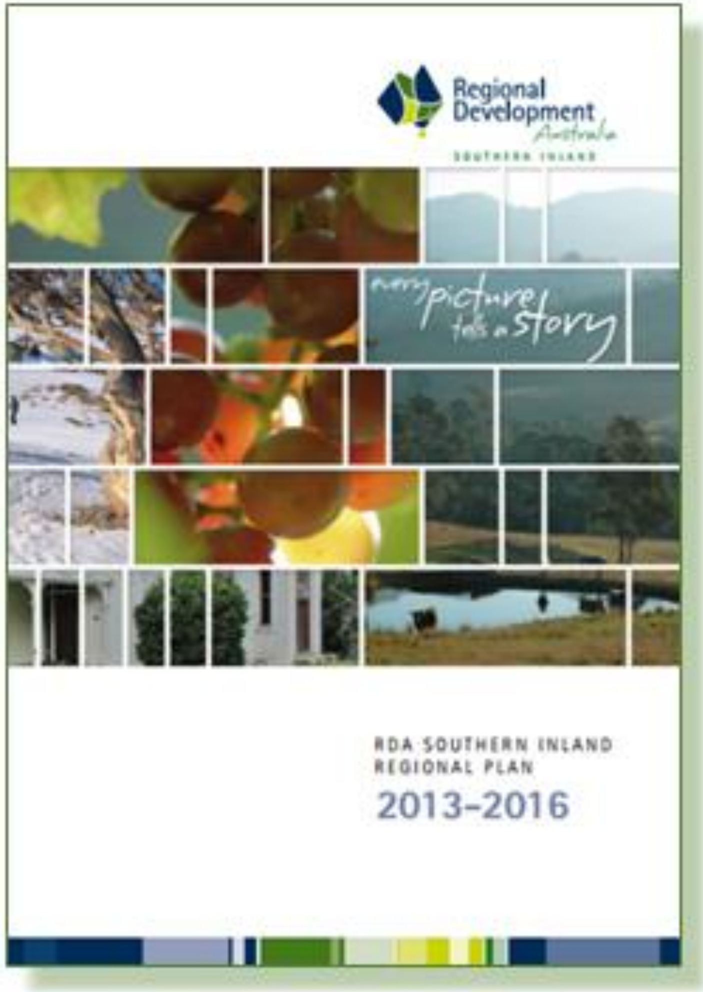
Wednesday, 11 June 2014

Welcome

Regional Development Australia
SOUTHERN INLAND

Regional Food Priority

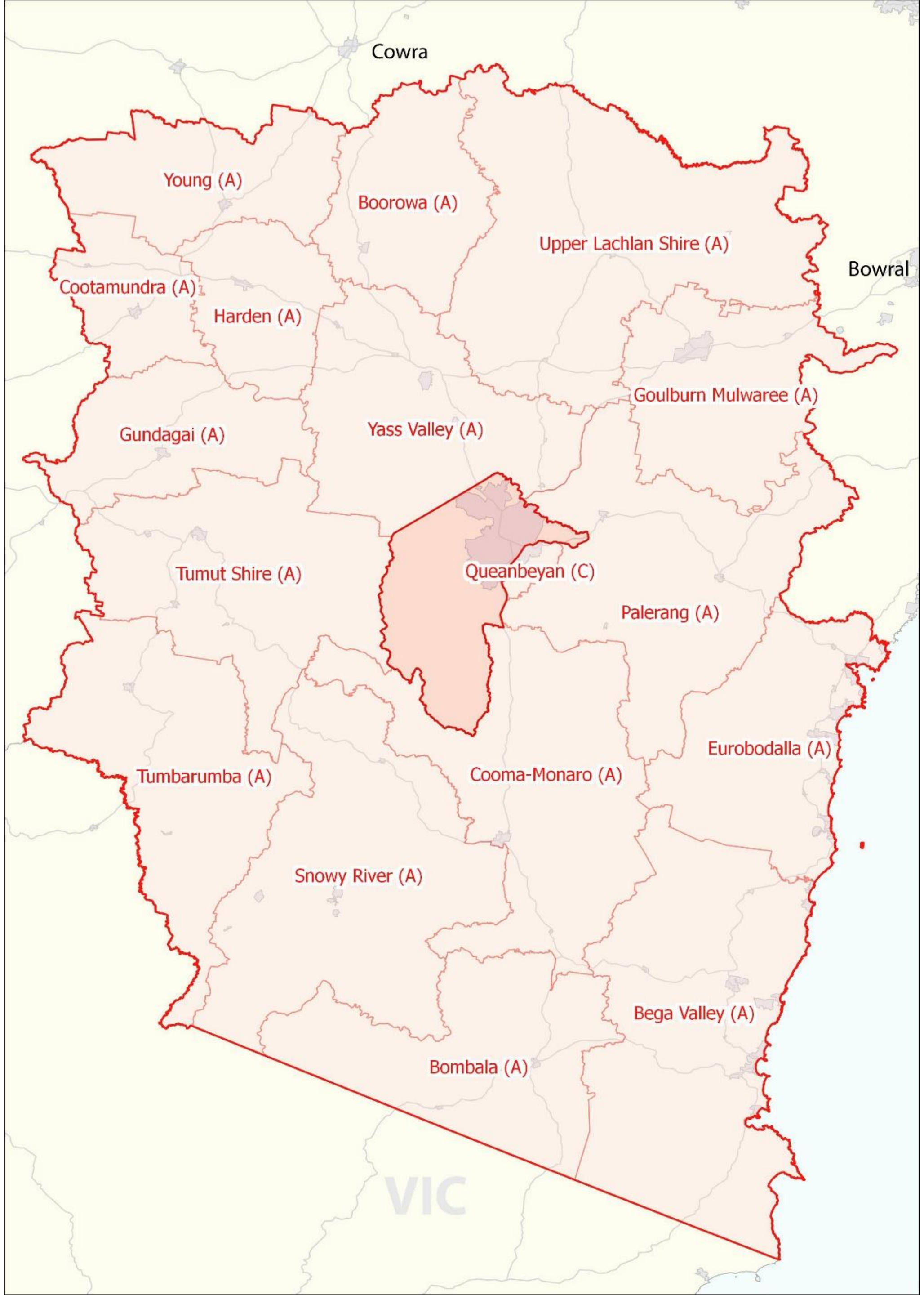
- Land use
- Location in SE Australia
- Recognition of food and wine within the region

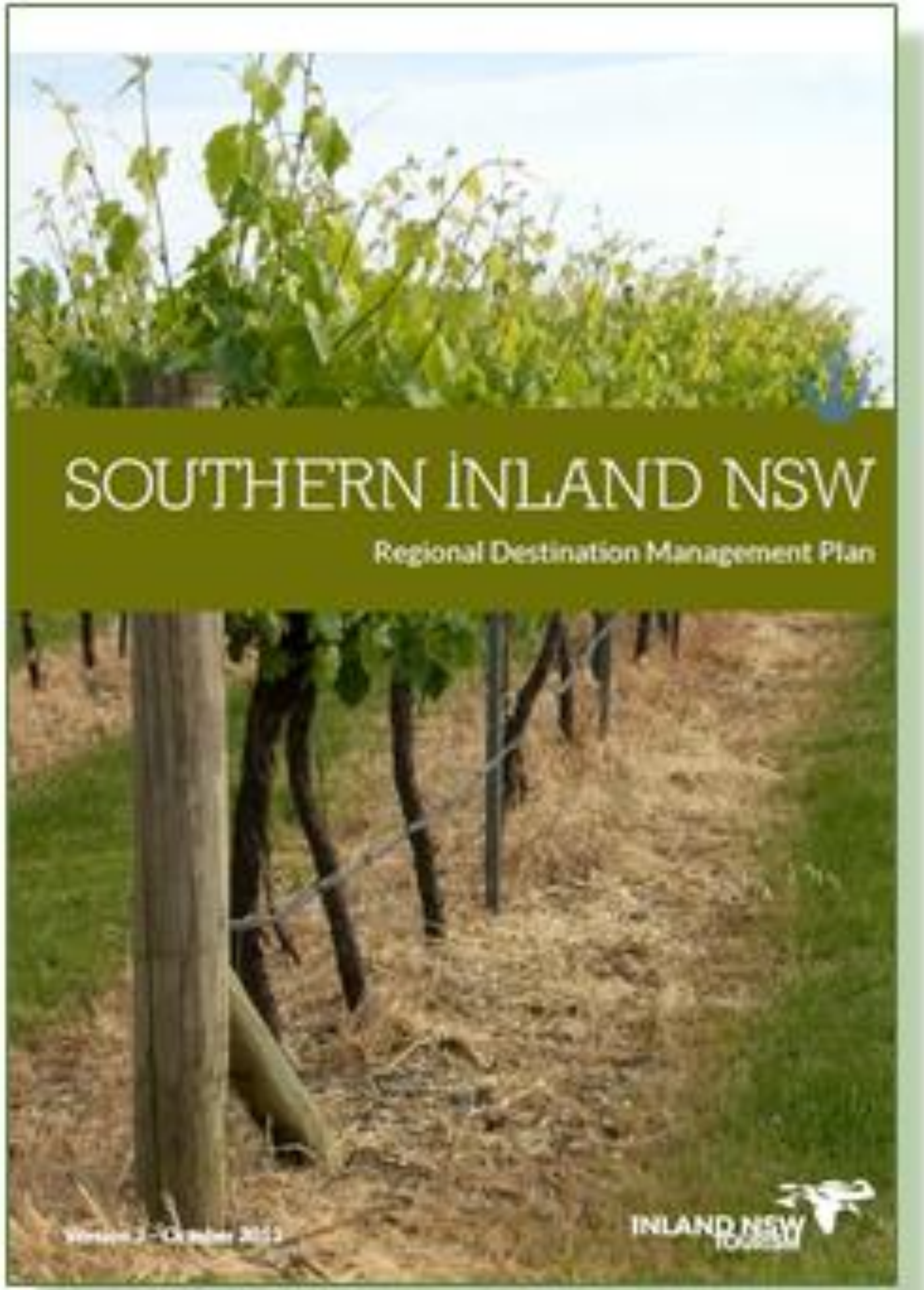


PROFILE

79% agricultural land
20% parklands
<1% urban development

The Australian Capital Region





'Food and wine will be a key theme…'

Top Three Priorities

Priority 1: Develop a regional brand strategy for Southern Inland NSW.

This new marketing platform will bring together the wider region under a new regional brand strategy. This collaborative approach, led by Inland NSW Tourism, will leverage the region's key strengths as well as provide an opportunity for lesser-known destinations to take advantage of the awareness of the more familiar hubs. Food & Wine will be a key theme through the development of this program. Taking a collaborative approach to marketing the region will also enable new partnership platforms to be developed – with Australian Capital Tourism as well as other tourism groups in surrounding regions.

Significance Of Regional Food

Contributes to regional economic development and community prosperity

- Grows existing business, attracts new business
- Builds community resilience
- Informs long-term health policy
- Encourages greater investment in production and promotion of nutritious food

Setting the Scene

RDA Southern Inland ‘Regional Food’ Priority
Southern NSW Harvest
Local Food Initiative
Food Hub Event





Why are we here today?

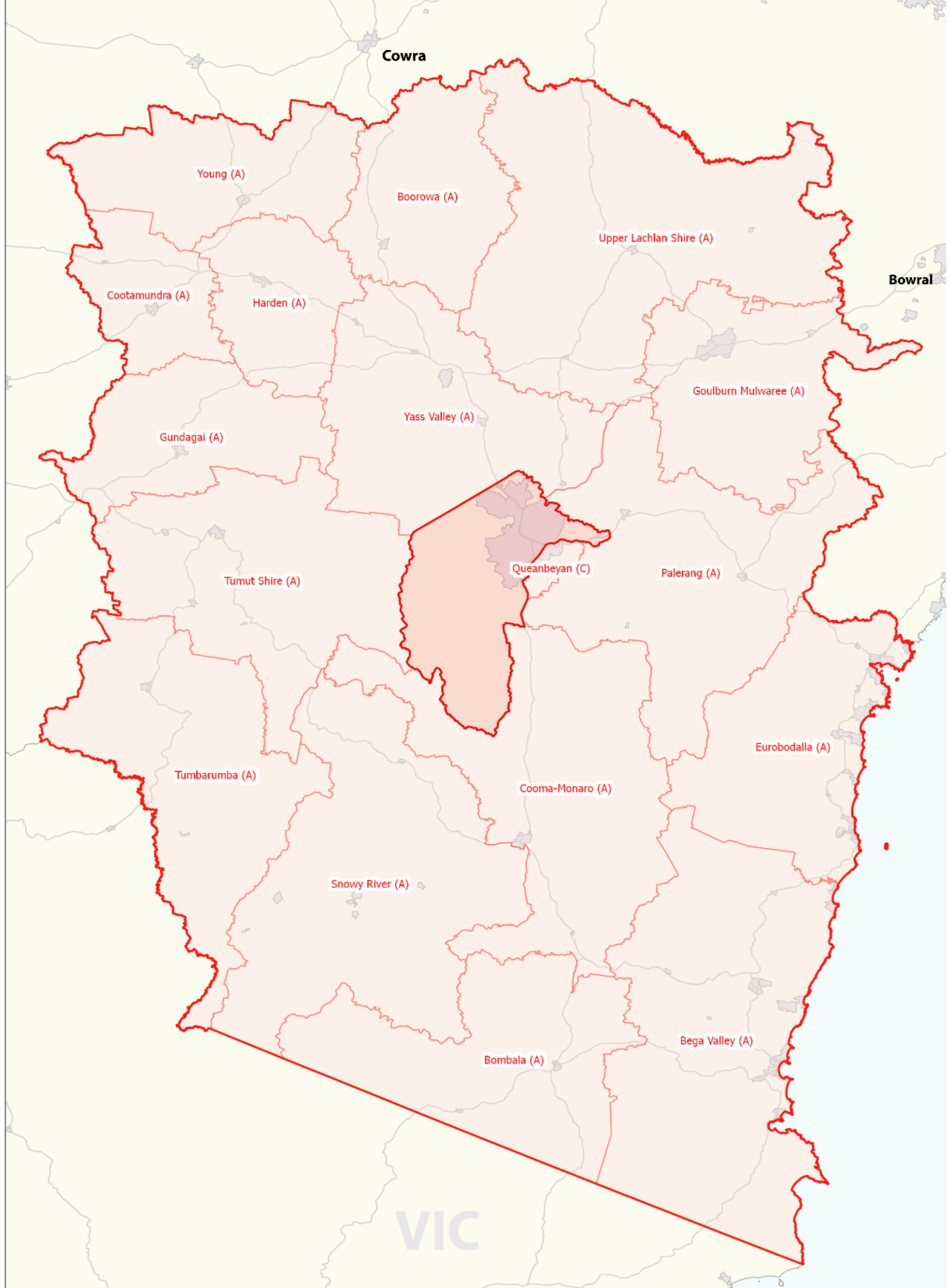
To learn how we can:

•Build a resilient local food economy in the Australian Capital Region

•Make local food more accessible by bridging the gap between producers and consumers

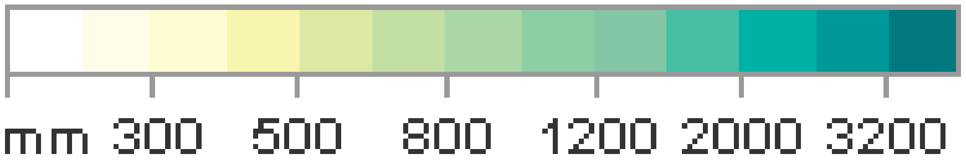
An Overview

Australian Capital Region

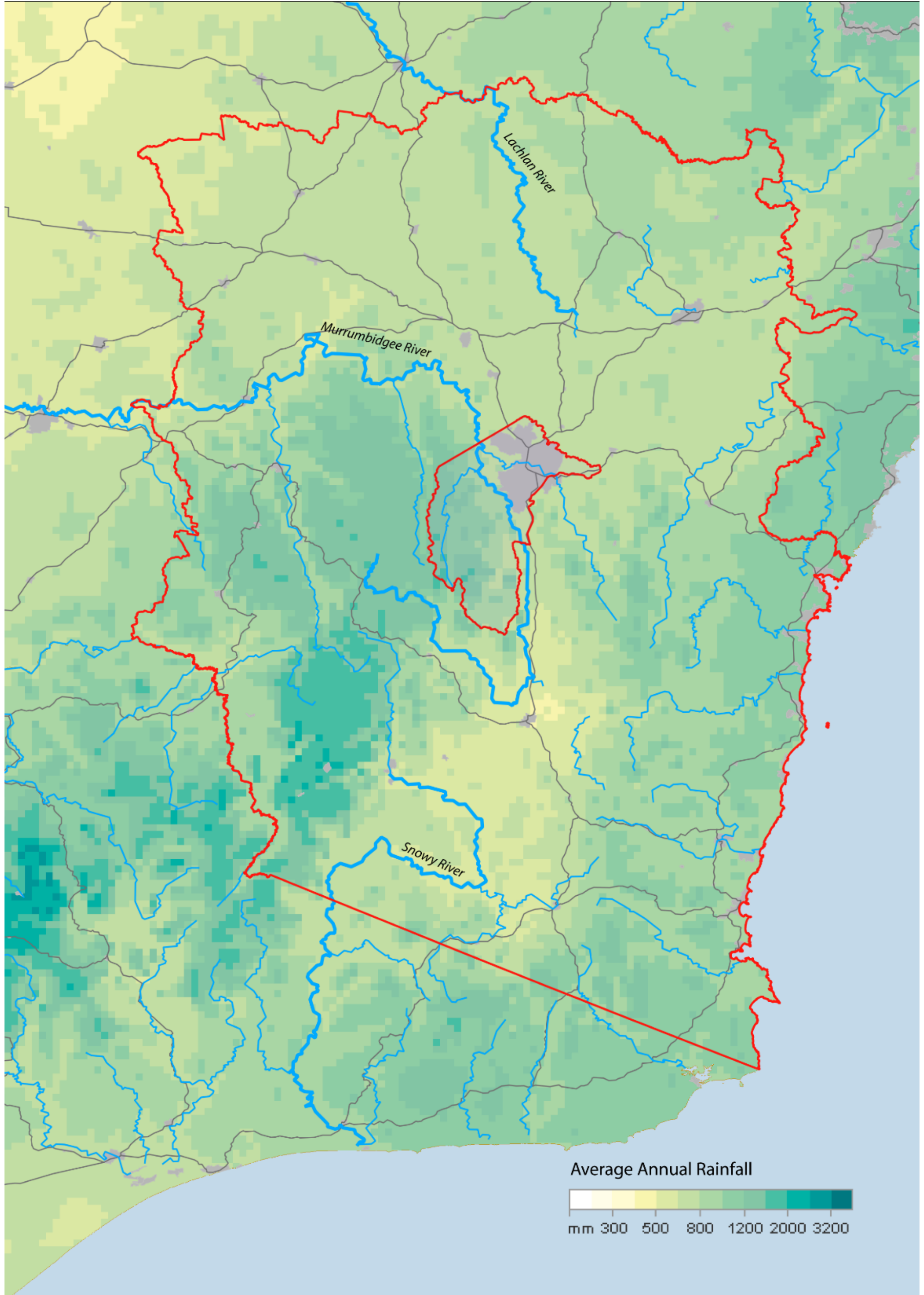


Rainfall

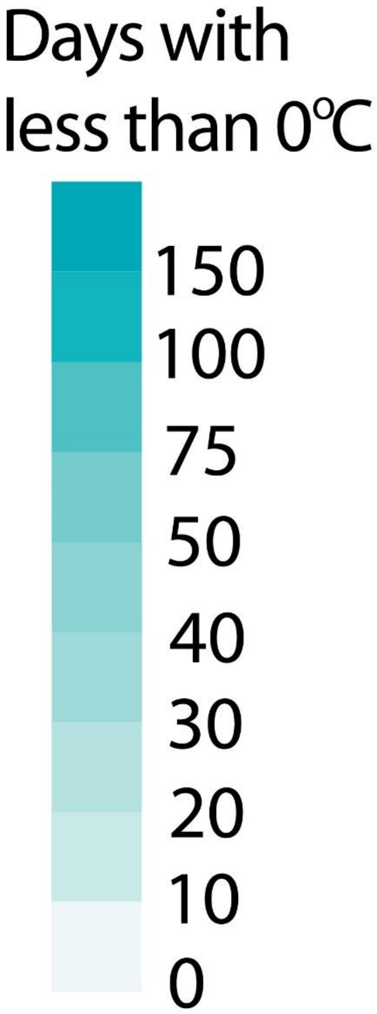
Average annual rainfall

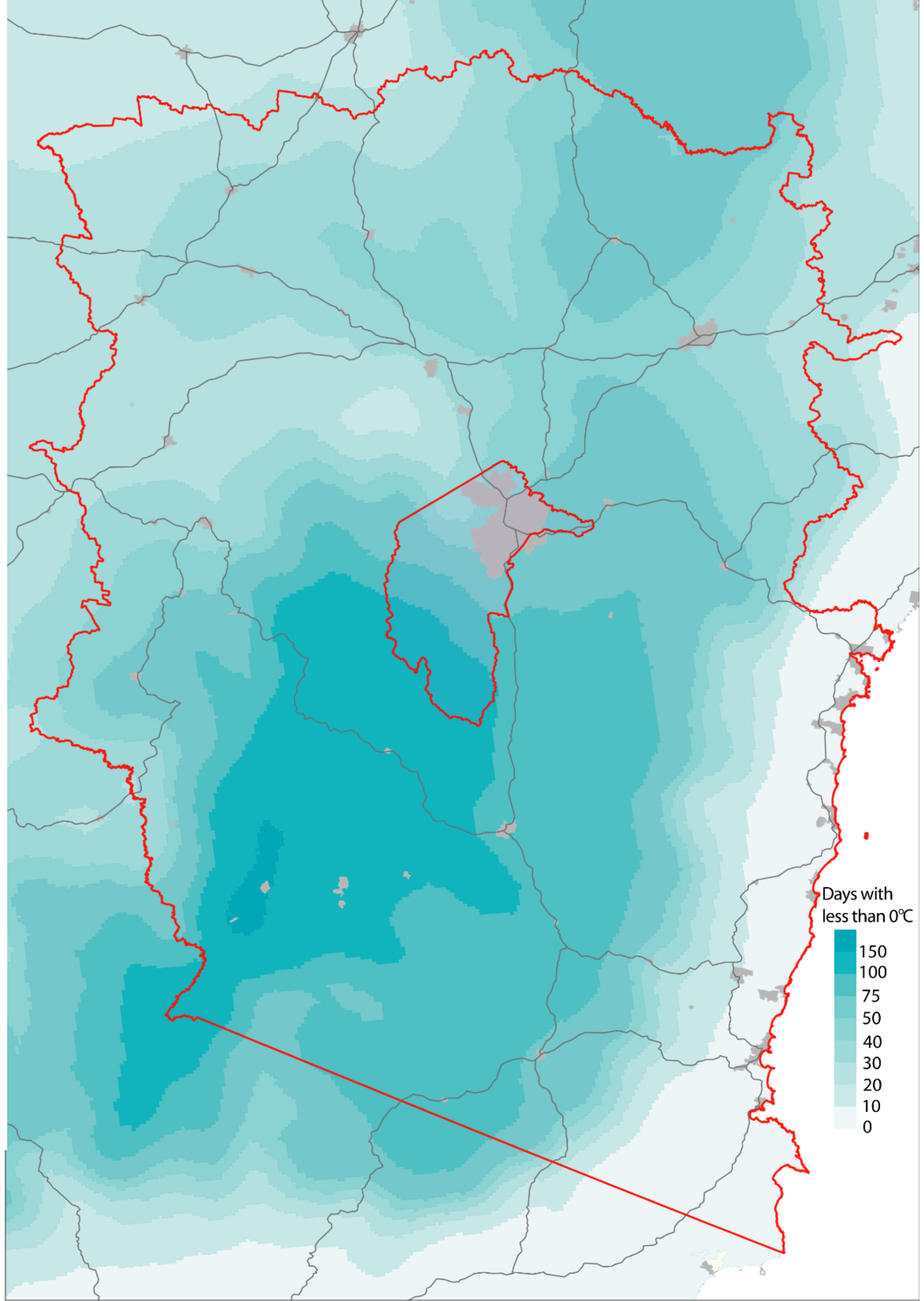


Source: Australian Bureau of Meteorology



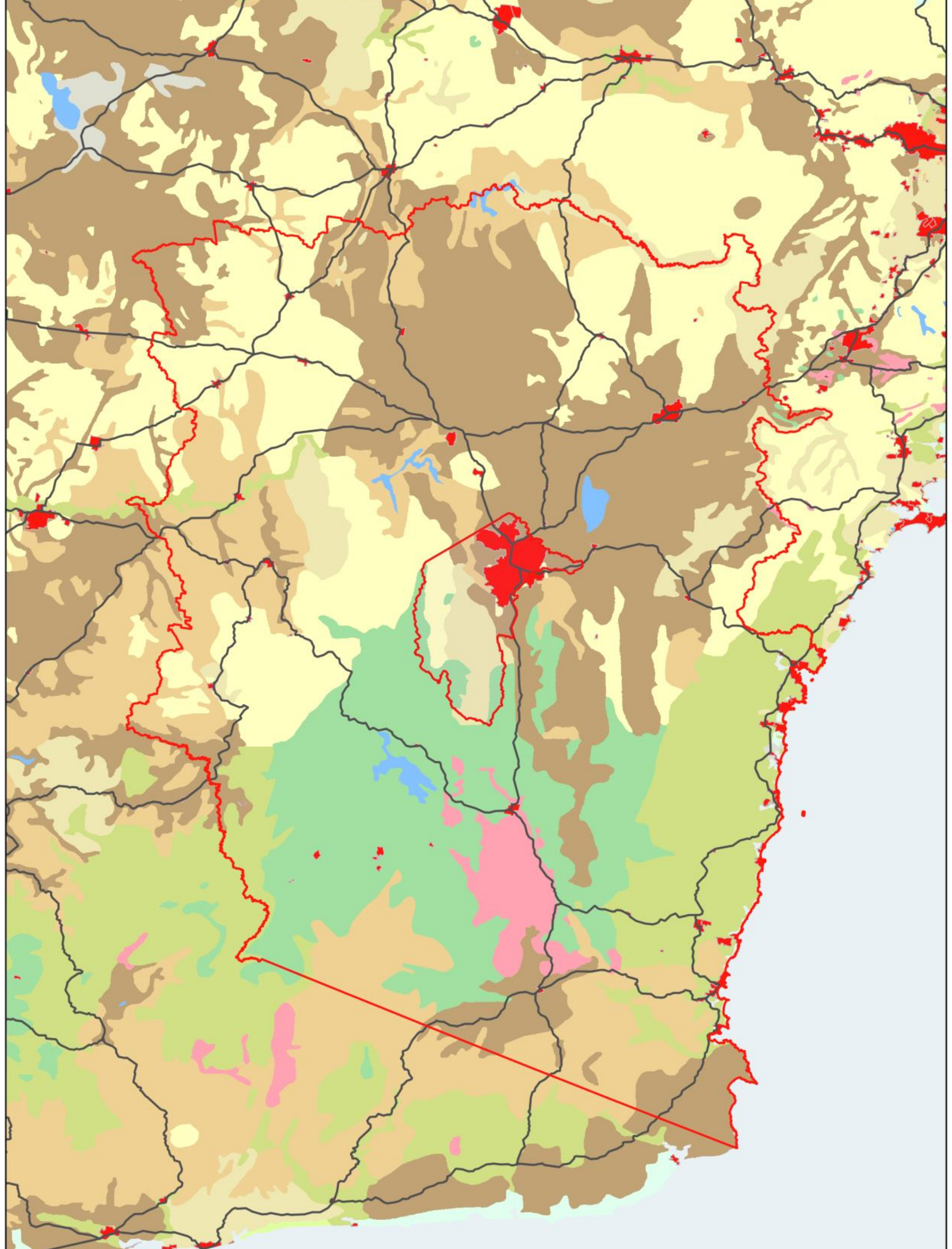
Frost





Source: Australian Bureau of Meteorology

Soil Types



Source: Australian Soil Resource Information System.

Indigenous Food

- Range of indigenous food species in our region.
- ‘Commercialising’ indigenous food is a long, arduous and expensive process.
- Long term potential, however in the shorter term indigenous food will not have a large role to play.





Local Food Initiative

Community

Aims

Survey

Running since late 2013.

Aim - identify trends and barriers to local food production and consumption.

Survey

Areas of study include:

- Current situation
- Potential
- Barriers
- Responses / actions

Survey

There were three distinct surveys:

- Producers
- Distributors
- Consumers

Online via SurveyMonkey.

Distributed via websites, newsletters and networks of the participating organisations.

Producers

- A producer is defined as producing food for human consumption.

- This could be home-based (metro/rural), semi-commercial as a second industry, or full-time farming.

Distributor

Distributors in the food supply chain include:

- Retailers – Food Lovers, IGA's
- Restaurants – Pomegranate, The Conservatory
- Caterers – Food for Friends, tuckshops
- Markets – EPIC, Northside, Southside

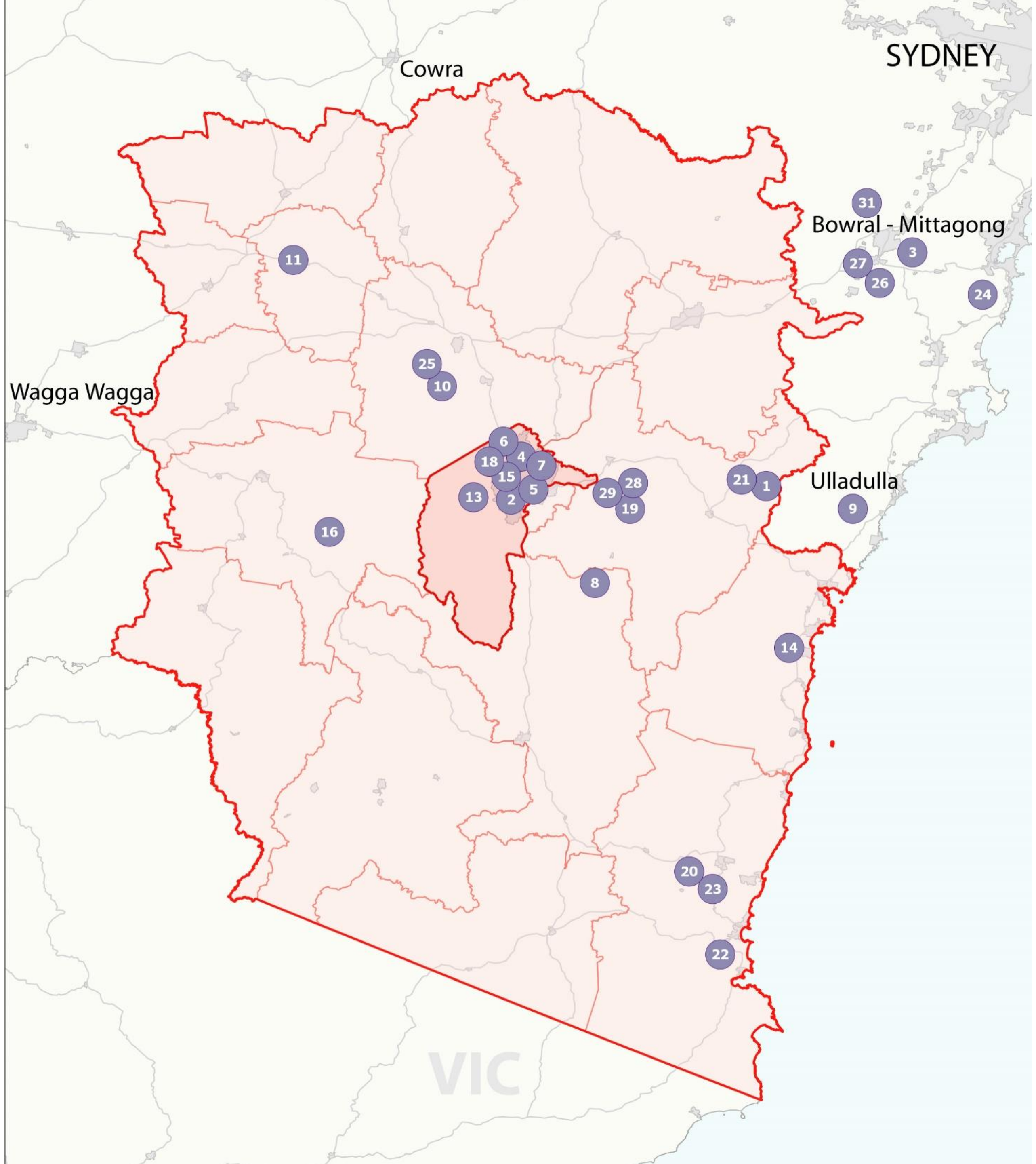
Consumers

Consumers - anyone who eats food. They can be loosely grouped into the following:

- Health conscious
- Philosophical
- Foodies / lifestyle

Producer Survey

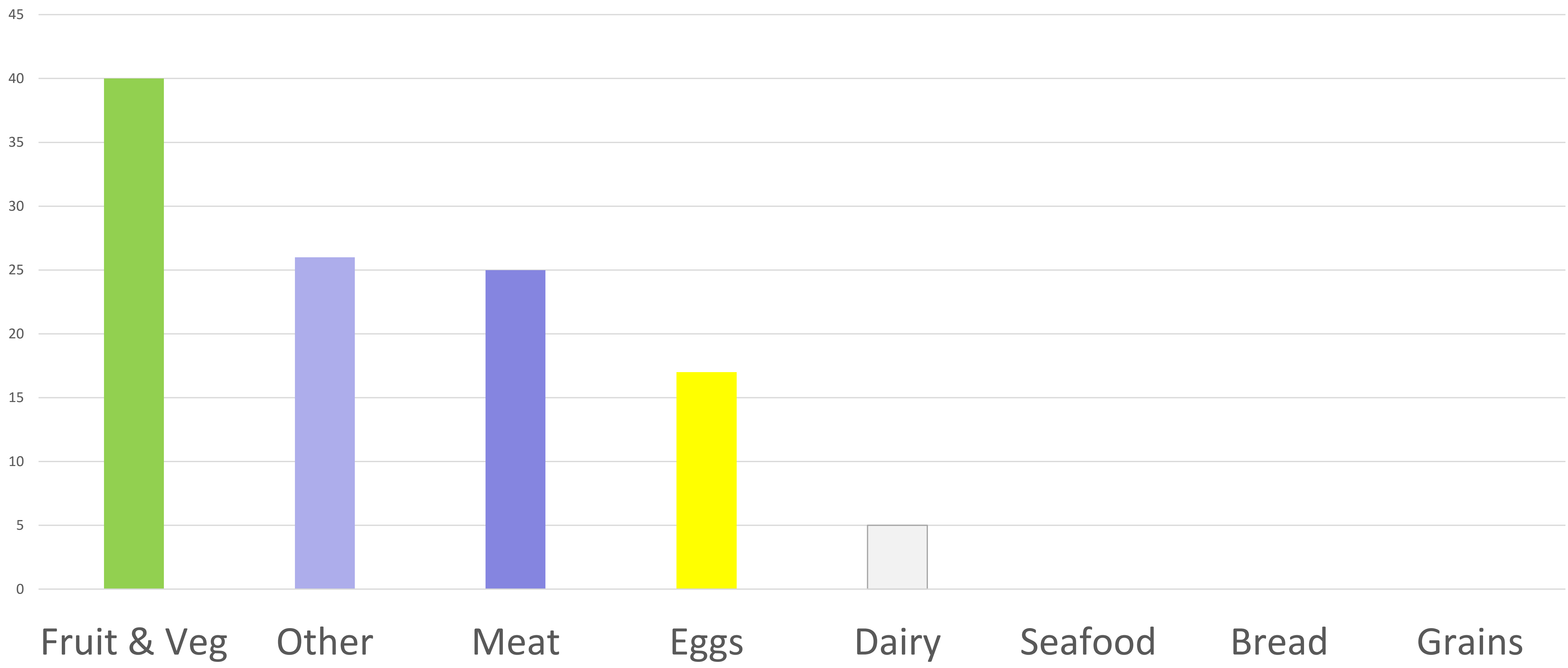
34 Respondents



Shopping Basket

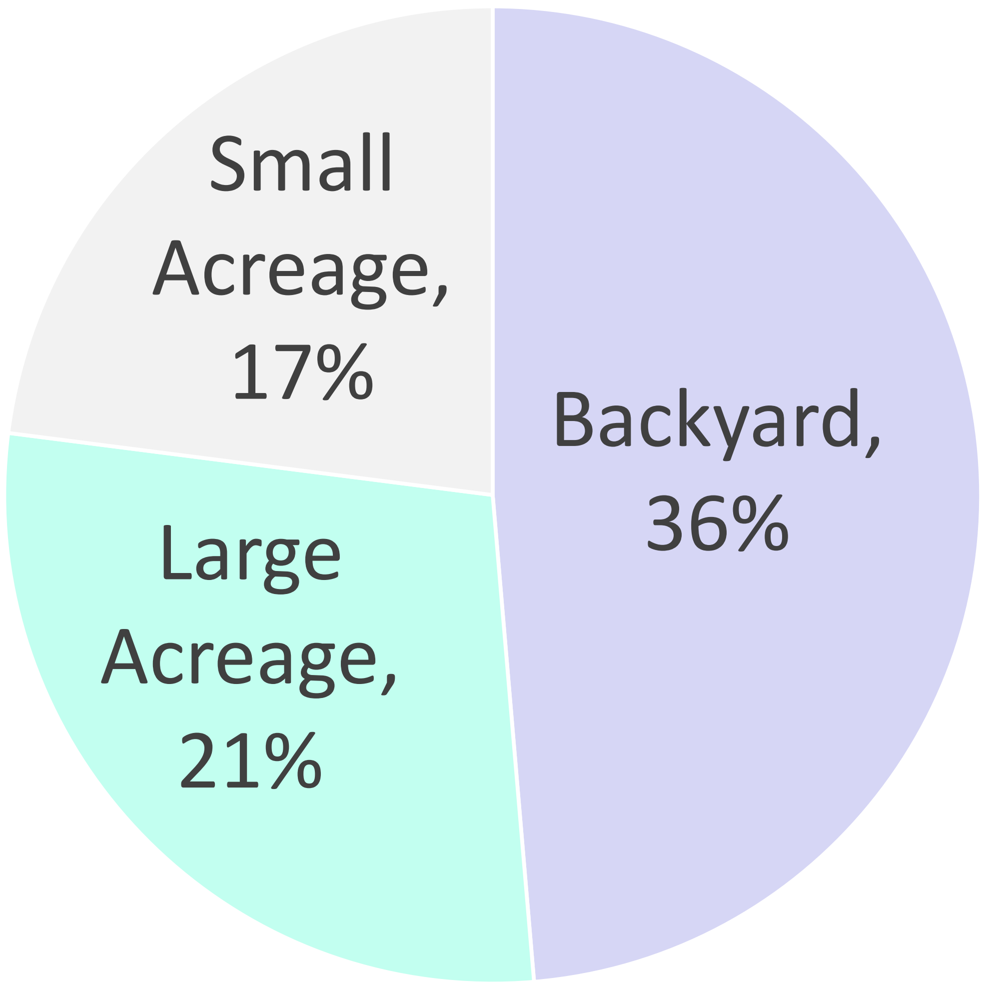
Meat
Seafood
Fruit & Veg
Dairy
Bread
Eggs
Grains
Other – preserves, olives, nuts etc.

Producers Survey

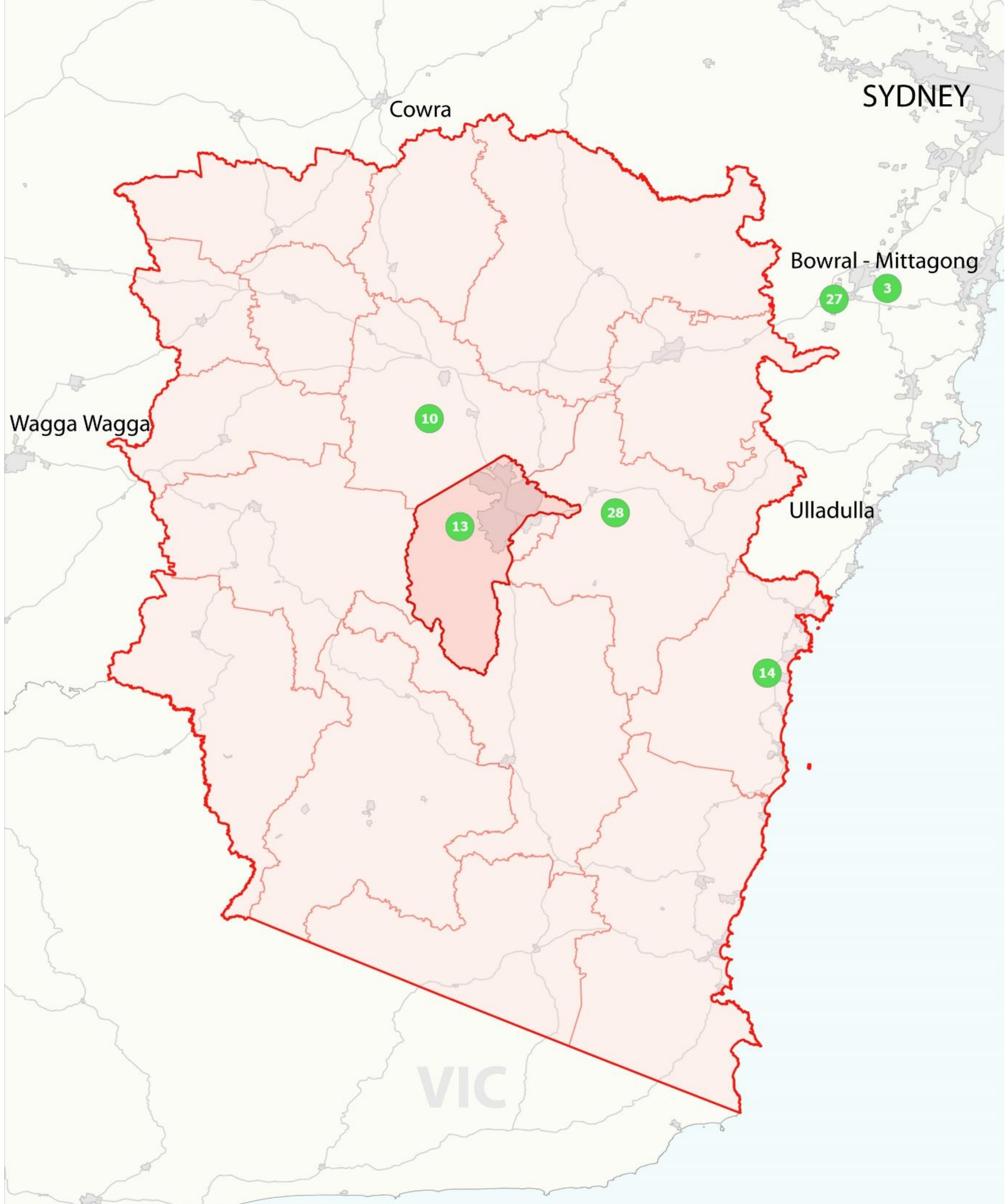


Production Format

8 Ha (20 Acres)

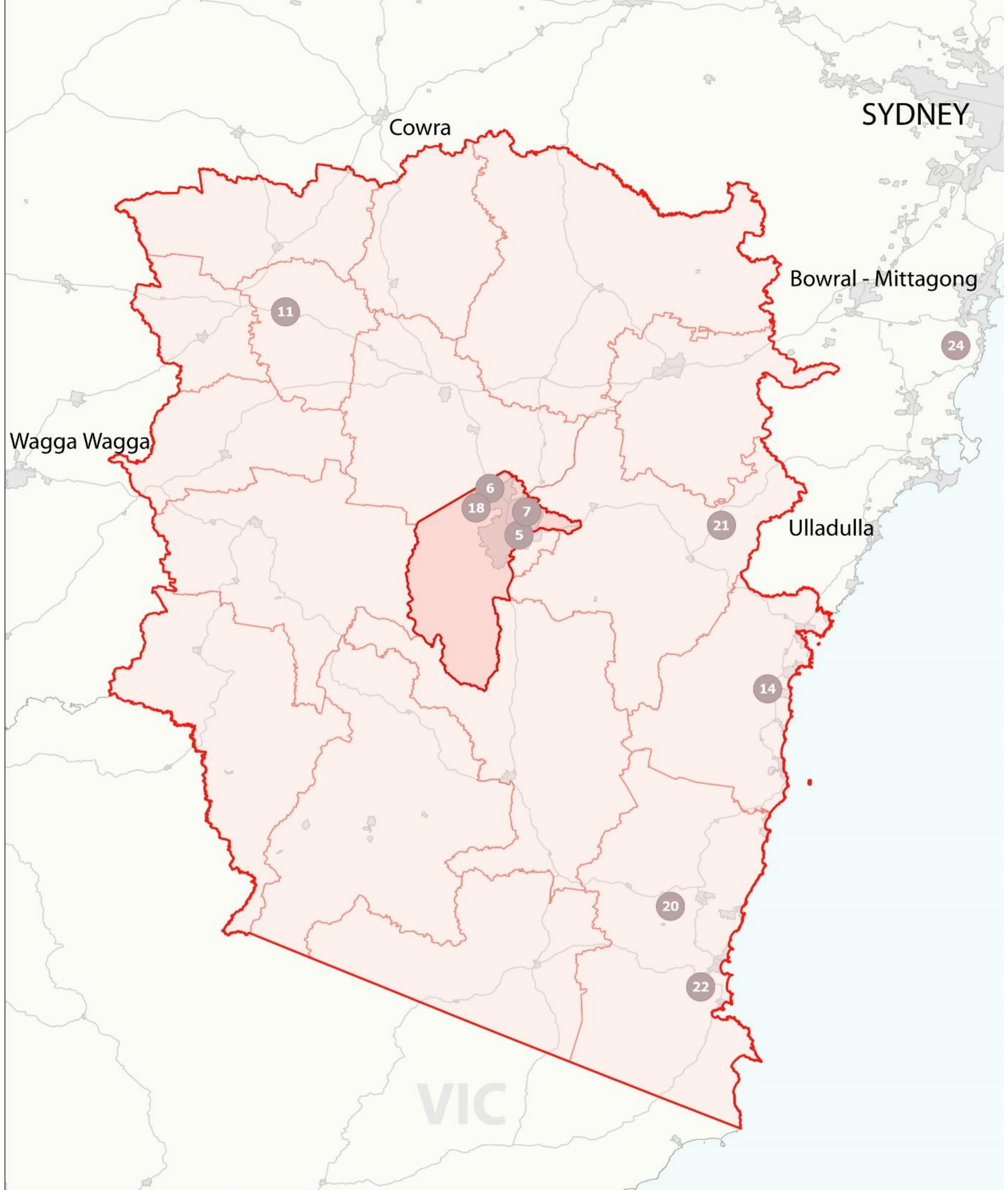


Fruit & Vegetables



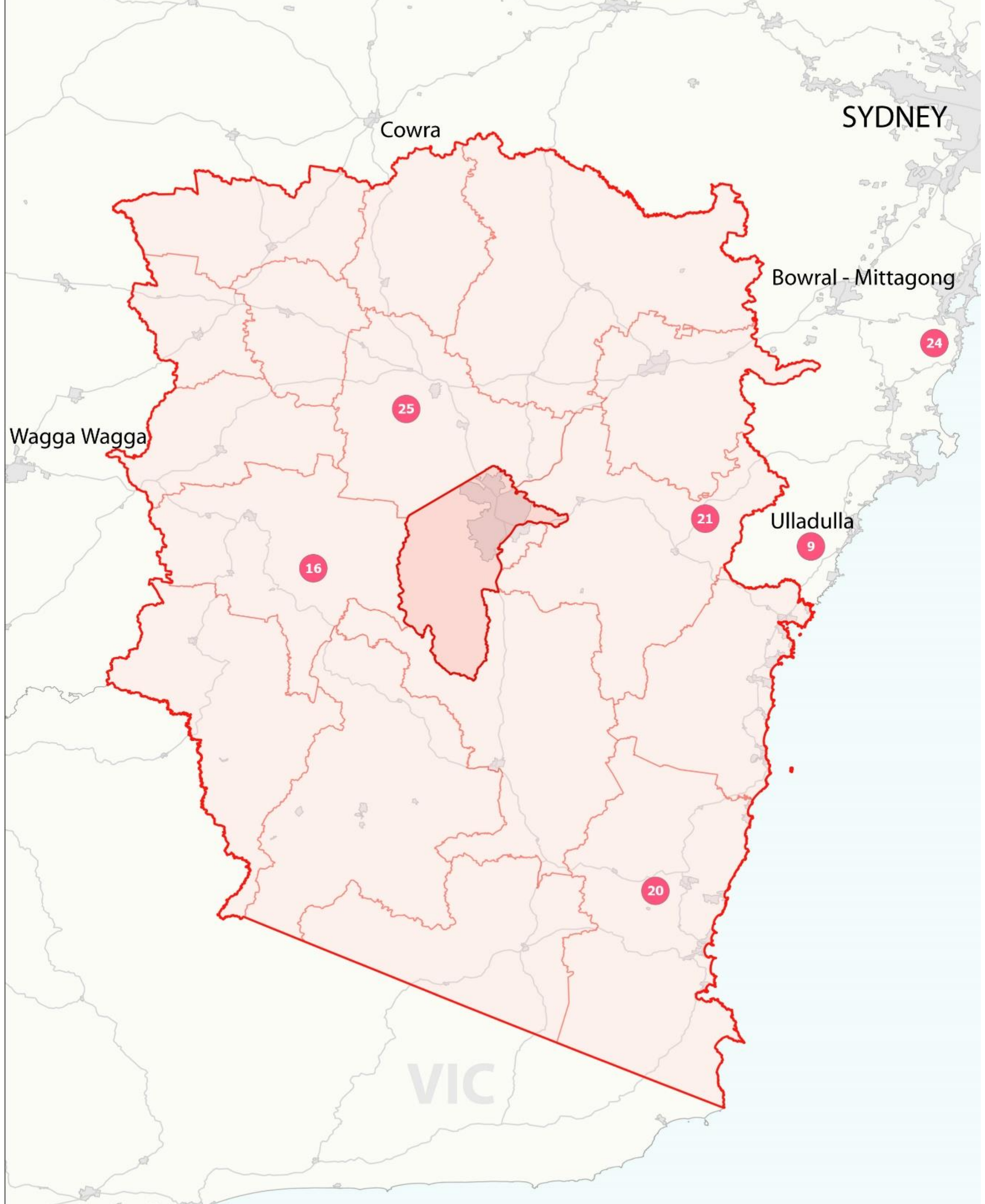
Other

Honey, olives, garlic, jams, preserves

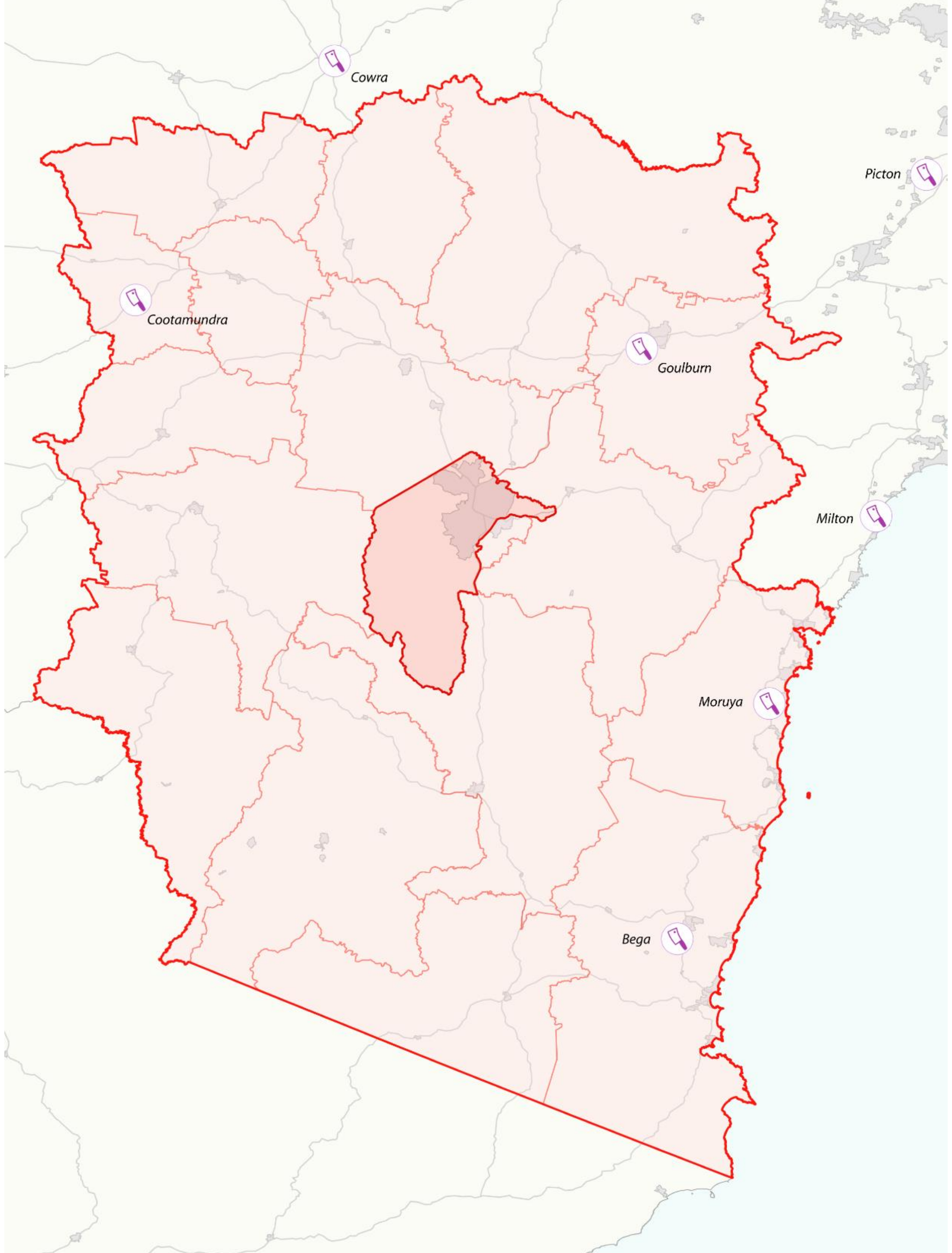


Meat

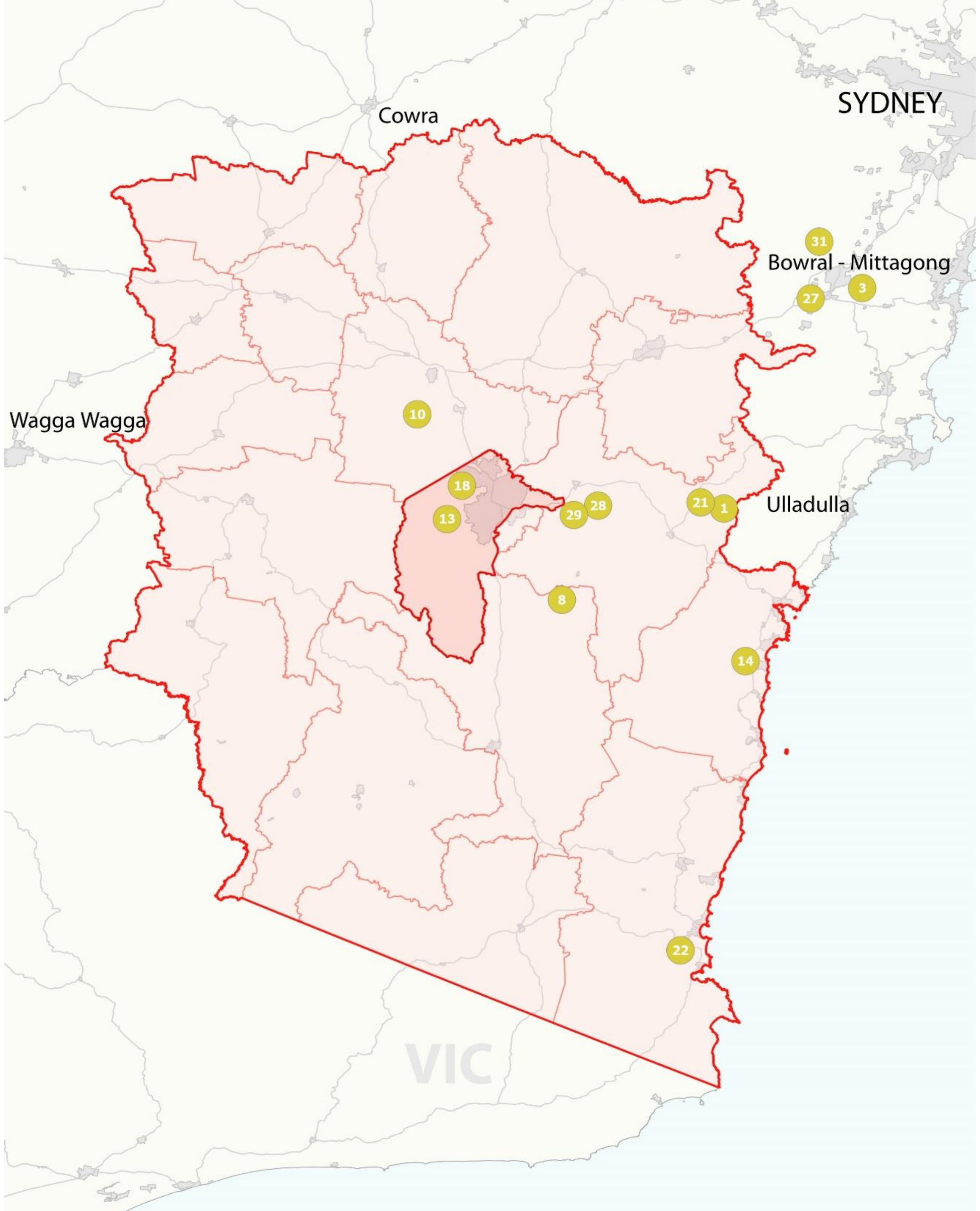
Beef, poultry, pork, lamb



Abattoirs

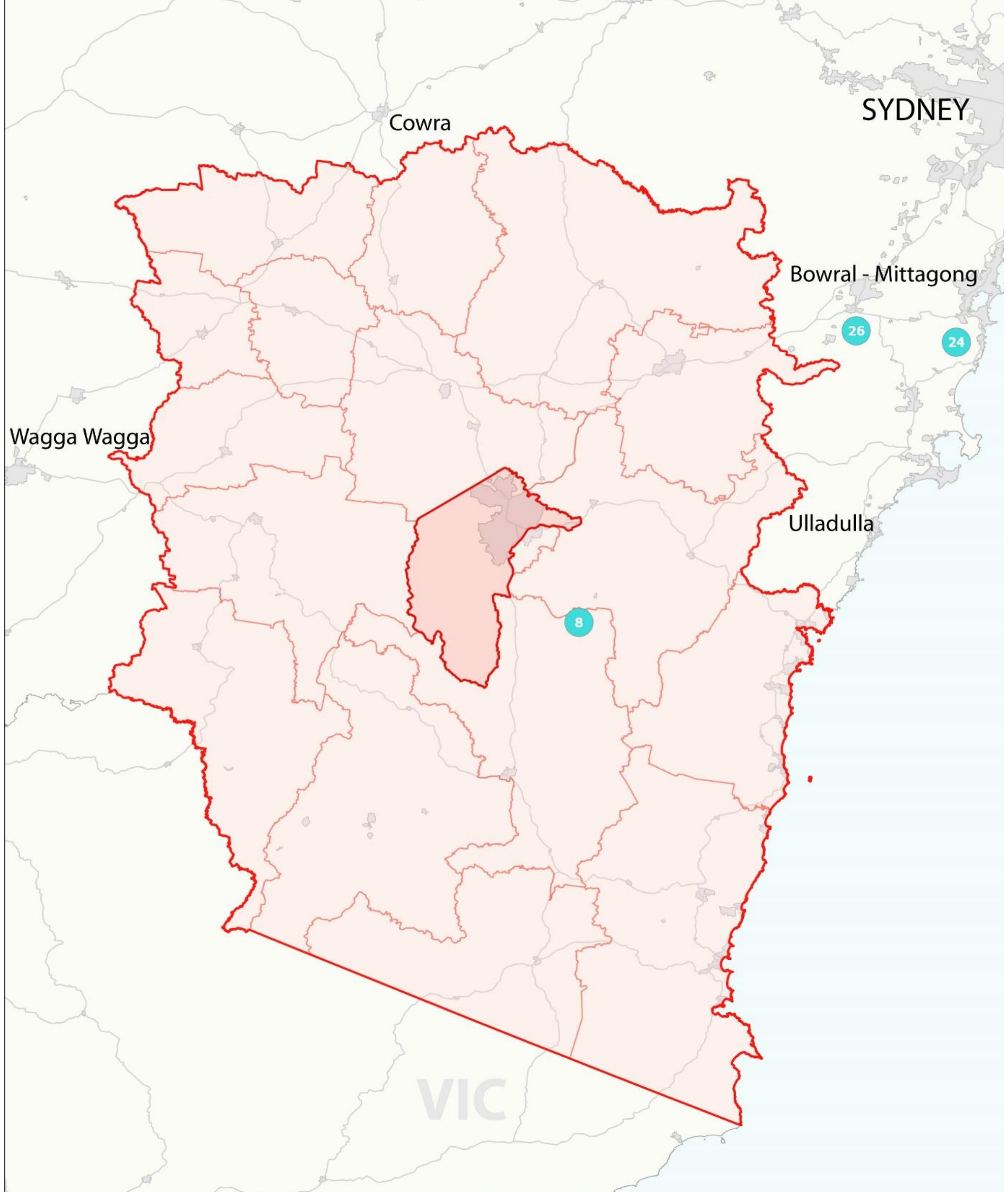


Eggs

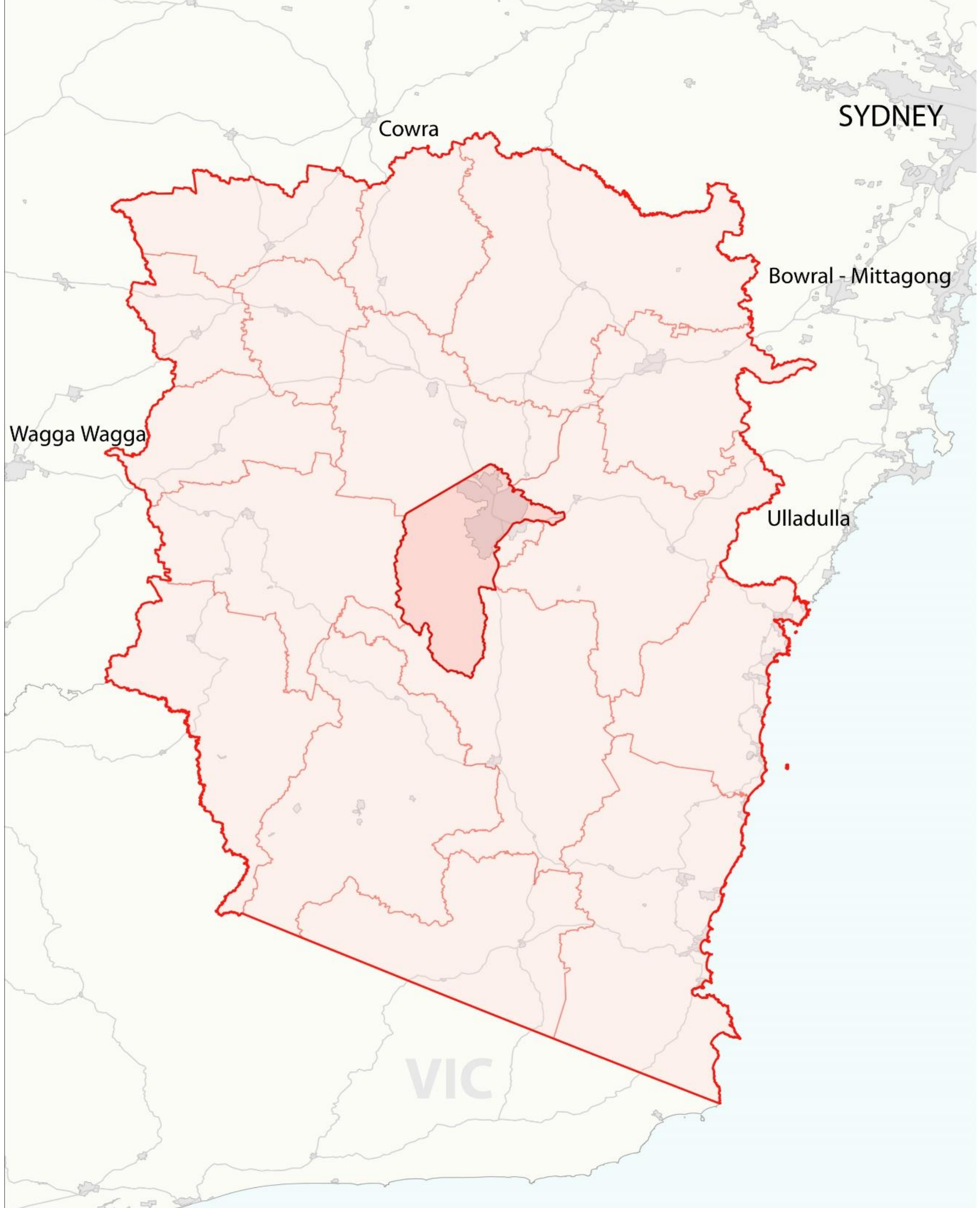


SYDNEY
Cowra
31
Bowral - Mittagong
27
3
Wagga Wagga
10
18
13
29
28
21
1
Ulladulla
8
14
22
VIC

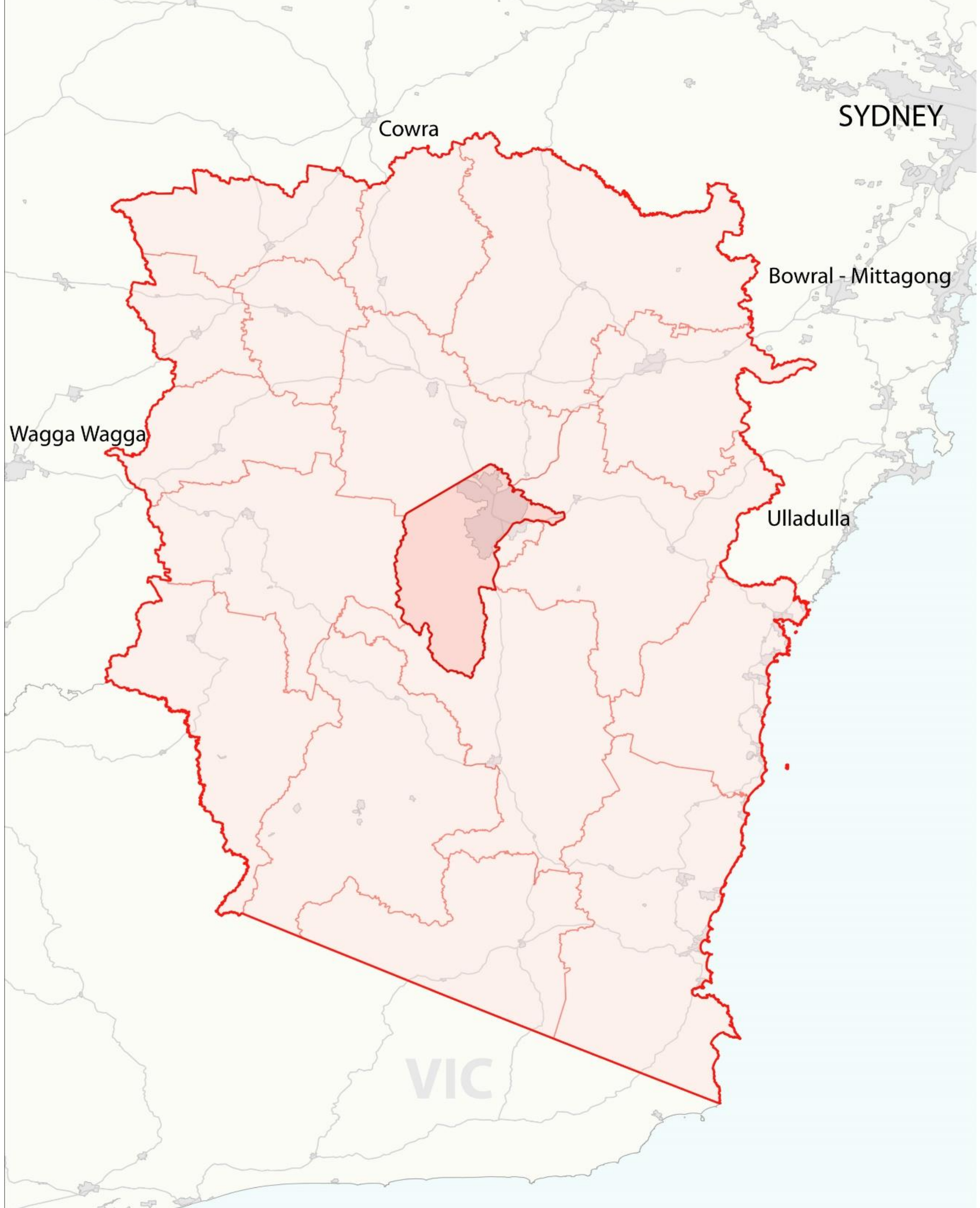
Dairy


Cowra
SYDNEY
Bowral - Mittagong
26
24
Wagga Wagga
Ulladulla
8
VIC

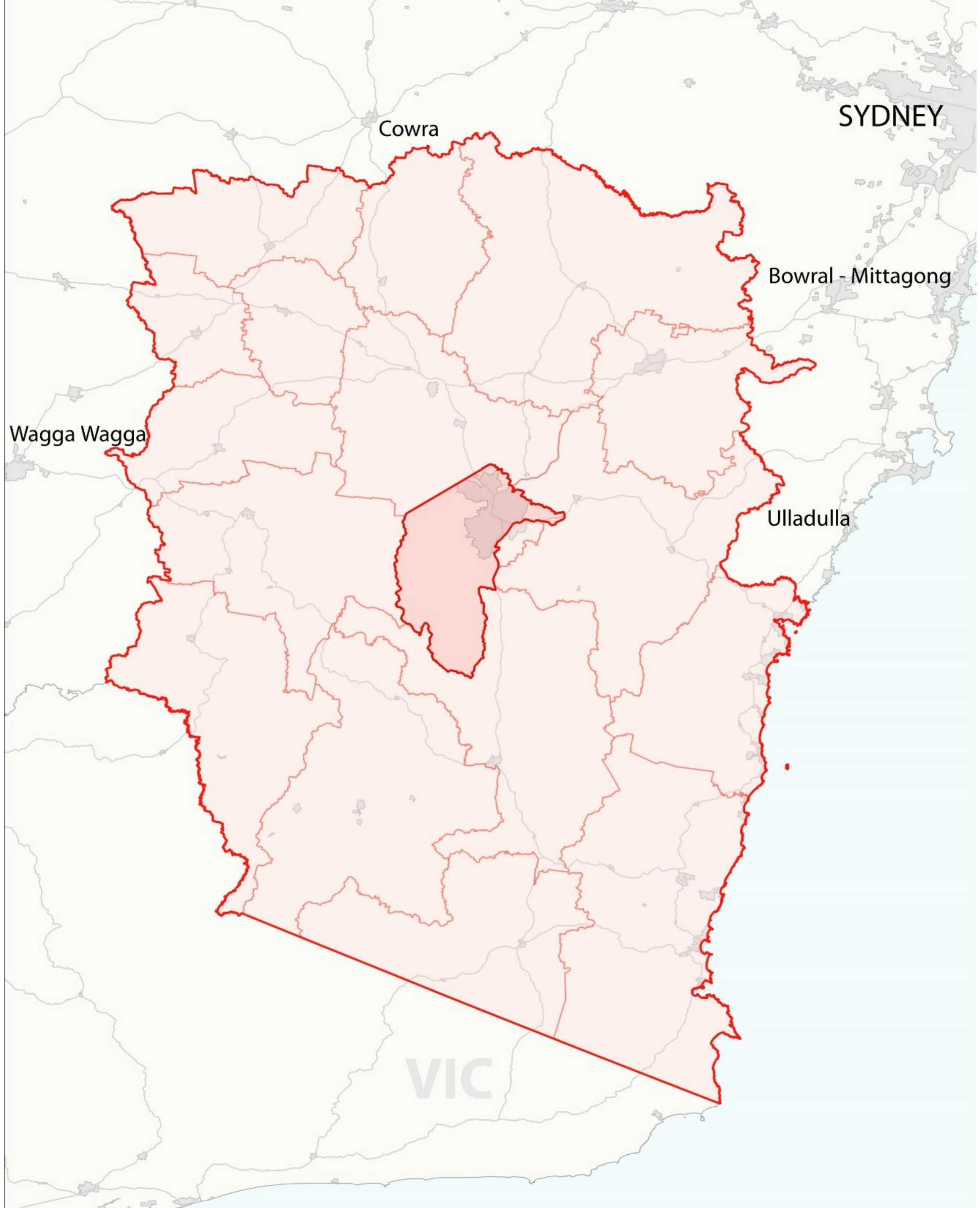
Seafood



Grains



Bread



Survey findings - Producers

Sales/Distribution

- Swap market (65%)
- Direct to retail (50%)
- Direct to restaurants (43%)
- Farmers Markets (28%)

Accreditation

- Organic (non-certified) (63%)
- Sustainable (50%)
- Free-range production (43%)

Survey findings - Producers

Barriers

The top 3 barriers to supplying for local consumption are:

- Not enough production (64%)
- Red tape (council, food authority etc) (32%)
- Processing for product not available locally (14%)

Producers– the way forward

Sales – Preference

The top 3 ways producers would prefer to sell are:

- Local retail shop (44%)
- Local farmers market (41%); and
- Online with on-farm pickup (19%)

Frequency - Preference

Producers indicate a preference for selling:

- Weekly (32%)
- Fortnightly (23%)
- Seasonally (27%)

Producers– the way forward

More findings…

62% say they sell 100% of their produce locally, although 57% say they have more produce to sell than they currently sell.

The most helpful activity to assist producers would be to be part of a region-based marketing brand (24%)

Producers– the way forward

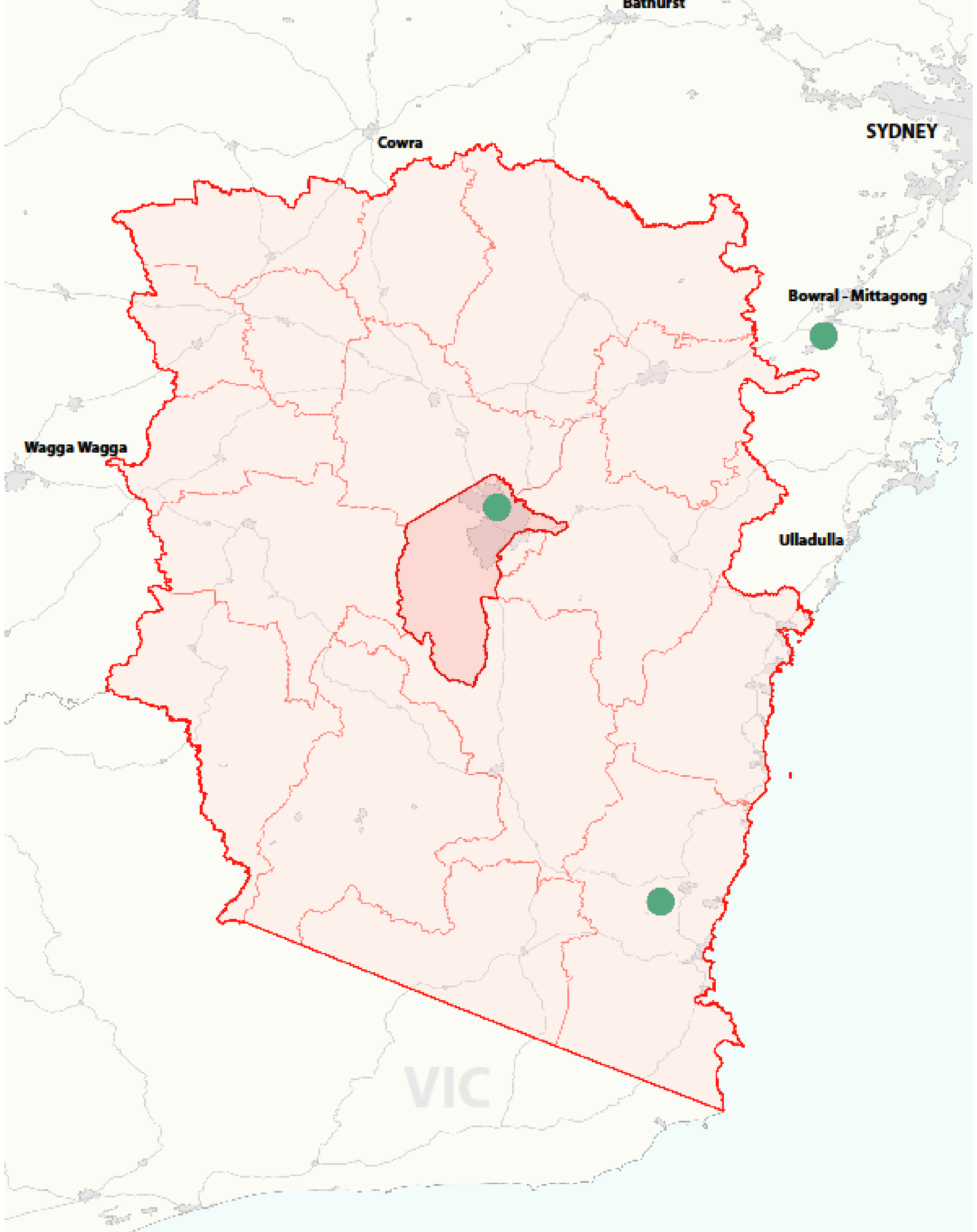
More findings…

What should we do to build a more resilient local food economy?

- ‘Education’ of consumers
- Council support
- Reduction in red tape.

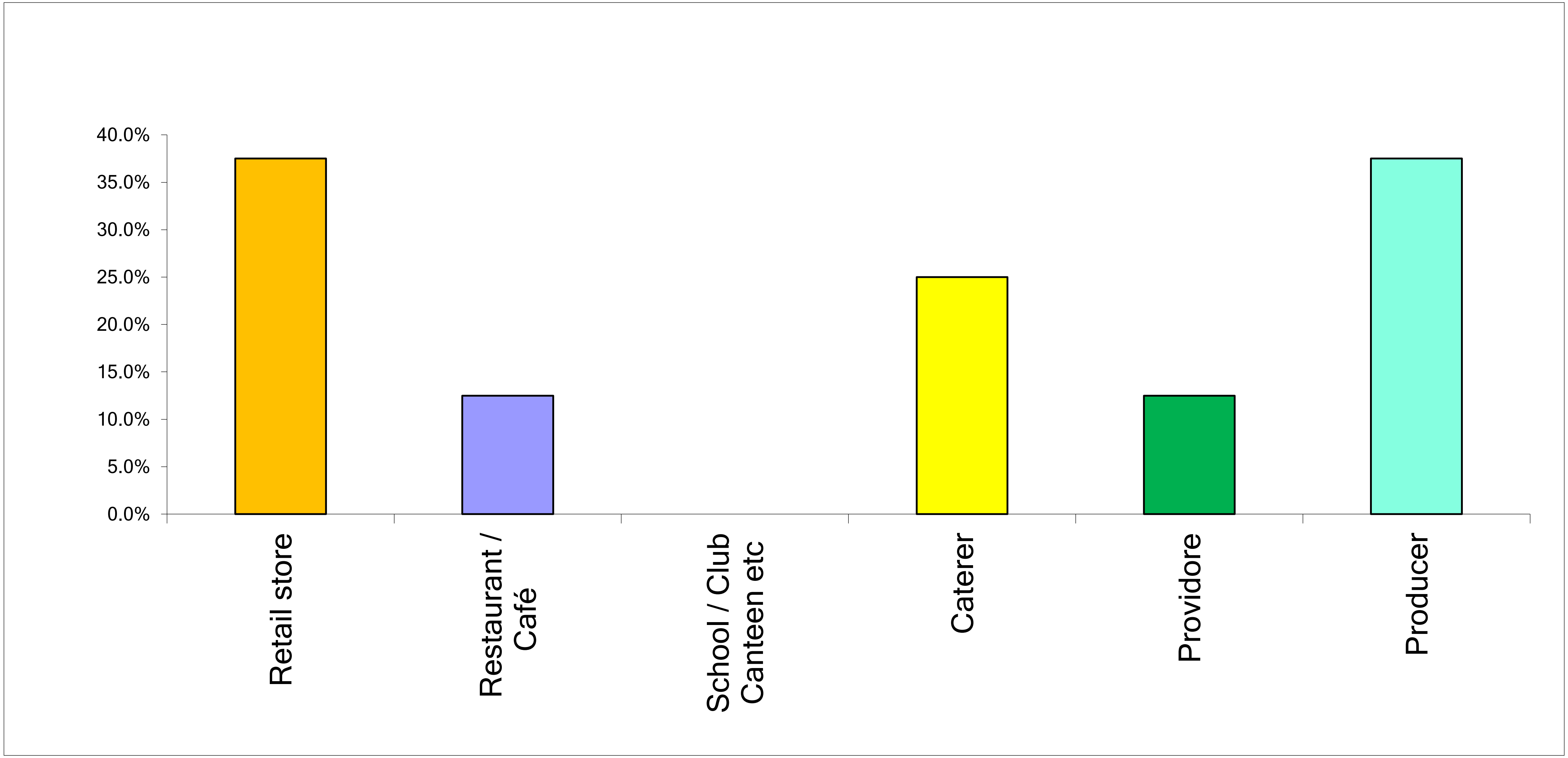
Distributors Survey

8 Respondents



Distributors Survey

8 Respondents



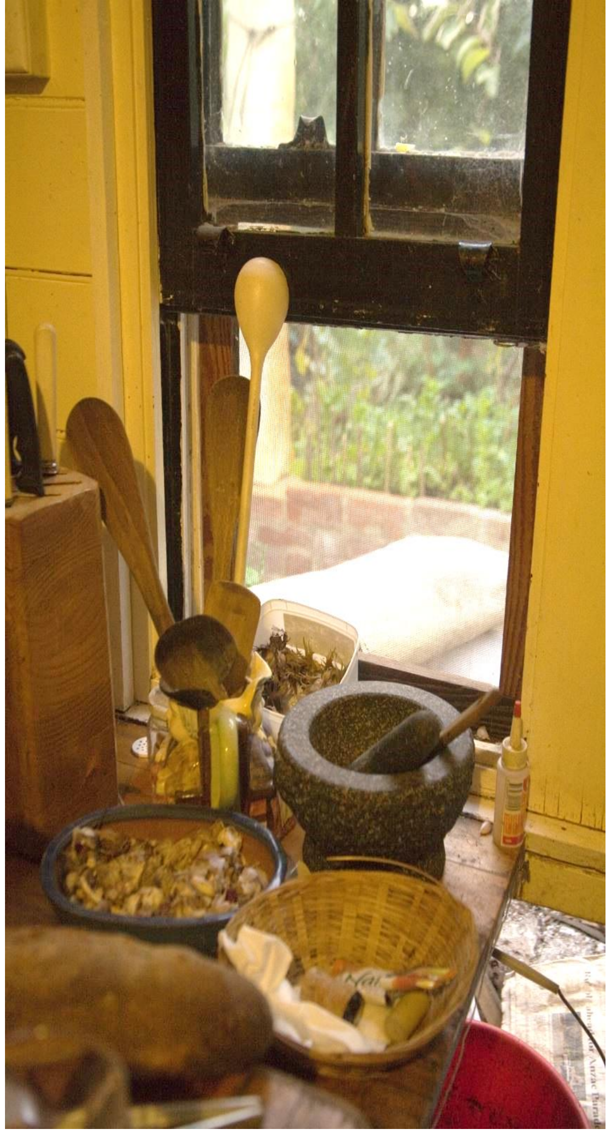
Survey Results - Distributors

Source of produce

- Buy often or always through specialist wholesalers (100%)
- Individual producers (88%)
- Local markets (60%)

Buy Local

- 100% of distributors purchase at least some product locally
- The following items are less likely to be purchased locally - seafood, poultry, beef, lamb, pork and dairy.
- 100% of distributors would purchase local produce if it was available.



Survey Results - Distributors

The top 3 concerns when purchasing are:

- Locally sourced (160km radius) (100%)
- Free range / pastured / sustainable / humane choice (100%)
- Fresh (83%)

Survey Results – Distributors

Limitations to purchasing locally include:

- Difficult to find in all food categories (50%)
- Supply too inconsistent (25%)
- Don't know where to purchase it (13%)

Survey Results - Distributors

Distributors prefer to purchase produce:

Meat
- 75% weekly

Vegetables
- 25% daily
- 25% multiple times/week
- 25% weekly

Fruit
- 33% multiple times weekly
- 33% weekly

Survey Results - Distributors

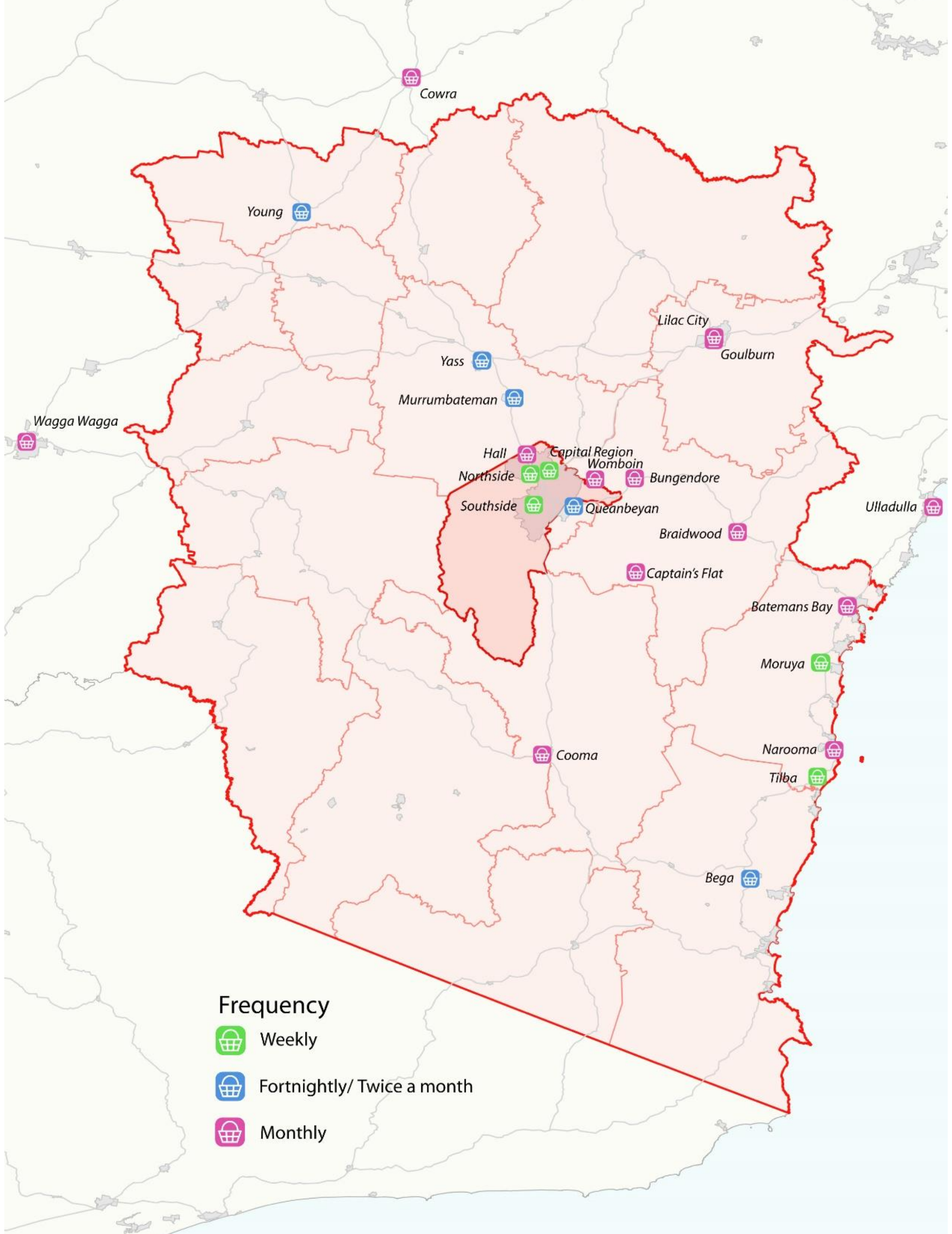
Distributors prefer to purchase produce weekly or more often:

Dairy
- 50% weekly

Bread
- 33% daily
- 33% multiple times weekly

Eggs
- 50% daily
- 25% weekly

Farmer’s Markets

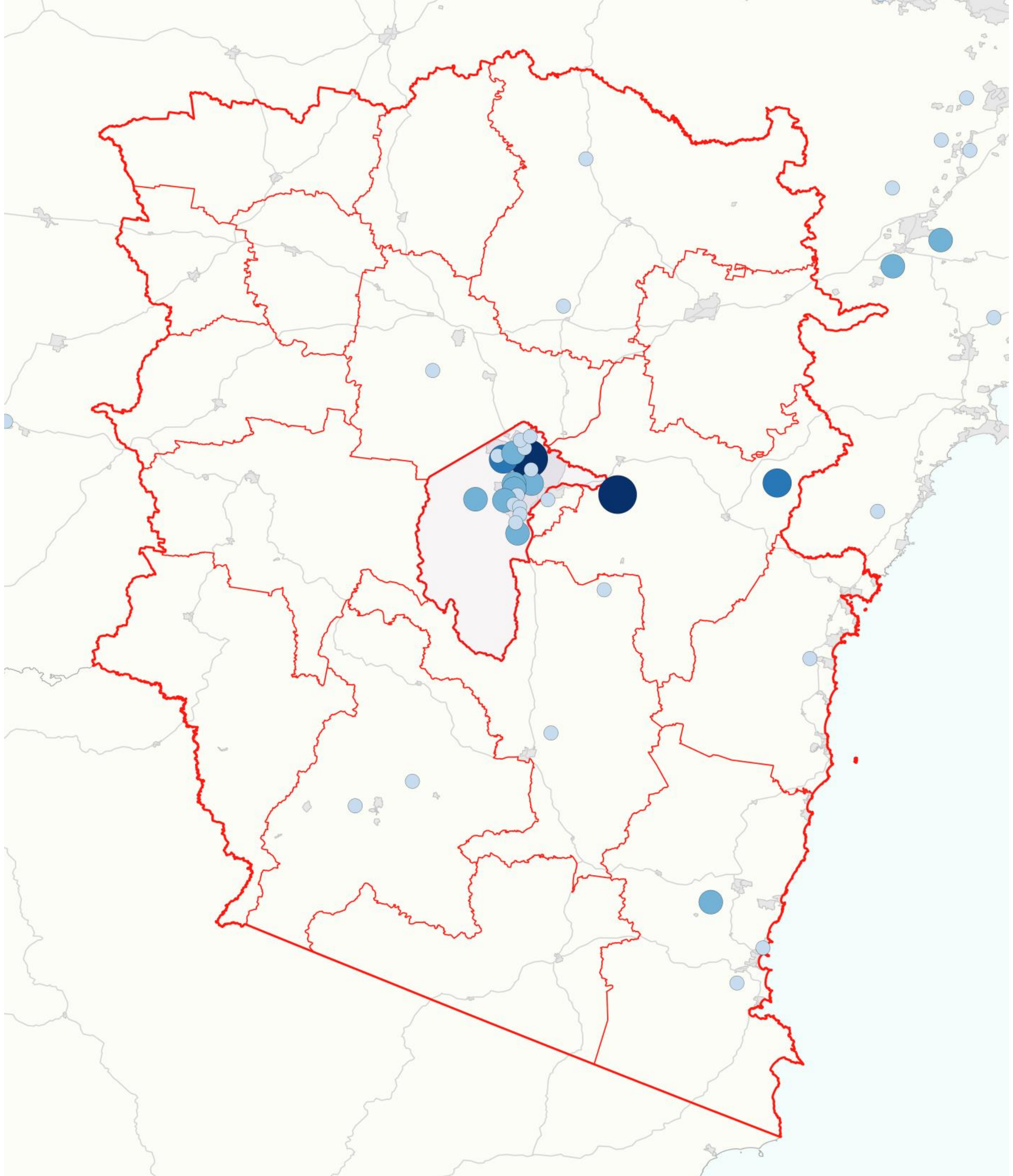


Consumers Survey

188 Respondents

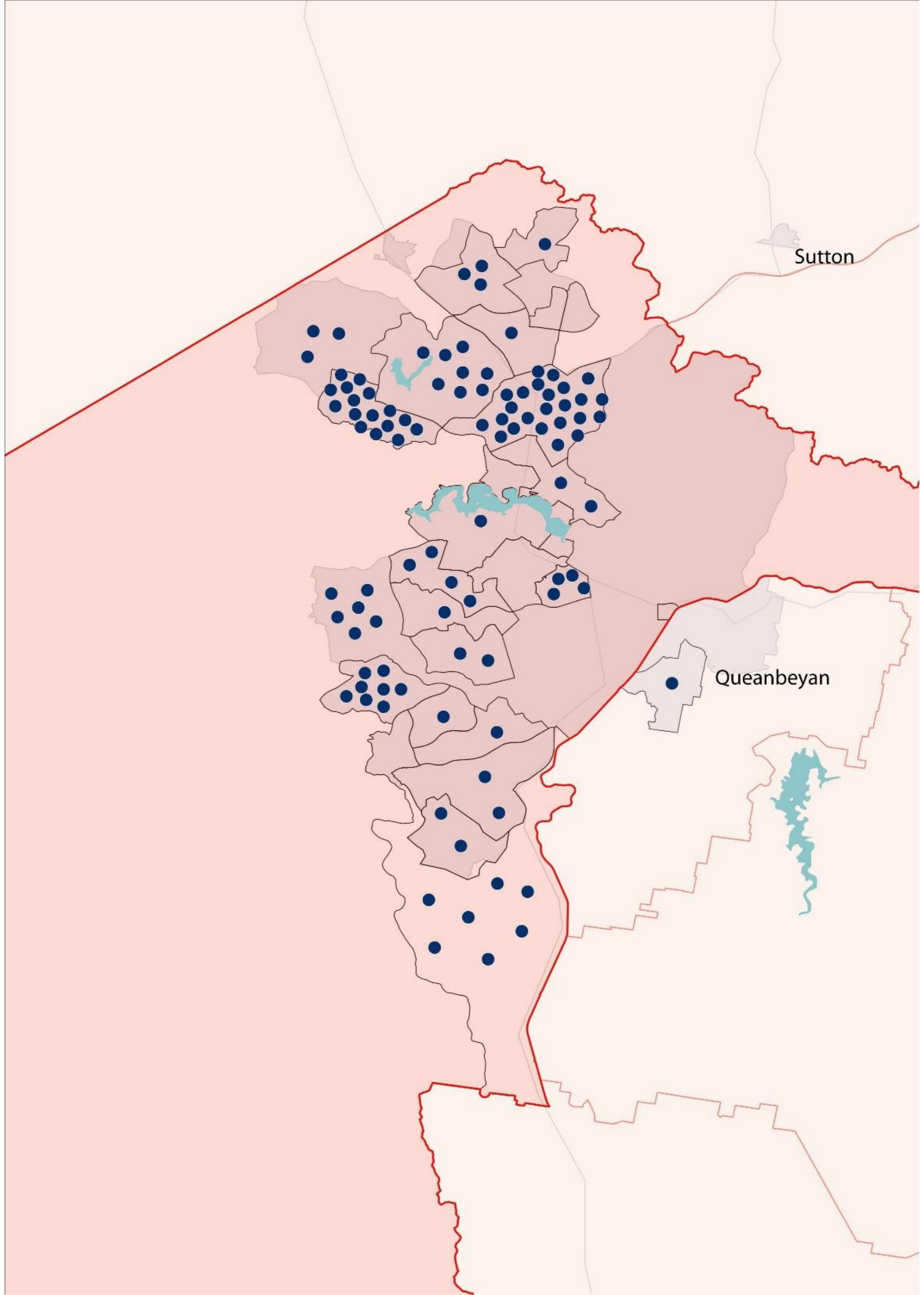
Number of respondents per location

1 - 3
4 - 8
9 - 16
17 - 24



Consumers Survey

Close Up - Canberra



Survey Results – Consumers

Most important things when sourcing food are:

- Fresh (76%)
- Sustainable (59%)
- Free range/pastured (58%)

Consumers purchases are spread relatively evenly across supermarkets, specialty stores and farmers markets.

Survey Results - Consumers

Consumers prefer to buy produce regularly.

More than once a week

- Meat 19%
- Vegetables 32%
- Fruit 32%
- Dairy 32%
- Bread 32%

Survey Results - Consumers

Consumers prefer to buy produce regularly.

Weekly

- Meat 39%
- Vegetables 50%
- Fruit 55%
- Dairy 50%
- Bread 35%
- Eggs 26%

Other products such as honey and value added are less frequently purchased.

Survey Results – Consumers

Consumers who purchase **none** of the following produce locally

- Beef 27%
- Lamb 30%
- Poultry 39%
- Seafood 51%
- Pork 44%
- Dairy 32%

Survey Results - Consumers

The predominant issue faced by consumers as brought out in comments is that **‘It’s not on the label**’ and **‘I do not know’**.

Survey Results – Consumers

Top 3 barriers to purchasing local food:

- Difficult to find (69%)
- I like to buy some food out of season (35%)
- Too expensive (34%)

Survey Results - Consumers

Most mentioned comments included:

- **Awareness/Access** – don’t know who local producers are
- **Labelling** - lack of identification of local food
- **Convenience/Distribution** - lack of retail outlets stocking food
- **Diversity** – seasonality and growing climate
- **Price** – too expensive, can’t compete with supermarkets

Survey Results – Consumers

Suggestions to improve local food economy

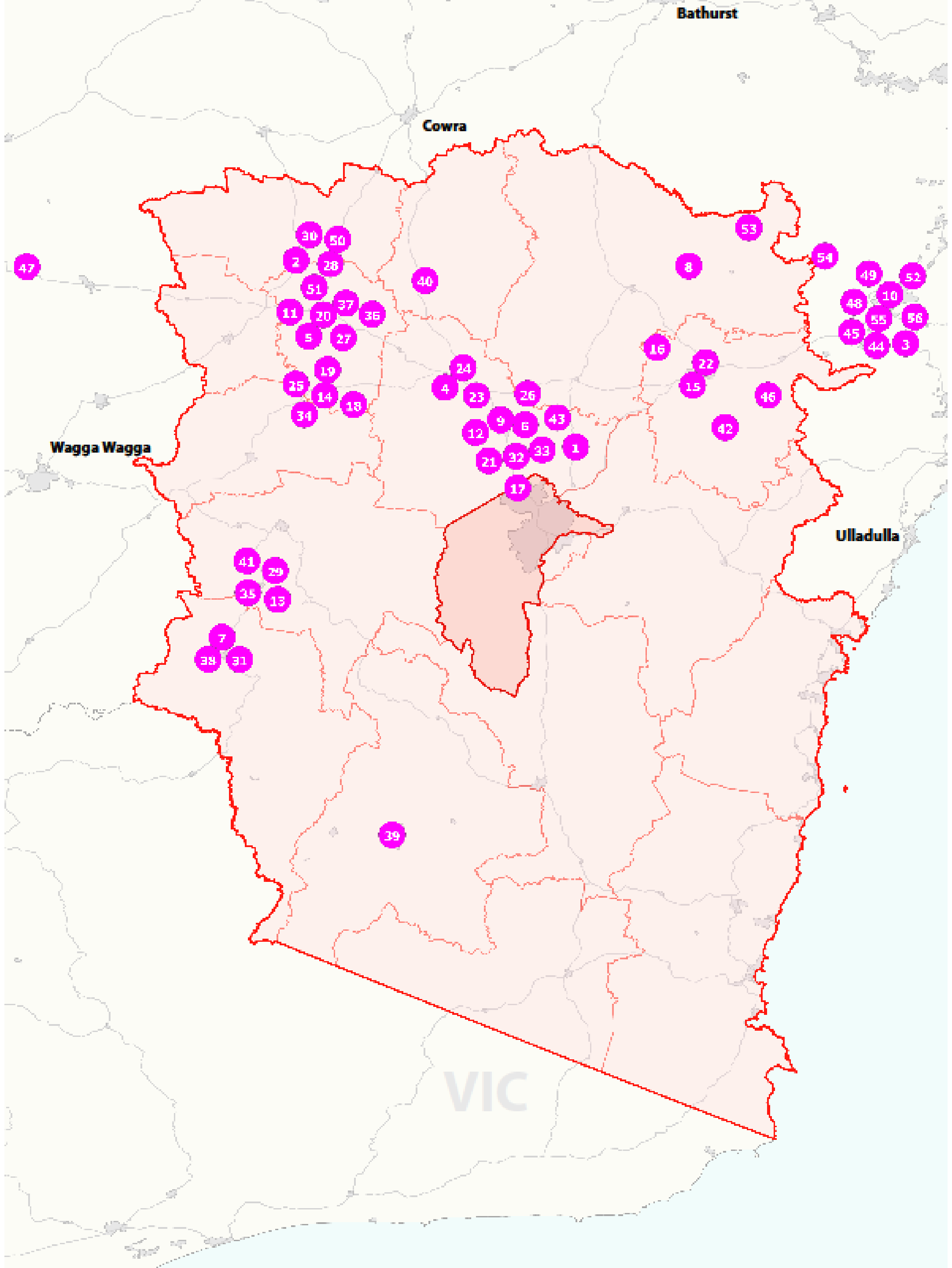
Most mentioned comments included:

- Information – linking producers and consumers
- Education – about local production, health, transport, economic benefits
- Access – more places to buy – food hubs, box schemes, markets
- Branding – identification and labelling

Southern NSW Harvest Association

Past and present Southern Harvest Members:

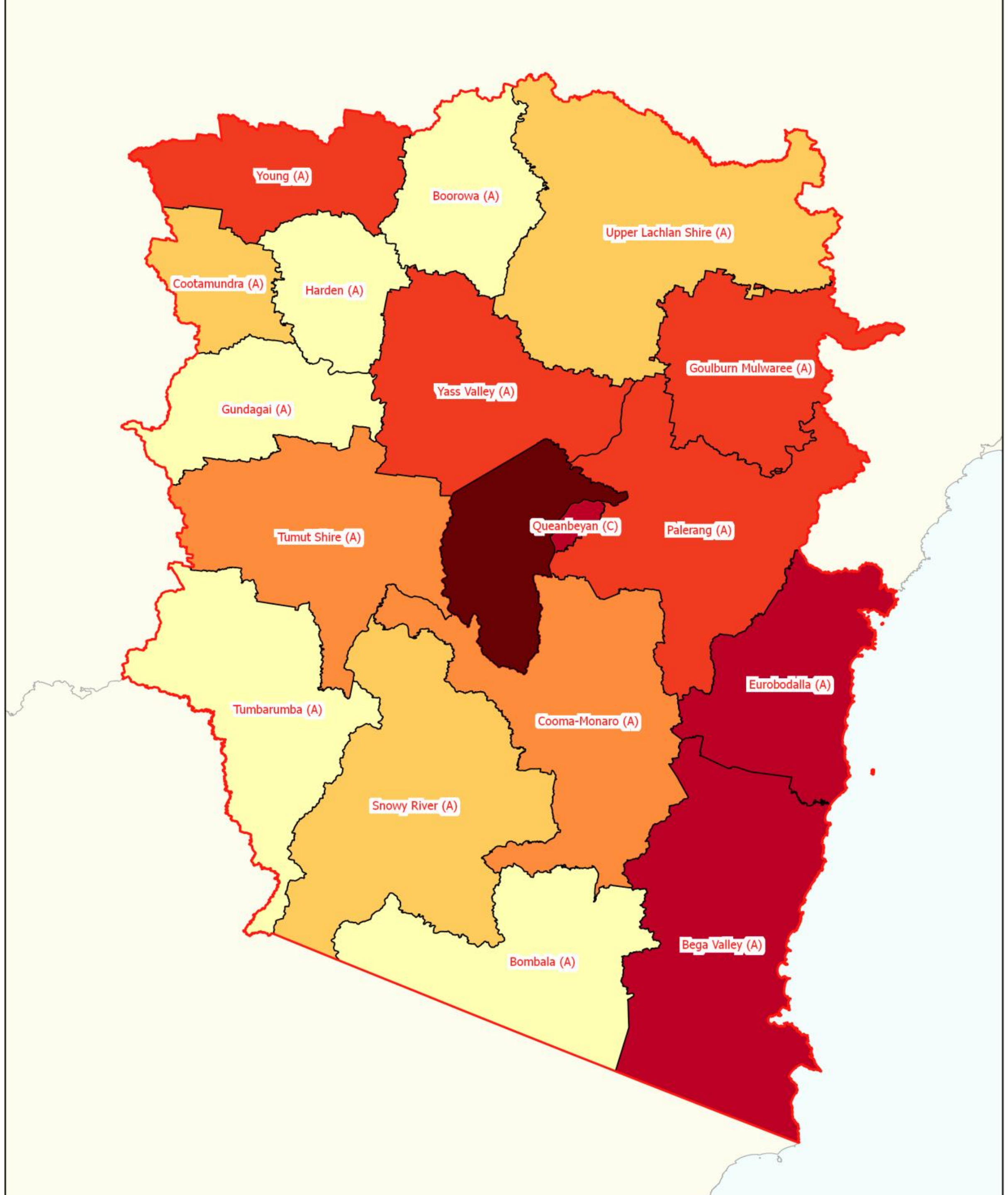
Accommodation
Cafes, restaurants
Cellar Door
Farmgate sales
Markets
Providores
Retail sales
Wholesale



Regional Expenditure

Estimated Market Size ($M)

- 0 - 5.5
- 5.5 - 11
- 11 - 17
- 17 - 36
- 36 - 55
- 400+



“Australian Capital Region presents an opportunity for local producers to participate in food supply chain worth in excess of $1Billion per year…”

Conclusions from Local Food Initiative Survey, June 2014

Where to from here?

We need to tell our regional food story:

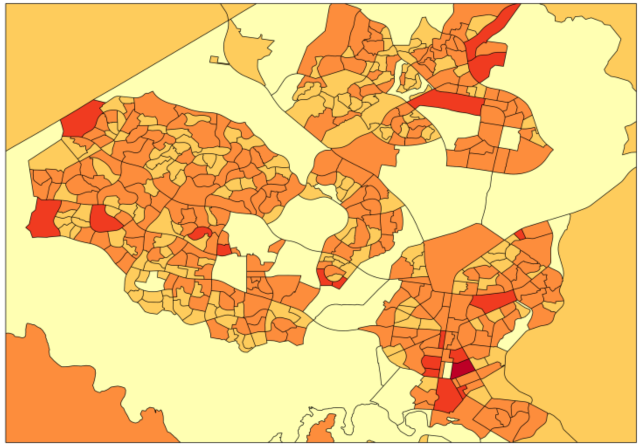
Step 1. Visit www.rdasi.org.au/foodhub

Step 2. If you haven’t completed the survey, please do so.

Step 3. Take a look at the community groups in your area, get involved.

Step 4. If you know others in the food chain please share the link with them.

Market estimate information down to local neighbourhoods…

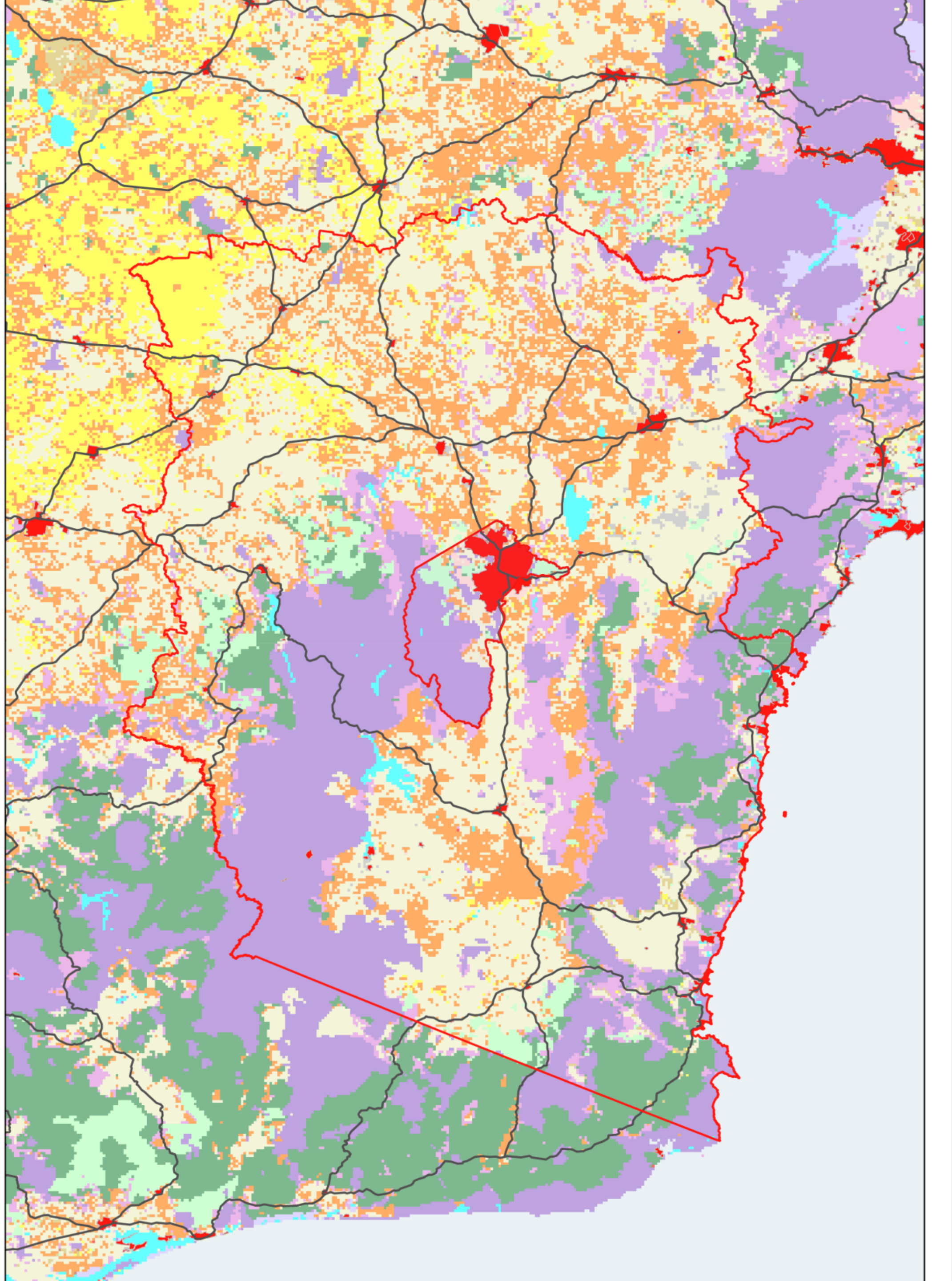


Australian Capital Region

Market size estimates for selected food categories

Food Category:	Surrounding LGAs	ACT	TOTAL:
Beer	$ 57,842,136	$ 84,664,658	$ 142,506,794
Fresh vegetables	$ 49,611,816	$ 72,617,779	$ 122,229,595
Fresh fruit	$ 44,140,262	$ 64,608,960	$ 108,749,222
Processed meat (including ham, bacon and sausages)	$ 39,450,360	$ 57,744,258	$ 97,194,618
Wine	$ 38,944,586	$ 57,003,947	$ 95,948,533
Bread	$ 32,139,629	$ 47,043,399	$ 79,183,028
Poultry	$ 23,495,494	$ 34,390,811	$ 57,886,305
Beef and veal	$ 22,346,008	$ 32,708,286	$ 55,054,294
Fruit and vegetable juice	$ 12,460,428	$ 18,238,571	$ 30,698,999
Mutton and lamb	$ 11,356,922	$ 16,623,347	$ 27,980,269
Pork (excluding bacon and ham)	$ 6,161,245	$ 9,018,334	$ 15,179,579
Fresh meat for animal food (including mince and bones)	$ 965,568	$ 1,413,321	$ 2,378,889
TOTAL:	**$ 338,914,452**	**$ 496,075,671**	**$ 834,990,123**

Land Use 2001-02



Ref: ASRIS. (2011). ASRIS – Australian Soil Resource Information System. Http://www.as

1 Degree

30 Minute

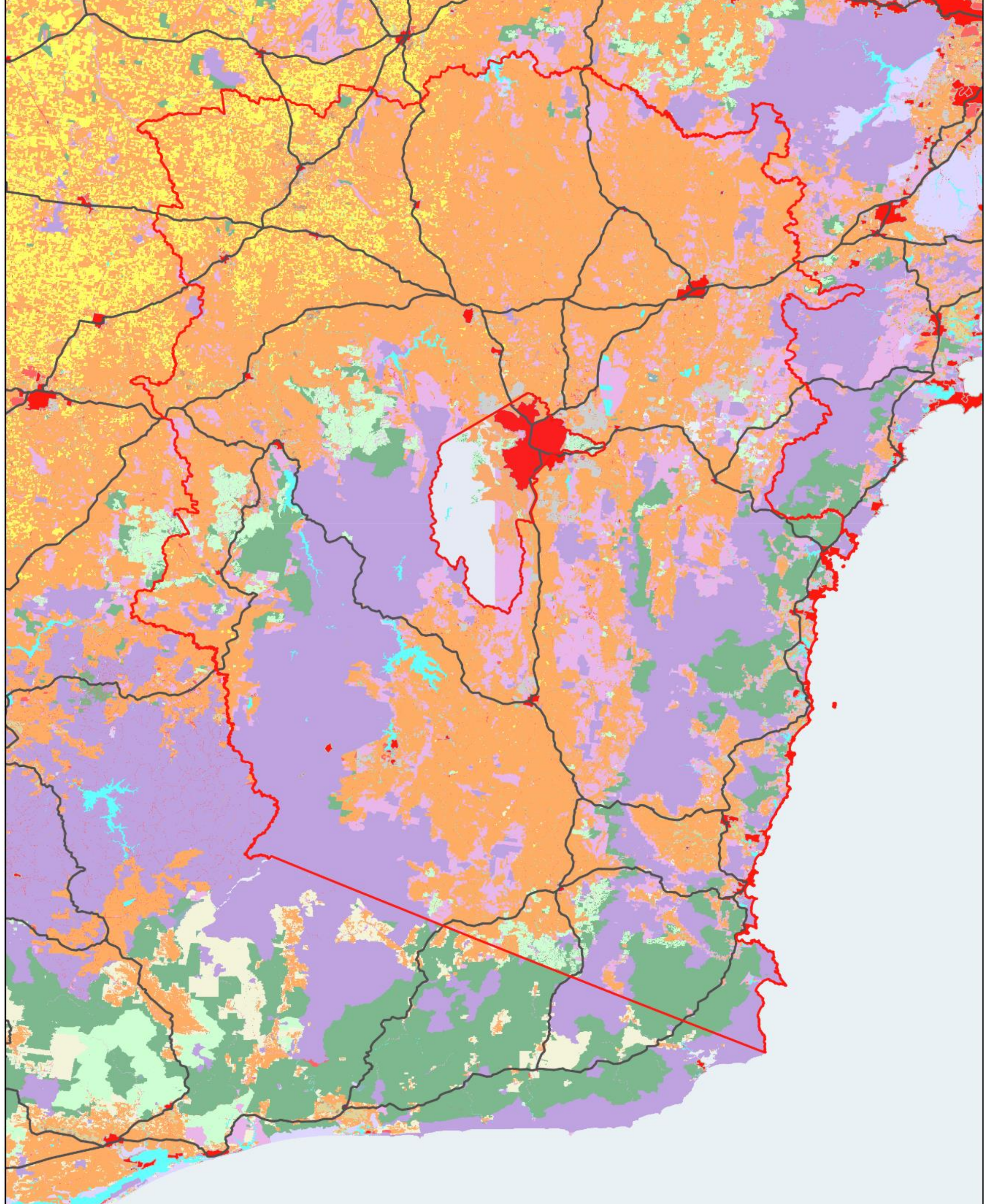
States and Territories

Roads (1:10M)

Land Use Catchment Scale

- 1 Nature conservation
- 2 Other protected areas (inc. indigenous uses)
- 3 Minimal use
- 4 Grazing natural vegetation
- 5 Production forestry
- 6 Plantation forestry
- 7 Grazing modified pastures
- 8 Dryland cropping
- 9 Dryland horticulture
- 10 Irrigated pastures and cropping
- 11 Irrigated horticulture
- 12 Intensive animal and plant production
- 13 Rural residential
- 14 Urban intensive uses
- 15 Mining and Waste
- 16 Water
- No Data

Base-Map



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