

SOUTHERN HIGHLANDS Agribusiness & Equine



INDUSTRIES Summary Plan for the Future

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BACKGROUND STATEMENT

The Agribusiness & Equine Industry Development Project was developed as a strategic response to industry needs identified by the Southern Highlands Key Stakeholders Group (SHKSG), Agribusiness & Equine Strategic Working Group (AESWG). Post drought, bushfires, and Covid-19, local farmers requested assistance to drive economic recovery outcomes and to build resilience for the future. With the strong link to agritourism and the visitor economy, Destination Sydney Surrounds South (DSSS) agreed to take on the critical role of Lead Agency for this pilot project, and to also be a funding partner. Wingecarribee Shire Council (WSC) was identified as an obvious project partner given the capacity of council to enable strategic outcomes through planning. WSC had demonstrated a clear commitment to supporting farmers after developing, with industry engagement and collaboration, a proactive Rural Tourism Policy. WSC also agreed to be a funding partner. With DSSS as Lead Agency, in collaboration with WSC, and SHKSG, the Southern Highlands Agribusiness and Equine industry Development Project, Phase 1 (12 months), commenced in July 2020. The project focussed on engaging with farmers (growers and producers) and other stakeholders to identify actions (strategies) and projects that could be implemented to drive financial viability and to futureproof the sectors, including encouraging diversification into agritourism to supplement traditional farming income. Long term resilience can also be achieved by assisting farmers to embrace innovation, sustainability, and best practice farming including landscape regeneration, reducing carbon emissions, producing nutritious food, and maximising yield. An important outcome for residents, visitors, and the regional economy is that supporting working farms to remain viable preserves the 'green between' towns and villages, which is the essence of a rural ambience and a point of difference for the Southern Highlands as a destination, uniquely located within 90 minutes of three international airports in 2026.

ACKNOWLEDGEMENT OF FUNDING

<< WSC to provide >>

Thank you to farmers (growers and producers), industry body representatives, agribusiness and equine sector operators, stakeholders, community members, and government agency representatives, who attended workshops and consultation events, invested time in carrying out surveys and/or participated in direct interviews with the Project Team during the 12 months, Phase 1 of the Project.

DISCLAIMER

<< WSC to provide >>

PROJECT FOREWORD

<< Hugh to provide >>

Southern Highlands Agribusiness and Equine Industry Development Project

I am proud to introduce this report, a summary of a key aspect of the substantial work undertaken as part of the **Southern Highlands Agribusiness and Equine Industry Development Project**. On the back of significant disruption to industry including many years of drought, the 2019/2020 bushfires, and from March 2020 the emergence of Covid-19, there was a critical need to scope out and implement a project to help develop a clear vision, build resilience, and action opportunities to stimulate economic recovery for the agribusiness and equine sectors.

Scoping began with industry insisting that this project be focused on actions and outcomes, unlike past strategic documents that were not implemented. The NSW Government Wingecarribee Regional Economic Development Strategy 2018 – 2022 correctly identified priorities such as the significance of Beef Cattle Farming, Horse Farming, Dairy Cattle Farming, high quality fresh horticultural produce, “a growing opportunity to service and value add this produce locally, grow the cool climate wine, distilling and brewing sectors...Facilitate the development of agriculture as a key strength and specialisation and grow the visitor economy based on food, wine and events.”, “Agricultural Infrastructure including ‘fit for purpose’ marketing and transport infrastructure...Create an equestrian facility in the Wingecarribee region.”, “Secure the future of relevant agricultural infrastructure such as the Moss Vale Saleyards”, and “Develop a plan for long term collaboration between the University Of Wollongong (UOW) and TAFE Illawarra, Moss Vale Campus.”

In my capacity as Co-Chair, with Brigid Kennedy, of the Southern Highlands Key Stakeholders Group, Agribusiness and Equine Strategic Working Group, I would like to acknowledge that the deliverables associated with Phase 1 of this project were only possible due to collaboration with, and funding support from, Destination Sydney Surrounds South (DSSS) and Wingecarribee Shire Council, and positive engagement with the local community including farmers. This was an important project and not a job for a volunteer. The joint funding allowed for Bridie George to be recruited and appointed to the contract role of Agribusiness and Equine Industry Development Coordinator to facilitate on the ground activation during the first 12 months phase of the project. Thank you Bridie for your experience, professional approach, and passion, that successfully drove things forward during extremely challenging times for industry. Hopefully, this pilot project will benefit other regions. The UTS Sydney Food Futures study identified that due to urban sprawl the Greater Sydney basin would lose up to 60% of its fresh food production by 2031. Wingecarribee Local Government Area (LGA) had the greatest potential to increase fresh food production, by more than one million tonnes a year, of all LGAs in the Greater Sydney basin, providing there was a strategic intervention to support agriculture. The next three LGAs with the highest potential to increase agricultural production, up to one million tonnes a year, are Wollondilly, Shoalhaven, and Hawkesbury. Three of the top four LGAs for growth potential (excluding Hawkesbury) are located within the DSSS territory.

It is a strategic advantage to a destination if a framework is in place that enables agribusiness and equine operators, who are committed to innovation and sustainability, to easily diversify into agritourism. Industry commends Wingecarribee Shire Council for the outstanding collaboration and engagement, led by their planning team, that developed a proactive Rural Tourism Policy. Work related to this project also included advocacy for changes to planning at a state level including the incorporation of agritourism definitions and land uses into the NSW Standard Instrument. Supporting these sectors to thrive delivers outcomes such as up-skilling staff, raising awareness of and creating opportunities around education linked to best practice farming, landscape regeneration including traditional indigenous land management methods, reducing carbon emissions, aspiring to achieve a circular economy, jobs growth, and food security. Agritourism is an integral part of the visitor economy in rural areas. The long supply chain of the visitor economy is a major embedded component of an overall regional economy. This project identified, through engagement and collaboration with stakeholders, opportunities for industry to attract investment and leverage and support game changing economic development outcomes. Industry is delighted to welcome Racing NSW to the Southern Highlands, establishing their presence with the intent to provide world-class thoroughbred training.

The value of collaboration facilitated through this project cannot be underestimated. New strategic alliances have been formed and these will accelerate the disaster recovery process, especially economic recovery. Many thanks to the

numerous people who have contributed to, and continue to actively support, this project.

The right structure is required to continue achieving goals and leave a meaningful legacy for the Southern Highlands, such as establishing a premium quality Southern Highlands produce brand.

This is the beginning. There is much more work to be done. Let's make it happen!

Hugh Clarke

Farmer

Director, Destination Sydney Surrounds South

Co-Chair, Southern Highlands Key Stakeholders Group, Agribusiness and Equine Strategic Working Group

GLOSSARY OF ORGANISATION ABBREVIATIONS

DPIE – Department of Planning, Industry and Environment (NSW)

DPI – Department of Primary Industries (NSW)

DSH – Destination Southern Highlands

DSSS – Destination Sydney Surrounds South

SHKSG – Southern Highlands Key Stakeholders Group

SNSWDRAIH – Southern NSW Drought Resilience Adoption and Innovation Hub

WSC – Wingecarribee Shire Council

Executive Summary

The Southern Highlands, in regional NSW, is a popular destination with a rural ambience. Three towns and more than forty villages, each with its own character, are surrounded by working farms, wineries, nature reserves and National Parks. The Wingecarribee River meanders east to west, and there are several lakes and reservoirs, across the Shire. The main arterial route between Sydney and Canberra, the Hume Motorway, runs north to south through the centre of the Shire. Attractions include Fitzroy Falls, villages, shops, antiques, galleries, wineries, cafes and restaurants, Bradman Museum, and Illawarra Fly. The scenic landscape features lush green rolling hills. The fertile land is well suited to supporting growth in the agribusiness, equine, and agritourism industries. In 2026 the region will be uniquely positioned in the centre of three international airports.

The agribusiness, equine, and agritourism sectors, and the associated supply chains, have been impacted by a prolonged drought compounded by bushfires and Covid-19. Industry determined that a project was urgently required to implement meaningful actions and establish a roadmap to drive economic recovery and build future resilience. When scoping this Agribusiness & Equine Industry Development Project the most relevant existing document identified, prepared by the NSW Government, was the Wingecarribee Regional Economic Development Strategy 2018 – 2022. A solid vision is articulated for the Southern Highlands. Unfortunately, there was no implementation. It remains valid, recognising the significance of beef cattle, horse, and dairy cattle, farming, high quality fresh horticultural produce, and “a growing opportunity to service and value add this produce locally, grow the cool climate wine, distilling and brewing sectors.” An opportunity exists to facilitate “the development of agriculture as a key strength and specialisation and grow the visitor economy based on food, wine and events.” Agricultural infrastructure ‘fit for purpose’ includes creating “an equestrian facility in the Wingecarribee region” and securing the future of the Moss Vale Saleyards. The critical role of skills training and education is identified “Develop a plan for long term collaboration between the University Of Wollongong (UOW) and TAFE Illawarra, Moss Vale Campus.”

Phase 1 of this project, 12 months, facilitated engagement and collaboration among relevant stakeholders, industry, community, and all tiers of government, and maintained an outcomes focus.

Gross Regional Product (GRP) could be boosted by \$520 million a year by 2030 if proposed projects are implemented. Demand continues to grow for agritourism and immersive food experiences, and consumers are increasingly interested in food traceability. Industry needs to leverage enabling policies such as Wingecarribee Shire Council’s Rural Tourism Policy, the development of an Agricultural Land Use Plan, and the NSW Government’s Right to Farm Policy. Producers need support to diversify income streams and build resilience. Futureproofing businesses through sustainability mitigates the impact of otherwise disruptive events. The creation of a Southern Highlands quality produce brand could help extract a premium value and commence with beef as a pilot. An Agribusiness Hub, fostering best practice sustainable farming, combined with a Food Sustainability project, on a greenfield site, could increase GRP by \$250 million a year, and create 150 new full time equivalent (FTE) sustainable jobs.

The growing thoroughbred industry, with a strong presence of performance horse disciplines, is a platform to position the Southern Highlands as a world leader in equine excellence - thoroughbred training and high performance. That would boost the strategic positioning of NSW. The Southern Highlands working collectively with other leading equine regions could position NSW to be a world leader in equine. This would enhance what is already a multi-billion-dollar sector. Product development could include ‘equitourism’ as a new and distinct aspect of agritourism. Integrating equine activities with luxury tourism is a potential growth area that would further strengthen the local visitor economy and assist operators to diversify. Establishing a Southern Highlands Equine Centre of Excellence could boost GRP by \$25 million a year and create 15+ new FTE sustainable jobs. The centre would align well with a world-class Thoroughbred Training Hub, which could add a further \$225 million to GRP a year and create 150+ new FTE jobs.

Across the agribusiness, equine, and agritourism industries there is an immediate need to partner with TAFE, universities, and other education providers to facilitate practical training and professional work placements for students to equip them with the hands-on, skills-based, training needed to competently enter industry employment. The region could emerge as a leader in practical (vocational) training and build on the education tourism market. Activating existing assets to support jobs creation will build economic resilience. Creating a Southern Highlands Agribusiness & Equine Education Precinct would further boost GRP by \$20 million a year by 2030 and create 15 new FTE sustainable jobs.

Swift action is required to drive outcomes that maximise the potential of these key opportunities.

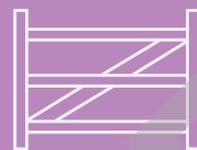
Southern Highlands Equine Industry Snapshot

\$7.4M direct value added
\$7.5M indirect value added
\$15M total value added



200 total equine properties
\$2.5M median value
\$500M total value

54 direct jobs (FTE)
46 indirect jobs (FTE)
100 total jobs



25 specialist thoroughbred properties
\$6M median value
\$150M total value



8 top equestrian assets in the region
\$100M combined value



\$30M combined value of community owned assets that support equestrian activities (showgrounds & Bong Bong racecourse)



Thoroughbred Industry

721 broodmares covered
491 live foals

(AgriFutures Thoroughbred Horses - Measurement of Economic Impact of the Australian Thoroughbred Breeding Industry)

162 yearlings offered for sale in 2021
 96 yearlings offered in 2017 (70% increase)

\$25M total value of yearlings sold in 2021
\$11M total value for sales in 2017 (130% increase)

Figures are based on estimates for the Southern Highlands region

Southern Highlands Agribusiness Industry Snapshot

agriculture, forestry & fishing **4th largest industry** in the region

546 businesses (9.3% of local businesses)

employing **655 people** (3.7% of local workforce)*

incl. 456 sole traders

90 businesses employing between 1-19 staff

**Economy.id (based on 2016 census data)*



50,000ha total productive agricultural land

\$35,000/ha median value

\$1.75B total land value

30% agricultural land currently underutilised



\$42M gross value of food focused agricultural goods



\$23M slaughtered livestock (beef, poultry, sheep, pigs)

incl. **\$15.2M** beef production and **\$7.7M** poultry meat



\$2.1M potato production (4,000 mt/yr)

\$1.4M other fruit, vegetables & grapes

\$377k egg production

(Agrology from 3.75.5.1 SH RPH Feasibility Study_Draft_20210505.

Using Census data, Value of Agricultural Commodities Produced - NSW and LGAs 2015-2016)



15 cellar doors, **7** wineries

31 growers producing

600 tonnes of fruit across **140 hectares**

(NSW Wine Industry Association)

Agribusiness Industry SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • The Southern Highlands is ideally suited to agriculture, cool temperate climate (700m elevation) and rich volcanic soils. • The UTS Sydney Food Futures study identified the Wingecarribee Shire as the number one Local Government Area in the Greater Sydney basin for potential to increase fresh food production, by more than 1 million tonnes a year. • Strong desire from residents and visitors for the region to maintain its agricultural heritage, local agricultural shows, award winning producers, and food and wine events are well supported. • Conveniently located on the Hume Motorway, the main arterial route between Sydney and Canberra and Melbourne, with access to international airports (a third airport in 2026). • Covid-19 has motivated city dwellers to want to relocate to rural areas for a lifestyle change, greater interest in fresh produce, food traceability, and food security, increased investment in the region, and greater interest in agritourism. • Landowners and managers that are practitioners of regenerative and sustainable farming practices are creating boutique branding and provenance opportunities. • Increasing number of landowners building quality beef cattle herds and engaged in creating a regional boutique beef brand. • Maintaining working farms is the most efficient method of preserving the ‘green between’ townships and villages and rural character and appeal of the Southern Highlands. 	<ul style="list-style-type: none"> • Greater demand for land and facilitating population growth through residential developments (urban sprawl) has significantly increased land and property prices motivating some farmers to sell agricultural land thereby reducing production capacity. • The UTS Sydney Food Futures study identified that if urban sprawl continues at its current rate, without a strategic intervention to support agriculture, by 2031 60% of the fresh food production capacity of the Greater Sydney basin would be lost. • Lack of a skilled and practically trained local agribusiness and on-farm workforce to support business expansion and growth. • The increasing number of smaller, less productive, agricultural land parcels are often acquired by absentee landowners. • Some members of the community seek to influence Council to oppose development applications to expand or progress agricultural operations and production, such as large sheds, buildings and intensive production infrastructure, claiming visual impact on the landscape. • A perceived difficulty in dealing with Council in relation to development applications and community consultation. • Lack of a current structure to lead the opportunity to create a premium, regional, boutique, Southern Highlands beef and produce brand. • No formal structure, adequately resourced, to act as an Agribusiness Industry Advisory Committee/Group to provide ongoing input and feedback to government.
Opportunities	Threats
<ul style="list-style-type: none"> • Implement a strategic intervention to support best practice, sustainable, agriculture including landscape regeneration. • Create an Agribusiness Toolkit for new and existing landowners and agribusiness operators, including a roadmap to diversify and leverage the Rural Tourism Policy (recommended inclusions are contained in this document). • Leverage maintaining working farms as a destination point of difference to boost agritourism and the visitor economy. • Establish demand for premium fresh produce in the population centres of Canberra and Sydney, collaborate on large-scale agribusiness projects such as a Produce Hub (processing to extend shelf-life of produce) or an Agrifood Hub. • Leverage the proximity to Sydney and Canberra airports, and Western Sydney Airport in 2026, by engaging with supply chain and logistics stakeholders to activate export-ready, premium pricing opportunities for producers. • Facilitate collaboration among beef cattle farmers to pilot the development of a premium, boutique, Southern Highlands produce brand. • Development of an Equine and Agribusiness Precinct, collaborate with Racing NSW, to support education, jobs, innovation, sustainability, and a circular economy. • Develop an Agricultural Land Use Plan with definitions, including agritourism, to resolve land use conflicts and support industry development and growth by maintaining existing farmland, clarifying a landowner’s individual rights. • Work with the State Government on the Right to Farm Policy, focussing on securing suitable outcomes for Peri Urban areas. 	<ul style="list-style-type: none"> • The increasing prices for land, and new house and land packages, continue to trigger the sale of farmland to developers. • Loss of agricultural productive capacity due to farmers determining the risks and often low profit margins associated with traditional farming are too great and sell. • Climate change and adverse weather events, such as drought, bushfires, and flooding, without mitigation, trigger an exit of farmers from the sector. • Farmers forced to scale-down, or delay growth and expansion, due to a lack of locally available skilled staff. • Subdivision of farms and sales of smaller lots resulting in absentee landowners not utilising their productive capacity. • Lost opportunities due to a disconnect between stakeholders, without facilitation and leadership no collaborative engagement to drive projects and outcomes. • Failure to drive economic development due to a communication or relationship breakdown between industry and Council. • Rural land use conflicts stifling growth - expectations of a rural lifestyle from new residents not reconciling with the practical needs of farmers. • Residents not understanding what practical expansion of agricultural operations entails, which maintains working farms and preserves the ‘green between’, and objections to applications triggering further sales of farms. • Ageing agricultural workforce not being replaced. • Not securing the future of relevant agricultural infrastructure such as the Moss Vale Saleyards.

Agribusiness Industry Gap Analysis

MAINTAIN WORKING FARMS AND PRESERVE THE “GREEN BETWEEN” TOWNS AND VILLAGES

Focus Area: Maintain working farms with an increased focus on innovative and sustainable agricultural production and achieve the highly desirable community outcome of preserving the “green between” towns and villages.

Current State: Approximately 300 working farms in Wingecarribee and Shoalhaven (ABS combines the LGAs), and many smaller hobby farms, with a risk of more farm land being sold to developers, or, scaling back of production.

Desired Future State: Increase, or at the very least maintain, the current area of land being used for agricultural production - working farms. Assist farmers to achieve economic viability and to build resilience through embracing innovation and sustainability. Implement a strategic intervention to support agriculture and increase production, yield, and profitability. Best practice agricultural production to be recognised as the preferred method of preserving the ‘green between’ towns and villages. Preserving the agricultural heritage of the region, and maintaining a fresh food production capacity, should be valued above unabated urban sprawl. Population growth can be facilitated without simply surrendering farmland to become poorly designed urban residential developments.

Gap	Proposed Actions	Collaborators
1. Seasonal variations in production levels and farm income exacerbated by recent adverse events such as extended drought conditions and bushfires. Additionally, the high price of land affects the feasibility of agricultural production in terms of opportunity cost or cost benefit analysis.	<p>a. Implement education and support programmes to encourage landowners and land managers to embrace innovation, sustainability, and best practice farming including:</p> <ul style="list-style-type: none"> • drought mitigation methods • landscape regeneration • innovative and sustainable agricultural practices, • on-farm diversification and agritourism • value adding and extraction • specialty and niche commodities (premium quality/price) • promote these initiatives through strong industry engagement, and stakeholder organisations encouraging participation 	Industry, Southern Highlands Key Stakeholders Group (SHKSG) Agribusiness & Equine Strategic Working Group (AESWG), NSW Farmers, Department of Primary Industries (DPI), Local Land Services (LLS), Wingecarribee Shire Council (WSC), University of Wollongong (UOW), TAFE, Charles Sturt University (CSU), WinZero, Southern NSW Drought Resilience Adoption and Innovation Hub (SNSWDRAIH)
2. Current lack of a centralised Southern Highlands Produce Hub or brand, and related value-add integrated supply chain, to support extracting value such as identifying premium markets and distribution and processing to extend perishability (shelf-life).	<p>a. Establish an industry led Produce Hub, including innovative methods to aggregate and value-add to local produce, and after identifying potential sources of establishment funding transition the Produce Hub to being market oriented and self sustaining.</p> <p>b. Establish a premium Southern Highlands produce brand, based on products meeting quality assurance benchmarks.</p> <p>c. Assist producers with the transition to market oriented premium products, including export-ready, and activate distribution and supply chain opportunities including the Canberra and Sydney markets and three international airports, Western Sydney from 2026.</p>	Industry, SHKSG AESWG, NSW Farmers, DPI, WSC, WinZero, UOW, CSU, SNSWDRAIH, Regional Development Australia ACT (RDAACT) Agrifood Hub, Regional Development Australia Southern Inland (RDASI)
3. Difficulties faced by employers in attracting experienced, cost-effective labour solutions to support operations and growth.	<p>a. Work with TAFE NSW Moss Vale, Training Services NSW, other relevant Registered Training Organisations (RTOs), and industry to form a centralised on-farm contract labour-hire pool.</p> <p>b. Continue to work with TAFE NSW on offering Short Courses across the Agribusiness & Equine Skillspoint that cater to current industry skills needs and labour shortages, and work with TAFE, UOW and CSU to develop and deliver additional qualifications as required.</p>	Industry, SHKSG AESWG, TAFE, Training Services NSW, UOW, CSU, SNSWDRAIH
4. Land use conflicts including differing expectations between some residents and farmers on land use policy and activities undertaken on rural land.	<p>a. Work with the NSW Government and the Agriculture Commissioner (DPI) to create an effective Agricultural Land Use Planning Strategy and develop effective Development Control Plans, policies and subsequent LEP interpretations that allow for the preservation of rural land for agricultural production, while maintaining a high quality of character and amenity for both farmers, residents, and visitors.</p>	WSC, Industry, SHKSG AESWG, Destination Sydney Surrounds South (DSSS), Department of Planning, Industry and Environment (DPIE), DPI, NSW Farmers

Agribusiness Industry Gap Analysis CONTINUED

DIVERSIFICATION THROUGH AGRITOURISM

Focus Area: Encourage diversification of farming income streams to increase resilience, and champion agritourism activities.

Current State: Currently some landowners and agribusiness industry operators have diversified income streams, including agritourism initiatives. Others rely solely on production of one to two agricultural commodities, with income being heavily concentrated around harvest or stock sale time. They are highly susceptible to adverse events such as extended droughts, floods, bushfires, and Covid-19.

Desired Future State: Agribusiness sector operators and rural landowners access a toolkit and resources, supported by an Agribusiness Hub that provides information and resources on diversification into agritourism and processes to extract premium value for locally produced commodities, specialty food, beverage products, and fresh and value-added produce. This will mitigate the risk associated with singular income streams and susceptibility to disruption events such as extended droughts, floods, bushfires, and Covid-19.

Gap	Proposed Actions	Collaborators
1. Current planning issues around development and restrictions on agritourism activities, hospitality, events, and retail activities on rural land, particularly in the RU1, RU2, and E3, zones, including limitations of the template LEP and interpretations of policy makers at State Government level. Operators required to satisfy Council's planning controls regarding approval for agritourism activities and events, which may see significant changes required to be made for occasional or one-off events (e.g. traffic management, parking, disabled access).	<p>a. WSC has collaborated with industry to develop a proactive Rural Tourism Policy. DSSS and SHKSG have advocated on behalf of industry for 'Produce Door Premises' and/or agritourism definitions and land uses to be recognised in the NSW Standard Instrument. Further collaboration is required to champion and roll-out information, planning changes, and support, for agritourism to industry operators e.g. activities such as farm tours, farmstays, farm gate, roadside stalls, and produce door premises.</p> <p>b. Facilitate industry providing feedback and insights to Council's Planning Department from regarding 'on the ground' requirements to apply new agritourism definitions and land uses. Communicate key approval issues/requirements and seek practical solutions that encourage industry development and economic growth.</p> <p>c. Council to review LEP and other planning controls following insertion of new definitions and land uses in the NSW Standard Instrument.</p>	Wingecarribee Shire Council (WSC), Industry, Southern Highlands Key Stakeholders Group (SHKSG) Agribusiness & Equine Strategic Working Group (AESWR), Destination Sydney Surrounds South (DSSS), Department of Planning, Industry and Environment (DPIE), Destination NSW (DNSW), Australian Regional Tourism (ART)
2. Some agritourism businesses and landowners are not confident or proficient in managing agritourism including online content (e.g. ATDW), using accommodation and tour distribution platforms (e.g. Get Connected and AirBnb), or ecommerce website modules, and see the task of managing content, inventory, distribution, and promotion, as challenging.	<p>a. Collate any existing toolkits and resources from industry organisations such as DNSW, DSSS, ART and AirBnb and create an Agribusiness Toolkit relevant to the Southern Highlands.</p> <p>b. Promote already available free, and low-cost, business advice and support services, to assist agribusiness and agritourism operators to access resources and to develop a contemporary and relevant business plan, such as DNSW, ART, ASBAS Digital (Aust. Gov.), Entrepreneurship Facilitators (Aust. Gov.), Business Connect (NSW Gov.), Service NSW, and BDCU Entrepreneurship Program.</p>	DSSS, DNSW, ART, Southern Region Business Enterprise Centre (SRBEC) – which delivers the business advisor programmes ASBAS Digital, Business Connect, and Entrepreneurship Facilitators

Agribusiness Industry Gap Analysis CONTINUED

SOUTHERN HIGHLANDS PRODUCE BRAND (BEEF PILOT)

Focus Area: Develop a premium, regional, boutique, Southern Highlands produce brand, and supply chain and distribution network, commencing with a pilot project to support beef producers.

Current State: There are local beef producers, ranging from small to large herds, who have expressed interest in participating in the creation of an industry-led premium Southern Highlands produce brand. Beef producers are keen to collaborate and participate in a brand development and distribution programme because they accept that focussing resources and leveraging economies of scale will deliver outcomes that far exceed what a sole operator can achieve. According to the Australian Bureau of Statistics (2020) there were 117 Beef Cattle Farms in the combined Local Government Areas of Wingecarribee and Shoalhaven during FY 2018-2019.

Desired Future State: To implement the creation of a premium Southern Highlands produce brand, including sustainability, accreditation, quality assurance, branding, and establishing a supply chain and distribution network. The establishment of a Produce Hub. Outcomes will include increased yields, higher margins, and greater profitability. Currently, beef producers do not have shared access to support and an established processing chain including abattoir services. Commencing with beef producers, providing their products meet the quality specifications, there will be greater awareness of the destination and new experiences to attract visitors. A Southern Highlands produce brand would boost agritourism, the visitor economy, and benefit operators in the long supply chain.

Gap	Proposed Actions	Collaborators
1. Absence of an operational abattoir in the region, with the closest viable option for beef being located at Cowra, which poses supply chain efficiency issues.	a. Establish a producer-backed mobile abattoir and on-farm butchery solution to streamline processing and increase margins. At the time of project implementation compare the feasibility (with a 3 year projection) of using existing mobile abattoir services or creating a new producer-funded cooperative structure for a local abattoir vehicle – and adopt the most cost-effective. Include input from Meat & Livestock Australia (MLA) and Australian Meat Industry Council (AMIC).	Industry, Southern Highlands Key Stakeholders Group (SHKSG) Agribusiness & Equine Strategic Working Group (AESWR), Wingecarribee Shire Council (WSC)
2. The Southern Highlands is not exploiting the growing market for fresh, premium quality, traceable food, and does not have a premium Southern Highlands produce brand. There is little to no coordination of collaboration among beef producers.	a. Facilitate producers improving performance by accessing resources and education programmes through industry bodies such as MLA and AMIC. b. Form a Southern Highlands Beef Industry Development Steering Group and invite representatives from key industry organisations such as MLA, AMIC and NSW Farmers. c. Collaborate with Regional Development Australia ACT (RDACT) Agrifood Hub and Regional Development Australia Southern Inland (RDASI) to activate consumer supply opportunities.	Industry, SHKSG AESWG, MLA, AMIC, NSW Farmers, RDACT, RDASI



Equine Industry SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • The Southern Highlands is suitable for breeding and developing elite bloodstock. • Conveniently located on the Hume Motorway, the main arterial route between Sydney and Canberra and Melbourne, with access to international airports (a third airport in 2026). • A growing thoroughbred industry in the region, including development of world-class private facilities, and Racing NSW establishing a presence with a vision for a training facility. • A concentration of high-performance equestrian and Olympic discipline athletes present in the region, including industry-leading coaches. • Several well-appointed private equestrian facilities, equipped to host state, national, and in some cases international events, as well as Bong Bong Picnic Racecourse. 	<ul style="list-style-type: none"> • Lack of a skilled and practically trained local equine workforce to support business expansion and growth. • A perceived difficulty in dealing with Council in relation to development applications and community consultation. • No formal structure, adequately resourced, to act as an Equine Industry Advisory Committee/Group to provide ongoing input and feedback to government. • Lack of a surgical equine veterinary facility in the region and a foal critical care facility. • The Australian Taxation Office requirement that Fringe Benefits Tax must be applied to staff accommodation, making it more prohibitive and challenging for operators to attract skilled industry staff. • Planning policy restrictions for on-farm staff accommodation.
Opportunities	Threats
<ul style="list-style-type: none"> • Racing NSW to progress the vision of a world-class training hub in the Southern Highlands. • Existing education assets including the TAFE and University of Wollongong campus at Moss Vale, could form part of an education precinct championing equine industry education in collaboration with other Registered Training Organisations (RTOs) and industry operators. • Work with TAFE to continue offering Foaling Down and Yearling Preparation Short Courses and incorporating practical placements at local studs, including industry supporting promotion and meeting minimum student enrolment targets. • Development of an Equine Centre of Excellence, incorporating industry, RTOs, and education providers. • Partner with leading veterinary and equine science education institutions, such as Charles Sturt University, to champion the delivery of practical, hands-on training. • Proximity and positioning to three international airports strongly supports equine import, export, and quarantine hub opportunities. • Development of an Agribusiness & Equine Precinct, supporting education, jobs, sustainability and promoting a circular economy within the industry. • Work with the State Government and Racing NSW to identify a suitable location/s and infrastructure for a thoroughbred training and industry development hub, including a broader agribusiness and food resilience project and forming a Jobs Activation Precinct. • Work with Council and the NSW Government to develop specialist equine definitions in the NSW Standard Instrument and develop appropriate land use planning controls to recognise equine as a stand-alone entity within the LEP to support the development of the equine industry. • Increase collaboration across industry operators to take advantage of growing opportunities such as organised group yearling inspections and joint buying discounts. • Within Agritourism develop and elevate equitourism experiences. • Create 'Highlands Horse Week', incorporating The Gong, Bong Bong Races and thoroughbred yearling inspections. 	<ul style="list-style-type: none"> • Failure to secure suitable land/sites to fulfil the full vision of a world-class thoroughbred training hub and/or Agribusiness hub integrated with a food resilience project. • Industry operators forced to scale-down or delay growth and expansion due to a lack of skilled staff. • Lack of collaboration across local operators could lead to the loss of key growth opportunities. • Rural land use conflict in relation to equine developments; differing expectations of what rural lifestyle is about for those moving to the region, versus expectations of local industry operators and landowners. • Communication breakdown between industry and local government and a 'not open for business' perception of Council among local industry operators, and prospective operators, who may seek to relocate to, or setup satellite facilities in, the region. • Ageing population, with an increasing percentage of residents not seeking employment, and existing workforce not being replaced. • The growing thoroughbred industry, while economically positive, could lead to a loss of land suitable for agricultural and food production. • Inability to insert an equine specific land use definition in the NSW Standard Instrument and subsequent interpretation into local planning policies, leading to possible future loss of development opportunities.

Equine Industry Gap Analysis

LOCAL SKILLED WORKFORCE

Focus Area: Develop a skilled workforce to support equine industry operators and sector expansion, including championing practical training.

Current State: Industry operators have difficulty finding staff with suitable practical experience, with many seeing a particular lack of local applicants. It has also been challenging to get experienced industry staff to relocate from other regions due to relatively high cost of living, limited affordable housing, and lack of social connectedness in the region. This issue has forced some local operators to decide against expansion, and in some cases to scale-back their business offerings or relocate to other regions.

Desired Future State: To have a local skilled workforce, that has received industry-leading practical and hands-on training, available to operators to facilitate strong operational outcomes and sector expansion. A skilled workforce programme should include a stream of school leavers and graduates keen to enter the equine sector based on industry providing a roadmap to a genuine career pathway with ongoing personal development.

Gap	Proposed Actions	Collaborators
1. Lack of skilled staff, ageing workforce not being replaced, high cost of living, lack of affordable housing dissuading skilled staff from relocating.	a. Advocate for Council and the NSW Government to implement proactive policies that will deliver more affordable housing stock, for purchase and rent.	Industry, Southern Highlands Key Stakeholders Group (SHKSG) Agribusiness & Equine Strategic Working Group (AESWR), Wingecarribee Shire Council (WSC)
2. TAFE and universities are finding it increasingly difficult to provide practical, hands-on, training for students, particularly with large animals.	a. Facilitate industry working with TAFE, University of Wollongong, local high schools, Charles Sturt University, and University of Sydney, to provide course delivery that includes local practical training. Integrate programme delivery with an Education Precinct Project (refer to Project Summary). Collaborate with Training Services NSW on the Regional Education Partnerships Program. b. Encourage local industry operators to employ trainees and raise awareness of incentive schemes available through TAFE.	Industry, SHKSG AESWG, TAFE, University of Wollongong (UOW), local high schools, Charles Sturt University (CSU), University of Sydney, Training Services NSW
3. There is often a lack of visibility on career progression for equine sector employees, particularly at small farming and boutique equine operations. Also, equine industry wages are often lower than other industries.	a. Engage with industry operators to improve performance by flow charting possible career pathways and aligning competitive wages with achieving Key Performance Indicators (KPIs). b. Collaborate with TAFE to offer Short Courses across the Equine Skillspoint that will meet industry needs and help overcome the skills and labour shortages. c. Promote the Southern Highlands to prospective equine staff as a point of difference region for career pathways and competitive wages, and they will acquire industry-leading skills. d. Engage with industry to secure sponsorship for the Thoroughbred Industry Careers Cadet Program.	Industry, SHKSG AESWG, TAFE, UOW, local high schools, CSU, University of Sydney, Thoroughbred Industry Careers, Team Thoroughbred NSW
4. Planning controls restrict staff accommodation onsite, required to enable the hours worked, it is an industry norm and expected inclusion, and it mitigates the otherwise barrier of high cost of local housing. Also, being within 100kms of Wollongong negates "remote" status and Fringe Benefits Tax applies to staff accommodation.	a. Advocate for amendments to planning controls so that agribusiness and equine operators can easily provide appropriate and sustainable onsite staff accommodation. b. Advocate for the Australian Taxation Office (ATO) to either define the Southern highlands as "remote", or provide an exemption, in relation to Fringe Benefits Tax (FBT) currently being applied to local agribusiness and equine operators offering staff accommodation. The FBT is currently a disincentive and barrier to attracting skilled staff. Refer to FBTA 1986 58ZC.	Industry, SHKSG AESWR, WSC, Service NSW, ATO

Equine Industry Gap Analysis CONTINUED

WORLD-CLASS THOROUGHBRED DESTINATION

Focus Area: Grow the local thoroughbred industry and establish the Southern Highlands as a world-class thoroughbred destination.

Current State: There are industry-leading thoroughbred studs in the region, predominantly focussed on breeding and yearling preparation. Growth could be boosted by enhancing support and satellite services and collaborating with Racing NSW on establishing a training centre in the region. The development of a training hub and establishment of the Southern Highlands as a world-class destination for thoroughbred racing, coupled with the combined offerings across the state positioning NSW as the horse capital of the Southern Hemisphere, would provide an opportunity to develop 'equitourism' experiences, as a subset of agritourism.

Desired Future State: The Southern Highlands being recognised as home to a world-class thoroughbred training hub, supported by industry-leading operators across breeding, specialist veterinary, surgical, and foal critical care services. Multiple leading trainers have satellite stables in the region. There is a quarantine and biosecurity station and transport hub, rehabilitation facilities, industry training programs, and a base for Racing NSW's Registered Training Organisation (RTO) and welfare program. Equine projects are complimentary to agribusiness, agritourism, and food resilience projects and collectively could form a potentially state-significant Jobs Activation Precinct in the Southern Highlands.

Gap	Proposed Actions	Collaborators
1. Alignment with Racing NSW's vision to create a world-class training hub with associated programmes.	a. Facilitate collaboration with Racing NSW management and Board to support the full potential of the vision to create a world-class training hub.	Industry, Southern Highlands Key Stakeholders Group (SHKSG) Agribusiness & Equine Strategic Working Group (AESWR), Destination Sydney Surrounds South (DSSS), Racing NSW
2. Identifying a suitable land bank for agribusiness and equine projects including a Jobs Activation Precinct.	a. Coordinate with Council, the NSW Government, and Racing NSW the identification of a suitable land bank, large enough to operate a world-class agricultural resilience and fresh food production project in conjunction with aspiring to implement a circular economy.	Industry, SHKSG AESWG, DSSS, Wingecarribee Shire Council (WSC), Racing NSW, WinZero
3. Lack of required support services and infrastructure. Need proactive and enabling planning controls through Council.	a. Advocate for planning controls through Council to proactively enable key support services and infrastructure. Advocate for an equine quarantine and biosecurity station and a transport hub.	Industry, SHKSG AESWG, DSSS, WSC
4. Develop 'equitourism' experiences as a subset of agritourism.	a. Facilitate industry operators activating and promoting 'equitourism' experiences and products to boost the visitor economy e.g. could coincide with buyers viewing bloodstock.	Industry, SHKSG AESWG, DSSS, Destination NSW, Destination Southern Highlands

Equine Industry Gap Analysis CONTINUED

EQUINE CENTRE OF EXCELLENCE

Focus Area: Establish an Equine Centre of Excellence to support industry and foster education and high performance. Please refer to Project Summary.

Current State: There are a significant number of high-performance equestrian athletes and bloodstock located in the Southern Highlands, however, there is currently no formal structure to foster high-performance development, specialist services, and industry-leading education and training. There industry-leading veterinarians practicing in the region, however, the lack of an equine surgical facility limits treatments that can be performed locally.

Desired Future State: An Equine Centre of Excellence established in the Southern Highlands, supporting a Racing NSW training hub, could offer high performance for Olympic equine disciplines, excellence in equine veterinary sciences, rehabilitation and alternative therapies, and industry skills development for local operators. Such a facility would put the region on the map as a thoroughbred and equine industry leader in the Southern Hemisphere and create a boost for education tourism.

Gap	Proposed Actions	Collaborators
1. There is currently no face-to-face equine industry training available in the Southern Highlands through existing RTOs (TAFE students are required to travel to Goulburn for practical training). Additionally, The University of Wollongong, who have a Moss Vale Campus, do not offer veterinary or equine science qualifications.	a. Collaborate with TAFE to promote equine qualifications in the Southern Highlands and build-up enrolment numbers to support delivery at Moss Vale.	Southern Highlands Key Stakeholders Group (SHKSG) Agribusiness & Equine Strategic Working Group (AESWR), TAFE, University of Wollongong (UOW), Training Services NSW
2. Charles Sturt University has expressed interest in working with the region for practical training of veterinary and equine science students, however, the lack of local affordable student accommodation and no current formal structure to facilitate the collaboration could limit this opportunity in the short term.	a. Advocate with the relevant Charles Sturt University Heads of School and local industry operators to pursue opportunities for practical training and education delivery in the Southern Highlands. b. Engage with local studs to support sponsorship of the Thoroughbred Industry Careers Cadet Program and promote the Southern Highlands as a destination for equine education and training.	SHKSG AESWG, UOW, Charles Sturt University (CSU), Southern NSW Drought Resilience Adoption and Innovation Hub (SNSWDRAIH)
3. There are equine alternative and specialist therapy practitioners in the region, with most operating individually. Increasing collaboration (e.g. the establishment of an equine rehabilitation centre) and information sharing may support further commercial opportunities. This could also support the emergence of the region as a leader of further professional education, specialist short courses, and summer schools.	a. Engage with professional associations and professional development and education associations to hold events in the region. b. Facilitate 'equitourism' and equine education tourism product development and promotion.	Destination Sydney Surrounds South (DSSS)
4. The need for a local surgical and critical care clinic, a shared facility among existing and prospective local veterinary practitioners (sharing the burden of on-call staffing and overhead costs) to assist with the feasibility of such a facility.	a. Engage with local veterinarians and veterinary practices to identify the most viable options for the establishment of a shared surgical and critical care facility, and advocate for this to be included in a potential Racing NSW training hub.	Industry, SHKSG AESWG
5. Currently, high-performance squad activities and camps take place across NSW. With the right facilities (or collaboration from the owners and operators of existing industry-leading facilities) there is the potential to develop the Southern Highlands as the capital of high-performance for Olympic equestrian disciplines in Australia.	a. Engage with Equestrian Australia and Equestrian NSW (and sub-organisations such as Dressage NSW) to encourage the Southern Highlands to become the base for Olympic and high-performance squads.	Industry, SHKSG AESWG

PROJECT SUMMARY | Southern Highlands Agribusiness Hub

OVERVIEW

The creation of a Southern Highlands Agribusiness Hub (SHAH) would support local producers and contribute to agricultural production remaining a sustainable and viable land use and preferred method of preserving the 'green between' towns and villages. The SHAH would facilitate industry-leading education, developing a skilled agricultural workforce to support industry growth, and incorporate practical, hands-on, training for students. Furthermore, it would deliver education initiatives to assist in upskilling local and regional landowners and managers in implementing measures addressing improved resilience against drought, dealing with climate change and catastrophic events, and best practice methods in regenerative and sustainable land management to produce high-quality produce - all of which would assist in futureproofing the region's agribusiness industry. Additionally, the SHAH could support an aggregation point for a regional, boutique, premium Southern Highlands produce brand, including a flagship beef brand, supporting local producers to extract premium value for their produce by streamlining supply chains and forming a central structure for specialist functions such as marketing and distribution. These support services could further aid producers in becoming export ready, and to leverage the region's proximity to Sydney and Canberra Airports and Western Sydney Airport from 2026. Premium products at premium prices could reach export and specialty markets and assist with achieving financial viability. By assisting producers to expand and grow the economic benefit of the agribusiness industry in the region would strengthen the regional economy, jobs would be created, and existing agricultural infrastructure such as the Moss Vale Saleyards would be supported and preserved.

PROJECT INCLUSIONS

- Education and training, supporting leading innovation and advancements in sustainable practices, yield increase, regenerative farming, indigenous land management and carbon sequestration and farming methods, thus increasing produce and food quality and security.
- Education and training on improving resilience and responsiveness of the agribusiness industry and farming enterprises to natural disasters, climate risk and extreme events.
- A Produce Hub, including an aggregation point with facilities for value-adding to products and streamlined distribution, supporting local producers to extract premium value for their produce.
- An export-ready pipeline to support producers in leveraging proximity to major international airports and targeting export and specialty markets, with a focus on Asia's premium beef demand.
- Education and training initiatives to support fresh food producers to expand and diversify their production.
- Southern Highlands regional, boutique, produce brand, including a flagship beef brand.
- An Agribusiness Toolkit, available to all new and existing landowners and business operators, including agritourism resources.
- Agritech development and trials, including potential autonomous small farm vehicle development.
- Education and skills training in collaboration with TAFE, University of Wollongong, Charles Sturt University and Training Services NSW and relevant RTOs.
- Vertical and urban farming trials and demonstration sites.
- A Southern Highlands base for the University of Wollongong's Industry 4.0 Hub and centre for their agribusiness-focused projects.
- Collaborate with Southern NSW Drought Resilience Adoption and Innovation Hub, UOW is in partnership with CSU.

Southern Highlands Agribusiness Hub CONTINUED

FOOTPRINT OPTIONS

- A suitable site of approx. 5000 acres, incorporating an Agribusiness and AgritourismHub and Food Resilience project.
- An online platform, supported by a physical aggregation point for local produce and centralised value-adding and support servicesand supply chains.

COLLABORATORS

- Southern NSW Drought Resilience Adoption and Innovation Hub
- University of Wollongong (Shoalhaven Industry 4.0 Hub)
- Charles Sturt University (Agriculture, animal and veterinary sciences)
- University of Sydney (Agriculture and veterinary science)
- Southern Cross University (Regenerative agriculture)
- TAFE NSW
- Training Services NSW
- Regional Development Australia ACT and Regional Development Australia Southern Inland
- South East Local Land Services
- NSW Department of Primary Industries
- Skills Impact Agricultural, Food & Animal Management ITAB



Southern Highlands Agribusiness Hub CONTINUED

ALIGNMENT WITH STRATEGIC PRIORITIES

Wingecarribee Regional Economic Development Strategy 2018-2022 (NSW Government)

- “Strategy Focus...the key engines for growth sectors...Agriculture” (pg. 40)
- “The most common genuine rural land use in the LGA is beef cattle farming. The next most significant is horse farming, dairy cattle farming, mushroom growing and nursery production(outdoors) and vegetable growing” (pg. 48)
- “Facilitate the development of agriculture as a key strength and specialisation and grow the visitoreconomy based on food, wine and events.” (pg. 58)
- “Infrastructure priorities...Agricultural infrastructure including ‘fit for purpose’ marketing andtransport infrastructure” (pg. 60)
- “Secure the future of relevant agricultural infrastructure such as the Moss Vale Saleyards” (pg. 69)
- “Develop a plan for long term collaboration between the University of Wollongong and TAFE, MossVale Campus” (pg. 71)

Southern Highlands & Table Lands Regional Action Plan NSW 2021 (NSW Government)

- “Competitive advantages...expansive rural landscape close to major cities...Strong viticulture, dairy,horticulture and farming industries...Rural amenity and natural beauty offering high quality of life for residents...Proximity to Sydney and Canberra for employment and distribution hubs...” (pg 4)
- “To strengthen and diversify our economy we need to: Support existing business and industry to expand and grow” (pg 6)
- “the NSW Government will support key growth sectors to revitalise the Southern Highlands and Tableland economy including value adding agribusiness...to improve growth, resilience, productivity...international education and research sectors” (pg 6)
- “Effectively manage natural resources and agricultural land.” (pg 9)
- “Build on the information developed for the region to identify responses and opportunities to improve the resilience of local communities to extreme events and climate risk” (pg 18)

South East and Tablelands Regional Action Plan 2036 (NSW Government)

- “Direction 1” Leverage access to the global gateway of Canberra Airport” (pg 16)
- “Direction 4: Leverage growth opportunities from Western Sydney...Australia’s third largesteconomy...The new Western Sydney Airport...” (pg 19)
- “Direction 5: Promote agricultural innovation, sustainability and value-add opportunities” (pg 21)
- “Direction 8: Protect important agricultural land” (pg 25)
- “Direction 28: Manage rural lifestyles (pg 56)
- “Local Government Narratives” Wingecarribee...Protect important agricultural land as a resource for food security...Grow and diversify the areas agricultural base, including value-added activities, and capitalize on access to national and international markets in Sydney” (pg 59)

Sydney Food Futures Report 2011–2013 (University of Technology Sydney)

- If there is an intensified focus on Agriculture, the Wingecarribee Local Government Area has the capacity to increase fresh food production by up to 1 million tonnes per year.

NSW Government’s 20 Year Economic Vision for Regional NSW (February 2021)

- Agribusiness classed as an “engine industry”.

PROJECT SUMMARY | Southern Highlands Equine Centre of Excellence

OVERVIEW

A Southern Highlands Equine Centre of Excellence (SHECE) would lead the strategic direction of the equine industry on a state-wide scale, championing education, high-performance, innovation and best practice to a world's-best standard. The SHECE would support the equine industry overall with a particular focus on the development of the thoroughbred racing and breeding sector, and Olympic and western performance disciplines. Collaboration with other regions that offer complimentary specialisations, such as the Hunter Valley for thoroughbred breeding, could drive statewide industry growth and jobs creation through clear strategic goals. The SHECE would contribute to extracting maximum growth and value for the multi-billion-dollar equine industry in NSW. Furthermore, the SHECE would partner with and support education providers, registered training organisations, and professional organisations to deliver practical, hands-on training, skills development, and continuing professional education, whilst also supporting innovative technology and research initiatives through a physical hub.

PROJECT INCLUSIONS

- An education and training hub, specialising in hands-on practical training with horses, in an environment that equips students to develop industry-leading skills to enter the workforce and support industry growth.
- Industry leading, hands-on, training in specialist skills such as foaling down and yearling preparation, incorporating placements at local studs.
- A facility for Short Courses, Summer Schools, and continued professional education.
- Infrastructure to support resident and visiting industry specialists being based out of the Centre of Excellence.
- State of the art technology to support training in equine and veterinary sciences, thoroughbred industry professions and research, including riding simulators and gait analysis equipment.
- A network of 'supporting facilities' in the region to facilitate specialist education and care, such as rehabilitation and technology advancements in artificial insemination and breeding.

Southern Highlands Equine Centre of Excellence CONTINUED

FOOTPRINT OPTIONS

- A physical centre positioned with a potential Racing NSW Thoroughbred Training Hub, and supported by an online platform with access to information, updates and educational resources.
- An independent physical hub, located within the Southern Highlands region with adequate land to enable large animals to be kept for training purposes, or with proximity to another site that could support practical training (e.g. Moss Vale Showgrounds). Supported by an online platform with access to information, updates, and educational resources.
- Combined with the Southern Highlands Education Precinct Project, and potentially based at the current TAFE Moss Vale and University of Wollongong Campus to further activate these existing assets. Practical training would be delivered offsite with the Moss Vale Showgrounds being ideally situated to support this.

COLLABORATORS

- TAFE NSW (Performance Horse, equine and short courses)
- Charles Sturt University (Equine and Veterinary Sciences)
- Racing NSW
- Team Thoroughbred NSW (Racing NSW's welfare and education RTO)
- University of Sydney (Equine and veterinary science)
- Western Sydney University (Equine studies)
- Equestrian Australia/Equestrian NSW
- Thoroughbred Breeders Australia/Thoroughbred Breeders NSW
- Thoroughbred Industry Careers
- Australian Horse Industry Council
- Multiple discipline-specific organisations (e.g. DressageNSW, National Cutting Horse Association Australia)
- Skills Impact Agricultural, Food & Animal ManagementITAB



Southern Highlands Equine Centre of Excellence CONTINUED

ALIGNMENT WITH STRATEGIC PRIORITIES

Wingecarribee Regional Economic Development Strategy 2018-2022 (NSW Government)

- “The [second] most significant agricultural activity [in the LGA] is horse farming” (page 48)
- “Infrastructure priorities...Create a multi-purpose equestrian facility in the Wingecarribee region” (page 60)
- “The Wingecarribee Shire is an attractive area for equestrian events. With appropriate infrastructure, theWingecarribee Shire could be part of the equestrian circuit which would further strengthen the regional visitor economy” (page 62)

Southern Highlands & Tablelands Regional Action Plan NSW 2021 (NSW Government)

- “To strengthen and diversify our economy we need to: Support existing business and industry to expand and grow” (page 6)

The South East and Tablelands Regional Action Plan 2036 (NSW Government)

- “Direction 4: Leverage growth opportunities from Western Sydney...Australia’s third largest economy...Thenew Western Sydney Airport...” (page 19)



PROJECT SUMMARY | Southern Highlands Education Precinct

OVERVIEW

A Southern Highlands Education Precinct (SHEP) would support the education sector to deliver industry-leading training in the agribusiness and equine sectors and strengthen the two accompanying priority shovel ready projects for the region, an Equine Centre of Excellence, and an Agribusiness Hub. By upskilling a local and regional workforce these existing engine industries would be supported to expand and grow with trained and skilled employees, contributing to the economic strength and resilience of the region and increasing gross regional product. Additionally, the SHEP would assist in addressing the ageing demographic of the Wingecarribee Local Government Area by creating education opportunities and career paths that encourage school leavers and jobs seekers to transition into agribusiness and equine industry workplaces in which labour is in demand, thus allowing them to stay living and working locally. Existing education assets within the region such as TAFE Moss Vale and the University of Wollongong campus could be further activated by forming a collaborative SHEP and expand to offer amenities such as affordable student accommodation to support broader collaboration with other education providers out of the region and develop the education tourism market.

PROJECT INCLUSIONS

- A collaborative precinct specialising in agribusiness and equine TAFE and university qualifications, short courses, practical training programs and continued professional education. The facility could provide contract hands-on training services to universities and RTOs.
- Affordable student accommodation.
- Facilities to accommodate large animals for training purposes, or an agreement with a suitable site in convenient proximity such as the Moss Vale Showgrounds to house the animals.
- Infrastructure to support resident and visiting industry specialists to base at the SHEP.
- Trial sites to showcase innovative agricultural practices, such as carbon testing and urban farming.
- A network of 'supporting facilities' in the region to facilitate specialist education programs, such as equine rehabilitation and cattle breeding.

Southern Highlands Education Precinct CONTINUED

FOOTPRINT OPTIONS

- A physical hub consisting of the current TAFE Moss Vale and University of Wollongong campuses.
- A newly created education precinct placed on land within the region deemed suitable or advantageous e.g. alongside a Jobs Activation Precinct or Agribusiness Hub.

COLLABORATORS

- TAFE NSW (agriculture and equine)
- University of Wollongong (Industry Hub 4.0)
- Charles Sturt University (Agriculture, equine and veterinary sciences)
- University of Sydney (Equine and veterinary science)
- Western Sydney University (sustainable agriculture and food security, equine studies)
- Southern Cross University (regenerative agriculture)
- Multiple discipline-specific organisations (e.g. DressageNSW, National Cutting Horse Association Australia)
- Skills Impact Agricultural, Food & Animal Management ITAB



Southern Highlands Education Precinct CONTINUED

ALIGNMENT WITH STRATEGIC PRIORITIES

Wingecarribee Regional Economic Development Strategy 2018-2022 (NSW Government)

- “Develop a plan for long term collaboration between the University of Wollongong and TAFE, Moss Vale Campus” (page 71)

Southern Highlands & Tablelands Regional Action Plan NSW 2021 (NSW Government)

- “Our education system will provide education and training pathways for young people encouraging them to stay in the region” (page 1)
- “Offer a range of strategies to support student’s transition from school to higher education and the workforce” (page 15)

The South East and Tablelands Regional Action Plan 2036 (NSW Government)

- Education identified as a “priority growth sector” under Goal 1 (page 15)
- “Facilitate joint venture opportunities to share community and education facilities” (page 45)





APPENDIX 1 | Project Briefings

- Southern Highlands Produce Brand (Beef pilot)
- Southern Highlands Jobs Activation Precinct

PROJECT BRIEFING | Southern Highlands Produce Brand (Beef pilot)

WHY THIS PROJECT?

Growers and producers have expressed a strong interest to participate in the establishment of a premium Southern Highlands produce brand. An initial pilot project for beef producers is a logical starting point. The ABS (2017) data identifies the value of beef cattle production in the Southern Highlands region as being \$15.4 million across 147 working cattle farms. Since the Agribusiness & Equine Industry Development Project was activated, and stakeholder engagement and auditing has been undertaken, we believe these numbers to be significantly higher, and growing. This increase is fuelled in part by city dwellers being drawn to the appeal of country living and purchasing Southern Highlands land and wanting the land to be productive, but also the rise in awareness of food quality, provenance, and sustainability. Therefore, the development of a boutique, regional, produce brand, commencing with beef as a pilot, has been identified as a key opportunity for the growth of the agribusiness sector, and diversification builds resilience.

PROJECT DESCRIPTION

The creation of a premium, regional, boutique, Southern Highlands beef brand would create a central aggregation point to which local producers could supply product, providing it meets the quality specifications. This will increase yield through a streamlined processing and distribution chain. Increasing margins contributes to preserving viable agricultural land into the future and preserves the “green between” towns and villages.

The establishment of a regional, boutique, Southern Highlands beef brand would contribute to promoting the region as an agritourism destination. High quality food production accompanied by a story to support its value proposition will increase awareness and attract provenance visitation. This in-turn supports agribusiness operators who want to diversify into farm tours, farm stays, farm gate and immersive on-farm experiences. Diversification into agritourism mitigates risk and builds resilience. The brand would capitalise on a direct-to-consumer supply chain, including subscription services.



Southern Highlands Beef Brand CONTINUED

PROJECT INCLUSIONS

- Appointment of a suitably experienced/qualified beef cattle industry expert, with marketing experience, to the role of Southern Highlands Beef Industry Coordinator to coordinate the project including undertaking a comprehensive beef industry audit at that time and identify Southern Highlands beef herd current numbers, capacity, and current selling methods.
- Coordinate the implementation of a mobile abattoir solution, including a cost benefit analysis of using an existing service provider or acquiring a customised vehicle (mobile slaughter unit) to service the area. Structure an appropriate producer-led cooperative model.*
- Engage with industry and Wingecarribee Shire Council (or lessees of the facility) to further develop the Southern Rural Livestock Exchange (Moss Vale saleyards) into an agritourism asset supported by the produce brand and enhancing the 'paddock to plate' visitor experience.
- Coordinate the development of branding and positioning statement, identify the selling points of a quality assurance and accreditation programme, identify methods and processes to ensure product quality. Develop a marketing plan.
- Establish a direct-to-consumer subscription distribution model and network of suppliers.
- Ensure best practice education through Meat Standards Australia and identify export-ready support for producers to leverage proximity to international airports and access to premium export and specialty markets.
- Establish collaborative relationships with other key beef production regions such as New England and Central West to expand supply and volume capability.
- Partner with Charles Sturt University's Faculty of Science and the Graham Centre for Agricultural Innovation to collaborate with key researchers in product development through the Meat Lab Facility, including further developing markets for secondary cuts, while trialling mechanisms to increase versatility, quality of cooked product, and farmgate return from these cuts.

Benefit: Contribute to boosting Gross Regional Product by \$500 million a year by 2030 (\$3.67 billion) and support local producers to increase profit margins on beef production, preserving agricultural land and promoting high quality food production.



* Research Undertaken through a Meat & Livestock Australia funded project by FarmGate MSU – Mobile Slaughter Unit Final Report (Project Code P.PSH.1019) indicates that feasibility exists at processing levels of >50 head/week (10 head/day). While the associated cost of MSU operations is above industry standard for \$/kg produced, of the 4000 responses received from end used customers and 30 farmers to a survey conducted by Farmgate MSU there was evident significant value placed on the welfare of animals:

- 31% of respondents stated that animal welfare was the main reason they are not eating red meat.
- 78% of respondents indicated they would pay a premium if high animal welfare and better product taste was achieved across the entire supply chain of the red meat product.

This project mapped current state-based meat processing legislation and regulatory requirements and a detailed framework was created for the successful licensing, auditing, and routine operation of a mobile slaughter unit. A framework has also been set for the HACCP and FSP for the MSU to be created in accordance with Australian Standard 4696:2007 and documented standards exist for operation procedures and risk assessment, ensuring the wholesomeness of the product created.

Southern Highlands Beef Brand CONTINUED

STRATEGIC ALIGNMENT

Wingecarribee Regional Economic Development Strategy 2018-2022

- “The most common genuine rural land use in the LGA is beef cattle farming” (page 48)
- “Facilitate the development of agriculture as a key strength and specialisation and grow the visitor economy based on food, wine and events.” (page 58).
- “Secure the future of relevant agricultural infrastructure such as the Moss Vale Saleyards” (page 69)

Southern Highlands & Table Lands Regional Action Plan NSW 2021 (NSW Government)

- “The NSW Government will support key growth sectors to revitalise the Southern Highlands and Tableland economy including value adding agribusiness...to improve growth, resilience, productivity...international education and research sectors” (page 6)
- “Effectively manage natural resources and agricultural land.” (page 9)

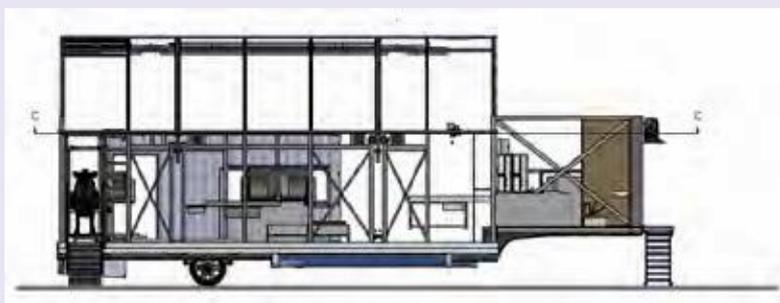
South East and Tablelands Regional Action Plan 2036 (NSW Government)

- “Direction 1” Leverage access to the global gateway of Canberra Airport” (page 16)
- “Direction 4: Leverage growth opportunities from Western Sydney...Australia’s third largest economy...The new Western Sydney Airport...” (page 19)
- “Direction 5: Promote agricultural innovation, sustainability and value-add opportunities” (page 21)

Sydney Food Futures Report 2011–2013, University of Technology Sydney

- If there is an intensified focus on Agriculture, the Wingecarribee local Government area has the capacity to increase fresh food production by up to 1 million tonnes per year.

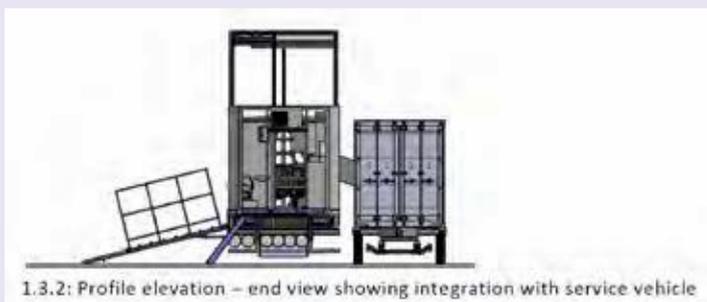
Agribusiness is identified as an ‘engine industry’ in the NSW Government’s **20-Year Economic Vision for Regional NSW** (February 2021).



1.3.2: Profile elevation – end view showing integration with service vehicle



1.3.3: 3D (spatial) view



1.3.2: Profile elevation – end view showing integration with service vehicle



1.3.4: Floor plan view – loading ramp and integration chutes to service vehicle

Concept as shown in ‘FarmGate MSU – Mobile Slaughter Unit Final Report’, an MLA Donor Company funded project (project code: P.PSH. 1019)

“In the spirit of collaboration we are keen to support other producers to add value to the Highlands herd. There are many examples of farming communities collaborating to establish paddock-to-plate and customer direct programs. Sharing information and enhancing our practices will increase our yield and ultimately create jobs, all making for a more resilient farming sector in the Highlands.”

Hugh Clarke

Farmer, Co-Chair SHKSG Agribusiness & Equine Strategic Working Group, Director Destination Sydney Surrounds South

Southern Highlands Beef Brand CONTINUED

COLLABORATORS?

The creation of a regional, boutique, Southern Highlands produce brand, commencing with beef as a pilot, is a key aspect of establishing an overarching Agribusiness Hub, including a Produce Hub. Primary collaborators:

- Industry, beef producers
- Southern Highlands Key Stakeholders Group (SHKSG) Agribusiness & Equine Strategic Working Group
- Destination Sydney Surrounds South (DSSS)
- Wingecarribee Shire Council (WSC)

SHKSG and DSSS will consult with industry groups such as Meat & Livestock Australia and the Australian Meat Industry Council, and the NSW Department of Primary Industries.

This Project has also attracted interest and support from Charles Sturt University’s Faculty of Science and School of Agriculture, Veterinary & Animal Sciences, who are willing to be potential project partners and champion research and product development through their Meat Laboratory facility within the Food Technologies Laboratory at the Graham Centre for Agricultural Innovation.

WHAT IS REQUESTED OF GOVERNMENT?

Initial grant funding and support to facilitate

- the appointment of a Southern Highlands Beef Industry Coordinator
- purchase of a mobile slaughter unit (with ongoing costs of operating the unit being met by a producer-led cooperative model).*
- approvals for a mobile slaughter unit vehicle to operate in the area (an approval precedent already exists through work completed by FarmGate MSU)*
- brand development and marketing
- outcomes including maintaining working farms, food sustainability, and agritourism.

PROJECT PARTNERS



PROJECT BRIEFING | Southern Highlands Jobs Activation Precinct

WHY THIS PROJECT?

There is an opportunity to drive economic recovery and build future resilience for the regional NSW economy through a collaboration of industry, all tiers of government, and Racing NSW to explore the full vision of establishing a world class Southern Highlands Agribusiness & Equine Jobs Activation Precinct. Sustainability is a vital component of any project. This pilot project is a test case for the development of a circular economy that sets the standard for jobs growth in sustainable regional economies.

Peter V'landys, CEO of Racing NSW, identified the Southern Highlands as having the potential to be Australia's premier training hub, similar to Newmarket in the UK. Such a facility could feature as the epicentre of a larger proposed project – Southern Highlands Agribusiness & Equine Jobs Activation Precinct. This project will significantly boost the regional economy and create hundreds of new full time equivalent sustainable jobs. It represents an opportunity to position New South Wales as the horse capital of the southern hemisphere, with these three integral regions showcased:

- Hunter Valley - world class thoroughbred horse breeding
- Sydney - largest prize money events for thoroughbred sprint racing, The Everest and The Golden Slipper
- Southern Highlands - a world class racehorse training and equine industry development hub.



Racing NSW World Class Training Hub

Required land space approximately 1,000+ acres (400+ hectares)

- World class training centre modelled on Newmarket in the UK.
- Australia's premier training hub.
- Favoured location is the Hume Coal site near Berrima (Southern Highlands)
- Complimentary elements; supporting Jockeys, development and welfare of thoroughbreds and performance horses.
- Specialist equine veterinary services.
- Equine quarantine facilities.

BENEFIT: Boost Gross Regional Product by \$500 million a year by 2031 (\$3.67 billion)



Agribusiness & Agritourism Food Resilience Project

Required land space approximately 5,000 acres (2,000 hectares)

- Best practice farming including landscape regeneration with Indigenous land management methods.
- Fresh food production.
- Agritourism including farm tours, farmstays and education tourism.
- Education & skills training in collaboration with TAFE, University Of Wollongong, Training Services NSW and other RTOs.
- Proximity to airports for food export.

BENEFIT: Create 300+ new full time equivalent sustainable jobs

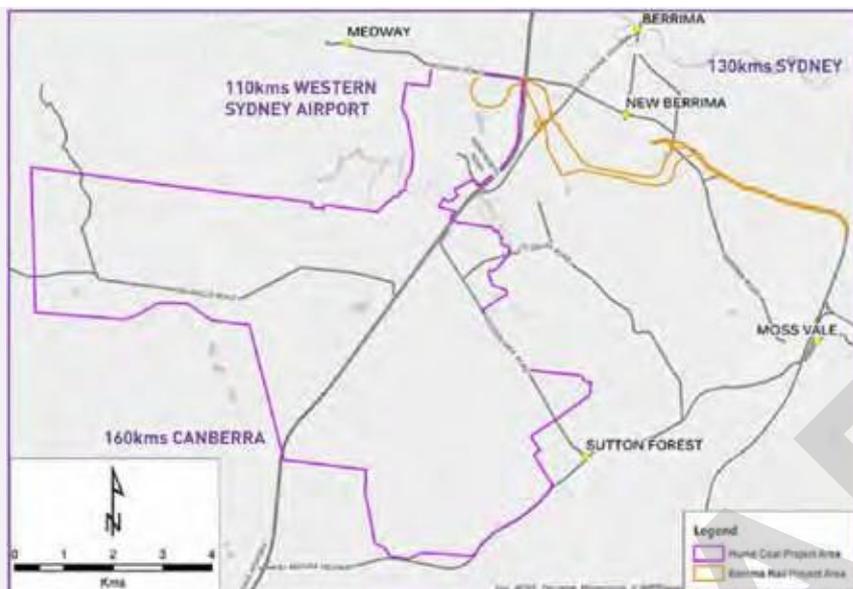
PROJECT DESCRIPTION

Part 1: A world class racehorse training and equine industry development hub, specialising in the training, development, and welfare of thoroughbreds and performance horses, specialist veterinary services, equine quarantine facilities, and biosecurity management facilities.

Part 2: A world class farming project encompassing best practice, sustainable, farming. A showcase of a circular economy ensuring animal waste, and waste from cafes and restaurants, is recycled creating its own economic benefits and employment. The production of high quality, safe, and nutritious food for the Sydney, Canberra and export markets will also be outcomes of the project.

Southern Highlands Jobs Activation Precinct CONTINUED

The proposed site at Berrima, on the major interstate road freight route (Hume Motorway) is in close proximity to the new Western Sydney Airport. A development of this calibre could support thoroughbred racing and equine industry operations on an interstate basis (mainly Victoria and Queensland) and have distinct advantages for quarantine and export.



“...the region is now more widely known for its rural land uses, small-scale agriculture, scenic landscapes and tourism.”

Optimal Location –
Hume Coal Project Area
Hume Coal Project and Berrima Rail
Project Assessment Report 2018
(NSW Government)

STRATEGIC ALIGNMENT

The Wingecarribee Regional Economic Development Strategy 2018 – 2022 (NSW Government)

- “Facilitate the development of agriculture as a key strength and specialisation and grow the visitor economy based on food, wine and events.” (Page 58)
- “Infrastructure priorities...Agricultural Infrastructure including ‘fit for purpose’ marketing and transport infrastructure...Create an equestrian facility in the Wingecarribee region.” (Page 60)
- “Wingecarribee Shire is an attractive area for equestrian events. With appropriate infrastructure, the Wingecarribee Shire could be part of the equestrian circuit which would further strengthen the regional visitor economy.” (Page 62)

Southern Highlands & Tablelands Regional Action Plan NSW 2021 (NSW Government)

- “Effectively manage natural resources and agricultural land.” (Page 9)
- “Develop a Southern Highlands Strategic Land Use Plan” (Page 18)

Sydney Food Futures Report 2011 – 2031 (University of Technology Sydney)

If there is an intensified strategic focus on agriculture, 3 of the top 4 LGAs in all of Greater Sydney with the highest capacity to increase fresh food production (up 1 million additional tonnes per LGA per year are; Wollondilly, Wingecarribee (Southern Highlands), and Shoalhaven.



“This could be a game changer for the state, the equine industry and the food security of greater Sydney.”

Hugh Clarke
Director,
Destination Sydney
Surrounds South

Southern Highlands Jobs Activation Precinct CONTINUED

WHO ARE THE PROJECT PARTNERS?

This Southern Highlands Agribusiness & Equine Jobs Activation Precinct is a core element of an overarching Resilience Hub project proposed by the **Southern Highlands Key Stakeholders Group**. **Destination Sydney Surrounds South** is the agency for the visitor economy in the Illawarra, Shoalhaven, Wollondilly and Southern Highlands.

WHAT IS REQUESTED OF GOVERNMENT?

- Grant funding to commission a scoping report for the Southern Highlands Agribusiness & Equine Jobs Activation Precinct project.
- Assistance in identifying a pathway to acquire suitable land.

1 Scope out the project

Taskforce created to scope out the full potential, including new full time equivalent jobs and economic value of Jobs Activation Precinct and develop a Project Plan including a budget, timeline, and Key Performance Indicators.

2 Acquire and allocate the land

Stakeholders follow and support the pathway identified by the NSW Government and Project Plan to acquire and allocate suitable land in the Southern Highlands.

3 Implement the project

Collaboration of stakeholders and Taskforce to implement the Project Plan.

PROJECT PARTNERS





APPENDIX 2

- Agribusiness Toolkit

Agribusiness Toolkit - Suggested Inclusions

The following links provide a guide for suggested resources that could be used as reference to form a Southern Highlands Agribusiness Toolkit. The Toolkit could be made available to existing and new residents in the region who own or manage or are purchasing rural land. The Toolkit could also be available to access through local stakeholder channels such as Wingecarribee Shire Council and Destination Southern Highlands websites, Chambers of Commerce websites, and RDASI's BusSI website. The aim of the Toolkit is to assist rural landowners and managers to make informed decisions and have the correct tools in place to operate diverse and profitable entities, encourage agricultural production and related activities to be viable land uses into the future, and preserving the 'green between' towns and villages.

OPERATIONS & FINANCE

- » [Queensland Government Agbiz Tools - Business and Finance - Farm Operations](#)
Tools to help farmers calculate profit, construct budgets and cashflows, and improve decision-making.
- » [Queensland Government Agbiz Tools - Business and Finance - Farm Finance](#)
Tools to help farmers calculate profit, construct budgets and cashflows, and improve decision-making.
- » [Tas Government - Farm Business Planning Tools - Gross Margin Analysis Tool](#)
A gross margin analysis tool that allows users to compare a variety of farming enterprises, tailored to their management system and geographic location. This page also includes an Improving Energy Efficiencies on Farm Self Assessment Tool.

ON-FARM

- » [WA DPIRD Deferred Grazing Calculator](#)
A calculator to assist in determining how many days it will take to meet a pasture target and reach a particular pasture growth rate.
- » [Tocal College Publications - Field Crops and Pastures](#)
A compilation of relevant field crop and pasture publications from Department of Primary Industries and NSW Government Industry & Investment.
- » [DPI Young Farmer Business Program WHS Toolkit](#)
A range of videos, factsheets and customisable templates to assist you in getting started with WHS management in your business.
- » [Colorado Tourism Office Integrating Safety into Agritourism Checklist](#)
A comprehensive set of safety guidelines and check lists for on-farm activities and situations related to agritourism.

COVID-19

- » [NSW Government Agriculture COVID Toolkit](#)
A toolkit of adaptable communication materials for agriculture businesses, including Being COVID safe and workplace signage.
- » [NSW Government - Get Business Ready](#)
A guide providing 5 simple steps to assist in preparing your business for disasters.

AGRITOURISM

- » [Tasmanian Leaders - Our Place in the Sun: Harvesting Tasmania's Agritourism](#)
A comprehensive report on Tasmania's key Agritourism opportunities and potential for cross-industry collaboration.
- » [Cootamundra Gundagai Regional Council - Rural Lands Issues Paper; Agricultural Tourism](#)
An Issues Paper providing guidance and recommendations to actively promote agritourism in the Council area.
- » [Colorado Tourism Office Integrating Safety into Agritourism Checklist](#)
A comprehensive set of safety guidelines and check lists for on-farm activities and situations related to agritourism.
- » [Australian Regional Tourism & Airbnb – Growing Regional Economies through Agritourism Webinar](#)
Available through the ART Tourism Hub website (free registration required to access site).

SOUTHERN HIGHLANDS | Agribusiness & Equine

Industries Summary Plan for the Future

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Southern Highlands Key Stakeholders Group

Hugh Clarke

Chair

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Destination
Sydney Surrounds South





SOUTHERN HIGHLANDS EQUINE INDUSTRY DEVELOPMENT WHITE PAPER 2024

Identifying opportunities to support the economic growth
of the equine industry in the Southern Highlands,
Wingecarribee Local Government Area

Prepared by

GROW
SOUTHERN HIGHLANDS

ABSTRACT

This document identifies strategic opportunities and projects that will, through collaboration among equine stakeholders and implementation of projects, support the ongoing growth of the equine industry, increase Gross Regional Product, and through Agritourism linked to equine events such as equine skills training and education and farmstays, boost the regional visitor economy.

Equine related businesses, organisations, and individuals in the Southern Highlands have been collectively identified as a growing \$1 billion industry including landbank investment, annual revenue generated from services provided and sales of products, and the hosting of equine events.

The equine industry is diverse, comprising multiple sectors, and many businesses, organisations, and individuals are recognised as national and international leaders and competitors in their respective sectors.

There is overwhelming support for a new world-class annual event to be created, a Southern Highlands Horse Festival, to commence in November 2024, to raise awareness of the significance, diversity, scale, and quality of the equine industry, promote the world class services and products on offer, and position NSW as the horse capital of the world.

EXECUTIVE SUMMARY

Original research was conducted as part of the Southern Highlands Equine Industry Development Project and it was identified that the diversity, scale, and quality of the equine industry in the Southern Highlands (Wingecarribee Local Government Area) is of state, national, and international significance. Considering factors including landbank investment, annual revenue generated from services provided and sales of products, and the hosting of equine events, equine is a growing \$1 billion total value industry. It is estimated that there are more than, 200 properties linked to commercial equine activities (horse farming) with a total land value exceeding \$700 million, 9,000 horses, 1,000 horse owners and/or households owning horses, and 600 Full Time Equivalent (FTE) equine related jobs.

The equine industry in the Southern Highlands comprises multiple diverse sectors. Outside of the industry there is some awareness of activities such as thoroughbred breeding and racing, performance horse breeding, international competitors, training, clinics and events for dressage, eventing, showjumping, as well as clinics on horsemanship, camp drafting, and cutting, Western horse sports, polo, polorosse, and pony clubs for children. However, there is little awareness of many other equine activities such as the extent of leisure horse riding, including trail riding, endurance, spelling and agistment, breeding other horses separate to thoroughbreds and performance horses, showing, carriage driving, working equitation, and liberty work. There is also little awareness outside of the industry that many equine businesses, organisations, and individuals located in the Southern Highlands are recognised as national and international leaders and competitors in their respective sectors.

Extensive stakeholder engagement was undertaken as part of the Southern Highlands Equine Industry Development Project including face to face events and an equine industry survey of horse owners. The survey received 235 complete responses representing ownership of 2,081 horses, 23% of the estimated 9,000+ total horses. The main strategic opportunities and projects, with broad support among stakeholders, include:

1. Create an annual event “**Southern Highlands Horse Festival**” to raise awareness of the significance, diversity, scale, and quality of the equine industry and promote the services and products offered, an event over 16 days is projected to attract 10,000 visitors and generate \$3.3 million economic value, create 22 jobs, and contribute \$2 million to GRP
2. For the **Southern Highlands to be recognised as a significant equine hub in Australia**, with world class sectors including thoroughbred, performance horse, and carriage driving, complimented by many other diverse sectors operating at a quality level, and all supported by equine skills training and education, a centre of equine learning excellence, which would boost the visitor economy through education tourism
3. A **shared equine calendar of events** listing all major annual events across all sectors
4. The need for a **multi-purpose, all-weather (undercover/indoor), equine centre**, that in addition to hosting events and attracting visitors, is open to local clubs and residents – examples of types of equine centres suggested include Camden and Tamworth
5. A **local veterinary hospital specialising in equine** offering a 24 hours emergency service

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1. INTRODUCTION

Grow Southern Highlands is proud to be the lead agency for the Southern Highlands Equine Industry Development Project, a collaboration with Destination Sydney Surrounds South, Wingecarribee Shire Council, Destination Southern Highlands, and the Southern Highlands Key Stakeholders Group. The project is an extension of the initial broader scope Southern Highlands Agribusiness & Equine Industry Development Project, and its purpose is to identify strategic opportunities to support and leverage full potential economic growth of the equine industry.

This document identifies projects that, through collaboration among equine stakeholders and implementation, will drive outcomes such as increasing Gross Regional Product (GRP) and boosting the regional visitor economy through Agritourism linked to equine events, equine skills training and education, farmstays, farm gate premises, and farm experiences.

Grow Southern Highlands undertook extensive stakeholder engagement including meetings and communications with individuals, businesses, and organisations. Two major face to face events were held as part of NSW Small Business Month in October 2023 with 125 attendees, and an equine industry survey of horse owners received 235 complete responses, representing ownership of 2,081 horses, 23% of the estimated 9,000+ total horses.

Supporting agriculture and agritourism is critical to preserving destination appeal

The Southern Highlands (Wingecarribee Local Government Area) is a picturesque region in New South Wales known for its rich agricultural land and scenic landscapes including lush green rolling hills, farms, dams, villages, rivers, and waterfalls. With most of the land at an elevation of 640 metres the area is known for its cool climate. More than 20 wineries have established a reputation as a cool climate wine region. Agriculture, including horse farming and cattle farming, is a part of the region's economy. Cellar doors, boutique distilleries, craft breweries, and quality cafes and restaurants enable the Southern Highlands to be promoted as a genuine food and wine destination. Many outlets offer produce from local farms on their menus.

A total area of approximately 2,700 km², with the Wingecarribee River running through it, the Southern Highlands is easily accessible from the Hume Motorway, the main arterial route between Sydney, Canberra, and Melbourne. It is also uniquely located within 90 minutes of three international airports, Sydney Airport, Canberra Airport, and Western Sydney Airport (due to commence operation in 2026). There are three towns Bowral, Mittagong, and Moss Vale, and more than thirty villages, each with its own character and charm, creating a mix of rural and urban characteristics. Working farms are an important part of the destination's rural ambience and appeal. Supporting agriculture and agritourism needs to be a strategic priority to ensure that working farms remain viable and are not sold at a risk of becoming developed. The Wingecarribee Shire Council Community Strategic Plan clearly identifies that the community wants to preserve the 'green between' towns and villages to maintain the character of the shire. Ensuring proactive and strategic support of agriculture, such as the Rural Tourism Policy and Agritourism planning amendment, is one of the simplest and most effective solutions to preserving the 'green between'. Supporting the equine industry will contribute to maintaining the point of difference appeal of the Southern Highlands as a destination.

2. INDUSTRY OVERVIEW

The equine industry in Australia is well-established with a strong focus on horse racing, breeding, and various equestrian activities. Australia is known for its world-class thoroughbred racing, and several regions have a significant presence in the breeding and training of horses.

The Southern Highlands is a significant equine region, and the local thoroughbred breeding and racing sector is just one sector experiencing growth. Studs such as Milburn Creek and Silverdale Farm are recognised as among the leading studs in Australia. Silverdale Farm has also established Silverdale Academy which, in collaboration with TAFE NSW, delivers much-needed equine skills training. In 2023 more than 200 students attended the world-class facility of Silverdale Farm. Another significant sector comprises a cluster of performance horse professionals, coaches, competitors, and breeders, with an aspiration for the Southern Highlands to be recognised as the Performance Horse Hub of Australia, like Lexington in Kentucky, USA. The Southern Highlands is also home to many other diverse equine sectors including dressage, eventing, showjumping, horsemanship, camp drafting and cutting clinics, Western horse sports, polo, polo crosse, pony clubs for children, leisure horse riding including trail riding, endurance, spelling and agistment, breeding other horses, showing, carriage driving, working equitation, and liberty work, as well as skills training and education, retail, wholesale, supply chain including feed, fencing, transport, and horse care including veterinary care, chiropractors, farriers, osteopaths, and physiotherapists. It needs to be understood that many equine businesses, organisations, and individuals located in the Southern Highlands are recognised as national and international leaders and competitors in their respective sectors.

Existing Southern Highlands equine facilities include:

- Bong Bong Picnic Race Club, East Bowral
- Wallaby Hill Farm, Robertson (private training facility, indoor and outdoor arenas)
- Moss Vale Showground and Robertson Showground
- Carriage driving at Bundanoon
- Polo and polo crosse fields
- Multiple privately owned arenas such as Cedar Lodge, Penrose (indoor and outdoor, specialising in performance horses) and Farm Club, Werai (outdoor, specialising in horsemanship, camp drafting, and cutting clinics)

Bowral Co-op

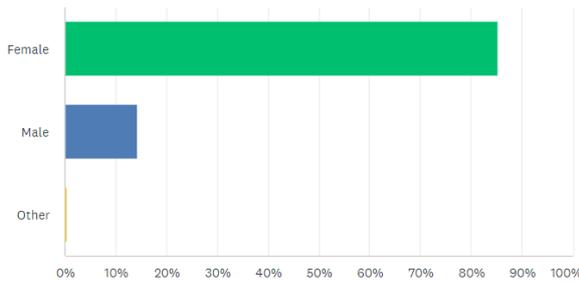
Bowral Co-op started its journey in 1926 with a dairy focus. In 1972 it commenced trading as Bowral Co-op to operate the retail business. The business expanded and became a growing provider within the flourishing equine industry. The retail store was upgraded in 2016 and in 2018 the Saddleworld franchise was added to the retail store. Currently, the overwhelming majority of Bowral Co-op's revenue is generated servicing the equine industry.

Research and survey results create an overview of the equine industry

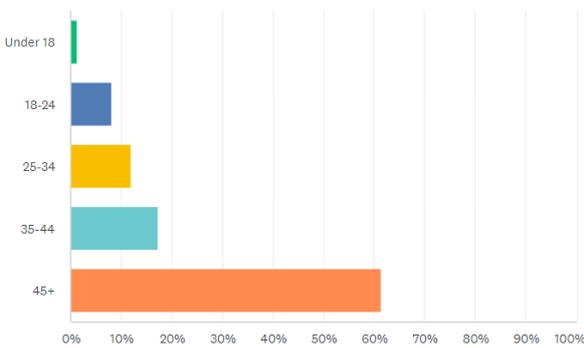
Grow Southern Highlands is proud to have conducted original research including the sales results from Southern Highlands studs at the major annual yearling sales (\$32.8 million in 2023), interviews, workshops, and a comprehensive survey of horse owners (235 completed responses) all of which contributed to establishing the significance, diversity, scale and quality of the equine industry in the Sothern Highlands – a \$1 billion growing industry.

Profile of horse owners in the Southern Highlands based on survey results

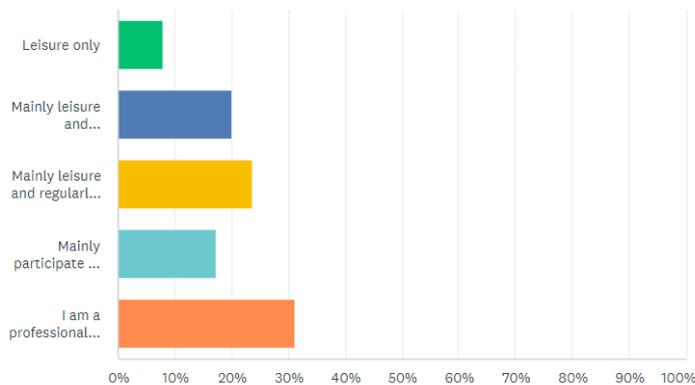
Gender (85% female)



Age (61% 45 years+)

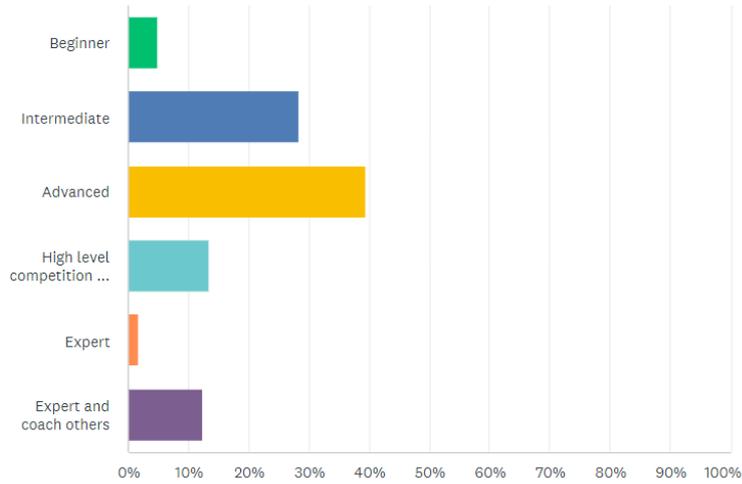


Personal involvement (31% professional in the equine industry and derive an income from equine activities)



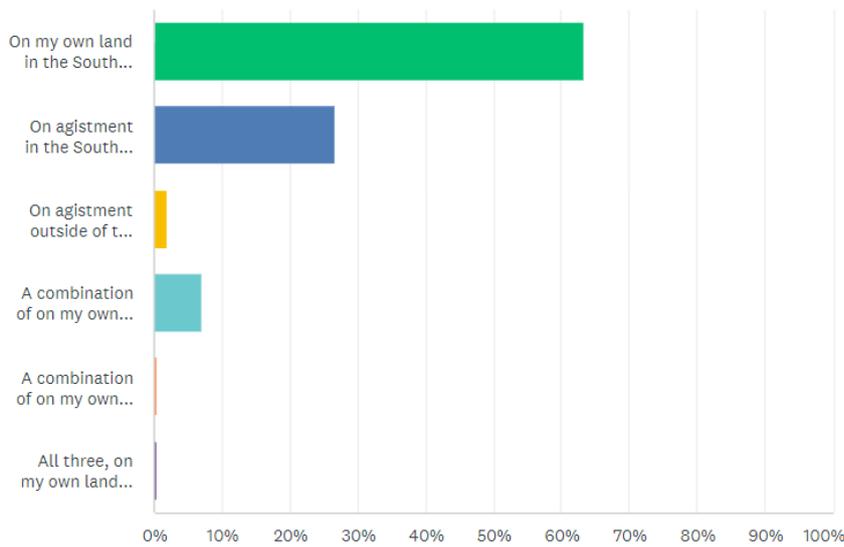
Leisure only	7.79%
Mainly leisure and occasionally attend clinics or sport or competitions	20.08%
Mainly leisure and regularly attend clinics or sport or competitions	23.77%
Mainly participate in sport or competitions	17.21%
I am a professional in the equine industry and derive income from equine activities	31.15%

Horse riding ability (39% advanced)



Beginner	4.92%
Intermediate	28.28%
Advanced	39.34%
High level competition or sport	13.52%
Expert	1.64%
Expert and coach others	12.30%

Where are your horses located, own land/agistment? (63% own land in the Southern Highlands)



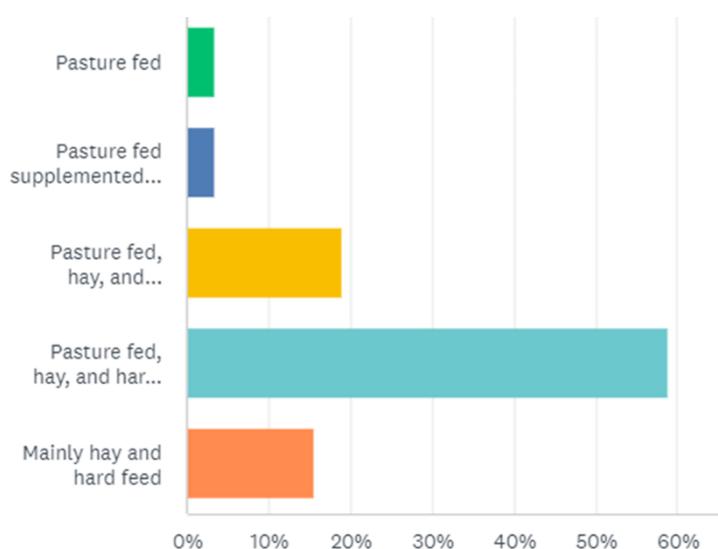
On my own land in the Southern Highlands	63.33%
On agistment in the Southern Highlands	26.67%
On agistment outside of the Southern Highlands	1.90%
A combination of on my own land plus on agistment in the Southern Highlands	7.14%
A combination of on my own land plus on agistment outside of the Southern Highlands	0.48%
All three, on my own land plus on agistment in the Southern Highlands plus on agistment outside of the Southern Highlands	0.48%

What suburb are your horses located in? (Top suburb was Bundanoon with 8% of properties with horses located there)

Suburb	Percentage of properties with horses
Bundanoon	8%
Exeter	7%
Berrima	7%
Sutton Forest	6%
Moss Vale	5%
High Range	4%
Bargo River (Wollondilly)	4%
Alpine	4%
Canyonleigh	3%
Robertson	3%
Woodlands	3%
Marulan (Goulburn)	3%

Note: There are 3 towns and more than 30 villages in the Southern Highlands, the Top 12 suburbs listed above represent the locations of 57% of properties with horses

Overall feed situation over the past 12 months:



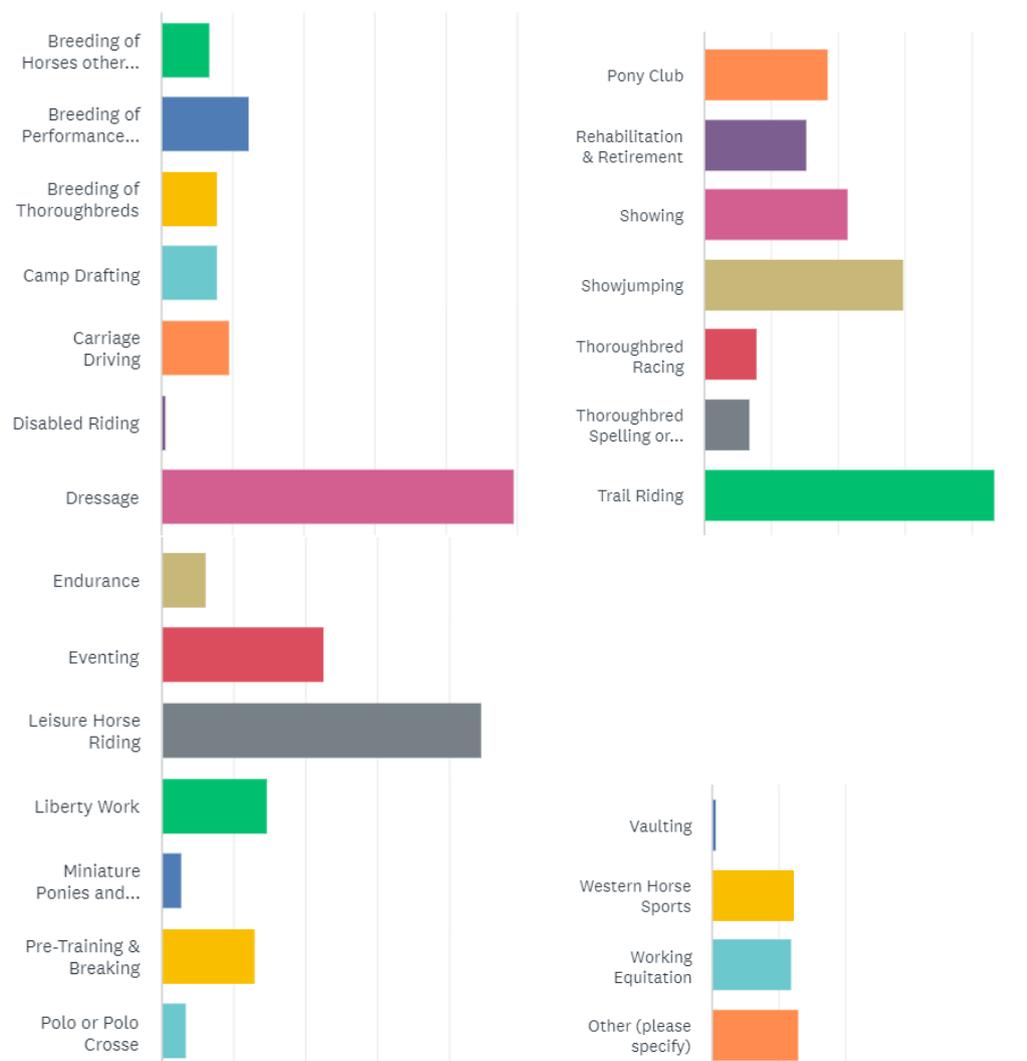
Pasture fed	2.87%
Pasture fed supplemented with hay	4.02%
Pasture fed, hay, and occasionally hard feed	19.54%
Pasture fed, hay, and hard feed at least once a day	58.05%
Mainly hay and hard feed	15.52%

On average horse owners/properties are spending \$15,109 a year on feed and bedding.

3. SEGMENTATION OF THE EQUINE INDUSTRY

Survey results identified the “Top 4” equine segments for participation, by individual horse owners and their immediate family members, in the Southern Highlands (not representative of the economic value of the segments), as;

Dressage (51%), Leisure Horse Riding (44%), Trail Riding (44%), and Showjumping (31%).



Pony clubs provide a popular entry point for young people to equine

Pony Club NSW is a not-for-profit organisation established in 1946 and the largest recognised state body for pony clubs in Australia, with one of the largest associations of riders in the world. It is invested in the development of horse riding in NSW and has over 270 clubs, from Tweed Heads in the north to Eden in the south, with over 13, 000 members. These clubs include riding members up to the age of 25, and non-riding members such as parents and coaches. Pony clubs represent the absolute grassroots level of horse riding in NSW and some of the activities include training and competition in dressage, jumping (showjumping and jumping equitation), cross country, sporting, mounted games, polocrosse, trail rides, campdrafting, show riding, eventing and many others.

4. REGULATORY ENVIRONMENT

Equine sectors have their own governing bodies such as thoroughbred racing has The Australian Racing Board, established in 1998, as the peak national administration body for thoroughbred racing in Australia. The statutory bodies for racing in each State or Territory, known as the Principal Racing Authorities, set up the Australian Racing Board by consensual agreement. Racing NSW is a statutory body established under the NSW Thoroughbred Racing Act 1996 to control and regulate the NSW Thoroughbred Racing Industry.

Equestrian Australia (EA) is the peak body for the administration of Equestrian Sport in Australia. Equestrian NSW (ENSW), established in 1951 and incorporated in 1990, is the State branch of EA. The main function of EA and ENSW is to provide a structured and regulated framework for equestrian competitions with fair rules and regulations for competitors and to promote, develop and grow the sport. EA administers the Federation Equestre Internationale (FEI) rules in Australia which enables international events to be hosted in the Southern Highlands with international officials and competitors, and the results recognised on the world stage. ENSW aims to improve facilities and access to competitions and training throughout NSW as well as to encourage and promote equestrian sport, increase spectator levels, administer coach and officials education and attract sponsorship funding.

Wingecarribee Shire Council (WSC), of which Destination Southern Highlands is a business unit, administers the Local Government Area. In addition to planning, including the overseeing of zoning and the Development Application approval process, it sets strategic priorities for economic development. WSC has demonstrated strategic support for agriculture including equine:

- Agriculture is a priority in the Regional Economic Development Strategy (NSW Government)
- The WSC Rural Tourism Policy supports Agritourism (including horse farming) which in turn supports the Community Strategic Plan to preserve the 'green between' towns and villages by ensuring working farms are economically sustainable and not sold at a risk of development
- WSC proactively supported industry and Destination Sydney Surrounds South to advocate for the Agritourism planning amendment to the NSW Standard Instrument which, recognising that working farms provide food security and create a rural ambience that is a defining point of difference for rural destinations, boosts the visitor economy through farmstays, farm gate premises, and farm experiences including equine events and education tourism such as showcasing regenerative farming
- When Racing NSW proposed the Southern Highlands for a world-class training facility like Newmarket in the UK, representatives of the Southern Highlands Key Stakeholders Group and WSC met with Racing NSW to further explore the opportunity, Racing NSW purchased Waratah Stud in 2021
- Agriculture/Agribusiness/Agritourism represents significant jobs for school leavers and there are skills training and education opportunities linked specifically to the equine industry

5. ECONOMIC IMPACT

Original research for this project identified the significance, diversity, scale and quality of the equine sector in the Southern Highlands as a \$1 billion growing industry. Key estimates about the size of the equine industry, based on research and survey results, include:

- More than 9,000 horses
- More than 1,000 horse owners and/or households owning horses
- More than 200 properties linked to commercial equine activities with a total land value exceeding \$700 million (\$250,000 per hectare equine developed, \$150,000 per hectare not improved)
- 30% of survey respondents have employed staff in the past 12 months
- More than 600 Full Time Equivalent (FTE) equine related jobs

Activity	Value
Landbank investment 200+ commercial equine related properties	\$700 million
Equine infrastructure past 5 years (buildings, stables, arenas)	\$108 million
Horse fencing past 5 years	\$22 million
Equine services annual revenue (care, agistment, veterinary, bedding, chiro, farriers, feed, osteo, physio)	\$97 million
Thoroughbred yearling sales annual revenue	\$33 million
Equine wholesale and retail annual revenue (equipment and accessories)	\$22 million
Horse transport annual revenue (floats, fuel, transport costs)	\$15 million
Horse coaching, clinics, workshops annual revenue	\$3 million
TOTAL	\$1 billion

In terms of growth, horse owners/properties:

- 21% bred horses in the last 12 months
- More than 1,000 horses bred in the last 12 months
- 38% plan to buy another horse or horses in the next 12 months
- 43% are aware of someone in the Southern Highlands intending to take up a horse related activity for the first time in the next 12 months
- On average, 59% of horse property land is dedicated to horses (16.5 acres per property)
- 83% invested in infrastructure in the past 5 years, on average \$128,268 per property
- 46% invested in horse fencing in the past 5 years, on average 7.25km for \$45,766
- 70% identified spending money on equipment in the past 5 years, on average \$17,192
- On average spend \$15,109 a year on feed and bedding
- On average spend \$24,163 a year on transport
- On average spend \$13,709 a year on horse care
- On average spend \$4,828 a year on coaching/clinics/workshops/seminars/webinars

6. THOROUGHBRED BREEDING AND RACING

New South Wales

According to Racing NSW the NSW Thoroughbred Racing Industry is a critical contributor to the NSW economy with almost 50,000 participants providing 27,600 full-time equivalent jobs, many of which are in regional areas. More than \$3.5 billion is generated in economic benefit by the NSW Thoroughbred Racing Industry each year. Currently the industry is made up of 129 race clubs which conduct 740 race meetings each year. Total prizemoney and returns to owners were more than \$370 million in 2022/23. Racing is conducted in the metropolitan area by the Australian Turf Club, which was formed in 2011 from the amalgamation of the Australian Jockey Club (formed in 1842) and the Sydney Turf Club (formed in 1943). Racing in Sydney is conducted at Royal Randwick, Warwick Farm, Rosehill Gardens and Canterbury Park, which between them host 109 meetings each year.

In the provincial area (Surrounding Sydney) five clubs conducted a total of 135 meetings. Those clubs are the Newcastle Jockey Club, Hawkesbury Race Club, Wyong Race Club, Illawarra Turf Club and Gosford Race Club.

Country racing is conducted by more than 121 clubs throughout NSW. In 2022/23 there was 496 race meetings at country racecourses.

In 2022/2023 overall returns to owners and participants were \$371 million, an increase of 18.8% over the previous year. In addition to increases in the prizemoney, The Stablehands Bonus and Equine Welfare Fund were also increased to 2% and 1.5% respectively. Racing NSW has also continued with its strategy of future-proofing the industry through property acquisitions, the Prizemoney Sustainability Provision and the Club Sustainment Provision. [Source: Racing NSW] The Southern Highlands is strategically located to take advantage of this growth in thoroughbred breeding and racing.

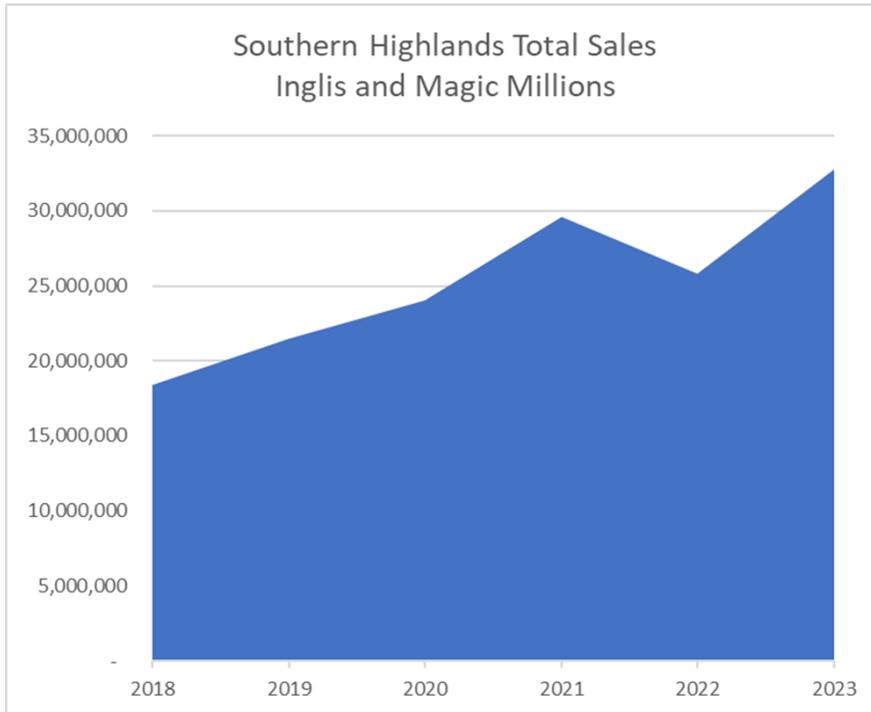
Bong Bong Picnic Race Club

The Bong Bong Picnic Race Club was formed in 1886 and hosts the Bong Bong Picnic Races. In the 1980s, when the Bong Bong Picnic Races were still held on a Saturday, it was recognised as the largest picnic race meeting in the world, peaking in 1985 with 35,000 attendees. Subsequently, for crowd control, the authorities limited attendance to members and their guests and for the meeting to be held on a weekday. [Source: Alan Chittick author of Yesterday, Today, Tomorrow] Bong Bong Picnic Race Club is located in East Bowral and the Bong Bong Picnic Races, now held every year on the last Friday in November, continue to be a popular annual regional racing event for locals and visitors. The facility is also available for hire for a range of community and social events such as concerts.

Southern Highlands

The Southern Highlands thoroughbred breeding and racing sector has demonstrated consistent growth. Of the approximately 7 major local studs Milburn Creek and Silverdale Farm are recognised as leading Australian studs having bred Group 1 winners and regularly achieving individual horse sale prices in excess of \$1 million. Regarding yearling sales generated from local studs at the major national Inglis and Magic Millions auction events:

- Total sales in 2018 \$18,368,750
- Total sales in 2023 \$32,791,000



The increase in yearling sales revenue over 5 years is \$14,422,250 which represents:

- 78.5% growth over 5 years
- 15.7% average annual growth

Source: original research of auction results from more than 100 auction events over 6 years

7. OTHER EQUINE ACTIVITIES

Separate from the thoroughbred breeding and racing sector there is a broad range of other sectors within the Southern Highlands equine industry.

Performance horses

Just one example is the performance horse breeding and training sector. Brett and Melinda Parbery operate the Cedar Lodge facility at Penrose, a 60m x 20m indoor dressage arena, an outdoor dressage arena, as well as a large grass show jumping arena complete with a full show jump course.

Brett Parbery started out riding saddle broncs nationally and internationally before he transitioned to dressage in 2000. Living and training in Europe for three years before returning to Australia he worked with a number of top trainers. Starting his own stable in 2003, Brett has been professionally riding, training and coaching dressage. The pinnacle of his achievements were at the World Equestrian Games in 2010. Brett finished 10th in the World Cup Final, 6th at Aachen CHIO, 3rd at Rotterdam CHIO and won the Grand Prix Special at Hickstead. Brett, with his top horse Victory Salute, a home bred Australian horse, completed the 2010 season with an 8th place finish at the best World Games of all time at the Kentucky Horse Park in Lexington, Kentucky, USA. Some of Brett's other achievements include winning over 30 individual Australian Championships across all levels including 4 x Australian Grand Prix Champion. Brett has represented Australia on 2 occasions at the World Games in Kentucky and Tryon 2018. In 2008 and 2016 Brett earned a spot in the final 5 for selection to those respective Olympics, with misfortune on each occasion denying the opportunity. At the London Olympics, Brett was on staff as the Dressage Coach to the Australian Eventing Team and after dressage had the team well positioned in 1st place over all 5 team scores.

Brett has stated that there is a cluster of performance horse professionals, coaches, competitors, and breeders located in the Southern Highlands and the region should aspire to be recognised as the Performance Horse Hub of Australia, like Lexington in Kentucky USA.

Carriage driving

The Southern Highlands Carriage Club has operated for almost 50 years. The sport of carriage driving is alive and well with the club hosting an international event in Bundanoon in 2023. Australia competed against the United Kingdom in carriage driving for The Zilco Ashes, drawing inspiration from the cricket rivalry. The event was a success and supported through sponsorship including Zilco and a grant from Wingecarribee Shire Council through the Community Assistance program. The format for the event was innovative and televised by Horse and Country TV between the UK and Southern Highlands. It is proposed to become an annual event. The Southern Highlands Carriage Club expanded by absorbing Moss Vale Pony Club after they were displaced. Council offered a 21-year lease of the grounds in Bundanoon and the club has enhanced the site by constructing new facilities. The site offers camping which is sought after for local events such as Brigadoon and Winterfest.

Other equine sectors

The stakeholder engagement sessions led to a comprehensive list of equine sectors/activities that horse owners participate in. See the full list below.

In addition to sectors/activities for participation there is recognition of the service providers in the equine supply chain including retail, wholesale, feed, fencing, transport, and horse care including veterinary care, chiropractors, farriers, osteopaths, and physiotherapists.

What horse related activities do you and your immediate family participate in?

Respondents were able to select more than one activity

Breeding of Horses other than Performance Horses or Thoroughbreds	7.21%
Breeding of Performance Horses	14.42%
Breeding of Thoroughbreds	7.69%
Camp Drafting	6.73%
Carriage Driving	8.17%
Disabled Riding	1.44%
Dressage	49.52%
Endurance	7.69%
Eventing	24.04%
Leisure Horse Riding	45.67%
Liberty Work	15.87%
Miniature Ponies and Horses	2.88%
Pre-Training & Breaking	11.54%
Polo or Polo Crosse	3.37%
Pony Club	18.75%
Rehabilitation & Retirement	13.94%
Showing	21.15%
Showjumping	28.37%
Thoroughbred Racing	7.69%
Thoroughbred Spelling or Agistment	7.21%
Trail Riding	44.23%
Vaulting	0.48%
Western Horse Sports	12.98%
Working Equitation	13.94%
Other (please specify)	Responses 12.02%

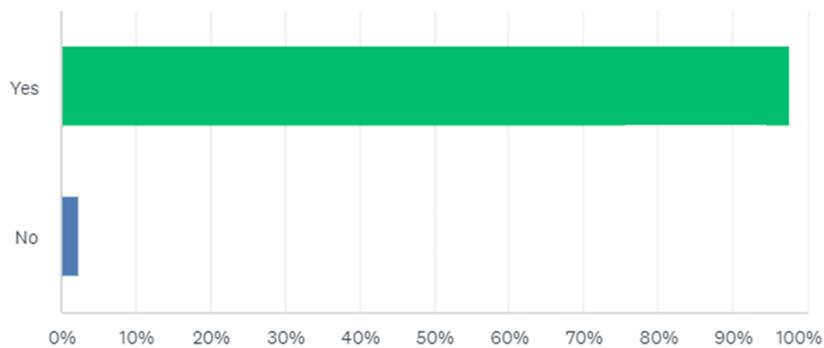
Respondents that selected Other were asked to specify what other activities they participated in. Additional activities mentioned included fox hunting, cutting, reining, Australian Light Horse re-enactment, and medieval horse sports.

8. CHALLENGES AND OPPORTUNITIES

The stakeholder engagement sessions and survey provided an opportunity for individuals, businesses, and organisations to raise, and comment on, issues.

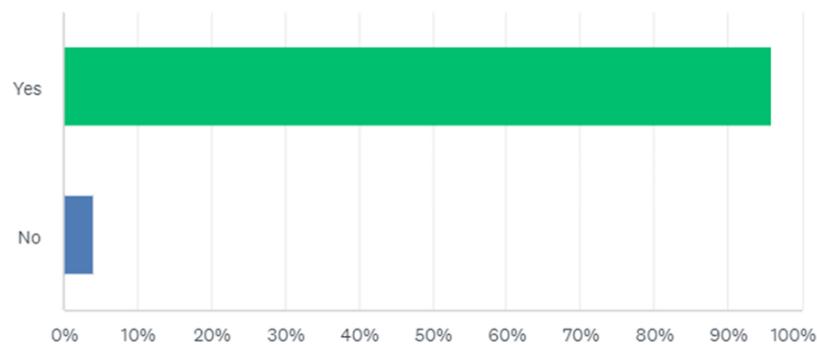
Do you support the creation of a new annual event "Southern Highlands Horse Festival"? It is proposed to run for approximately 2 weeks in late November and early December, commencing in 2024, to raise awareness of and showcase the diversity, scale, and quality of the equine sector in the Southern Highlands.

98% Yes



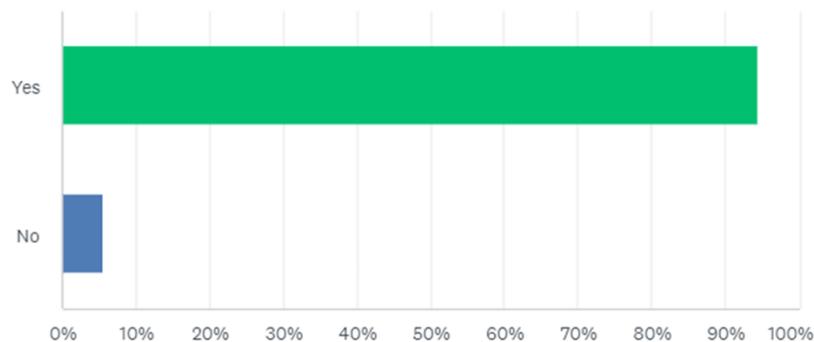
Do you support the creation of a centralised Southern Highlands annual Equine Calendar of Events, which would include all disciplines, sports and organisations, available to all equine stakeholders and the public?

97% Yes



Do you support the need for a multipurpose equine centre in the Southern Highlands?

95% Yes



Are there any equine related services that you would be willing to pay for that are not readily available in the Southern Highlands?

There most common responses included:

- An indoor/all-weather equine facility, covered arena, facility to have gallop track, allow jumping, canter and camping
- Water, water treadmill, horse swimming pool
- 24 hours emergency equine vet hospital
- More clinics covering camp drafting/cattle/dressage/liberty/Western
- Riding coaches
- Farriers that live locally
- Horse care services including chiropractor/osteopath/physiotherapist
- Equitation grounds
- Cross country course
- Clubs for adult riders
- Saddle fitter

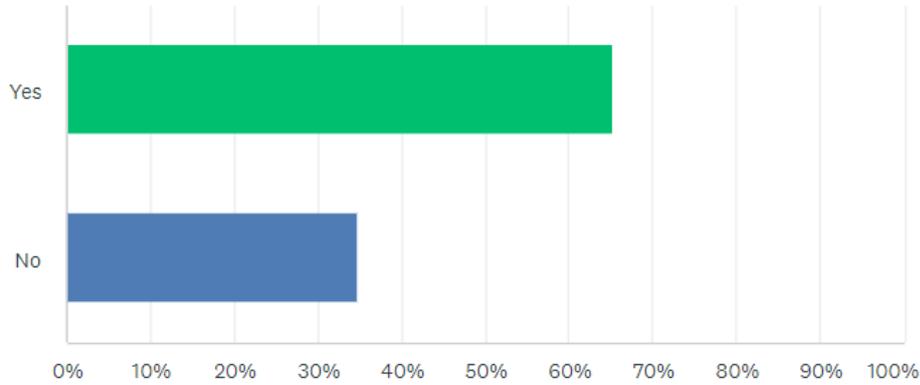
Are there any final comments you would like to make about the significance of the equine sector in the Southern Highlands, or local equine facilities?

There most common responses included:

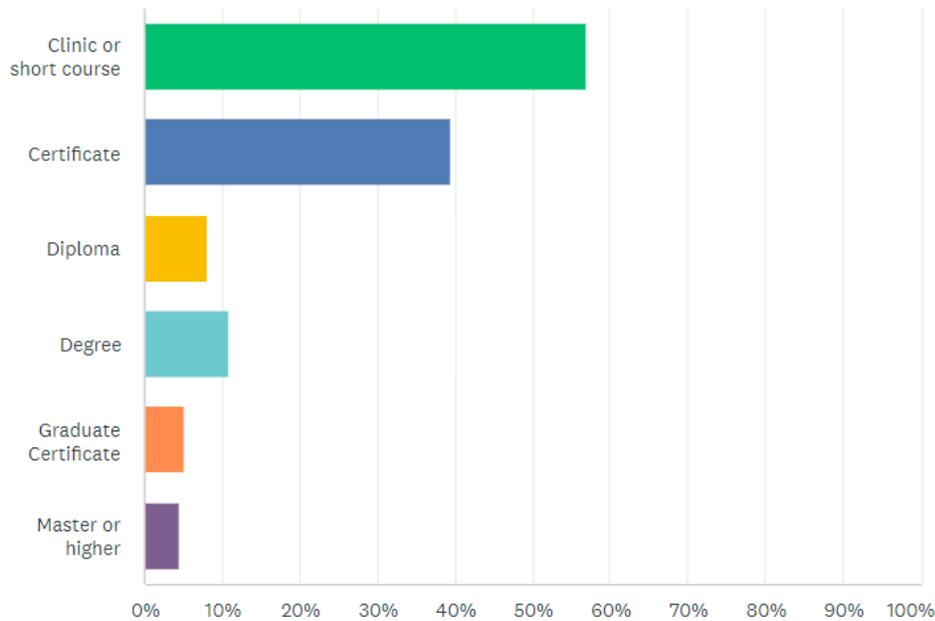
- The need for a large equine facility, with public access for clubs, needs to be indoor/all-weather
- Need more equine dedicated areas
- Need more trails, other places have trails that can be shared by horses/walkers/cyclists
- Need a vet hospital with 24 hours emergency services
- Need more equine specialist vets
- Need more organisation around clubs for adult riders, recognition of Adult Owner Riders (AOR) as a segment, a budget to support initiatives, affordable membership, social activities for adult riders
- Horse Festival is a great idea, maybe 7-10 days to start with
- Need more facilities and support for carriage driving
- Need experienced equine staff
- Need more awareness and promotion of equine therapy and assisted learning
- Need improvement to the Development Application process for simple additions such as horse shelters
- Explore a better utilisation of Bong Bong facilities for equine activities like Bowral Dressage does
- Brisbane is hosting the 2032 Summer Olympics in only 8 years, Australia is the only country without a High Performance Program, with a cluster of high performance people in the Southern Highlands there is an opportunity to offer a solution

9. EQUINE SKILLS TRAINING AND EDUCATION

Horse owners were asked, Have you completed any form of equine/horse related education or training? (65% Yes)



What level/s of education or training have you completed? (57% clinic or short course)



Clinic or short course	56.93%
Certificate	39.42%
Diploma	8.03%
Degree	10.95%
Graduate Certificate	5.11%
Master or higher	4.38%

What courses or subjects have you studied? Open response.

There was a broad range of subjects and levels, the top responses were:

- Accredited Coach/Certificate/Diploma
- Horsemanship/Natural Horsemanship
- Certificate in Horse Breeding
- Certificate in Horse Husbandry
- Horse Management
- Certificate in Performance Horse
- Degree as a Vet
- Vet Nursing
- Degree in Agriculture
- Equine Science
- Dressage
- Liberty
- Equitation
- Certificate/Diploma/Degree in Business

Survey feedback on Southern Highlands employment and skills training:

- 30% of survey respondents have employed staff in the past 12 months
- Only 16% of employers offer formal skills training for staff (mainly first aid and Certificate in Horse Breeding)
- 45% of employers believe that if they were to offer additional skills training or qualifications to staff it would improve the efficiency or productivity of the business
- 42% of employers believe they would benefit from assistance to employ local skilled job seekers
- 33% of employers believe they would benefit from assistance to employ equine skilled international job seekers on work visas
- 50% of employers would subscribe to or participate in a centralised information portal listing available job seekers

Industry has collaborated closely with TAFE NSW, Moss Vale and Goulburn campuses, and an overview of the TAFE offering in South Region includes:

- Hands-on learning environment
- Industry relevant courses developed through 'industry consultation processes'
- Traineeships available for full-qualifications
- Growing student cohort – more than 50 at some stage of completion of full qualifications
- Increased interest and awareness in Horse Industry
- Introduction through TVET – Animal Care, Agriculture
- Engaging with Career Advisors and Workforce Providers
- Intensive marketing, event/expo attendance, forums and industry events

The two main industry qualifications offered by TAFE are:

- Certificate III in Horse Breeding
- Certificate III in Horse Care

There is also the collaboration between TAFE and Silverdale Academy:

- Commenced in May 2022
- Subsidised by NSW Government
- Consists of 4 units of competency (toward full qualification)
- Received over 100 applications to date
- 43 intern graduates from 5 programs
- 12 continued into full Certificate III qualifications
- Several gained employment or work experience
- School student internship program sponsored by RIEP late November 2023
- Unable to track all graduates, numbers could be higher
- Upcoming programs in 2024 – Summer & Autumn EOI's are ready
- Guest speakers, industry professionals, career chats
- In partnership with the Australian Turf Club (Warwick Farm)
- Possibility of future partnerships and further locations for delivery

10. SOUTHERN HIGHLANDS HORSE FESTIVAL

Research, the survey, and stakeholder engagement identified overwhelming industry support (98%) to create and deliver, as a strategic priority in 2024, a **Southern Highlands Horse Festival** as an annual event with a primary purpose of raising awareness of the significance, diversity, scale and quality of the equine industry and promoting the services and products offered. An event over 16 days, spanning three weekends, is projected to attract 10,000 visitors, in addition to 5,000 locals, and generate \$3.3 million economic value, create 22 jobs, and contribute \$2 million to Gross Regional Product.



Concept behind the Horse Festival running over 16 days, spanning 3 weekends

After broad consultation it was determined to leverage existing quality annual events such as Bong Bong Picnic Races and an international event at Wallaby Hill and to build the festival around those anchor events. Thoroughbred and performance horse breeders specified that early December is the best time of year to showcase their sectors. Accommodation operators expressed support for a major festival at this time of the year, bridging the end of spring and the beginning of the summer school holidays. To adequately showcase the diversity of equine sectors it was resolved that the optimal format for a curated world-class event is to run over 16 days, commencing on the last Friday in November with Bong Bong Picnic Races, and spanning 3 weekends. Economic modelling has been done for 16 days.

Note, if the Festival had run in 2023 it would have been Friday 24 November to Sunday 10 December. In 2024 the inaugural event is proposed to run Friday 29 November to Sunday 15 December. This fits comfortably between Equitana (every 2 years) in Melbourne 14 to 17 November and the NSW school term finishing on Friday 20 December. Hopefully the festival can utilise the infrastructure in place at Bong Bong on Friday again on Saturday 30 November/Sunday 1 December for a major launch event. Possibly the next weekend 7/8 December will include an international event at Wallaby Hill, and the final weekend will include an international carriage driving event and/or polo and polo crosse exhibition events. There are many activities including vet symposiums to include in the festival.

Overview

For the Southern Highlands Horse Festival to:

- Be recognised as a world-class curated event
- To commence in November 2024, subject to funding
- Raise awareness of the significance, diversity, scale and quality of the equine industry
- Promote the high-quality services and products offered
- Showcase all aspects of the equine industry featuring world-class achievements
- Position the Southern Highlands as a High Performance Hub
- Position NSW as the horse capital of the world
- Attract more equine specialists and skilled workers to the region
- Create more jobs, drive more skills training and upskilling
- Collaborate with Racing NSW on their journey with the post racing welfare of thoroughbreds
- Invite equine stakeholders to participate in a calendar of events via an Expression Of Interest (EOI) round, organisations may be able to schedule existing events to fit the calendar or create a showcase or exhibition event

Proposed Southern Highlands Horse Festival components:

- Bong Bong Picnic Races (normal annual event last Friday in November)
- Potentially leverage the infrastructure at Bong Bong for a major launch event
- A major Opening Event, could include a Parade of Champions (champion thoroughbreds bred in NSW), Australian Light Horse re-enactment team, NSW Mounted Police, a showcase/parade of the sectors of the industry in the Southern Highlands, pony races, local food and wine offered, culminating in a country music live performance by a prominent artist
- Wallaby Hill eventing with international competitors
- Endurance event
- International carriage driving event
- Exhibition sports (polo crosse/polo)
- Dressage showcase
- Horsemanship/Camp drafting/Cutting
- Thoroughbred yearlings sales showcase, with awards presented for best draft
- Farriers' competition
- Pony clubs
- Horse care showcase, veterinary and other care services
- Veterinary symposiums
- Feature skills training and education and jobs with TAFE e.g. 200 students through Silverdale Farm Academy

Economic Impact Assessment

With the support of Wingecarribee Shire Council and the use of an economic modelling tool, an “Event impact calculator”, the economic value of the Southern Highlands Horse Festival has been assessed.

Key assumptions:

- Event duration 16 days
- 5,000 locals to attend
- 10,000 visitors to attend (7,500 daytrip visitors with an average daily spend of \$143, 2,500 overnight visitors, average length of stay of 2.3 nights, with an average daily spend of \$208)

The event, with regional significance, is projected to directly generate \$2,268,513.

	Output \$	Value added \$	Local jobs
Direct impact	1,950,014	887,248	12.8
Industrial impact	1,055,703	465,213	7.1
Consumption impact	309,780	156,757	1.6
Total impact on local economy	3,315,497	1,509,216	22

The event is projected to generate \$2.3 million with a total economic impact of \$3.3 million. Gross Regional Product is estimated to increase by \$2 million. The combination of all direct, industrial and consumption effects would result in a total estimated increase of employment equivalent to 22 annual local jobs.

Source: input average spend data from Tourism Research Australia (TRA) and Destination NSW, event impact calculator through National Institute of Economic and Industry Research (NIEIR)

Examples of prominent international Horse Events:

- Royal Horse Show, 10 days, November, Toronto, 300,000 visitors
- Calgary Stampede, 10 days, July, Calgary, 1 million visitors
- Badminton Horse Trials, April/May, Badminton, 200,000 visitors
- The Paris Horse Show, 10 days, 2,000 horses, Paris
- London International Horse Show (Olympia), December
- Land Rover Kentucky, April, Lexington
- World Equestrian Festival CHIO Aachen, Aachen/Germany
- Royal Windsor Horse Show, June
- Devon Horse Show, Devon/Pennsylvania
- AQHA World Championship Show, 20 days, November, Oklahoma

Why is a Southern Highlands Horse Festival strategically relevant?

In addition to preserving the point of difference rural character of the destination, there is the strategic synergy of leveraging a significant and growing equine industry to boost the visitor economy through a major annual event that will have a \$3.3 million economic impact. Of the Sydney Surrounds South region the Southern Highlands may be the primary beneficiary of visitors linked to the development of and eventual opening of Western Sydney Airport. Any efforts to support a growing industry and Agritourism will increase the Gross Regional Product.

Destination Sydney Surrounds South is committed, via its Destination Management Plan, to:

- Support the Sydney Surrounds South **visitor economy to recover and be sustainable, capable, and resilient**
- Build the identity of Sydney Surrounds South's destinations to align with the Feel NSW brand and **strengthen collaborative marketing partnerships**
- Continue to **develop authentic visitor experiences** to drive greater visitor dispersal and longer stays to the Sydney Surrounds South region
- Grow the Sydney Surrounds South visitor economy through the **delivery of high quality events and attraction of new events**
- Provide an enabling environment to **attract investment** to the Sydney Surrounds South visitor economy

Proposed Product Development Budget for Southern Highlands Horse Festival

You only get 1 chance in life to make a positive first impression, and a world-class event needs to make a positive impact in Year 1. Therefore, an optimal minimum budget of \$200,000 is required to ensure a quality event and reputation is established. Ideally, grant funds would fully fund the event in Year 1, and after establishing proof of concept to prospective sponsors the event could transition, with sponsorship and ticket sales, to being self-funded in Year 4. Local industry organisations and businesses are able to provide approximately \$200,000 of in-kind support including administration, coordinating volunteers, the donation of facilities and resources, and promotion through their networks.

	2024 Year 1	2025 Year 2	2026 Year 3	2027 Year 4
INCOME				
Grant Funding	\$200,000	\$100,000	\$50,000	
Sponsorship		\$70,000	\$100,000	\$150,000
Ticket Sales/Ticket Sales Commission		\$20,000	\$30,000	\$60,000
Advertising external to participating organisations and in addition to in-kind support		\$10,000	\$20,000	\$30,000
Total Income	\$200,000	\$200,000	\$200,000	\$240,000
EXPENSES				
Facilitate Expression Of Interest (EOI) Stage	\$30,000	\$30,000	\$25,000	\$20,000
Horse Festival content creation	\$40,000	\$40,000	\$35,000	\$30,000
Create and Implement a Production Plan	\$40,000	\$40,000	\$35,000	\$30,000
Support development of Opening Event	\$10,000	\$10,000	\$15,000	\$20,000
Support development of events	\$5,000	\$5,000	\$5,000	\$10,000
Support development of new events	\$5,000	\$5,000	\$5,000	\$10,000
Support development of International competitor events	\$10,000	\$10,000	\$15,000	\$20,000
Support development of Closing Event	\$10,000	\$10,000	\$15,000	\$20,000
Digital marketing campaign	\$50,000	\$50,000	\$50,000	\$60,000
Total Expenses	\$200,000	\$200,000	\$200,000	\$220,000
NET PROFIT	\$0	\$0	\$0	\$20,000

11. RECOMMENDATIONS

The Equine Industry Development Project with stakeholder engagement sessions, research, and a comprehensive equine industry survey established broad support for the following:

1. Adopt a strategic aspiration for the Southern Highlands to be recognised as a significant high performance equine hub in Australia, with world-class sectors including thoroughbred, performance horse, and carriage driving, complimented by many other diverse sectors operating at a quality level, and all sectors supported by equine skills training and education, a centre of equine learning excellence with world-class facilities, which would also boost the visitor economy through education tourism.
2. Establish a curated world-class annual event “Southern Highlands Horse Festival” to raise awareness of the significance, diversity, scale and quality of the equine industry and promote the services and products offered. An event over 16 days is projected to attract 10,000 visitors in Year 1 (2024) and generate \$3.3 million in economic value, create 22 jobs, and contribute \$2 million to Gross Regional Product.

Note: \$200,000 in grant funding is required to activate the event in Year 1, November 2024. From Year 4 (2027) the event could be self-funded from sponsorship and revenue.

3. Develop a shared equine calendar of events listing all major annual events across all sectors. The collaboration, sharing of information and resources, will drive synergy and improved outcomes. Practical economic outcomes from a shared calendar include informing the accommodation sector of dates and locations and estimated attendance for events.

Note: Wingecarribee Shire Council has kindly offered, through Destination Southern Highlands, to coordinate the production, publishing, and maintaining of a digital calendar.

4. Develop a masterplan for a world-class, multi-purpose, all-weather (undercover/indoor), equine centre, that in addition to hosting events and attracting visitors, is open to local clubs and residents. Examples of types of equine centres suggested include Camden and Tamworth.

Note: Remarkably, globally renowned equine facility architect Timothy Court is a resident of the Southern Highlands, his business Timothy Court & Company P/L Architects led the design of the 2008 Olympic Equestrian Centre in Hong Kong (\$130 million), won an award for the Sydney International Equestrian Centre, 2000 (\$50 million), led the masterplanning and design of the Australian Equine and Livestock Event Centre in Tamworth, 2008 (\$50 million), as well as the Inglis Thoroughbred Centre in Sydney, 2015 (\$100 million), and Balios International Equestrian Centre, Seoul, Korea, 2013 (\$40 million).

5. Identify a 'lead proponent' for sourcing interest in establishing a veterinary hospital specialising in equine and offering a 24 hours emergency service. Scope out a suitable location and develop a masterplan for a world-class equine veterinary facility.
6. Establish an Equine Industry Stakeholders Group to explore issues contained in these recommendations and explore issues such as:
 - a. a desire for more clinics to be hosted locally such as camp drafting/ cattle/ dressage/ liberty/ Western
 - b. attracting more horse care services including farriers / chiropractors/ osteopaths/ and physiotherapists to live and work locally
 - c. the need for more equine dedicated areas including more trails e.g. trails could be shared by horses/ walkers/ cyclists
7. Identify an existing club, or collaboration of clubs, or 'lead proponent' to explore establishing a club for adult riders, giving recognition to Adult Owner Riders (AOR) as a segment, ideally affordable membership and social activities for adult riders
8. Develop a strategic plan to support the growth of, and identify the full potential for, carriage driving in the Southern Highlands and hosting international events

12. REFERENCES

- Bong Bong Picnic Race Club
- Bowral Co-op
- Destination NSW
- Destination Southern Highlands
- Destination Sydney Surrounds South
- Equestrian Australia
- Grow Southern Highlands (stakeholder engagement sessions and industry survey)
- National Institute of Economic and Industry Research
- Racing NSW
- Southern Highlands Key Stakeholders Group
- TAFE NSW
- The Australian Racing Board
- Tourism Research Australia
- Wingecarribee Shire Council

Contact

For any enquiries regarding the Southern Highlands Equine Industry Development Project or general equine industry related enquiries contact Grow Southern Highlands

<https://growsouthernhighlands.com.au/>