

## **Loddon-Mallee Strategic Land Use Study for DPCD via Planisphere, June 2013**

Phillips Agribusiness was commissioned to conduct an evaluation of the different agricultural industries within the Loddon-Mallee region through determining their structure and operational characteristics, contribution to the regional economy and the underlying trends guiding future industry development.

The study was a desktop analysis which relied on published information and a limited telephone interview program. However, consultants were used who had industry experience and an office presence in Mildura to verify and substantiate horticultural input.

ABS data 2011 was analysed to determine the broad patterns of rural land use within the region. Over 60% of total holding area<sup>1</sup> is directed to crop production. Grazing is the next most significant use with other uses being either conservation or unproductive land and relatively minor in incidence. The total farm gate value of agriculture in the region for 2011 was estimated at \$1.6b with the major contributors being broadacre crops, almonds, grapes and milk.

In the cropping sector, cereals are the major crops grown and comprise wheat, barley, oats and triticale. Within the cropping rotation, legumes are the next most important (lentils, field peas, chickpeas, vetch) followed by oilseeds (canola, safflower).

The intensive crop types such as fruit, nuts, vegetables and grape are mainly grown in the Swan Hill and Mildura irrigation districts and along the Murray where irrigation is available to service horticulture.

Of the grazing industries, milk cattle are the most significant enterprise because of the value of production and value adding capability. Their location is within the irrigation districts of Campaspe and Gannawarra whereas beef cattle and sheep are primarily located in the dryland areas and are farmed extensively, usually in association with crop production.

Industry profiles were completed for broadacre cropping, citrus, olives, almonds, dried fruit, wine grapes, table grapes, dairying, sheep and beef.

Value adding provides considerable flow on effects to the regional economy. Value adding multipliers in the rural sector differ according to commodity but are generally range between 2-3. The WA Department of Agriculture in 2010<sup>2</sup> estimated a mean rating for agricultural commodities at 2.37 but with a range of 1.7 to 3.95 depending on commodity type.

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<sup>1</sup> Holding area is private land owned

<sup>2</sup> Multipliers: Western Australian Agriculture and Food Industries August 2010