



Central Murray

Farm-to-plate Cluster Plan

Prepared by

regionality
PTY LTD





The Murray Farm-to-plate Program is a regional, cross-border initiative and has been proudly funded by the NSW Government in association with the Victorian Government, Local Government partners and Murray Regional Tourism.

DISCLAIMER

The information contained in this report is intended only to inform and should not be relied upon for future investment or other decisions. It is expected that any investment decisions made using these specific recommendations will be fully analysed, with appropriate due diligence undertaken.

In the preparation of this document, recommendations have been made using information and assumptions provided by many sources and from the methodology adopted for this report. The authors, and Murray Regional Tourism, accept no responsibility or liability for any errors, omissions or resultant consequences, including any loss or damage arising from reliance on the information contained in this report.

It should also be noted that any data presented in this report for the region is an approximation of the administrative boundaries of the various local government areas (LGAs). Definitions can vary between data sources and, over time, the data should be used with caution. The data has been sourced largely from National and International Visitor surveys, ABS data and local surveys compiled and analysed by Regionality Pty Ltd on behalf of Murray Regional Tourism.

NOTE: Data has been extracted from Tourism Research Australia's National Visitor Survey by directly accessing the dataset under licence. Domestic overnight visitor expenditure has been estimated by calculating the item category expenditure for visitors that spend all of their trip nights in the LGA (i.e. single stopover trips) and discounting these to allow for the fact that some expenditure may have taken place on the way to or from the destination. It is assumed that this single stopover visitor expenditure is likely to be the same as LGA visitors who have spent nights in other destinations during their trip (i.e. multiple stopover trips). Total expenditure estimates are therefore adjusted upwards to account for the proportion of LGA visitors that are on multiple stopover trips. Per-night expenditure is not adjusted and reflects the per night spends in each category for single stopover visitors. An aggregation of four years was chosen to boost sample sizes and decrease sample error. Estimates were not presented for those that did not meet minimum sample sizes. A cell-by-cell approach to determining the minimum was used. Domestic day visitor estimates for the same four-year period were examined. A majority failed the minimum sample-size test and were excluded. As with domestic overnight visitor expenditure estimates, discounts have been applied to account for expenditure that may have occurred on the journey to or from the destination.

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TABLE OF ACRONYMS

ABS	AUSTRALIAN BUREAU OF STATISTICS
SOC	SHIRE OF CAMPASPE
DNSW	DESTINATION NSW
DPC	NSW DEPARTMENT OF PREMIER AND CABINET
F2P	FARM-TO-PLATE
FIAL	FOOD INNOVATION AUSTRALIA LIMITED
GI	GEOGRAPHICAL IDENTIFICATION SYSTEM
IVS	INTERNATIONAL VISITOR SURVEY
MRC	MURRAY RIVER COUNCIL
MRT	MURRAY REGIONAL TOURISM
NVS	NATIONAL VISITOR SURVEY
RDA	REGIONAL DEVELOPMENT AUSTRALIA
RDV	REGIONAL DEVELOPMENT VICTORIA
RFS	REGIONAL FOOD SYSTEM
TA	TOURISM AUSTRALIA
TRA	TOURISM RESEARCH AUSTRALIA
VC	VALUE CHAIN
WWIC	VISIT VICTORIA



Lead agency, Murray Regional Tourism (MRT) is the regional tourism organisation (RTO) for the Murray region. Established in 2010 in partnership with Destination NSW (DNSW), Visit Victoria and local government councils in the Murray region, MRT provides overarching tourism strategy, a clear developmental direction, focused product development and support for visitor-economy-related infrastructure in order to achieve its goal of making the Murray a must-visit destination. MRT helps facilitate improvements in the supply and quality of tourism experiences, as well as an increased awareness of destinations, products, experiences and events within the region, for its 13 local government council members and the region's tourism industry.

MRT commissioned the Murray Farm-to-plate (F2P) Program to achieve its objective of developing the Murray region as a renowned agri and culinary tourism destination. The program was designed to boost the region's food- and drink-related products and experiences by improving the quality, authenticity and availability of offerings to visitors and locals



Author and lead project consultant Regionality is a specialist consulting firm that works across agriculture, tourism and regional food systems, with a focus on business innovation and economic development. Regionality's managing director, Rose Wright, is project lead. Rose is a pioneer in the development of and advocacy for agritourism and culinary tourism in Australia, with experience in policy, strategy and working with businesses on the ground. Her work with the Sustainable Tourism Cooperative Research Centre – translating and extending research into practical tools and programs for business – has resulted in innovative, highly acclaimed and successful programs that have transformed regions.

She continues to work with business, industry and governments at local, state and national levels, across agencies and sectors that span the farm-to-plate value chain, including tourism, regional development, land use planning, agriculture and the food industry.

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Methodology

Background and context

To understand the methodology behind the Report and the Cluster Plan, one first needs to understand the background and process to the broader program.

Murray Regional Tourism (MRT) identified agri and culinary tourism as a potential experience theme across the region in 2016. It also identified a gap in the number and types of experiences on offer in the sector. Regionality was engaged by MRT as a specialist consultancy to scope the:

- agri and culinary tourism potential of the region,
- best approach to facilitating its development, and
- level of support from regional stakeholders and other partners.

An initial discussion paper was developed and delivered via a series of workshops with key partners. The feedback identified that the desire to develop the sector, the shared opportunity and significance of the project was common across the Murray region.

Initial consultation and research found a number of key factors that underpin or impede the development of agri and culinary tourism. These include:

- an expectation by consumers that regional experiences will offer local produce as part of the food and drink offering and that they will have access to agri and culinary tourism experiences on and off farm,
- significant challenges in identifying and accessing the region's fresh seasonal and value-added regional produce from both a consumer, visitor and commercial food service perspective,
- recognising that the food system is designed to supply the urban based central markets, which in turn supply back to regions,
- the real barriers that prevent farmers from diversifying into tourism or value adding their produce – knowledge and regulation are two key factors,
- the fact that tourism, hospitality and agriculture do not connect easily, and
- noting that there is no current system of provenance to understand seasonality and to connect the produce to the source.

A series of regional workshops involving key industry sectors beyond tourism identified support for the concept. They revealed that:

- there are common barriers and challenges requiring systemic change if the sector is to flourish,
- stakeholders could identify the potential, but also the challenges and dysfunction of the current system,
- there was support for a collaborative approach to align activity between agriculture and tourism, acknowledging that agri and culinary tourism was unlikely to evolve organically within a time frame that would allow the region to tap into growing demand and meet visitor expectations, and
- a collaborative, strategic intervention approach would also support industry and government working through policy and regulatory barriers that impede growth and development.

A scoping paper prepared by Regionality Pty Ltd, recommended a medium-term approach to strategic intervention, including some disruptive concepts, to 'fast track' the development of the sector. It recommended a three-year program that would combine:

- regional Farm-to-plate Strategy and Local Cluster Plans,
- pilot projects to facilitate systemic change, and
- industry development activating cross-sector collaboration between industry and governments.



The proposed program was used to advocate for co-investment by local government and funding support for strategic planning and pilot projects by both the NSW and Victorian governments. Funding was approved for year one activities in late in 2017. The project commenced in early 2018, focusing on strategic planning, capacity building and facilitating collaboration.

The Murray region extends from Albury Wodonga in the east through to Mildura Wentworth in the west. It includes thirteen local government areas across New South Wales and Victoria. Murray Regional Tourism, with the support of both state governments and all local government partners, aims to position the Murray as a region known for its quality food and food experiences. A Murray region Farm-to-plate Strategic Opportunities Report (the Report) has been developed to establish a common purpose and to create a platform for collaboration.

The Report will frame five cluster plans, covering the five main hubs along the river. Each hub has been designed around communities of interest and on an area that has both supply of agricultural and food products and a stable population base to create local demand.

While each of the clusters is different, extensive consultation revealed they share similar opportunities and challenges in terms of developing a farm-to-plate value chain. The cluster plans follow a format that will allow regional projects to be delivered locally and adapted to suit the local context. The Central Murray Farm-to-plate Cluster Plan is one of five local action plans framed within the context of the Report. Each cluster mirrors a regional community of interest that brings together an agricultural area centered on a larger resident population and core tourism hub in terms of visitation. This approach has been used in recognition that the area covered by the program is vast and that before we can facilitate cross regional activity, collaboration must first happen at a local level.

The local cluster plans are an effective way to align activity across the Murray region. They allow for local communities to evolve their approach within a common framework. They also enable efficient and consistent sharing of resources and systems to support the development of the sector.

Why take a farm-to-plate approach?

Our aim is to build the Murray Region's reputation as a high quality food production region and culinary tourism destination over time. This includes

- building Brand Murray with an alignment between food and tourism, and
- growing stronger visitor and agri/food economies.

The tourism sector realises that it cannot achieve its agri and culinary tourism aspirations without the active participation of the agri/food sector. At the same time, tourism offers the agri/food sector an opportunity to brand and market the region and the produce in a way that generates higher yield through targeting more direct relationships with high value consumers.

How do we do this?

- engaging businesses across the farm-to-plate value chain and communities of interest to buy into the vision;
- creating a framework for collaboration across the region as well as across the value chain;
- providing opportunities for food producers to tap into key drivers of consumer demand by connecting with the tourism industry;
- fostering the continued development of a vibrant regional food culture and provenance framework that will underpin the tourism experience and support business and economic development across the farm-to-plate value chain;
- establishing clusters of businesses across the region and across the value chain that want to trade regionally and build their reputation based on the region's food provenance;

- working together across industry and government to overcome challenges and realise opportunities;
- developing reliable access to regional food and drink products and experiences.

What are the key actions?

Despite the differences across the region, there are strong similarities in terms of the level of development and action required to bring the vision to life. This means a regional approach allows for co-investment and sharing of strategies and resources to ensure we are all working together under a common framework. A regional farm-to-plate network will provide the forum for five local clusters to work together to roll out this regional approach. The strategic framework across the clusters is shared and outlined in the plan. These strategies provide for a consistent approach to resolving intractable issues that limit the viability and potential of both the agri/food and tourism sectors.

The Cluster Plan provides direction for key stakeholders to deliver and prioritise activity in line with the regional activity. Given the distance from Mildura in the west to Albury in the east, it is unreasonable to expect businesses and stakeholders to engage regularly across that distance. However, local activation through clusters allows a regional strategic approach to be implemented in a way that empowers communities and provides for bespoke solutions to be crafted to similar problems and then to be shared at a regional level.

Developing the strategic approach and plans

The Report and Cluster Plans have been developed using a common Strategic Framework. This approach was identified through desktop research, extensive engagement and consultation undertaken during the scoping phase. Given the timeframe between initial scoping and the commencement of the program, it was important to test the Strategic Framework through the strategy consultation process.

The data collected and used to inform the Report and Cluster Plan was sourced through the following methods.

Desktop review of existing information to both inform the strategic concepts and align activities to best use available resources and to avoid duplication or a fragmented approach. This included, but was not limited to:

- current plans, policies and any data that may be specifically relevant to the project,
- national, state, regional and local government plans, and
- industry plans or documents.

Consultation, engagement and capacity building has been paramount in this process. Unlike some strategic approaches, the engagement activities are aimed at sharing both knowledge and seeking input. The cluster planning events brought together a diverse range of stakeholders from different sectors and government agencies. It was an opportunity to structure conversations that informed the process and commenced the process of relationship building.



- Two workshops have been held in each cluster, focusing specifically on the strategic approach. The first was held in Echuca on 6 April 2018 and was attended by almost 45 people. This discovery session provided an opportunity to inform and test the strategic framework in a local context.
- The second workshop, held in Moama on 13 August 2018, was attended by 13 people, a quite different cohort, allowing for further testing of the strategic themes that have evolved from the first round of discovery workshops across the region.

Surveys and feedback forms for specific industries were distributed over a period of six weeks to allow another layer of contribution from individuals.

In addition, every workshop attendee was given the opportunity to provide information through paper based feedback and surveys.

External influences and information were considered. There is a large body of work from across Australia and internationally, where projects and programs with similar goals have been delivered with varying levels of success. The process has identified that while the regions are very different in terms of their level of development or maturity in relation to agri and culinary tourism, their geography and agricultural production profile is similar. A focus on core activities that develop links between agriculture and tourism needs to occur across the region. All cluster areas require a similar level of strategic intervention to:

- grow the visitor and food economies
- establish a strong agri and culinary tourism sector and
- develop the Murray's brand and reputation for food production and experience.

There are several considerations to note regarding the cluster plans and the Murray Region Farm-to-plate Strategic Opportunities Report:

- the cluster plans must be considered in context of the Regional report;
- although they identify the need for action within the agricultural sector these documents are not agribusiness strategies;
- they are not simply tourism development plans, as they have a multi-sector approach;
- these plans should be considered platforms for cross-sector and cross-regional collaboration

In summary, the aim is to establish a collaborative value chain approach and to develop authentic connections between the producer and the consumer.

The regional consultation enabled the development of a core set of values and a strong vision, which are reflected consistently across the local cluster plans. This is deliberate, as they are designed to work together, to maximise resources and share knowledge. They all reflect the priorities identified by each of the groups.



Game Changing Concepts



Vision - By 2025, the Murray Region will be renowned for its high-quality, authentic food and drink products and experiences. By working collaboratively across the region and the farm-to-plate value chain, the region will develop prosperous and dynamic food and visitor economies.

We will work collaboratively to create a regional food system that maintains provenance from the farm through to the consumer's plate. We will work together to create partnerships, educating our industry, local consumers and visitors about our fresh seasonal regional produce and how they can buy and experience it. Our aim is to grow more of what we eat and eat more of what we grow by developing a sustainable and connected regional food community.

Values - Underpin our brand and provide a framework for decision-making.

Integrity: Being real, honest, decent and fair. We will ensure integrity in our food, our trade and our brand

Provenance: Our region is like no other. It is the authentic story of the people, place and produce of the Murray that makes us remarkable

Quality: We aim for excellence and create value through delivering quality

Objectives - By empowering industry and community to make it happen.

- A. **Access to regional produce** for locals and visitors: Educating our community so we “eat more of what we grow and grow more of what we eat”
- B. **Build brand** and reputation through quality and provenance: Positioning the Murray region as a high-quality food region and food tourism destination
- C. **Coordinated collaboration**, capability and capacity building: Enabling farm-to-plate businesses to adapt, trade and improve distribution
- D. **Disrupt the status quo and develop a farm-to-plate innovation ecosystem:** Fostering innovation and connectivity across the farm-to-plate value chain

Key concepts and processes

This Plan refers to a number of fundamental concepts, pivotal to supporting the development of agri and culinary tourism development in the Murray. Some regions have applied some of these concepts individually to support the growth of the sector, with varying levels of success.

The approach taken in the Murray is quite different, in that the Report recommends a range of disruptive processes that focus on a minimum of three years of strategic intervention. The approach outlined is designed to facilitate the systemic change required to create a business ecosystem that supports viable regional trade and distribution of food and drink, while maintaining provenance. We have defined these concepts succinctly below.

1. Provenance

“ [mass noun] The place of origin or earliest known history of something. The origin, source, place of origin.”¹

In the case of food, provenance could be determined by the place from which something was substantially raised, grown or produced.

The wine industry has long used the concept of provenance to define and differentiate wine regions through a Geographical Indication System (GI). These GIs allow the industry to collectively promote particular attributes unique to each region, or indeed each vineyard. The concept of provenance in the case of wine is expressed through the French concept of terroir, meaning the quality and flavour profile of the grapes, and in turn the soil, climatic conditions and environment. Food in Australia does not have an equivalent to the GI concept.

Regional food branding occurs in many places. However, few have taken the step to build criteria that relate to local content and provenance. Building a consumer brand based on the provenance of the ingredients is not simple. As the brand and reputation strengthens and consumer scrutiny over authenticity increases, a provenance-based brand should have greater integrity in the medium to long term, provided it can authenticate the source of the products and experiences that sit within it.

¹ <https://en.oxforddictionaries.com/definition/provenance>



2. Regional Food Systems [RFS]

The concept of an RFS is at the core of the report. It works alongside the current central food system rather than attempting to replace it. It is like the engine of a regional food business ecosystem. The RFS diagram (figure 1) demonstrates the ongoing process of:

- developing the supply of produce and experiences
- driving commercial and consumer demand
- creating a distribution system that supports regional trade
- addresses the barriers that arise from systemic and cultural change

As discussed, Australia's food system is based on a centralised distribution model, transporting fresh produce from regions to central markets in capital cities. Produce is sold via wholesale agents or transported directly to supermarket distribution centres under contract agreements with growers.

Regions such as the Murray also rely on the centralised system to source food and create demand for the considerable food output from the region's agricultural sector. The fresh food consumed in the community and at visitor hubs along the Murray is generally sourced from central markets or distribution centres in Melbourne or Sydney rather than from farms in the Murray. This system serves urban centres well. It does not, however, provide an authentic base for the development of agri and culinary tourism regions.

The centralised system also creates an enormous amount of food waste, as supermarkets are specific about the size and look of the produce they will accept. Fresh produce also needs to travel, so the ripe-and-ready-to-eat

produce is often not suitable for shipment over long distances. Given that there is no regional food system, this produce is generally wasted; it becomes stock feed or is given to food-recovery organisations, leaving the farmer to bear the cost of production with no return. This centralised system is disempowering for producers, rendering them price takers, receiving on average 10% of the price consumers pay.² One might consider this market failure given the dominance of a small number of retailers.

The legacy of the central system is that regional distribution and trade of food is completely reliant on the city-based markets. Local transport and logistics systems are fragmented. This means the cost and effort required to transport goods within the region is not competitive. The RFS concept as outlined in figure 15 is designed to create a critical mass of demand and supply to make regional distribution viable. It is a disruptive process; there will be challenges in the early years of establishment, and the need for collaboration and strategic intervention. Once established, however, the RFS will evolve and grow without coordination or intervention. Businesses will adapt and evolve with the RFS.

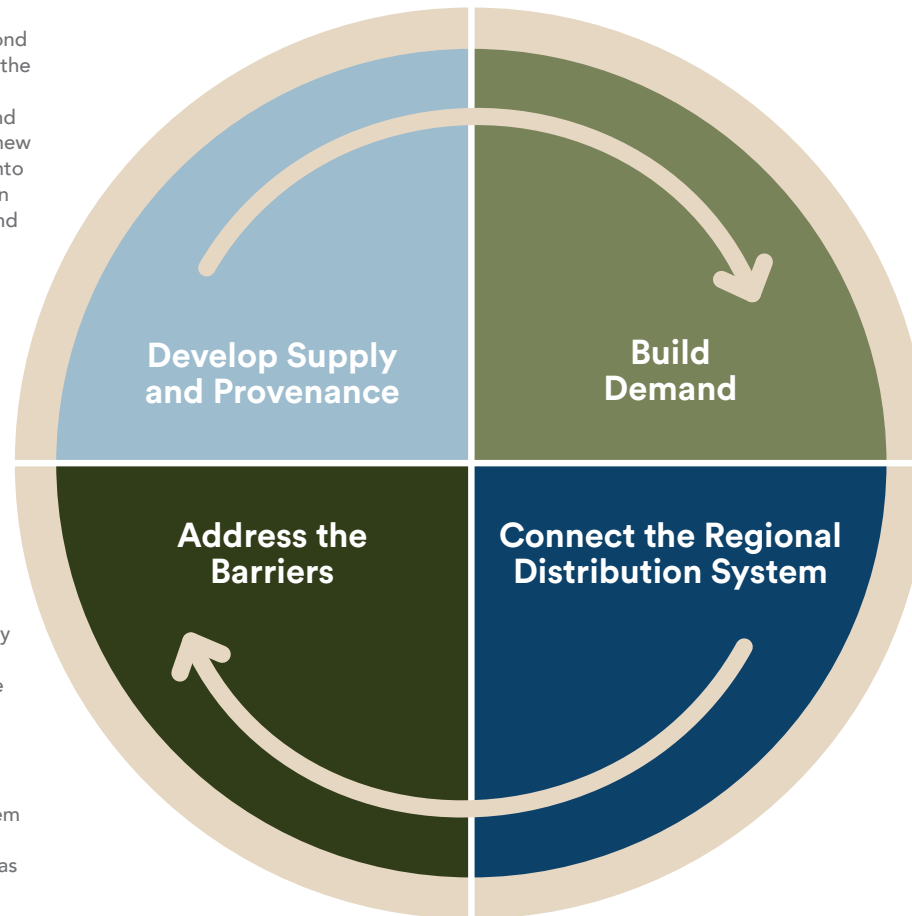
² Commonwealth of Australia 2014, Agricultural Competitiveness Green Paper, Canberra, October

PRODUCER ENGAGEMENT

Assisting producers to move beyond the farm gate, raise awareness of the opportunities and assist them to innovate their product. Identify and use their spare capacity and find new pathways to market, by tapping into the regional food system. Build an understanding that provenance and their story adds value from a consumers perspective.

DISRUPTION

Innovation and change to current systems and practice will inevitably face barriers. Some are systemic, other are regulatory and many are created through ignorance, misinformation or poor communication. A Regional Food Systems approach requires collaboration and a whole of system thinking to resolving intractable problems and to remove barriers as they arise.



CONSUMER ENGAGEMENT

and awareness of both locals and visitors. Create commercial demand for regional produce via regional food service, retail and tourism experience. The aim is to build a critical mass of regional demand to be able to maintain a viable regional food system. For farmers to supply a regional food system consistently, they need to know there is consistent demand locally.

REGIONAL DISTRIBUTION

systems are designed to transport out and in, but not around the region. Whilst many of the elements of a regional distribution system are there, the connections are missing. So to get produce from farm to plate without going to a central market first, the connections need to be made. Filling the food system gaps through value chain collaboration.

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FIGURE 1: REGIONAL FOOD SYSTEM MODEL

3. The value chain

Porter's concept of value chain “*disaggregates a company into strategically relevant activities*”.³ We have taken the same approach and applied it to a regional food system (RFS). In this case, the strategically relevant activities include a number of businesses in different sectors collaborating to create value through the concepts of provenance and traceability. The report identifies **ACTIVITIES** that use the RFS concept (see next page) to develop a short or regional supply chain as part of the regional cluster approach.

The three-year program of strategic intervention works to support members of the value chain to work collaboratively within the provenance framework to maintain traceability. This in turn allows consumer-facing businesses to deliver a provenance-based value proposition to consumers through the sale of fresh seasonal and regional food and drink items and experiences. It establishes a foundation for the development of authentic agri and culinary tourism experiences and fresh local seasonal produce for locals and visitors. It allows tourism and other demand-generating groups to promote the unique story and appeal of the region during different seasons. Most importantly, it provides the participating businesses and the Murray region with a **COMPETITIVE ADVANTAGE** through collaborative regional branding and marketing of unique products and experiences linked to an authentic Murray provenance story.

The **CHOICES** identified within this Cluster Plan will allow regional communities and individual businesses to buy into the concept and work collaboratively to deliver it. To that end, it must be clearly recognised that the value-chain approach will not appeal to every farmer, wholesaler, retailer or restaurant. Similarly, it will not attract every consumer. The tipping point will come when critical mass is achieved, making the sourcing of regional food and drink as cost-effective as the mainstream food system.

THE VALUE CHAIN

Developed by Michael Porter and used throughout the world for nearly 30 years, the value chain is a powerful tool for disaggregating a company into its strategically relevant activities in order to focus on the sources of competitive advantage, that is, the specific activities that result in higher prices or lower costs. A company's value chain is typically part of a larger value system that includes companies either upstream (suppliers), downstream (distribution channels), or both. This perspective about how value is created forces managers to consider and see each activity not just as a cost, but as a step that has to add some increment of value to the finished product or service.

Source: Institute for Strategy & Competitiveness Harvard Business School

ACTIVITIES

The value chain is the activities involved in delivering value to customers

COMPETITIVE ADVANTAGE

The activities, and the overall value chain in which activities are embedded, are the basic units of competitive advantage

SET OF CHOICES

Strategy is reflected in the set of choices about how The activities in the value chain are configured and linked

³ <https://www.isc.hbs.edu/strategy/business-strategy/Pages/the-value-chain.aspx>

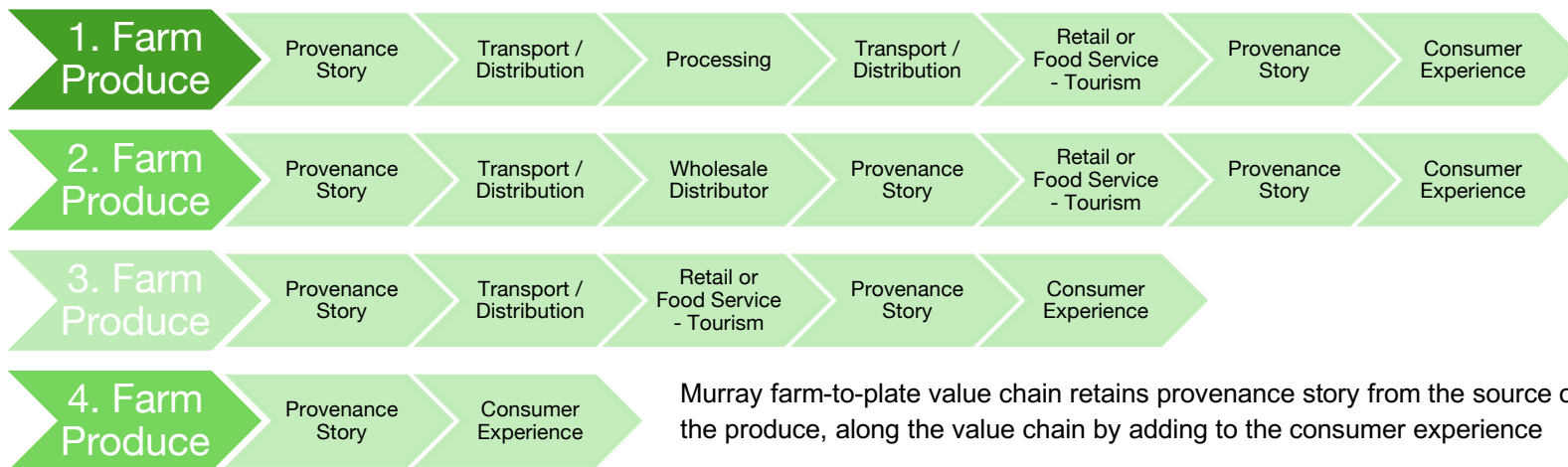
The Murray farm-to-plate value chain: concepts explained

By applying the concept to a regional food system model, we connect the elements of provenance and farm-to-plate with the concept of a value chain: stimulating collaboration among businesses to create value for the consumer by maintaining provenance of regional food. In summary, this model creates value through businesses working together to create food traceability.

Figure 2 demonstrates how the farm-to-plate value chain could apply in the Murray. It shows how the concept could be applied to different business models. This provides farmers and commercial buyers in the region with options for how they want to trade. Not every farmer will have the time or inclination to deal directly with individual restaurants or retailers; providing different pathways to market allows for businesses of different sizes and scales to be part of the regional food system should they so choose.

1. Farmers sell produce to a processor before sold through retail or food service
2. Farmers sell via a regional wholesaler who then distributes to retail or food service businesses
3. Farmers sell directly to retail or food service
4. Farmers sell directly to consumers

In every step of this value chain model, the provenance is retained and passed on as a value add to the consumer.



VALUE

=

WHAT

**BUYERS ARE
WILLING TO**

PAY

FIGURE 2: MURRAY FARM-TO-PLATE VALUE CHAIN OPTIONS



Making it Happen



Three Year Action Plan

Strategic intervention – creating a regional food system

A strategic framework was developed to support the establishment of a regional food system approach, to underpin the development of agri and culinary tourism. It was informed through both desk research and extensive consultation over a two-year period. The process sought to identify why a regional food system had not developed in the Murray of its own accord. Given the significant and diverse agricultural production across the region, and significant tourism visitation, why was there not greater connection between food and tourism? Why is the Murray relatively unknown when it comes to food reputation and agri/culinary tourism? The key outcome identified key barriers or market failures in the system. The framework focuses on four key concepts that should be applied and four strategic themes to focus activity and intervention. These were used and tested throughout consultation and have informed the action planning process.

STRATEGIC FRAMEWORK TO ESTABLISH MURRAY FARM-TO-PLATE

- Develop access to and diversify **regional supply**
- Connect the **distribution system** regionally to facilitate trade
- **Increase demand and reputation** for the region's agri-food products and experiences
- Identify and **address barriers** to innovation and systemic change

STRATEGIC THEMES FOR ACTIVITY AND INTERVENTION

- Improve **connectivity** and information
- Build capability and capacity
- Facilitate **collaboration** and cooperation
- Develop **provenance** and reputation

Summary of local activation across the Murray	Activation Required in Local Cluster Areas				
Regional & Cluster STRATEGIC PROJECTS	West	Mid-West	Central	Mid-East	East
Become an active member of the Murray Regional Food and Agri Network	Y	Y	Y	Y	Y
Establish the local cluster	Y	Y	Y	Y	Y
Facilitate collaboration within the cluster to coordinate reliable supply, distribution & demand for fresh & value added food & drink	Y	Y	Y	Y	Y
Establish a policy and regulatory environment that supports F2P business development & provides cross border consistency	Y	Y	Y	Y	Y
Participate in the development of a regional export action plan to tap into opportunities for existing & aspiring export businesses across food, drink & tourism					
Adopt & oversee local implementation of the regional provenance framework	Y + Crafted by Mildura	Y	Y	Y+ Sun Country	Y
Activate locally the consumer brand & supporting strategy to promote the Murray's provenance stories & reputation	Y + Crafted by Mildura	Y	Y	Y+ Sun Country	Y
Coordinate local industry engagement to facilitate buy in & accreditation activities	Y	Y	Y	Y	Y
Establish local procurement protocols & policies that preference local food group suppliers	Y	Y	Y	Y	Y
Expand Farm Gate Trail Program across the region	Y + Crafted by Mildura	Y	Y	Y+ Sun Country	Y
Participate in the regional data collection program	Y	Y	Y	Y	Y
Support the use & development of a regional digital trading & information platform	Y	Y	Y	Y	Y
Facilitate business innovation programs	Y	Y	Y	Y + Pilot	Y + Pilot
Implement the Regional Food Champions Program	Y	Y	Y	Y	Y

FIGURE 3: REGIONAL SUMMARY OF KEY ACTIONS

A large flock of sheep, including many adults and several lambs, are gathered in a lush green field. In the background, a large, dark tree stands prominently against a sky with scattered clouds. The scene is a typical pastoral landscape.

Informing the Central Murray Cluster Plan

Central Murray cluster overview

The Central Murray includes Edward River and the eastern half of Murray River Council in NSW and Campaspe Shire Council in Victoria. Like other parts of the region, this cluster combines a strong base of commercial and consumer demand generated by a core local population base centred around Echuca/Moama and strong visitor demand among this popular stretch of the Murray River. The agricultural base surrounding this region is diverse in size and scale of growers. This broad production base surrounds the core demand base to support the development of a regional food cluster and food system. The Central Murray region has an emerging culture supporting local food. A strong tourism and hospitality sector with a diversity of restaurants and cellar doors will help drive the implementation of the strategy from a demand perspective providing distribution challenges can be overcome. Participation in all activities in the Central cluster has grown in number over the course of the program. Significant engagement has contributed to attendees and stakeholders starting the collaboration process.

The activity and engagement thus far provides a strong base to activate the cluster plan with good participation by a diversity of producers and food businesses. Despite the interest, the current offer is limited, with a small number of local food experiences, retail outlets and few wholesalers sourcing and selling local food. The challenges of sourcing regional fresh and value added products for the retail and commercial food service sector is a consistent theme throughout all parts of the region.



FIGURE 4: CENTRAL MURRAY CLUSTER

Central cluster key data

There are several sets of data to consider in this cluster approach. The first is the size and scale of demand for food and drink, which helps us to understand the potential value of consumption within the Central cluster.

The average annual household expenditure on food and drink is an important insight into the potential size and scale of local demand for the region's produce. When combining household food and drink expenditure and the estimated average spend by visitors on food and drink is included, the total consumed in this sub region equated to almost half a billion dollars per annum (estimated \$443,000,000)⁴. Understanding the size and scale of demand in the cluster zone helps to frame the opportunity for suppliers who perhaps have not considered the regional market as an outlet for sale.

*Spend is estimated due to small sample size in some LGA's

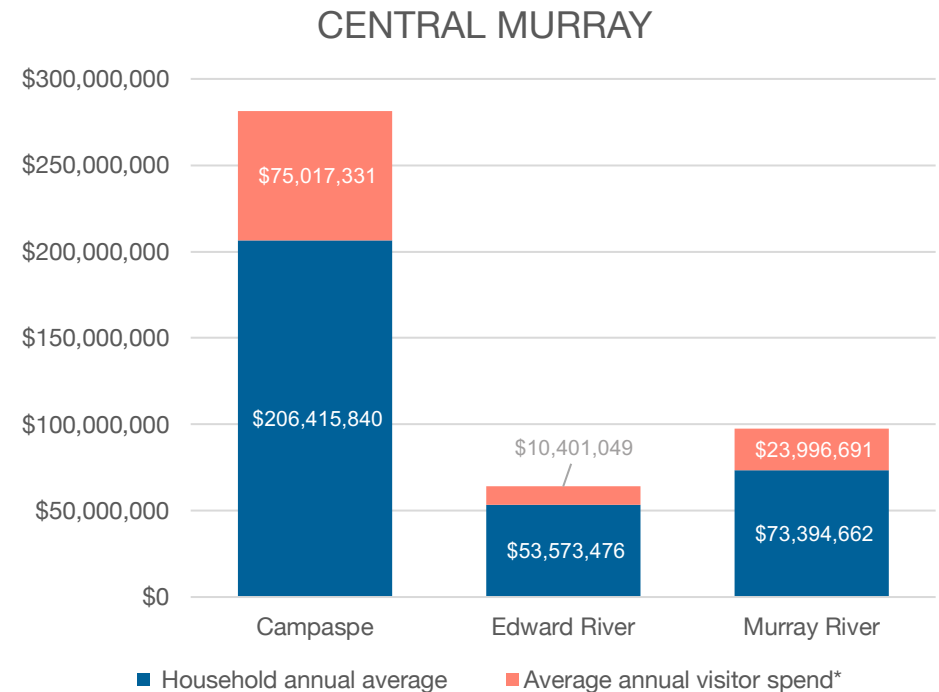


FIGURE 5: ESTIMATED ANNUAL AVERAGE HOUSEHOLD AND VISITOR SPEND ON FOOD AND DRINK

⁴ ABS Household Expenditure Survey (2016) and TRA NVS data averaged 2014-2017

Visitor data

The breakdown of visitor data is provided in both regional and local Destination Management Plans. However, we have provided a snapshot of average visitation data to demonstrate its value and potential.

According to Tourism Research Australia's 2017 LGA profiles,⁵ more than 1.4 million visitors spent around \$420,000,000 across the three local government areas of Campaspe, Murray River and Edward River LGAs⁶. Echuca is the anchor in terms of visitor economy. Considering that food and drink is the highest expenditure item of visitors to these regions, the opportunity to connect to this market is important for several reasons. The 'in region' expenditure is important, however there is also an opportunity for producers to build brand by connecting with visitors during their stay and continue a buying relationship with them when they return home.

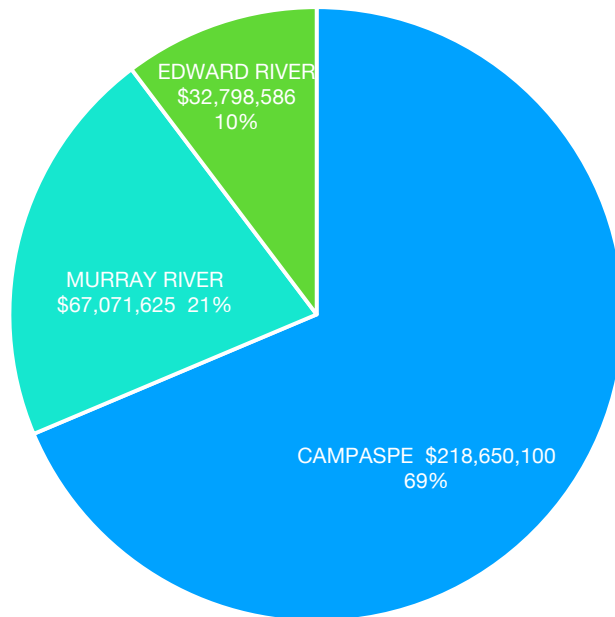


FIGURE 6: LGA % OF DOMESTIC VISITOR SPEND IN CENTRAL CLUSTER

⁵ Tourism Research Australia Local Government Area Profiles 2017

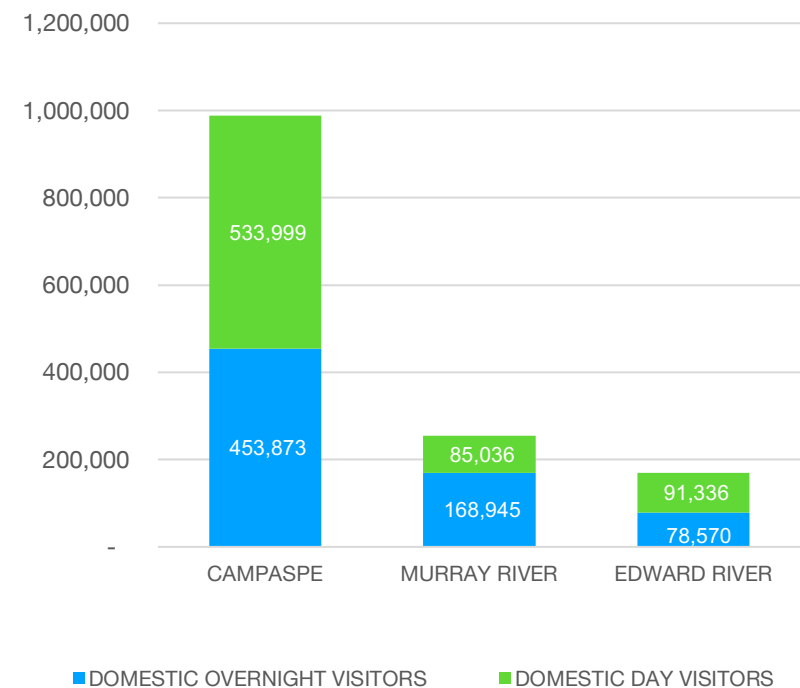


FIGURE 7: VISITOR NUMBERS

Business and employment

When comparing the number of businesses and employees in each Local Government Area (LGA), it is clear the importance of agriculture in all three LGAs is evident. The agriculture sector in the Murray River LGA is significant with almost 20% of employment and some 471 businesses. Accommodation and food service is strongest in Campaspe in terms of the number of businesses, however Murray River has stronger employment in this sector with 11.5% of employment in the sector, compared to 7.1% of employment in Campaspe. Transport and warehousing are comparable across the range of LGA's in the cluster.

In summary, the cluster provides an opportunity to leverage different sectors. While tourism numbers are high in the regional centres, the rural LGAs contribute significantly from an agri-food perspective. Overall these three sectors represent 45% of businesses across the Central cluster area

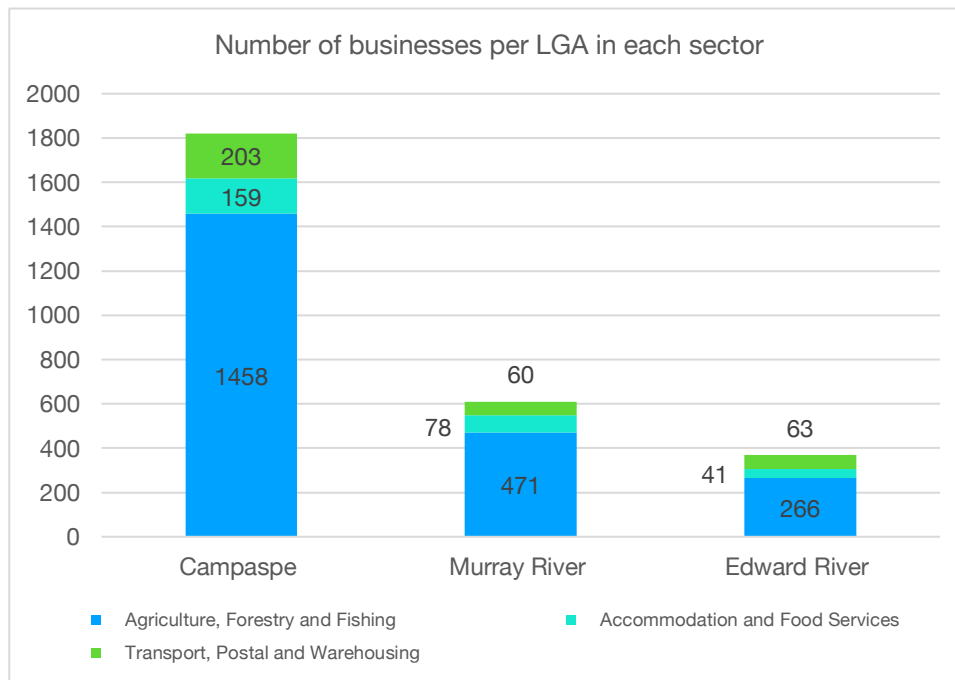


FIGURE 8: NUMBER OF BUSINESSES BY SECTOR

7

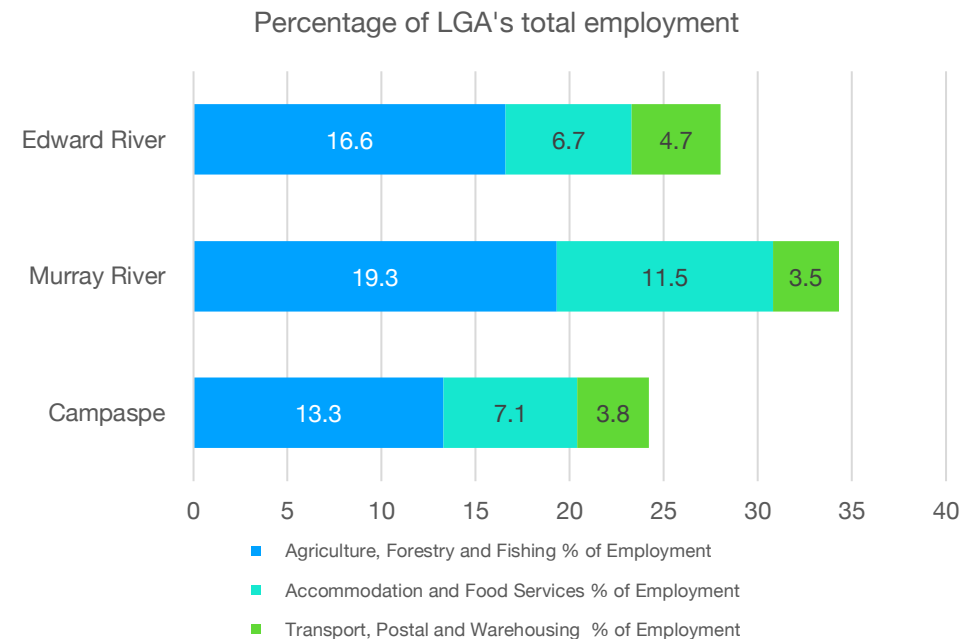


FIGURE 9: PERCENTAGE OF TOTAL LGA EMPLOYMENT

⁷ Data extracted on 22 Sep 2018 21:35 UTC (GMT) from ABS.Stat © Commonwealth of Australia. Creative Commons Attribution 2.5 Australia (<https://creativecommons.org/licenses/by/2.5/au>)

Summary of key challenges and opportunities

The two workshops held in the Central cluster area revealed significant support for the development of a farm-to-plate cluster approach. While there are community-based local food activities via small food hubs, farmers' markets and independent retail outlets, the challenges of sourcing regional fresh and value-added products for the retail and commercial food service sector is a significant challenge. Consultation identified a number of key factors that stood out as barriers to developing the concept of local food and agri and culinary tourism. The opportunities also reflect solutions to the challenges.

Challenges	Opportunities	
- Knowledge and education	- Collaboration and connecting	- Artisanal production
- Price and convenience	- Developing regional brand and provenance	- Diversifying production
- Access to abattoir	- Boutique meat processing	- Developing new pathways to market
- Access to produce - reliability	- Educating supply chain members and consumers about seasonality	- Better ways to use waste product
- Lack of local identity brand	- Successful case study story telling	
- Distribution, transport and warehousing	- Cooperatives	
- Supply disconnected to demand	- Consumer engagement and education and demand	
- Critical mass and viability	- Sharing knowledge	
- Regional branding and provenance	- Technology	
- Seasonality	- Food hubs	
- Freight costs	- Large and small operators working together	
- Restrictive contracts for smaller lot sales		
- Disconnect between producer and consumer		

FIGURE 10: SUMMARY OF OPPORTUNITIES AND CHALLENGES

Cluster priorities

The Central cluster has many elements in place to develop agri and culinary tourism. However, the industry consistently identifies the challenges in overcoming regulatory and systemic issues that make it difficult to develop supply and distribution of both food/drink and experiences. Distribution, provenance and education are key priorities.

Priority areas for intervention:

1. **Distribution** – use the value chain approach to develop a viable, convenient and cost-effective system to distribute produce enabling more effective use of a local **supply** of produce from farms to commercial businesses such as food service, retail, etc. within the region in a way that maintains provenance.
2. Support the establishment of a regional **provenance** system to ensure ongoing **authenticity** of regional food and food experiences.
3. Integrate **education** of local consumers, visitors and industry on **seasonality**, local food and how to access and use fresh seasonal and value-added regional product



The cluster consultation allowed for development, testing and refinement of key themes and strategies. While the cross regional consultation was used to develop the cluster plans, it also informed the regional Report, providing some consistency for cross-regional collaboration.

The Murray region is vast and diverse, representing an opportunity and a challenge. While there were a small number of specific considerations, the opportunities and challenges were relatively consistent across the five cluster areas. Variations tended to be related to gaps in infrastructure or facilities, for example meat processing facilities or inadequate supply of a particular product or an absence of business type (refer to regional summary of available meat processing facilities identified in Appendix 4).

The cluster plan focuses on four common objectives that are implemented across four main strategies. Each cluster reflects actions that can be delivered locally with support and collaboration at a regional level. The aim is that while each cluster will deliver locally, resources, information and trade will filter up to the regional level. The vision, values and objectives are at the core of each document and are also shared.



Central Murray

Cluster Action Plan

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy Summary		Alignment with OBJECTIVES			
		A	B	C	D
	Strategy 1 - Create a platform for regional collaboration across the farm-to-plate value chain in the Central cluster area	✓	✓	✓	✓
1.1	Support the establishment of a Regional Food Council (RFC)	✓	✓	✓	✓
1.2	Establish the Eastern cluster under the RFC, to facilitate collaboration and trade at a local level	✓	✓	✓	✓
1.3	Adopt and oversee the establishment of an accredited provenance framework across the F2P value chain sectors, to support the Murray regional food brand development	✓	✓		✓
1.4	Support the development and establishment of the Murray region food brand to build its reputation as a food production region and agri & culinary tourism destination		✓		
1.5	Participate in the regional data collection framework to benchmark, inform and measure strategic action	✓		✓	
1.6	Work with RFC to establish a policy and regulatory environment that supports F2P business development and provides cross border consistency	✓		✓	✓
	Strategy 2 - Develop the supply of high quality produce & experiences in the Central cluster area				
2.1	Recruit regional businesses to the Central cluster	✓	✓	✓	✓
2.2	Develop a Regional Food Champions Program to hero committed and active value chain businesses to encourage broader participation	✓	✓	✓	
2.3	Facilitate business innovation programs	✓	✓	✓	✓
	Strategy 3 - Connect the regional food system to efficiently distribute regional produce whilst maintaining provenance				
3.1	Work with the RFC to support the establishment of a regional food/drink incubator accelerator program to facilitate business innovation, product and business development	✓	✓	✓	✓
3.2	Support the establishment of a RFC digital trading and information platform that makes information available to facilitate trade, distribution and marketing of regional food and experiences to trade and consumers	✓	✓	✓	✓
3.3	Work locally to establish a Pilot “Murray Regional Proviore Network” to accredit and coordinate local and regional distributors of Murray regional food & drink across the region	✓	✓	✓	✓
3.4	Work with the RFC to engage local business to ‘The Murray Region Sommelier Pilot Project’ to better coordinate, promote, educate and distribute drink through an incentivised wine/drink list program with restaurants & bars	✓	✓	✓	✓
	Strategy 4 - Drive demand for regional food/drink produce & experience				
4.1	Work locally to implement the RFC cross sector marketing strategy to align tourism and food activities to promote the Murray’s provenance stories and reputation for quality food and food experiences within the local community and visitor alike		✓		✓
4.2	Develop a local consumer engagement model to promote local food culture and word-of mouth-marketing	✓	✓	✓	
4.3	Develop seasonal themed food events programs to encourage industry activation and delivery	✓	✓	✓	
4.4	Work with RFC & MRT to develop a cooperative approach to showcasing the region in other domestic and export markets	✓	✓	✓	✓

LEGEND: Objective A - Access to regional produce. Objective B - Build brand. Objective C - Coordinated collaboration. Objective D – Disrupt and develop

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy 1: Create a platform for regional collaboration across the farm-to-plate value chain in the Central cluster area

Key outcomes = Strategy governance, communication, knowledge sharing, brand management and problem solving

Strategic Actions	#	Key Activities	Stakeholder	Resources	KPI	Year
1.1 Support the establishment of a Regional Food Council (RFC) 1.2 Establish the Central cluster under the RFC, to facilitate collaboration and trade at a local level	1.1.1	a. Actively participate in the RFC steering group b. Identify and secure co-investment funds to support RFC grant applications	MRT, LGA, + Ag groups, RDA, RDV, DPC	MRT + Regionality	MOU established with RFC Co-funding partnerships established	Year 1
	1.2.1	Activate the local F2P clusters - Deliver activation workshops to prioritise actions in the cluster plans - Establish cluster plan steering groups to drive momentum locally - Support clusters to prioritise pilot activities and seek industry / partner co-investment for coordination and facilitation	RFC + other industry Ag, LGA partners, RDA, RDV, DPC	Regionality delivering activation. Steering group Implementation [see resourcing in 1.1]	- RFC formed as strategy delivery collaboration lead and local cluster formed as local collaboration lead - Cluster group formed and local plans prioritised and adopted	Year 1
	1.2.2	Facilitate sector collaborations within the cluster groups to - Encourage regular networking and engagement activities to encourage business participation the local clusters and to encourage trade and cooperation to achieve a reliable supply, distribution and demand for fresh and value-added food and drink through relevant pilot projects	F2P cluster groups, LGA + industry groups	Coordination funds to be secured [see above]	- Regular cluster gatherings scheduled and delivered. - Engagement by industry grows in number and activity	Years 1-3
1.3 Adopt and oversee the establishment of an accredited provenance framework* across the F2P value chain sectors, to support the Murray regional food brand development	1.3.1	Form a local cluster accreditation working group to support the roll out of the Regionality Provenance Framework for all value chain sectors including: - Suppliers of regional ingredients in fresh and value-added goods - Distributors in regional food system to maintain provenance across short supply chain - Commercial demand businesses in tourism and hospitality, manufacturing and retail sectors	RFC + local cluster, MRT	Coordination Contracted	- Provenance framework adopted by RFC and cluster implementation plan is rolled out locally - Accreditation working group formed - Industry applying for accreditation	Year 1-3

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy 1: Create a platform for regional collaboration across the farm-to-plate value chain in the Central cluster area

Key outcomes = Strategy governance, communication, knowledge sharing, brand management and problem solving

Strategic Actions	#	Key Activities	Stakeholder	Resources	KPI	Year
1.4 Support the development and establishment of the Murray region food brand to build its reputation as a food production region and agri & culinary tourism destination	1.4.1	<p>Actively participate in RFC brand processes</p> <ul style="list-style-type: none"> - Work to incorporate sub regional locators to align with local activities under a consistent brand - Support the implementation of RFC Brand user guidelines and licensing frameworks to allow businesses and local clusters to use the brand 	RFC + local cluster, MRT	Coordination & Funding	<ul style="list-style-type: none"> - RFC regional food brand framework adopted and incorporated into local activities 	Year 1-3
1.5 Participate in the regional data collection framework to benchmark, inform and measure strategic action	1.5.1	<p>a. Participate in research partnerships with universities and other research organisations</p> <p>b. Local audit/data collection on farm-to-plate sectors including:</p> <ul style="list-style-type: none"> - Current production and productive capacity of farming land - Identify wholesale, distribution businesses, routes, capacity, spare capacity and systems - Assess current logistics systems to identify gaps, duplication and need for additional services to meet regional distribution needs - Scope of commercial demand for the fresh and value added goods - Analysis to identify opportunity for diversified production and oversupply issues - Provide extension programs, training and support information to farm-to-plate businesses to support their participation in data collection 	RFC + local cluster, university & other research partners	Link to Digital Trading Platform 3.2	<ul style="list-style-type: none"> - Local participation in RFC research program - Local audit undertaken - Local baseline data collection and supplied to RFC for analysis 	Years 1-2

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy 1: Create a platform for regional collaboration across the farm-to-plate value chain in the Central cluster area

Key outcomes = Strategy governance, communication, knowledge sharing, brand management and problem solving

Strategic Actions	#	Key Activities	Stakeholder	Resources	KPI	Year
1.6 Work with RFC to establish a policy and regulatory environment that supports F2P business development and provides cross border consistency	1.6.1	Support Multifunctional Farming ⁸ to enable on-farm value adding to primary produce and direct connection to consumer	RFC + LGA DPC NSW RDV & DPI Vic	Provided	<ul style="list-style-type: none"> - LGAs participated in RFC Multifunctional farming symposium - Action plans for local implementation developed 	Years 1-3
	1.6.2	Participate where applicable in RFC initiative to establish regulatory systems that allow small-scale on-farm meat processing. * Refer to Multifunctional Farming Discussion Paper by Regionality Pty Ltd	RFC + LGA DPC NSW RDV & DPI Vic	Specialist contractor	<ul style="list-style-type: none"> - RFC working groups on regulatory reform established 	Years 1-3
	1.6.3	Investigate implementation of local procurement protocols and policies within LGAs and State agencies that preference local food group suppliers in line with regional strategic protocols	Cluster group + LGA DPC NSW RDV & DPI Vic Health	Specialist contractor	<ul style="list-style-type: none"> - Review, adapt and advocate for adoption of RFC Local Procurement Model policy by LGA and local firms 	Years 1-3
	1.6.4	Use collated data to identify solutions to regional food system barriers and augment uptake of opportunities [Refer to 1.5] - Establish pilot projects in local cluster locations to fill gaps.	RFC /Cluster group MRT Universities	Specialist contractor	<ul style="list-style-type: none"> - Gap analysis complete - Pilot programs identified and established 	Years 1-3

⁸ Wright, R., (2017) *Planning for Innovation in Agriculture Through Multifunctional Farming*

Strategy 2: Develop the supply of high quality produce and experiences in the Central cluster area

Key outcomes: Increased number and quality of authentic food/drink/agri products and experiences

Strategic Actions	#	Key Activities	Stakeholder	Resources	KPI	Year
2.1 Recruit regional businesses to the Central cluster	2.1.1	Implement the regional business engagement program to recruit businesses to become accredited members of the local cluster and RFC <ul style="list-style-type: none"> - Engage farmers and food value adders to become accredited suppliers of regional food /drink products and experiences - Engage with and establish network of accredited distributors in regional food system - Engage and recruit businesses in the tourism and hospitality, manufacturing and retail sectors to create commercial demand for regional food and to promote availability of regional products and experiences 	RFC & LGAs MRT, RDV, DPC	Funding coordinators	<ul style="list-style-type: none"> - Programs secured - Businesses engaged - Tourism businesses featuring & sourcing regional ingredients in experiences 	Year 1
2.2 Develop a Regional Food Champions Program to hero committed and active value chain businesses to encourage broader participation	2.2.1	Establish a local network of trained/accredited regional food champions who supply, distribute and sell accredited products and experiences. <ul style="list-style-type: none"> - Deliver a series of regional training and familiarisation events to keep knowledge of regional produce current and to cement trading relationships - Provide recognition through graded/star ratings based on level of participation in regional food systems and training - Seek funding and investment to deliver program - Create profiles for regional champions to promote them and their knowledge - Engage with early adopters through pilot programs to promote concept and participation across their cohort - Develop a communication strategy and resources to support concept roll out - Roll out round two of Regional Champions program 	RFC MRT LGAs DRM DPC, DPI, RDV VVIC DNSW	Funding coordinators	<ul style="list-style-type: none"> - Program funding secured - Programs successfully delivered with participation targets met - Local champions identified, profiled and established through marketing campaigns and activities - Support for round two secured 	Years 1-2

Strategy 2: Develop the supply of high quality produce and experiences in the Central cluster area

Key outcomes: Increased number and quality of authentic food/drink/agri products and experiences

Strategic Actions	#	Key Activities	Stakeholder	Resources	KPI	Year
2.3 Facilitate business innovation programs	2.3.1	<p>Extend farm gate producer program to support innovation, diversification and value adding on farm and beyond farm gate</p> <p>Extend distribution pilot program to drive improvements and innovation in regional food distribution and processing options</p> <p>Extend regional food masterclass program across tourism, distribution, retail and manufacturing businesses across the region</p> <ul style="list-style-type: none"> - Conduct regular farm tours and regional produce exchange events - Secure funding and support to roll out additional pilot programs for farmers, distributors and restaurants - Engage with early adopters through pilot programs to promote concept and participation across their cohort - Develop a communications strategy and resources to support concept roll out 	<p>MRT</p> <p>LGA-s</p> <p>DPC</p> <p>RDV</p> <p>RDA, NRM</p> <p>+ relevant sector groups</p>	<p>Funding & specialist contractors + refer to incubator [3.1.1] & cluster funding [1.1.1] options</p> <p>e.g. Artisanal producer funding (Vic)</p>	<ul style="list-style-type: none"> - Co-funding agreements established by MRTB & LGA-s - Matching grant funding secured - Businesses recruited - Programs successfully delivered - Number of products and experiences on offer increases across the region 	Years 1-3
	2.3.1.1	<p>Develop a Farm Gate Trail Program across the region</p> <ul style="list-style-type: none"> - Establish local signage policy to include Farm Gate Trail Way Finding signage - Regional maps and apps for farm gate trail 	<p>LGA/LTO</p> <p>MRT</p> <p>LGA EDO</p> <p>DNSW</p> <p>WWIC</p>	Tourism grant programs	<ul style="list-style-type: none"> - Farm Gate Trail program established - Trail signage policy developed and implemented - Collateral produced and marketing commenced 	Years 1-3
	2.3.2	Identify opportunities for co-operative and co-location solutions to processing in region such as small-scale abattoir or value-adding facility	<p>Local cluster/</p> <p>LGA/ RDV/DPC</p> <p>RDV/DPC</p>	Refer to Meat Processing Facility Audit in Appendices	<ul style="list-style-type: none"> - Opportunities assessed/next steps identified 	Years 1-3

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy 3: Connect the regional food system to distribute regional produce efficiently while maintaining provenance

Key outcomes: Functional RFS established, increase in regional B2B trade; provenance framework applied effectively

Strategic Actions	#	Key Activities	Stakeholder	Resources	KPI	Year
3.1 Work with the RFC to support the establishment of a regional food/drink incubator accelerator program to facilitate business innovation, product and business development	3.1.1	<p>Establish co- funding options with local industry and LGA</p> <p>Engage businesses within cluster to identify potential recruits</p> <p>Work with RFC to roll out mentoring and pipeline development initiatives such as:</p> <ul style="list-style-type: none"> - Meet the buyer events - Identify and resolve barriers to stocking and service of regional food and drink by retail and food service businesses 	<p>RFC – working group</p> <p>Local cluster, MRT, RDV, DPC + LGA</p>	<p>Austrade Incubator funds + [refer to funding model 1.1.1]</p> <p>DPC Jobs funding for clusters</p> <p>RDV Cluster funding – food & Fibre</p>	- Incubator / cluster established with co-investment secured and key deliverables achieved	<p>Years</p> <p>1-2</p>
3.2 Support the establishment of a RFC digital trading and information platform that makes information available to facilitate trade, distribution and marketing of regional food and experiences to trade and consumers	3.2.1	<p>Support local roll out of the RFC digital trading platform that</p> <ul style="list-style-type: none"> - Provides access to regional supply for commercial food buyers - Collects, aggregates and maintains current seasonal production calendar/supply and enable producers to list produce for sale and enables them to advise buyers of their forecasted production - Connects commercial supply, distribution & demand in a single platform - Integrates distribution and logistics services by tracking participating transport options, uses spare capacity and identifies gaps in logistics services by using real time route optimization - Creates a consumer interface to identify regional food/drink offerings, outlets and experiences 	<p>RFC – working group, MRT, DPC, RDV</p>	<p>Resourcing and funding partnerships to be secured by RFS</p>	- Ongoing support and participation in regional project	<p>Years</p> <p>1-2</p>

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy 3: Connect the regional food system to distribute regional produce efficiently while maintaining provenance

Key outcomes: Functional RFS established, increase in regional B2B trade; provenance framework applied effectively

Strategic Actions	#	Key Activities	Stakeholder	Resources	KPI	Year
3.3 Work locally to establish a Pilot “Murray Regional Providore Network” to accredit and coordinate local and regional distributors of Murray Regional food and drink across the region	3.3.1	<ul style="list-style-type: none"> - Support recruitment activities of local distribution business partners to set up coordinated regional distribution of food and drink to commercial buyers in food service and retail within the provenance system - Engage with regional farmers' markets to investigate their capacity to become distribution hubs for consumer and commercial trade - Support and promote participation by early adopters of regional food provenance through media and PR to attract others 	Cluster Working group RFC – Working Group MRT	RDV/ DAF/ NSW Dept Industry + Industry investment/ Co-operative model	<ul style="list-style-type: none"> - Industry buy-in to program supported locally - Co-funding grant secured - Program roll out successful with an uptake in local produce featured in regional food service outlets - Regional Providore becomes self-funding through trade revenue and co-funding by wine companies 	Years 1-2
3.4 Work with the RFC to engage local business to “The Murray Region Sommelier Pilot Project” to better coordinate, promote, educate and distribute drink through an incentivised wine/drink list program with restaurants and bars	3.4.1	<ul style="list-style-type: none"> - Recruit industry support to form the ‘Murray winemakers, distillers and brewers collective’ to drive the project - Create resources such as tasting notes, producer profiles, industry events and an incentives program to engage with and recruit food service and retail businesses to become outlets - Support participating outlets through marketing campaign profiling participating businesses 	Local Cluster RFC + LTO MRT	Wine Tourism & Cellar Door Grants RDV/ DAF/ DNSW/NSW Dept Industry + Industry investment/ Co-operative model	<ul style="list-style-type: none"> - Industry buy-in to program supported - Co-funding grant secured - Program roll out successful with an uptake in local beverage featured in regional food service outlets - Sommelier Project becomes self-funding through trade revenue and co-funding by wine companies 	Years 1-2

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy 4: Drive demand for regional food/drink produce and experiences

Key outcomes: Increased commercial, consumer (locals and visitors), export demand and brand appeal

Strategic Actions	#	Key Activities	Stakeholders	Resources	KPI	Year
4.1 Work locally to implement the RFC cross sector marketing strategy to align tourism and food activities to promote The Murray's provenance stories and reputation for quality food and food experiences within the local community and visitor alike.	4.1.1	<p>Prepare and seek funding for a local participation in regional marketing strategy & consumer campaign to promote provenance stories of accredited F2P businesses offering authentic regional food products and experiences</p> <ul style="list-style-type: none"> - Create consumer demand and awareness of provenance to drive demand for accredited businesses - Stimulate the development of a regional food movement amongst local consumers - Coordinate the use of the accredited regional food brand ensure adherence to the guidelines 	MRT, RFC WVIC, DNSW, DRM, LGAs	<p>Coordination, Specialist consultant, Implementation \$</p> <p>Co-funding from LGAs +Industry</p>	<ul style="list-style-type: none"> - Campaign strategy developed and supported locally - Funding secured - Co-funding by partners and industry secured - Campaign delivered with an increase in visitation 	Years 1-2
4.2 Develop a local consumer engagement model to promote local food culture and word of mouth marketing	4.2.1 4.2.2	<p>Support the development of a Murray Slow Food Movement</p> <p>Locavore – Buy local program + Visiting Friends & Relatives Program featuring agri & culinary experiences</p> <ul style="list-style-type: none"> - Coordinate local buy-in to fund a regional consumer campaign to promote accredited F2P businesses offering authentic regional food products and experiences - Create consumer demand and awareness of provenance to drive demand for accredited businesses - Stimulate the development of a regional food movement amongst local consumers 	MRT, RFC WVIC, DNSW, DRM, LGAs	<p>Coordination, Specialist consultant, Implementation \$</p> <p>Co-funding from LGAs +Industry</p>	<ul style="list-style-type: none"> - Develop partnership with Slow Food movement - Create agri and culinary VFR and buy local focused campaign - secure local LGA & industry buy in + Co funding through WVIC & DNSW - Campaign delivered - Increase in VFR and local awareness of products and experiences 	Years 1-2

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy 4: Drive demand for regional food/drink produce and experiences

Key outcomes: Increased commercial, consumer (locals and visitors), export demand and brand appeal

Strategic Actions	#	Key Activities	Stakeholder	Resources	KPI	Year
4.3 Develop seasonal themes food events programs to encourage industry activation and delivery	4.3.1	Collaborate with the RFC to create and implement a framework for events to encourage industry to host and market under seasonal events banners	MRT, RFC Vis VIC, DNSW, DRM, LGAs Food & Wine Vic	Coordination, Specialist consultant, Implementation \$ Co-funding from LGAs +Industry	<ul style="list-style-type: none"> - Local farm-to-plate events framework developed - Industry engaged - Local events calendar developed and connected to regional program 	Years 2-3
4.4 Work with RFC and MRT to develop a cooperative approach to showcasing the region in other domestic and export markets	4.4.1	Work locally to identify actions to fit within regional plan. Identify the most suitable local participants for out-of-region showcase events [refer to marketing strategy 4.1 and RFC Export Strategy 1.7 in regional Report]	Local Cluster MRT, RFC Austrade, + Industry, VVIC, DNSW, DRM, LGAs + Industry groups	Coordination, Specialist consultant, Implementation \$ Co-funding from LGAs +Industry	<ul style="list-style-type: none"> - Local participants identified and participation in regional showcase supported 	2-3 Ongoing



Appendix

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Appendix 1: Regional Strategic Alignment Tables

Strategy REF	MURRAY REGION FARM-TO-PLATE STRATEGY CONTEXT	FEDERAL ALIGNMENT	VICTORIAN STATE ALIGNMENT	NSW STATE ALIGNMENT	OTHER REGIONAL ALIGNMENT	LOCAL ALIGNMENT
Objective A	Access to fresh seasonal and value added food and drink for locals and visitors: Educating our community so we "eat more of what we grow and grow more of what we eat"	NFF Talking 2030 Agriculture White Paper Tourism 2020	VicHealth Healthy Eating Strategy 2017–19 [Focus 3 &4] Vic Wine Industry Dev Strategy	20 Year Vision for Regional NSW [#7. More domestic & int'l Tourists] DNSW VEIAP2030 NSW DPI Ag Industry Action Plan	Albury REDS [#1,2,&3] & Murray REDS [#1,2,&3]	Campaspe Economic Development Strategy 2014-2019 Campaspe Council Plan 2017-2021 Murray River Economic Development Strategy 2017-2027
Objective B	Build brand and reputation through quality and provenance: Positioning the Murray region as a high quality food region and food tourism destination	Agriculture and Export Policy FIAL - Food Growth Centre Strategy NFF Talking 2030 Agriculture White Paper Tourism 2020 Austrade - Entrepreneurs Program	Vic Wine Industry Dev Strategy VIC VISITOR ECONOMY STRATEGY	DRAFT DNSW Food & Wine Tourism Strategy 20 Year Vision for Regional NSW - Growth Centres [#7. More domestic & int'l Tourists] DNSW VEIAP2030 NSW DPI Ag Industry Action Plan	Murray DMP Riverina Murray DMP Albury REDS [#1,2,&3] & Murray REDS [#1,2,&3]	
Objective C	Coordinated collaboration, capability and capacity building: Enabling farm-to-plate businesses to adapt, trade and improve distribution	FIAL - Food Growth Centre Strategy NFF Talking 2030 Agriculture White Paper Tourism 2020	Vic Wine Industry Dev Strategy	20 Year Vision for Regional NSW [#4.Skills pathway 6. Innovation 9.Business Environment] DNSW VEIAP2030 NSW DPI Ag Industry Action Plan	Murray DMP Albury REDS [#1,2,&3] & Murray REDS [#1,2,&3]	

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy REF	MURRAY REGION FARM-TO-PLATE STRATEGY CONTEXT	FEDERAL ALIGNMENT	VICTORIAN STATE ALIGNMENT	NSW STATE ALIGNMENT	OTHER REGIONAL ALIGNMENT	LOCAL ALIGNMENT
Objective D	Disrupt the status quo to create a farm-to-plate innovation ecosystem: Fostering innovation & connectivity across the farm-to-plate value chain	Agriculture and Export Policy FIAL - Food Growth Centre Strategy NFF Talking 2030 Agriculture White Paper Tourism 2020 Wine Australia	Food and fibre sector strategy 2016 VicHealth Healthy Eating Strategy 2017–19 [Focus 3 & 4] Vic Wine Industry Dev Strategy	20 Year Vision for Regional NSW – [#5. Skills pathway 6. Innovation 9.Business Environment] DNSW VEIAP2030 NSW DPI Ag Industry Action Plan	Murray DMP Riverina Murray DMP Albury REDS [#1,2,&3] & Murray REDS [#1,2,&3]	Campaspe Economic Development Strategy 2014-2019 Campaspe Council Plan 2017-2021 Murray River Economic Development Strategy 2017-2027
Strategy 1	Create a regional collaboration platform Strategy ownership and governance Communication Knowledge Sharing	Agriculture and Export Policy FIAL - Food Growth Centre Strategy NFF Talking 2030 Agriculture White Paper Tourism 2020 Wine Australia	Vic Wine Industry Dev Strategy	20 Year Vision for Regional NSW [#6. Innovation 9.Business Environment] DNSW VEIAP2030 NSW DPI Ag Industry Action Plan	Albury REDS [#1,2,&3] & Murray REDS [#1,2,&3]	
Strategy 2	Develop the supply of high-quality produce and experiences [agri food products and visitor experiences]	Tourism 2020 Wine Australia	VicHealth Healthy Eating Strategy 2017–19 [Focus 3 & 4] Vic Wine Industry Dev Strategy	20 Year Vision for Regional NSW [#7. More domestic & int'l Tourists] Draft NSW Food & Wine Strategy DNSW VEIAP2030	Murray DMP Riverina Murray DMP Albury REDS [#1,2,&3] & Murray REDS [#1,2,&3]	
Strategy 3	Connect the regional food system to efficiently distribute regional produce whilst maintaining provenance	FIAL - Food Growth Centre Strategy NFF Talking 2030 Agriculture White Paper Tourism 2020 Wine Australia	VicHealth Healthy Eating Strategy 2017–19 [Focus 3 & 4] Vic Wine Industry Dev Strategy	20 Year Vision for Regional NSW - DIGITAL Disruption DNSW VEIAP2030 NSW DPI Ag Industry Action Plan	Albury REDS [#1,2,&3] & Murray REDS [#1,2,&3]	

NOTE: Action plan priorities are indicative and will be ratified by cluster when formed

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Strategy REF	MURRAY REGION FARM-TO-PLATE STRATEGY CONTEXT	FEDERAL ALIGNMENT	VICTORIAN STATE ALIGNMENT	NSW STATE ALIGNMENT	OTHER REGIONAL ALIGNMENT	LOCAL ALIGNMENT
Strategy 4	<p>Drive demand for regional food/drink produce and experiences</p> <p>Commercial demand</p> <p>Consumer demand [locals and visitors]</p> <p>Brand appeal [locals and visitors]</p> <p>Export demand</p>	<p>FIAL - Food Growth Centre Strategy</p> <p>NFF Talking 2030</p> <p>Agriculture White Paper</p> <p>Tourism 2020</p> <p>Wine Australia</p>	<p>VicHealth Healthy Eating Strategy 2017–19 [Focus 3 &4]</p> <p>Vic Wine Industry Dev Strategy</p>	<p>20 Year Vision for Regional NSW</p> <p>[#6. Innovation</p> <p>7. More domestic & int'l Tourists</p> <p>9.Business Environment</p> <p>DNSW VEIAP2030</p> <p>NSW DPI Ag Industry Action Plan</p>	<p>Murray DMP</p> <p>Riverina Murray DMP</p> <p>Albury REDS [#1,2,&3] &</p> <p>Murray REDS [#1,2,&3]</p>	<p>Campaspe Economic Development Strategy</p> <p>2014-2019</p> <p>Campaspe Council Plan</p> <p>2017-2021</p> <p>Murray River</p> <p>Economic Development Strategy</p> <p>2017-2027</p>

LEGEND: Objective A - Access to regional produce. Objective B - Build brand. Objective C - Coordinated collaboration. Objective D – Disrupt and develop

Strategy 1: Create a collaboration platform. Strategy 2: Develop supply. Strategy 3: Connect the distribution system. Strategy 4: Drive demand

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Appendix 2: Local strategic alignment & literature review

Strategic alignment to cluster plan

A-D = Objectives. 1-4 = Strategies

Local Government Area	Summary of relevance	Page No.	A	B	C	D	1	2	3	4
Campaspe Economic Development Strategy 2014-2019	Listing key food processing businesses - Fonterra, Murray Goulburn, SPC Ardmona, Kagome, Heinz and Simplot	15	☑			☑	☑	☑	☑	☑
	Campaspe Shire offers unique regional tourism experiences attracting high numbers of visitors. This results in high demand for tourism experiences, accommodation and food services.	13		☑		☑				☑
	Increased value-adding of local agriculture product, Increased employment, Increased branding and awareness as a 'food and farm' focused Shire and flow on benefits to tourism, hospitality and local community.	26	☑	☑	☑	☑	☑	☑	☑	☑
	Encouragement of the following Priority projects for the region are; increased investment in agricultural production, increased production of high quality produce and increased branding and awareness as a 'food and farm' focused Shire.	26	☑	☑	☑	☑	☑	☑	☑	☑
	Support expansion of existing specialised food manufacturing business and attract new businesses that can leverage locational factors such as proximity to raw product, transport and supply chain networks, linkages with local tourism and gourmet food industry.	35	☑	☑	☑	☑	☑	☑	☑	☑
	Shire plans to strengthen linkages with the tourism sector by growing the wine and cider manufacturing industry.	35	☑	☑	☑	☑	☑	☑	☑	☑
	Opportunities for educational farm-gate tourism activity by linking with the local tourism industry.	35	☑	☑	☑	☑	☑	☑	☑	☑

LEGEND: Objective A - Access to regional produce. Objective B - Build brand. Objective C - Coordinated collaboration. Objective D – Disrupt and develop

Strategy 1: Create a collaboration platform. Strategy 2: Develop supply. Strategy 3: Connect the distribution system. Strategy 4: Drive demand

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Appendix 2: Local strategic alignment & literature review

Strategic alignment to cluster plan


A-D = Objectives. 1-4 = Strategies

Local Government Area	Summary of relevance	Page No.	A	B	C	D	1	2	3	4
Campaspe Economic Development Strategy 2014-2019	Food trail for visitors, highlighting the high quality and broad nature of local production.	35	☑	☑	☑	☑	☑	☑	☑	☑
Campaspe Council Plan 2017-2021	Grow and develop the councils strategic direction for tourism by facilitating the attraction of new tourism businesses, by developing and growing existing tourism businesses.	11		☑	☑	☑	☑	☑		
Murray River Economic Development Strategy 2017-2027	Opportunities within the shire include tourism and demand for Agricultural products.	8	☑	☑	☑	☑	☑	☑	☑	☑
	The shire needs to address the promotion of tourism opportunities and opportunities for growth in agribusiness and associated manufacturing to support economic growth.	17	☑	☑	☑	☑	☑	☑	☑	☑
	Encourage and support new opportunities and actively encourage investment in agriculture, agribusiness, value added manufacturing		☑	☑	☑	☑	☑	☑	☑	☑

Appendix 3: Summary of local strategic conversations


Local strategic conversations were held over two workshops to set the context for the regional Report and provide input from a local context. The data collected through this process has been used to inform strategic actions locally and regionally. The discovery process tested the framework, with the second workshop recapping this content and exploring the four strategic themes in the local context. The tables below summarises the information provided by those attending each of the workshops.

Appendix 3: Summary of local strategic conversations

Central			
	Key Themes	Cluster Workshop One - Discovery Phase Sharing Concepts and Conversations	Cluster Workshop Two - Testing the strategic framework and themes
Supply side challenges 	Access to products	Continuity of Supply Consistent quality Seasonality Distribution - how do they get it? Illegal to sell small produce into artisan product - restriction/contracts Cellar door experience to other agricultural product No natural collaborative model for small farmers to sell under shared brand No local abattoir - no control Volumes through farmer market stall Smaller growers are value adding already	
	Education	Both supply and demand Knowledge of supply - seasonality	
	Key considerations	Export pushes prices up - intermittent supply Local butcher not sourcing local meat Lack of local demand Consumers not willing to pay more for local product Lack of east west courier options Everyone wants a deal Pre-existing relationships/loyalties/buying habits Networking and collaborating to solve distribution - time taxing Not a lot of local farm producers who are interested in the size and scale of this concept: Dairy/ not a lot of them Not really looking to restaurants Working with middle Time management and convenience Distance between sites (clusters)	

Central			
	Key Themes	Cluster Workshop One - Discovery Phase Sharing Concepts and Conversations	Cluster Workshop Two - Testing the strategic framework and themes
Supply side opportunities 	Access to products	<ul style="list-style-type: none"> Disconnect between producer and consumer Seasonality is a real opportunity - what's new in season Taste For us to be known for multiple specialty Offer consistency to consumers Collaboration between businesses Food register - who, what, how much? Farm trails e.g. Sun country Align events seasonality Help small producers to get involved Local abattoir Chefs and other co-ops 	<ul style="list-style-type: none"> Forever Fresh Echuca Epping Market Website Farmers' Markets - Various TBA Farmer Exchange Information - Online forum The Farm Table - www.farmtable.com.au (founder Airlie Trescowhick MD) Open food network Local residents in Echuca – harvest swap - Echuca Neighbourhood house (facebook page) Pricing stability for suppliers and buyers (not sure whether this would work)
	Education	<ul style="list-style-type: none"> Tell farming stories Make farming appealing - career paths of farms Along the Murray (showcase) Education in schools - create demand and love of local produce Educate on history and provenance Indigenous food and history Producers' showcase to build awareness and engagement, networking and connecting with chefs Events creating opportunities to come together 	Monash: Food Innovation
	Brand	<ul style="list-style-type: none"> Murray region is a real opportunity Awareness to visitor - it is a food region, advertising to build supply Murray Brand 	<ul style="list-style-type: none"> Murray Irrigation looking into regional brand Moulemein Oats (included)

Central			
	Key Themes	Cluster Workshop One - Discovery Phase Sharing Concepts and Conversations	Cluster Workshop Two - Testing the strategic framework and themes
Demand side challenges 	Products	Disconnect between producer and consumer Seasonality is a real opportunity - what's new in season Taste For us to be known for multiple specialty Offer consistency to consumers Collaboration between businesses Food register - who, what, how much? Farm trails e.g. Sun country Align events seasonality Help small producers to get involved Local abattoir Chefs and other co-ops	Forever Fresh Echuca Epping Market Website Farmers' Markets - Various TBA Farmer Exchange Information - Online forum The Farm Table - www.farmtable.com.au (founder Airlie Trescowhick MD) Open Food Network Local residents in Echuca - Harvest Swap - Echuca Neighbourhood House (Facebook page) Pricing stability for suppliers and buyers (not sure whether this would work)
	Key considerations	Point of difference - farm based experience Diversity New business opportunity Local government plans - for healthy community Local and state government initiatives to gain access to more people Younger farmers, different approaches and changes Developing relationships and communication	Murray Irrigation - production, water and weather data (Nathan Hoolihan - Comms)
	Education	Education of local consumers and businesses to value the local produce How to use / what is local products How do we make local produce convenient to access Lack of food knowledge / cooking skills	Lack of trained staff Consumer market needs educating re. whole of beef etc. seasonal produce use
	Brand	How do you generate demand - tools marketing Lack of food identity Make sure it's authentic Conflict of brand hierarchy	Shared marketing opportunities

Central			
	Key Themes	Cluster Workshop One - Discovery Phase Sharing Concepts and Conversations	Cluster Workshop Two - Testing the strategic framework and themes
Demand side opportunities 	Products		Clubs as a demand base Leadership around local buying “local products” October small business month - Murray River Shire - promote local produce Waste product (better ways to use it up) Micro producers collaborating with cellar door with retail Kagome Tomatoes - Host Australian Buyers Flavours Festival Partnership with Wine product with chefs
	Education		Heathcote/Bendigo - cross promotion VCal Chefs working with students (class based) - Cook off events in Echuca 2018 Provenance Story - SPC Weekes Family Fonterra Farmer Echuca working with Melbourne Restaurants - already using products bring 5-6 chefs (early 2019)

Appendix 4: Regional meat processing facilities

Location	Operator	Ind. Kills	Beef	Lamb	Goat	Pig	Offal	Poultry	Export	Domestic	HALAL
Wangaratta	GA Gathercole	√	√	√	√					√	
Cobram (?)	JBS	N/A		√					√		√
Tatura Abattoir	GA Gathercole	Only Woollies		√		√	√			√	
Kyneton	Hardwicks	√	√	√					√	√	√
Nathalia	Ryan Meat Company			√	√		√		√		√
Tallangatta	Smiths TMP	√	√	√						√	√
Tongala	Greenhams	x	√						√	√	
Canowindra NSW - 4hours	Tablelands	√		√	√	√		√			
Seymour 1.5hrs Echuca	Ralphs Meat	x	√						√	√	√
Swan Hill	HR Woodward	x	√	√					√	√	
Mitta Valley Beef Co-op	www.mittavalleybeef.com.au										
The Meat Room	Bespoke Butchers - Kilmore East Vic										
Articles - small batch processing											
https://www.stockjournal.com.au/story/4730649/small-on-farm-abattoirs-offer-great-opportunities/											
https://www.weeklytimesnow.com.au/news/rural-weekly/microabattoirs-innovation-in-meat-processing-on-show/news-story/5ce7f9a48686b91df8e6262294744e86											
https://www.farmonline.com.au/story/3367992/small-kills-will-benefit-small-producers/											