Agriculture and Fisheries in the Southern Highlands and Shoalhaven region of New South Wales, 2013

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1 Regional overview

The Southern Highlands and Shoalhaven region of New South Wales is located in the south-east of the state, along the coast and eastern side of the Great Dividing Range (Map 1). The region includes the major regional towns of Bowral and Nowra and encompasses most of the Shoalhaven and Wingecarribee local government areas, and a small part of the Kiama local government area. The region covers a total area of around 6700 square kilometres or 0.8 per cent of New South Wales and is home to approximately 137 000 people (ABS 2011).

The total land held by farm businesses was estimated to be 139 682 hectares in the Southern Highlands and Shoalhaven region in 2010–11. Agricultural land in the region was mainly used for grazing (124 825 hectares) and cropping (5660 hectares), with some forestry plantations (1755 hectares) also occurring. In addition, 7906 hectares of land held by farm businesses was set aside for conservation (ABS 2012).

Employment

Australian Bureau of Statistics (ABS) census data from 2011 indicate that around 53 100 people were employed in the Southern Highlands and Shoalhaven region. The region accounts for 2 per cent of total employment in New South Wales and 2 per cent of all people employed in the New South Wales agriculture, forestry and fishing sector.

Health care and social assistance was the largest employing sector with 7075 people (Figure 1), followed by retail trade (6572 people) and construction (4797 people). Other important employment sectors in the region were accommodation and food services (4747 people), manufacturing (4601 people), education and training (4404 people) and public administration and safety (4294 people).
The agriculture, forestry and fishing sector employed 1327 people, representing 3 per cent of the region’s workforce. Of this 84 per cent were employed in agriculture, 6 per cent in support services for the agriculture, forestry and fishing sector, and 6 per cent in fishing, hunting and trapping. In addition, an estimated 689 people were employed in food product manufacturing and 504 people were employed in wood, pulp and paper product manufacturing in the region (included in manufacturing sector employment).

Figure 1 Employment profile, Southern Highlands and Shoalhaven region

Source: Australian Bureau of Statistics
2 Agriculture sector

Value of agricultural production

In 2010–11 the gross value of agricultural production (GVAP) in the Southern Highlands and Shoalhaven region was $108 million, which was 1 per cent of the total gross value of agricultural production in New South Wales ($11.7 billion) for 2010–11. This is the most recent year for which data are available from the ABS on GVAP by statistical area.

The Southern Highlands and Shoalhaven region agricultural sector is dominated by dairy and cattle production, with some horticultural outputs. In 2010–11, the Southern Highlands and Shoalhaven region accounted for around 9 per cent of the total value of New South Wales milk production and 5 per cent of the total value of nurseries, flowers and turf.

The most important commodity in the region, based on agricultural output value, was milk (Figure 2). In 2010–11, milk contributed 43 per cent ($47 million) to the total gross value of agricultural production in the Southern Highlands and Shoalhaven region. Cattle and calves accounted for 28 per cent ($30 million), nurseries, flowers and turf accounted for 13 per cent ($14 million) and vegetables 7 per cent ($8 million). The major vegetable crops based on value were mushrooms ($5 million) and potatoes ($2 million).

![Figure 2 Value of agricultural production, Southern Highlands and Shoalhaven Region, New South Wales, 2010–11](chart)

Source: Australian Bureau of Statistics

Number and type of farms

ABS data indicate that in 2010–11 there were 909 farms in the Southern Highlands and Shoalhaven region with an estimated value of agricultural operations of more than $5000 (Table 1). The region contains 2 per cent of all farm businesses in New South Wales.
Table 1 Number of farms, by industry classification, 2010–11

<table>
<thead>
<tr>
<th>Industry Classification</th>
<th>Southern Highlands and Shoalhaven region</th>
<th>New South Wales</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>no.</td>
<td>%</td>
</tr>
<tr>
<td>Beef cattle</td>
<td>439</td>
<td>48</td>
</tr>
<tr>
<td>Other livestock</td>
<td>91</td>
<td>10</td>
</tr>
<tr>
<td>Dairy</td>
<td>83</td>
<td>9</td>
</tr>
<tr>
<td>Nurseries, cut flowers and turf</td>
<td>35</td>
<td>4</td>
</tr>
<tr>
<td>Fruit and nuts</td>
<td>30</td>
<td>3</td>
</tr>
<tr>
<td>Vegetable</td>
<td>12</td>
<td>1</td>
</tr>
<tr>
<td>Mixed livestock</td>
<td>11</td>
<td>1</td>
</tr>
<tr>
<td>Other</td>
<td>208</td>
<td>23</td>
</tr>
<tr>
<td>Total Agriculture</td>
<td>909</td>
<td>100</td>
</tr>
</tbody>
</table>

Note: Where the estimated value of agricultural operations is more than $5000.

Source: Australian Bureau of Statistics

Farms are classified in Table 1 according to the activities that generate most of their value of production. Beef cattle (439 farms) were the most common, accounting for 48 per cent of all farms in the Southern Highlands and Shoalhaven region, and 3 per cent of all beef farms in New South Wales.

A large proportion of farms in the region are small in terms of their business size. Estimated value of agricultural operations (EVAO) is a measure of the value of production from farms and a measure of their business size, and is somewhat similar to turnover. Around 72 per cent of farms in the Southern Highlands and Shoalhaven region had an EVAO of less than $50 000 (Figure 3). These farms accounted for only 12 per cent of the total value of agricultural operations in 2010–11. In comparison, 8 per cent of farms in the region had an EVAO of more than $350 000 and accounted for an estimated 65 per cent of the total value of agricultural operations in the region in 2010–11.

Source: Australian Bureau of Statistics
Farm financial performance—New South Wales

Each year, ABARES interviews Australian broadacre and dairy producers as part of its annual survey program. Broadacre industries covered in this survey include the grains, grains–livestock, sheep, beef and sheep–beef industries. The information collected is a basis for analysing the current financial position of farms in these industries and expected changes in the short term. This paper uses data from the ABARES Australian agriculture and grazing industries survey (AAGIS) and Australian dairy industry survey (ADIS) to compare estimates of financial performance indicators (Box 1) for broadacre and dairy farms in New South Wales.

Box 1 Definitions

<table>
<thead>
<tr>
<th>Major financial performance indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total cash receipts</strong>: total revenues received by the business during the financial year.</td>
</tr>
<tr>
<td><strong>Total cash costs</strong>: payments made by the business for materials and services and for permanent and casual hired labour (excluding owner manager, partner and family labour).</td>
</tr>
<tr>
<td><strong>Farm cash income</strong>: total cash receipts – total cash costs</td>
</tr>
<tr>
<td><strong>Farm business profit</strong>: farm cash income + changes in trading stocks – depreciation – imputed labour costs</td>
</tr>
<tr>
<td><strong>Profit at full equity</strong>: return produced by all the resources used in the business, farm business profit + rent + interest + finance lease payments – depreciation on leased items</td>
</tr>
<tr>
<td><strong>Rate of return</strong>: return to all capital used, profit at full equity * 100 / total opening capital</td>
</tr>
<tr>
<td><strong>Equity ratio</strong>: Farm capital minus farm debt expressed as a percentage of farm capital</td>
</tr>
</tbody>
</table>

Industry types

- **Grains**: farms mainly engaged in producing broadacre crops such as wheat, coarse grains, oilseeds and pulses, and including farms running sheep and/or beef cattle in conjunction with substantial broadacre crop activity.
- **Sheep**: farms mainly engaged in running sheep.
- **Beef**: farms mainly engaged in running beef cattle.
- **Dairy**: farms mainly engaged in milk production.

Performance of broadacre farms—New South Wales

Average broadacre farm cash income for 2012–13 is projected to increase slightly compared to that recorded in 2011–12. Overall, a small increase is expected in crop receipts with higher grain prices generally expected to offset lower production compared with 2011–12. Change in farm cash income is expected to vary across industries and regions. Small increases in farm cash incomes are expected for many grain farms in 2012–13, including farms growing rice. However, receipts from livestock and wool are projected to decline, due to lower sheep, wool and beef prices and despite an increase in the number of sheep, lambs and cattle expected to be sold.
On average, farm cash income of broadacre farms in New South Wales is projected to average $73,000 a farm in 2012–13 (Table 2), which is around 30 per cent above the average farm cash income recorded for the 10 years to 2011–12 (Figure 4).

Farm cash incomes are projected to increase in the main grain growing regions of north western New South Wales, central New South Wales and the Riverina in 2012–13. However, in Far Western New South Wales, the Northern, Central and Southern Tablelands regions, farm cash incomes are projected to decline due to reduced livestock and wool receipts.

Despite an increase in average farm cash income, average farm business profit is projected to decline as the rate of increase in sheep and beef cattle numbers slows and as stocks of grain on-farm are reduced relative to those held in 2011–12.

**Figure 4 Real farm cash income, broadacre industries, average per farm**

![Real farm cash income, broadacre industries, average per farm](image)

Note: p Preliminary estimate. y Provisional estimate.

**Table 2 Financial performance, New South Wales broadacre industries, 2010–11 to 2012–13, average per farm**

<table>
<thead>
<tr>
<th>Performance indicator</th>
<th>units</th>
<th>2010–11</th>
<th>2011–12p</th>
<th>RSE (%)</th>
<th>2012–13y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total cash receipts</td>
<td>$</td>
<td>371,670</td>
<td>343,700</td>
<td>(5)</td>
<td>340,000</td>
</tr>
<tr>
<td>Total cash costs</td>
<td>$</td>
<td>268,800</td>
<td>272,400</td>
<td>(5)</td>
<td>267,000</td>
</tr>
<tr>
<td>Farm cash income</td>
<td>$</td>
<td>102,870</td>
<td>71,300</td>
<td>(11)</td>
<td>73,000</td>
</tr>
<tr>
<td>Farms with negative farm cash income</td>
<td>%</td>
<td>27</td>
<td>32</td>
<td>(11)</td>
<td>32</td>
</tr>
<tr>
<td>Farm business profit</td>
<td>$</td>
<td>67,590</td>
<td>-8,300</td>
<td>(91)</td>
<td>-11,000</td>
</tr>
<tr>
<td>Profit at full equity - excluding capital appreciation</td>
<td>$</td>
<td>104,840</td>
<td>27,900</td>
<td>(29)</td>
<td>21,000</td>
</tr>
<tr>
<td>Farm capital at 1 July a</td>
<td>$</td>
<td>3,390,700</td>
<td>3,420,100</td>
<td>(4)</td>
<td>na</td>
</tr>
<tr>
<td>Farm debt at 30 June b</td>
<td>$</td>
<td>437,610</td>
<td>446,300</td>
<td>(9)</td>
<td>420,000</td>
</tr>
<tr>
<td>Equity ratio b</td>
<td>%</td>
<td>87</td>
<td>87</td>
<td>(1)</td>
<td>na</td>
</tr>
<tr>
<td>Rate of return - excluding capital appreciation c</td>
<td>%</td>
<td>3.2</td>
<td>0.8</td>
<td>(28)</td>
<td>0.7</td>
</tr>
<tr>
<td>Off-farm income of owner manager and spouse b</td>
<td>$</td>
<td>35,180</td>
<td>33,600</td>
<td>(11)</td>
<td>na</td>
</tr>
</tbody>
</table>

Note: a Excludes leased plant and equipment. b Average per responding farm. c Rate of return to farm capital at 1 July.

p ABARES preliminary estimates. y ABARES provisional estimates. na Not available. RSE Relative standard errors, expressed as a percentage of the estimate provided.
Performance of grains industry farms—New South Wales

Average farm cash income for New South Wales grains industry farms declined in 2011–12 compared with 2010–11. Record grain and oilseed production in 2010–11 resulted in the carryover of substantial grain stocks into 2011–12. Sale of on-farm grain stocks boosted crop receipts and helped offset the effect on crop receipts of lower grain and oilseed production combined with lower grain prices. The selling down of grain stocks cushioned the decline in farm cash income for grains industry farms but lowered the value of on-farm stocks, resulting in a larger decline in farm business profit in 2011–12.

In 2012–13, crop receipts are projected to increase by around 8 per cent for New South Wales grains farms as higher crop prices more than offset reductions in crop production resulting from drier conditions through winter and spring in most regions and high temperatures in northern summer cropping regions mid-summer. On mixed enterprise farms, increased crop receipts are expected to be partly offset by reduced receipts from sheep and due to lower sheep, lamb and wool prices and in spite of a small increase in beef cattle receipts as drier conditions result in increased cattle turnoff.

Farm cash income for New South Wales grains industry farms is projected to average $139 000 a farm in 2012–13, an increase on the average farm cash income for 2011–12, and around 75 per cent above the industry average for the previous 10 years (Figure 5). However, farm cash incomes for New South Wales grains industry farms were markedly reduced by dry conditions throughout much of this decade.

**Figure 5 Real farm cash income, grains industry, average per farm**

Note: p Preliminary estimate. y Provisional estimate.

Performance of sheep industry farms—New South Wales

Farm cash incomes have been relatively high in historical terms for New South Wales sheep industry farms in recent years (Figure 6).

In 2011–12 a small reduction in average prices received for adult sheep and lambs resulted in a small decline in average farm receipts for New South Wales sheep industry farms. Despite a reduction in average cash costs resulting mainly from reduced expenditure on sheep purchases,
average farm cash income for sheep industry farms declined slightly to an average of $81,300 per farm.

In 2012–13, lower prices for adult sheep, lambs and wool are projected to far outweigh small increases in wool production and in sheep and lamb turnoff, together with reductions in expenditure on sheep purchases and interest payments. Adult sheep prices received are expected to decline by around 30 per cent; lamb prices by around 20 per cent and the average wool price received by around 17 per cent.

As a result, average farm cash income for sheep industry farms is projected to decline to average $44,000 per farm, which is around 3 per cent below the industry average of $46,000 per farm for the previous 10 years, in real terms.

Performance of beef industry farms—New South Wales

A smaller average herd size for New South Wales beef industry farms compared with the average for the whole of Australia results in average farm cash income for New South Wales beef industry farms typically being below the national average (Figure 7).

Turnoff of beef cattle declined slightly in 2011–12 compared with 2010–11, but was offset by an increase of around 3 per cent in average sale prices for beef cattle to result in a small increase in total cash receipts. Increased receipts combined with a reduction in expenditure on cattle purchases together with reduced interest payments resulted in average farm cash income for New South Wales beef industry farms increasing to an average of $31,000 per farm.

In 2012–13 drier seasonal conditions are expected to result in an increase in beef cattle turnoff, in all New South Wales regions and a slow-down in the rate of increase in herd sizes. Lower average sale prices for beef cattle are projected to more than offset the increase in turnoff to result in average beef cattle receipts declining by around 2 per cent. Despite a further reduction in expenditure on beef cattle purchases and lower interest expenditure, farm cash costs are projected to increase. Lower farm receipts and higher farm cash costs are projected to result in average farm cash income for New South Wales beef industry farms declining to average
$21 000 per farm in 2012–13. This is around 35 per cent below the average of $33 000 for the previous 10 years, in real terms (Figure 7).

Figure 7 Real farm cash income, beef industry, average per farm

![Graph showing real farm cash income, beef industry, average per farm](image)

Note: p Preliminary estimate. y Provisional estimate.

Performance of dairy industry farms—New South Wales

In 2011–12, a small increase in average farm cash income is estimated for dairy farms in New South Wales. Milk production increased by around 4 per cent, more than offsetting a reduction of around 1 per cent in the average farmgate milk price received as well as an increase of around 2 per cent in total cash costs. Farm cash income for New South Wales dairy farms is estimated to have averaged $159 200 per farm in 2011–12 (Figure 8, Table 3).

Figure 8 Real farm cash income, dairy industry, average per farm

![Graph showing real farm cash income, dairy industry, average per farm](image)

Note: p Preliminary estimate. y Provisional estimate.
In 2012–13, lower average farmgate milk prices together with a small reduction in milk production and a small increase in total cash costs, resulting mainly from higher fodder expenditure, are projected to result in lower average farm cash income for all New South Wales dairy regions. Farm cash income for New South Wales dairy farms is projected to decline to an average of $109 000 per farm, which is still close to the average for the previous 10 years.

Table 3 Financial performance, New South Wales dairy industry, 2010–11 to 2012–13, average per farm

<table>
<thead>
<tr>
<th>Performance indicator</th>
<th>units</th>
<th>2010–11</th>
<th>2011–12p</th>
<th>RSE (%)</th>
<th>2012–13y</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total cash receipts</td>
<td>$</td>
<td>679 550</td>
<td>713 500</td>
<td>(3)</td>
<td>670 000</td>
</tr>
<tr>
<td>Total cash costs</td>
<td>$</td>
<td>541 460</td>
<td>554 300</td>
<td>(5)</td>
<td>561 000</td>
</tr>
<tr>
<td>Farm cash income</td>
<td>$</td>
<td>138 090</td>
<td>159 200</td>
<td>(10)</td>
<td>109 000</td>
</tr>
<tr>
<td>Farms with negative farm cash income</td>
<td>%</td>
<td>10</td>
<td>11</td>
<td>(44)</td>
<td>13</td>
</tr>
<tr>
<td>Farm business profit</td>
<td>$</td>
<td>53 240</td>
<td>63 300</td>
<td>(27)</td>
<td>- 11 000</td>
</tr>
<tr>
<td>Profit at full equity - excluding capital appreciation</td>
<td>$</td>
<td>119 860</td>
<td>122 400</td>
<td>(13)</td>
<td>43 000</td>
</tr>
<tr>
<td>Farm capital at 1 July a</td>
<td>$</td>
<td>3 967 720</td>
<td>3 889 800</td>
<td>(5)</td>
<td>na</td>
</tr>
<tr>
<td>Farm debt at 30 June b</td>
<td>$</td>
<td>600 540</td>
<td>646 900</td>
<td>(11)</td>
<td>640 000</td>
</tr>
<tr>
<td>Equity ratio b</td>
<td>%</td>
<td>85</td>
<td>83</td>
<td>(2)</td>
<td>na</td>
</tr>
<tr>
<td>Rate of return - excluding capital appreciation c</td>
<td>%</td>
<td>3.0</td>
<td>3.1</td>
<td>(13)</td>
<td>1.1</td>
</tr>
<tr>
<td>Off-farm income of owner manager and spouse b</td>
<td>$</td>
<td>18 100</td>
<td>16 100</td>
<td>(19)</td>
<td>na</td>
</tr>
</tbody>
</table>

Note: a Excludes leased plant and equipment. b Average per responding farm. c Rate of return to farm capital at 1 July. p ABARES preliminary estimates. y ABARES provisional estimates. na Not available. RSE Relative standard errors, expressed as a percentage of the estimate provided.
3 Fisheries sector

The coastline of the Southern Highlands and Shoalhaven extends northwards from Kioloa State Forrest, north of Batemans Bay, to Shoalhaven Heads. The key fishing port in the area is Ulladulla, a key centre for commercial fishing, processing and marketing of fish. Landings at Ulladulla include blue-eye trevalla, yellowtail kingfish, tiger flathead, silver trevally, snapper and abalone. State Fisheries operating in the area include the fish trawling sector targeting silver trevally, tiger flathead, southern calamari, school whiting and a number of shark and ray species. It is also a port for the Commonwealth Eastern Tuna and Billfish Fishery (mainly supplying export markets with tuna). Recreational fishing is also a popular activity for both residents in the area and tourists.

In 2010–11 the gross value of New South Wales fisheries production is estimated to be around $124 million, a decrease of 7 per cent ($10 million) from 2009–10. New South Wales contributed 6 per cent of the total value of Australian fisheries production in 2010–11. In value terms, the wild-catch sector accounted for 61 per cent ($75.4 million) of the state’s total production and the aquaculture sector accounted for the remaining 39 per cent ($48.1 million).

New South Wales wild-catch fisheries provide a range of fisheries products. In 2010–11, finfish species contributed 55 per cent of the wild-catch production, valued at $42 million. The main finfish species landed were sea mullet, with a gross value of production of $8 million, followed by black and yellowfin bream ($4 million), school whiting ($3 million), snapper ($3 million) and yellowtail kingfish ($2 million). Prawns contributed 19 per cent of the total value of wild-catch fisheries with a value of $15 million, with other important groups being eastern rocklobster (10 per cent; $8 million) and crabs (6 per cent; $4 million).

In 2010–11 the value of New South Wales aquaculture production is estimated to have declined by 8 per cent from $52 million in 2009-10 to $48 million. Oyster production makes the greatest contribution to New South Wales aquaculture production, accounting for 80 per cent of production by value, worth $38 million. Prawns ($2 million) and finfish aquaculture species, including silver perch ($3 million), trout ($2 million) and barramundi ($1 million) make up most of the remaining aquaculture production.

Commonwealth fisheries active in New South Wales include the Small Pelagic Fishery, the Eastern Tuna and Billfish fishery (mainly supplying export markets with tuna), and the Commonwealth trawl sector of the Southern and Eastern Scalefish and Shark fishery.

In 2010–11, New South Wales fisheries product exports were valued at $19 million. The main export products include live and fresh, chilled or frozen fish, rocklobster and abalone. Japan and Hong Kong, are the major destinations for New South Wales fisheries exports, accounting for 39 per cent, and 37 per cent of the total value of exports in 2011–12, respectively. Other major export destinations include Chinese Taipei (6 per cent) and New Zealand (6 per cent).

The New South Wales coastline is an important recreational fishing area, with a multitude of inlets and estuaries from which to fish (NSWDPI 2013). Being a tourism precinct, the region offers a number of recreational fishing opportunities, with the value of this activity to the regional economy likely to be significant. There are also a range of game fishing tournaments throughout the year, including in the Bermagui and Port Stephens area, targeting tuna and marlin species. New South Wales also contains a number of recreational only fishing areas, especially in the far south coast of New South Wales, a popular destination for both marine and freshwater recreational fishers. A large number of recreational fishers also fish in the Greater
Sydney area, stretching from the Newcastle to Illawarra area, and comprising the city areas of Newcastle, Sydney and Wollongong. Species commonly targeted in the area include yellowfin bream, dusky flathead, yellowtail, blue swimmer crab, squid, and southern calamari (Steffe and Murphy 2011).
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Steffe, AS & Murphy, JJ, 2011, *Recreational fishing surveys in the Greater Sydney Region*, NSW Fisheries final report series no. 131, NSW Department of Primary Industries, Cronulla Fisheries Research Centre of Excellence, Cronulla, New South Wales.