
Industry & Investment NSW

Analysis of Population Census and Agriculture Census data in Sydney Statistical Division

Profiles of specific agricultural commodities

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INTRODUCTION

The Sydney Statistical Division (Sydney SD) has a very important role to play in Australian agriculture. Overall, Sydney accounts for around 7% of NSW agricultural output in dollar terms. Areas close to capital cities excel in particular types of (usually) intensive agriculture, and, while NSW dominant agricultural outputs, such as grain crops and sheep, are less prevalent in Sydney, the popular conception of the city as having a non-agricultural focus is not entirely accurate. In particular, those agricultural industries which are intensive and require relatively little space (compared to broadacre farming and livestock production) are quite prevalent in Sydney, and indeed all Australia's capital cities. For instance, nearly half the value of NSW vegetable production comes from the Sydney SD, and some types of vegetables (eg. mushrooms) are almost entirely cultivated within this region.

The following commentary covers the main agricultural outputs of Sydney, with particular focus on those sub-groupings for which Sydney is the dominant supplying region in NSW. Data predominantly comes from the Australian Bureau of Statistics Agriculture Census, run every 5 years, with some data from the Population Census, also run every 5 years. Where possible, comparisons are made between 2000-01 and 2005-06 Censuses, but in some cases this is difficult, due to a change in scope between the surveys, and these numbers should be treated with caution.

The Australian Bureau of Statistics defines the Sydney Statistical Division as covering all of the built up area of Sydney and the Central Coast. It includes all LGAs which contain any built up area of either of these two urban centres, and is bounded by Wyong, Hawkesbury, Blue Mountains, Wollondilly, Campbelltown and Sutherland Shire. In this report, the terms "Sydney" and "Greater Sydney" are used interchangeably with this region, whereas "Sydney Basin" usually excludes Gosford and Wyong.

NURSERIES, CUT FLOWERS AND CULTIVATED TURF

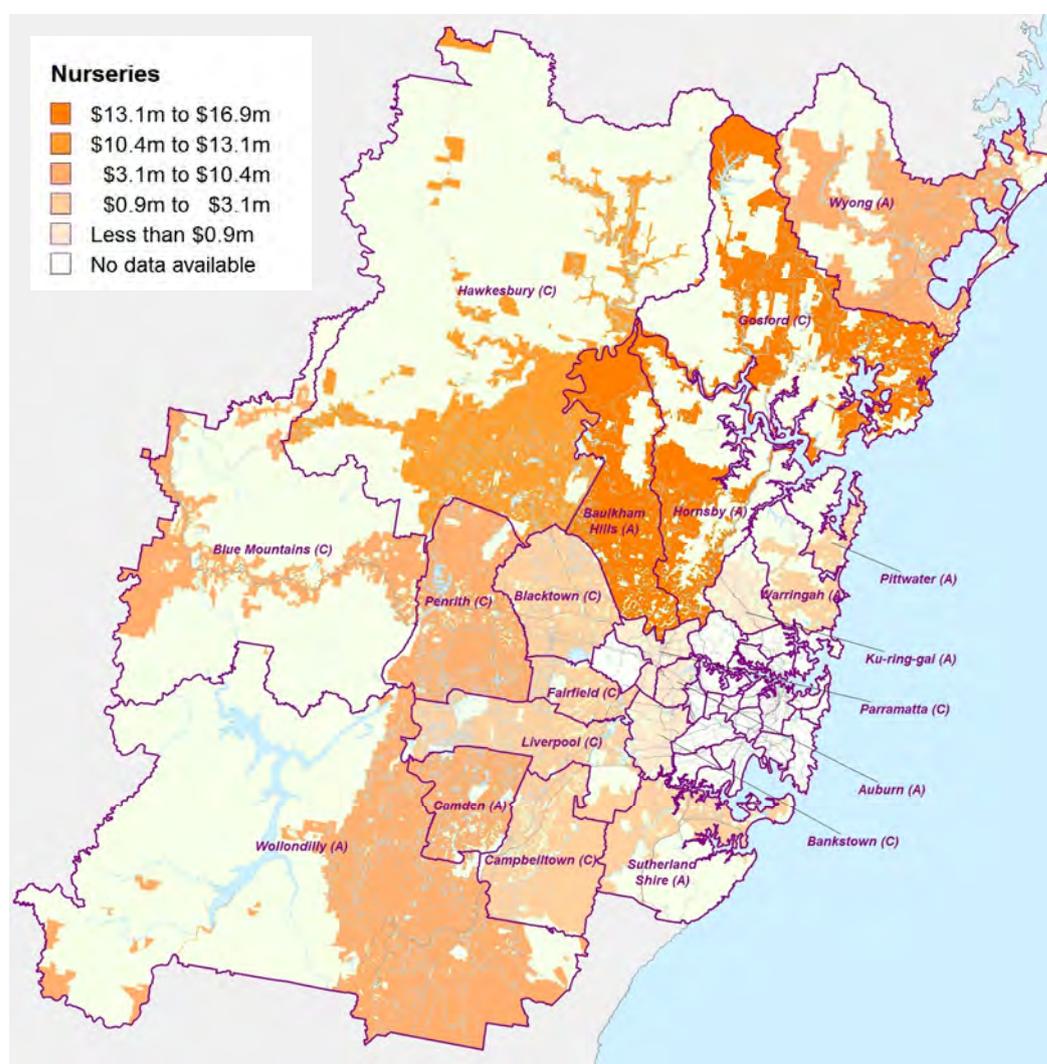
The nursery industry, along with the related industries of cut flowers and cultivated turf, is a very important one in the Sydney Statistical Division. These industries are traditionally located in outer suburban areas, close to ports and the urban market for which they are destined.

In Sydney, in 2005-06, the nurseries, cut flowers and cultivated turf industry produced \$172 million of total output, which represented 49% of the industry's output in value terms across NSW, one of the highest percentages for any agricultural commodity grouping. Between the 2000-01 and the 2005-06 Census, the industry increased from \$40 million to \$172 million in output. While some of this is likely to be due to a change in the scope of the data collection, it is nevertheless, clearly an expanding industry in Sydney.

NURSERIES

The nursery industry in 2005-06 was valued at \$85 million in Sydney. Like most agricultural industries, it was concentrated in the outer suburban areas. In terms of value of output, it was concentrated in the north-west of the Sydney basin and the Central Coast, with the highest value of output being located in The Hills Shire (\$16.8 million), Hornsby (\$14.1 million) and Gosford (\$13.1 million). Areas with large agricultural outputs in other commodities such as Fairfield and Liverpool had relatively low nursery production.

Value of Nursery agricultural output produced, 2005-06, Sydney LGAs

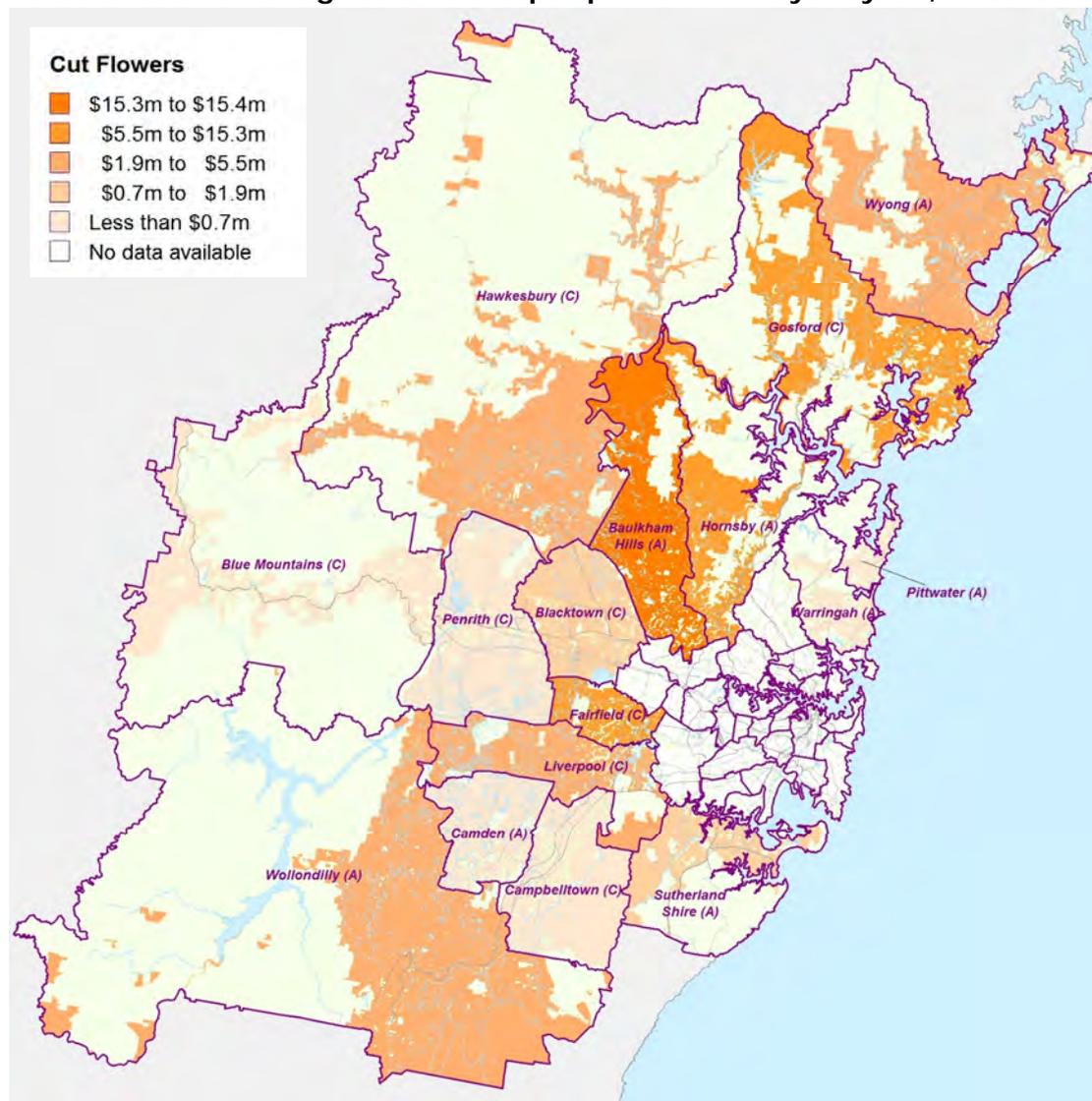


According to the 2006 Census, Nursery Production employs 648 people in the Sydney SD, with the bulk of the employment being located in The Hills Shire, Hornsby and Gosford. However, there is also considerable employment in the

Blue Mountains City, most of it in undercover nurseries, due to the colder climate there.

CUT FLOWERS

Value of cut flower agricultural output produced in Sydney SD, 2005-06



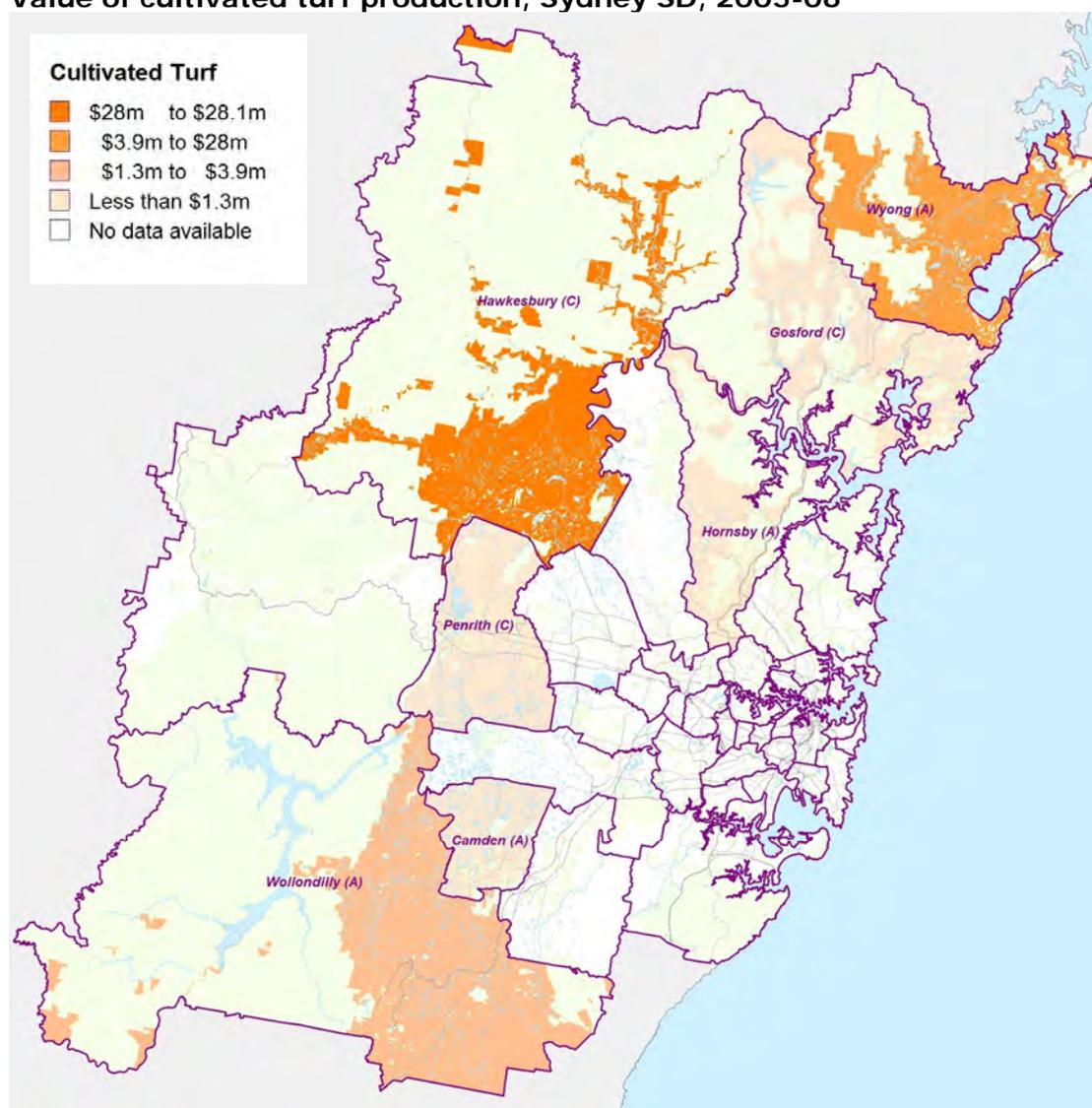
The cut flowers industry in 2005-06 was valued at \$54.9 million in Sydney. This commodity was also concentrated in The Hills Shire (\$15.3 million), followed by Gosford (\$9.6 million) and Hornsby (\$7.4 million). While these are the same top 3 areas as for nurseries, the next largest was in Fairfield (\$5.5 million) which had relatively low nursery production. This is probably due to the fact that Fairfield is a wholesale market gardening area, and flower transport is suited to transport with vegetable output, while nurseries are more likely to have a retail component and be located where people are likely to travel looking for plants.

According to the 2006 Census, cut flower production (floriculture) directly employs 348 people across the Sydney SD. The Hills, Gosford and Hornsby combined make up 55% of this.

CULTIVATED TURF

The cultivated turf industry produced approximately \$58 million worth of output in 2005-06 across NSW, of which \$34 million, or 58% was located in Sydney.

Value of cultivated turf production, Sydney SD, 2005-06

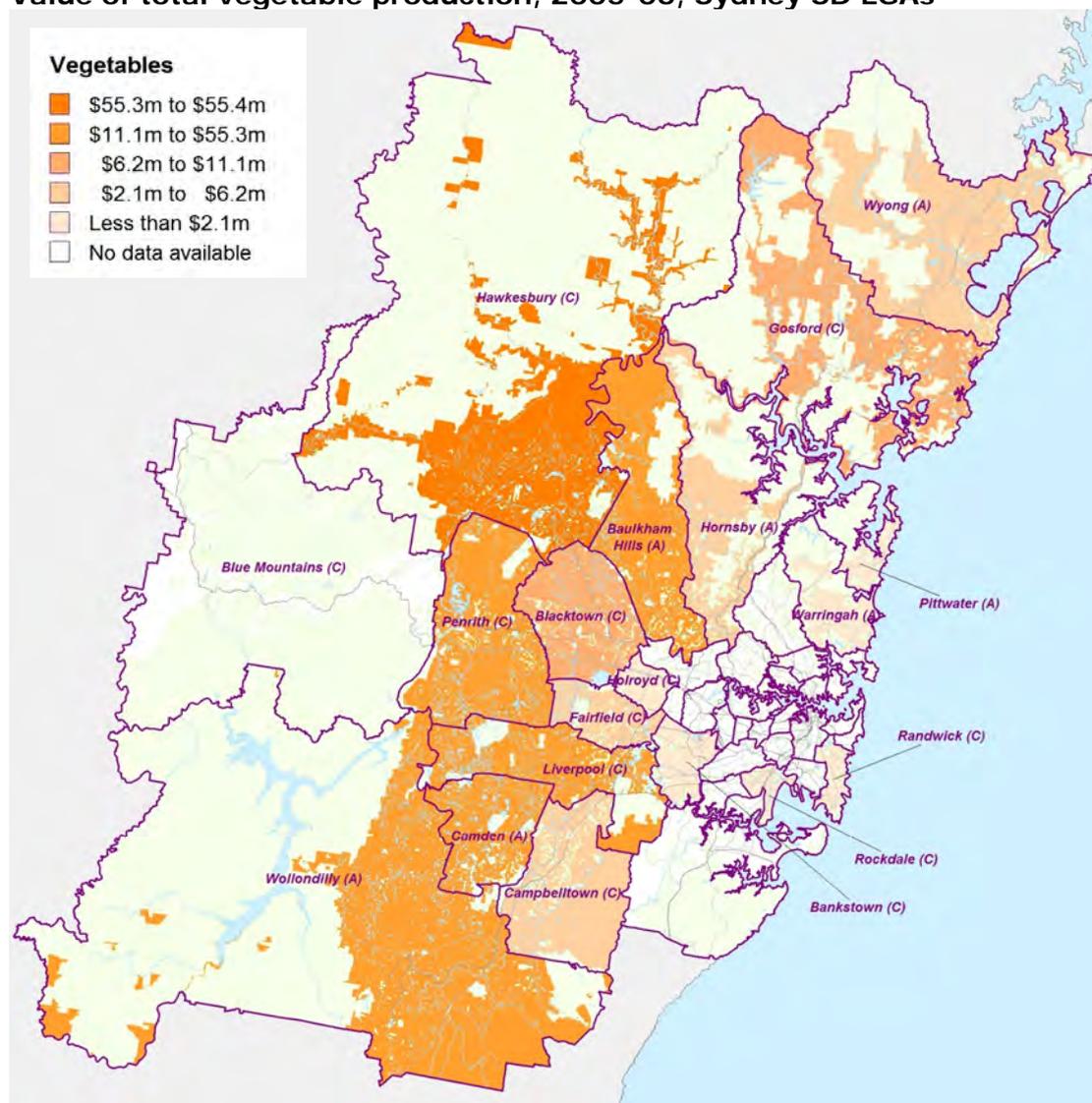


This agricultural output was overwhelmingly concentrated in Hawkesbury, which had \$28 million worth of this output, just over half the NSW total and 83% of Sydney's total. Employment data from the Census tells the same story, with 117 of 165 workers in the Sydney region located in Hawkesbury 71%.

VEGETABLES (total)

Vegetable production, normally in the form of market gardens is a key agricultural output of the Sydney region. In 2005-06, vegetable production was worth \$153 million in gross value in the Sydney Statistical Division, an increase from \$68 million in 2000-1. While some of this increase is likely to be due to the increase in the scope of the survey to include smaller establishments, as well as inflation, some of it indicates the increasing value of the industry across Sydney

Value of total vegetable production, 2005-06, Sydney SD LGAs



This output was by far the largest of any New South Wales statistical division in dollar terms, and represented 42.5% of the value of NSW's total vegetable production, indicating the strategic importance of the Sydney basin for these crops. Vegetables generally need to be grown fairly near local markets and export

opportunities. Crops located close to cities may be lower in volume but higher in value than those grown elsewhere.

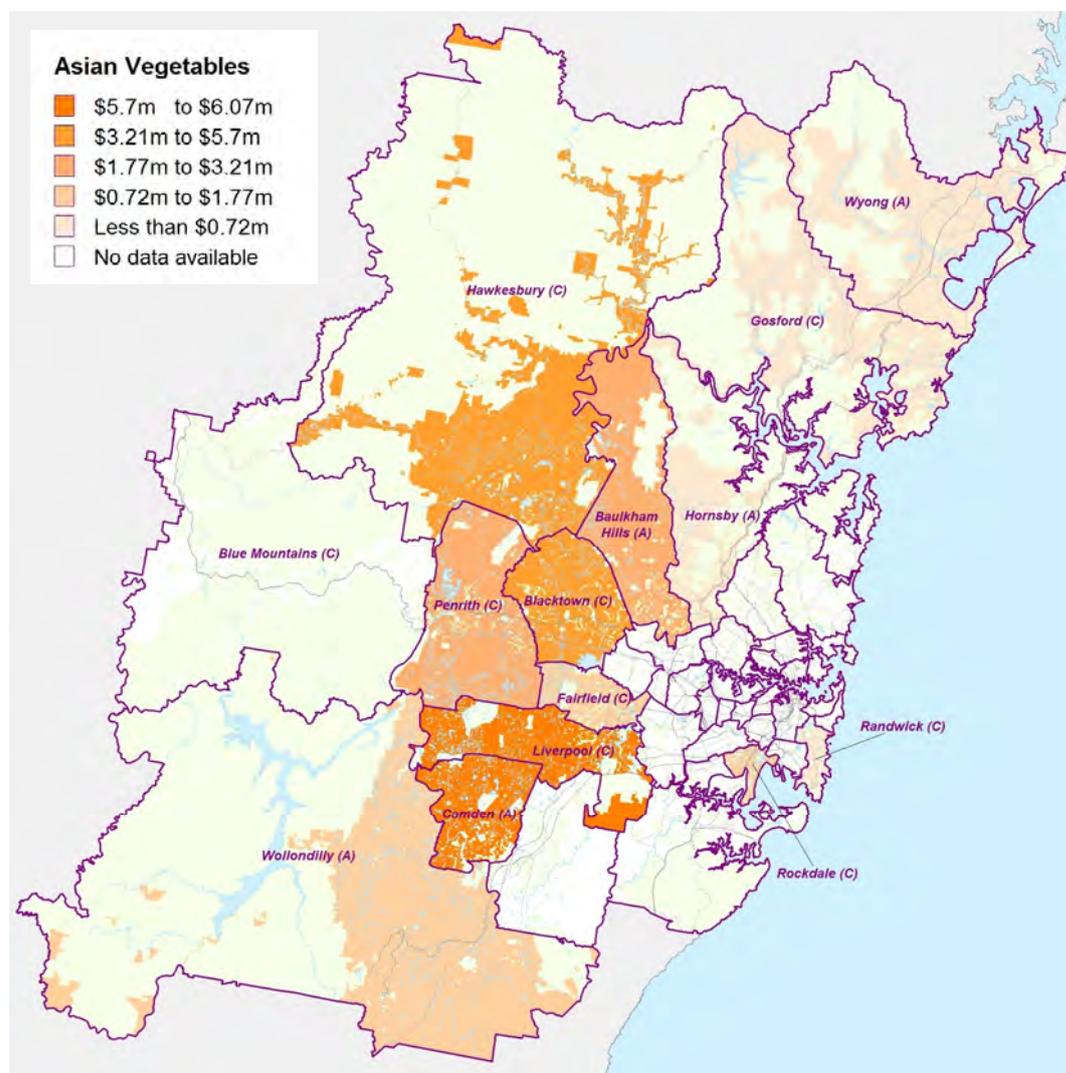
At the local government level, the Hawkesbury LGA (\$55 million) was, in dollar terms, by far the largest producer of vegetables in Sydney, and in fact in NSW (even larger than the Griffith and Hay LGAs in the Riverina). Other large producers in Sydney were Penrith (\$15.8 million), Liverpool (\$15.7 million), The Hills Shire (\$14.7 million), Wollondilly (\$12.5 million) and Camden (\$11.1 million). This illustrates the importance of Western Sydney's vegetable growing industry. In fact 39% of NSW vegetable production occurred in the WSROC and MACROC regions of western Sydney.

The largest vegetable crops within Sydney SD in 2005-06 were Mushrooms (\$52 million), Asian Vegetables (\$25 million), Lettuce (\$13 million), Silverbeet (\$10 million) and Tomatoes (\$10 million). The two largest of these, mushrooms and Asian vegetables, are profiled below.

Total vegetable growing employment increased in the Sydney SD from 1,373 people in 2001, to 1,854 people in 2006, a substantial increase, going against the general trend of decline in Agriculture employment in Australia due to increased automation, and showing the importance of this industry to the Sydney region.

ASIAN VEGETABLES

Value of Asian Vegetable production, 2005-06, Sydney SD



Asian Vegetables were a new category in the 2005-06 agriculture Census, prior to which they were included in a “not elsewhere classified” category. They were included separately due to their increasing importance around Australia, and particularly within Sydney, where they comprised the second-largest vegetable grouping by value of output. This may well be influenced by the large and increasing Asian population of Sydney (particularly people of Chinese and Vietnamese origin), and the increasing popularity of food styles of various Asian cuisines. Asian vegetables include chicory, Chinese cabbage, bok choy and wong bok.

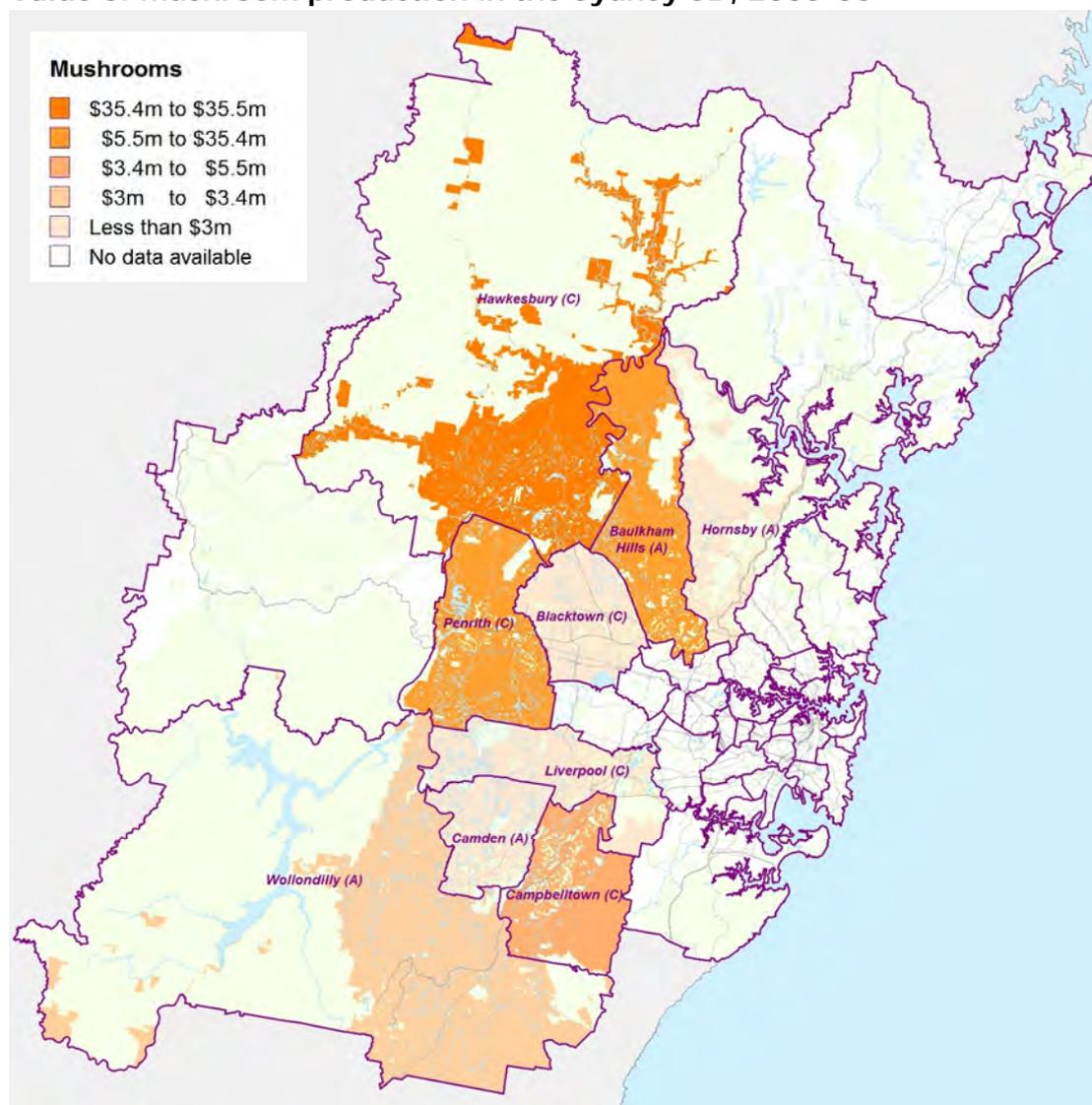
In 2005-06, Asian Vegetable production in the Sydney SD was worth \$25.6 million, or 91% of NSW Asian Vegetable production. The largest value was found in Camden Municipality, with \$6.1 million, more than half of all Camden’s vegetable production. Other large values were in Liverpool (\$5.7 million),

Blacktown (\$3.3 million) and Hawkesbury (\$3.2 million). The largest producer outside of Sydney is Richmond Valley, in the state's far north, with \$1.3 million.

MUSHROOMS

Mushrooms are typically a highly intensive crop, well suited to urban fringe agriculture, as they are usually grown indoors. Of all the major crops and livestock output, Mushrooms are among the most concentrated in Sydney SD, with Sydney accounting for \$52 million of the \$63 million total output for NSW.

Value of mushroom production in the Sydney SD, 2005-06



As with many agricultural commodities within the Sydney basin, the Hawkesbury LGA dominates the output. Hawkesbury in 2005-06 produced \$35.4 million worth of mushrooms, 68% of the Sydney total and more than half the NSW total. Other major producers are neighbouring Penrith (\$6.7 million) and The Hills Shire (formerly Baulkham Hills, \$5.6 million), plus Campbelltown (\$3.4 million), in the

Macarthur region of SW Sydney. Mushroom production is highly concentrated, with these four areas accounting for virtually all of Sydney's production in the 2005-06 Agriculture Census.

Mushroom growing is the only type of vegetable growing which is separated out in the official industry classification, ANZSIC. This means that specific employment numbers can be derived from the 2006 Census for it. In 2006, there were a total of 509 people employed in the Sydney SD in Mushroom growing, just under a third of all the vegetable growing employment. 337 of these were employed in Hawkesbury.

LIVESTOCK SLAUGHTERINGS

The livestock for meat industry is also important in Sydney, particularly the more intensive types of production, including poultry. Livestock production requiring larger amounts of space, such as cattle and sheep, are less prevalent in Sydney.

In the 2005-06 agriculture census, \$229 million worth of livestock were slaughtered in the Sydney Statistical Division, a small increase from \$200 million in the 2000-01 census. This represented only 8.2% of the total value across NSW, so livestock industries as a whole are less important in Sydney. However the standout is the poultry or meat industry (egg production is recorded separately), which accounted for \$185 million, or 81% of this figure.

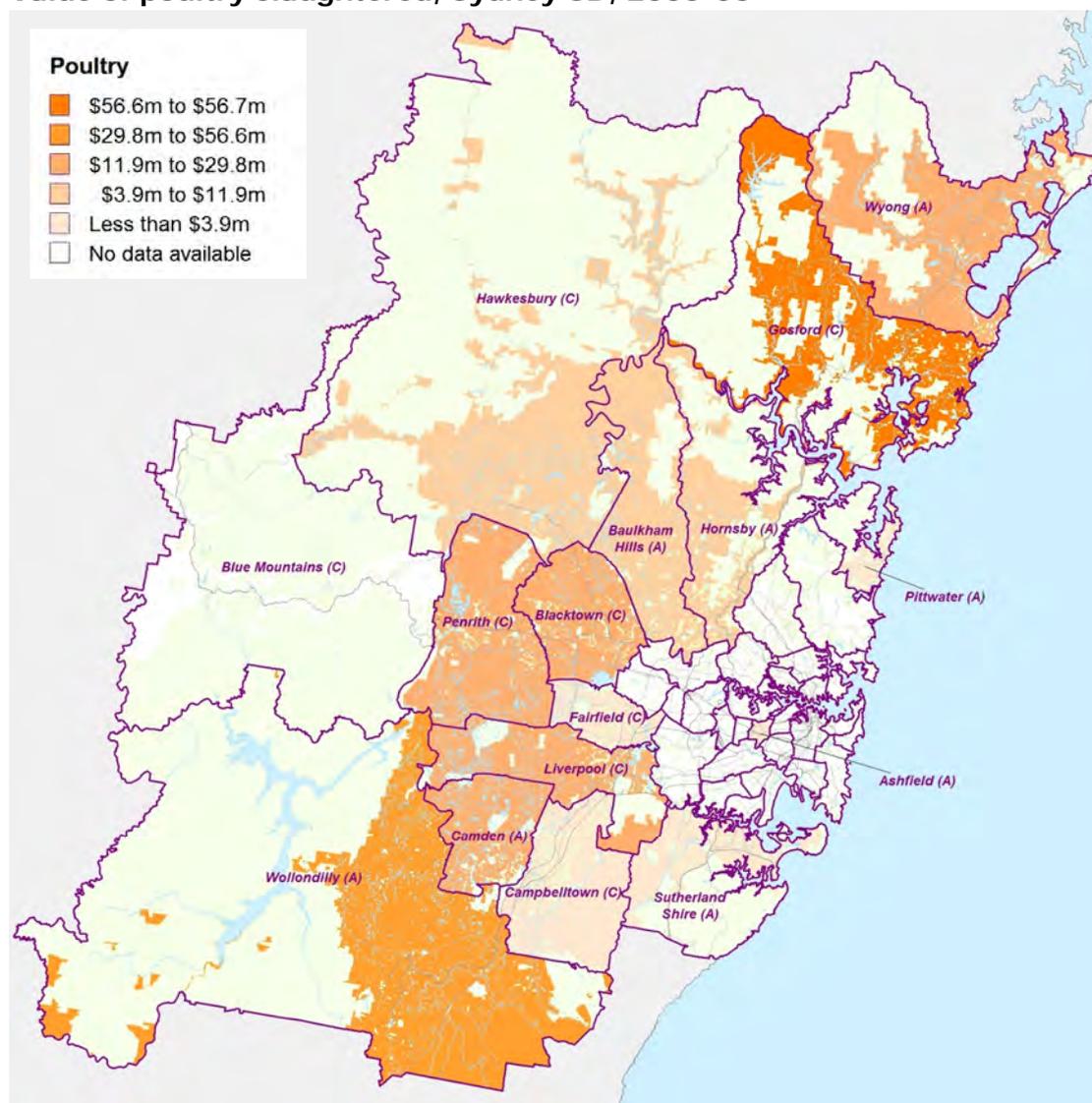
The LGAs involved in livestock industries are different to those involved in vegetable production. Within the Sydney SD, the largest amount of livestock slaughtering in 2005-06 was in Gosford (\$57 million), followed by Wollondilly (\$33 million), Campbelltown (\$27.9 million), Liverpool (\$21.1 million), and Penrith (\$20.9 million). The largest increase over a 5 year period occurred in Campbelltown, while the value in Blacktown declined significantly, probably due to urban expansion into previous farmland.

The two largest livestock slaughtering groups are Poultry and Cattle, and these two are explored below.

POULTRY SLAUGHTERED

The poultry industry, primarily chickens for both eggs and meat, but also including ducks and turkeys, is the most important livestock industry in the Sydney region. These birds are small relative to other livestock, and are generally intensively farmed, taking up less space. Even free range birds have small space requirements compared to cattle or sheep and are well suited to urban fringe locations.

Value of poultry slaughtered, Sydney SD, 2005-06

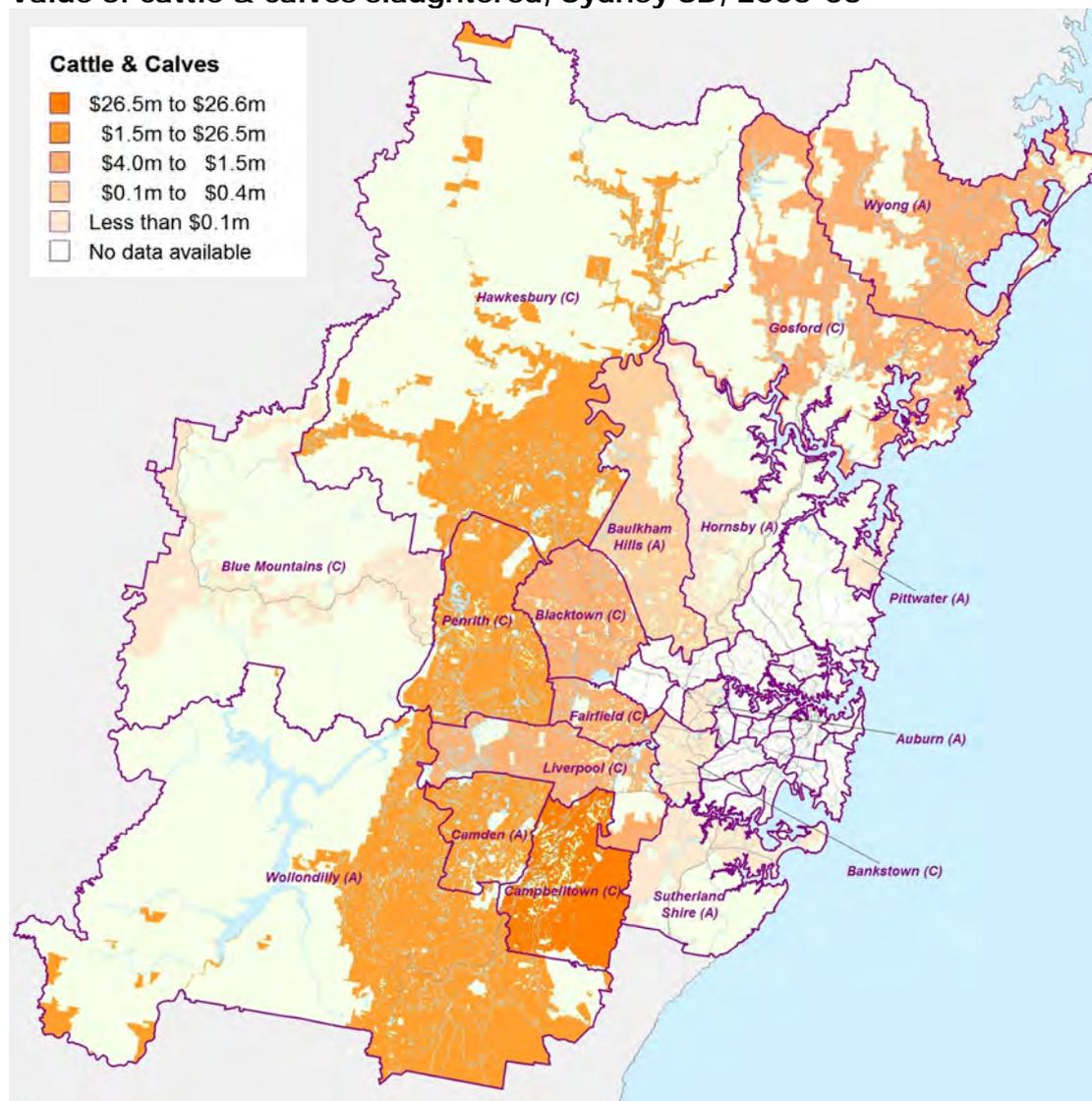


In 2005-06, poultry slaughtered in Sydney SD were valued at \$185 million, with very little change since 2001. The distribution of poultry mirrored that of total livestock, due to the dominance of the poultry industry in this category. The largest supplier of poultry meat was Gosford (\$56.6 million), followed by Wollondilly (\$29.8 million), Liverpool (\$19.8 million), Penrith (\$17.8 million), Blacktown (\$14.5 million) and Wyong (\$14.4 million). The poultry industry is clearly centred on the Central Coast, but with a significant proportion also in the Macarthur region and South-West Sydney.

CATTLE & CALVES SLAUGHTERED

The cattle industry in Sydney, while small relative to NSW overall, is nevertheless the largest livestock industry after poultry and egg production. In 2005-06, cattle and calf slaughtering was worth \$38.5 million in the Sydney Statistical Division. This represented only 2.4% of the NSW total.

Value of cattle & calves slaughtered, Sydney SD, 2005-06

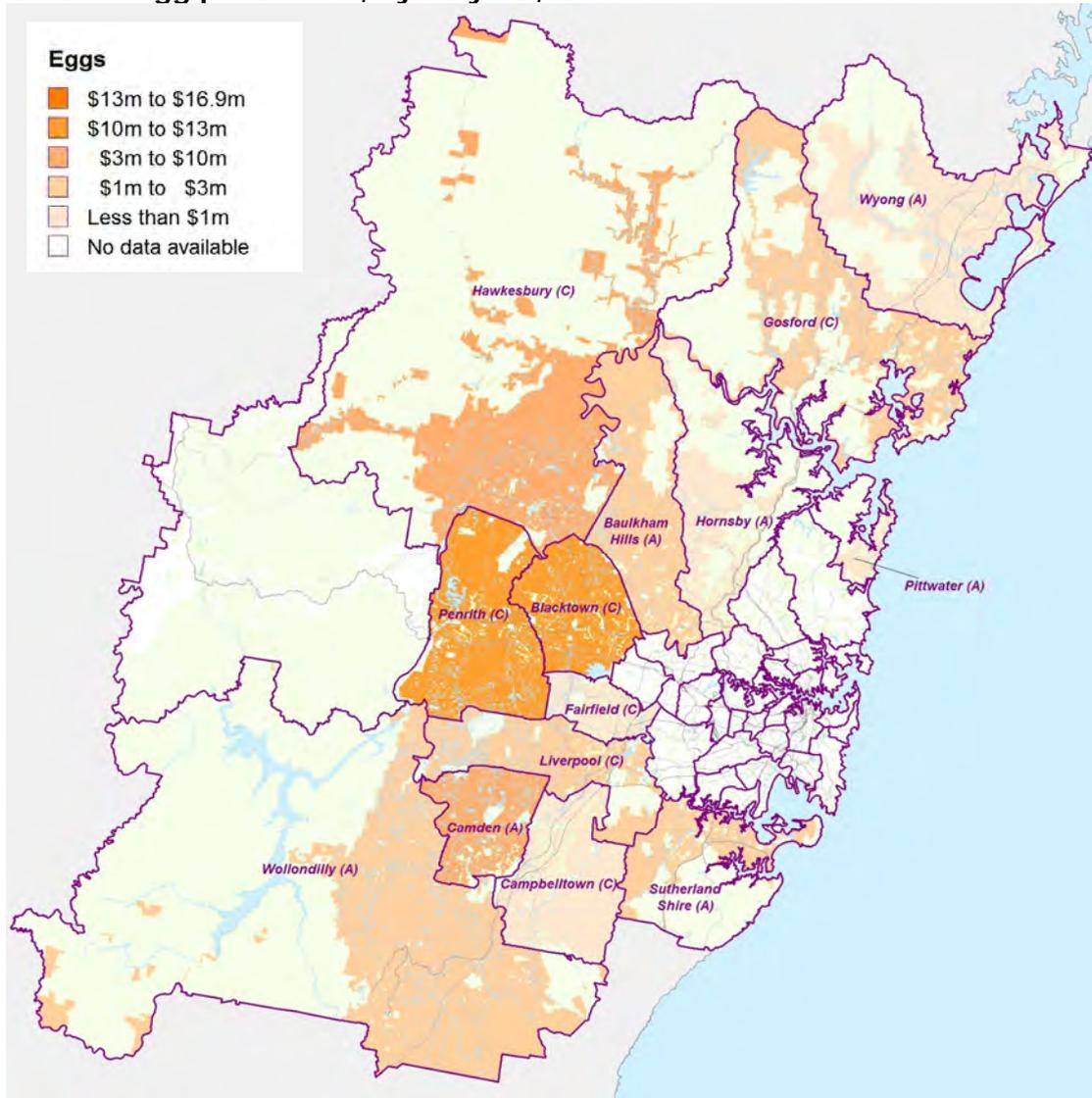


The majority of this total value was in the City of Campbelltown (\$26.5 million or 69% of Sydney's total). Along with neighbouring Wollondilly (\$3.2 million), this is the only area of significant cattle production for meat in the Sydney basin. Smaller amounts were found in Penrith (\$2.4 million), and Hawkesbury (\$1.6 million). The cattle industry in Sydney is very much focussed on the MACROC region.

EGGS

Egg production, as part of the poultry industry, is a major contributor to Sydney's agricultural output. In 2005-06, \$46.4 million worth of eggs were produced in the Sydney SD, which accounted for 7.4% of Sydney's agricultural output and 42.8% of all NSW egg production. As previously noted, intensive agriculture, which poultry production usually entails, is well suited to being close to urban areas.

Value of egg production, Sydney SD, 2005-06



Egg production in Sydney, like most agriculture, is concentrated in the west. In the case of eggs, there is a particular concentration in Penrith (\$12.7 million) and Blacktown (\$12.0 million). However egg production isn't as concentrated as some other commodities, with many other LGAs having some output, particularly Camden (\$5.6 million), Hawkesbury (\$3.6 million), The Hills Shire (formerly Baulkham Hills, \$3.0 million) and Liverpool (\$2.9 million).

Between 2001 and 2006, egg production in the Sydney SD was almost unchanged, declining just marginally from \$47 million to \$46 million. This is despite some changes at the LGA level – eg. egg production in Blacktown, Camden and Liverpool declined, possibly due to the urban expansion taking over agricultural land, while there were increases further out, in places like Wollondilly and Hawkesbury.