NSW GOVERNMENT | Department of Primary Industries

Agriculture Industry Snapshot for Planning

Far West Sub Region

August 2020

The value of agricultural production in the Far West Sub Region (FW) was over $163 million from livestock for meat and wool and broadacre cropping. (ABS 2015/16). The FW is expansive and sparsely populated, being 128,650 km² with 15,000 people, however, it produced $57 million from wool $48 million of GVP from sheep and lamb, $43 million from beef, $6.8 million from broadacre crops and $2 million from goats. Agriculture and related industries employ a large percentage of people across the Far West (ABS 2015/16).

The Far West has the advantage of rangeland landscapes and climate that supports suitable broadacre livestock production and cropping. The Sub Region successfully manages the challenges of a dispersed population and large distances from markets and climatic extremes.

Purpose of this profile

To develop effective land use planning policy for agricultural industries it is important to understand their location, the reasons why they exist in that location, the opportunities they take advantage of and the challenges they face. This profile details the key agricultural industries in the Far West rangelands and their interactions with suppliers, processing facilities and markets.

Establishing the significance of agriculture allows its recognition and management in land use planning by Councils. By providing the evidence base for strategic planning, agricultural land and local agriculturally-based economies can be protected and supported in planning instruments.

The Far West Sub Region's agricultural industries operate in an environment of increasingly global competition and opportunities, external challenges and changing land use. This profile will inform local strategic planning for these key agricultural industries considering their linkages to infrastructure and secondary industries throughout and beyond the sub-region. Land use planning is guided by the Far West Regional Plan 2036 (DPE, 2017). The Regional Plan has clear directions for the need to identify, protect and appropriately capitalise on agricultural industries, infrastructure and rural land.

Agriculture in the Far West Sub Region

Agriculture is a key industry for the Far West economically and for the unique scenic qualities of the rural lands where agriculture is undertaken. The Far West lies in semi arid rangelands in western NSW, generally west of the 500mm average annual rainfall limit. Agriculture is based on extensive grazing on predominantly native pastures and cropping on appropriate land on the western and southern margins of the Sub Region. Some irrigated agriculture occurs where there is access to surface water from the major rivers in the region. Opportunistic cropping can occur on ephemeral lake beds where conditions are conducive.

The Sub Region is 146,981 km² in area and incorporates land in the Darling River catchment, Broken Hill, Central Darling and the Unincorporated Area. The Sub Region is home to 21,056 people (ABS, 2016). The Sub region produced $163.5 million from agriculture in 2015/16. The following table shows the Gross Value of Production (GVP) from the main commodities.

Industry	Gross Value of Production ($)	% share of FW total	Number of businesses	% share of NSW
Broadacre crops	$10.8m	6.6%	6	0.2%
Beef	$43.3m	26.5%	164	1.7%
Sheep meat	$48.6m	29.7%	219	6.6%
Wool	$57.5m	35.2%		6.1%
Goats	$2.3m	1.4%	36	33.5%
All other agriculture	$1m	0.6%		0.03%
Total	**$1,772.9m**	**100%**		**1.2%**

Source: ABS 2015/16 (note: some businesses cover multiple industries).

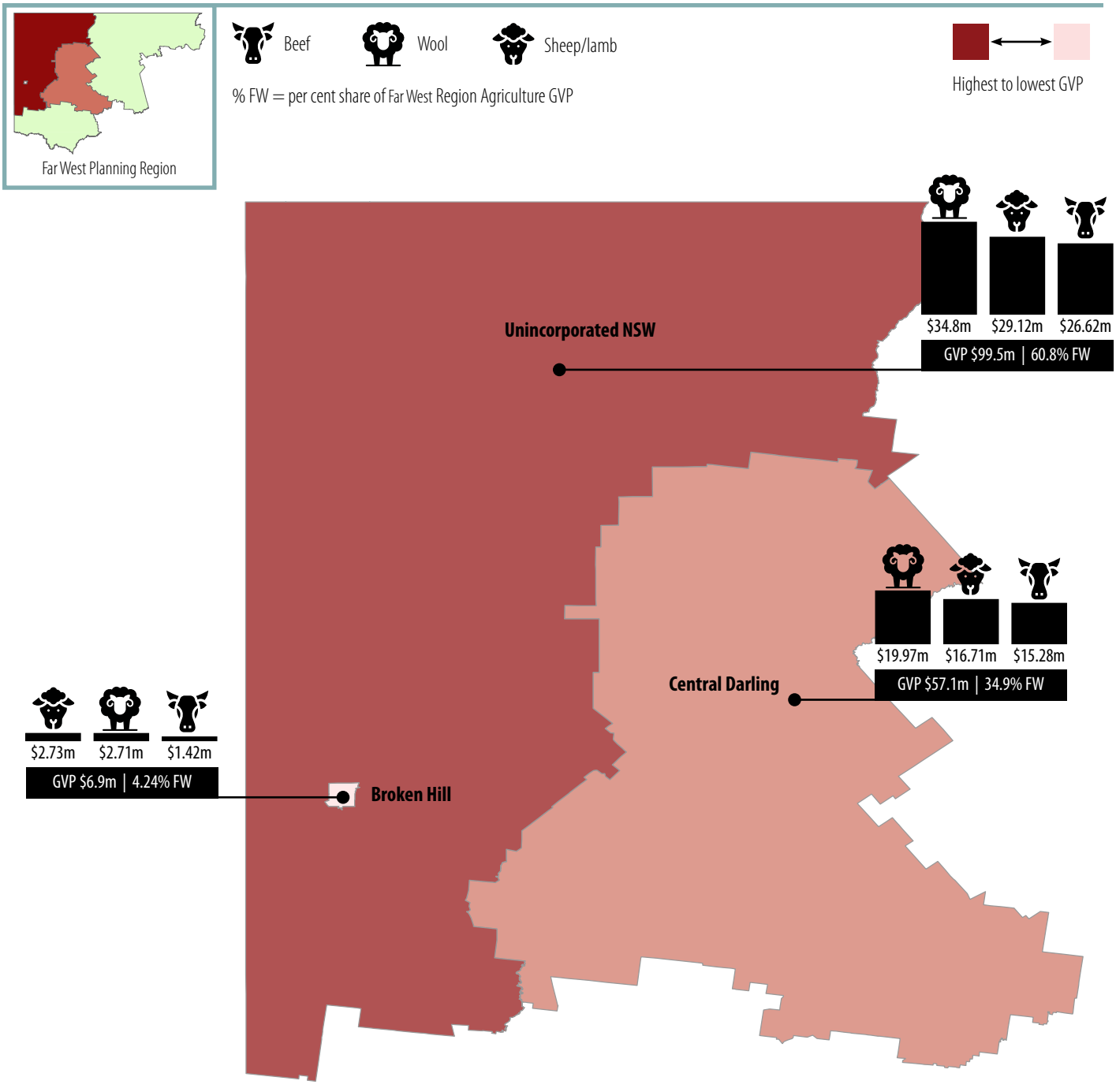
The Agribusiness Growth and Diversification in Far West NSW Report (WRI, 2016) identifies that the livestock industry is a very significant part of the regional agricultural economy. In 2015/16, wool and sheep and lamb were the dominant industries in terms of GVP, contributing $57m and $48m respectively, being 35.2% and 29.7% of the Far West GVP (ABS, 2016). The goat industry was a relatively new industry in 2015/16, capitalising on a formerly 'pest' species in the Far Wes. However the industry has since grown with national goat meat exports valued at $235.7m in 2019, up 29% on 2018 (MLA, 2020).

Employment

Agriculture employs over 40% of the Far West workforce in the Unincorporated Area and Central Darling LGA, and 7.8% of Broken Hill (REDS, 2020). Employment varies with seasonal conditions. These are people employed in the primary production of agriculture and do not include the vast workforce within the key secondary industries. It does not include employees that are hired on a seasonal basis that were not working in the Far West Sub Region at the time of the ABS census.

Local government distribution

The following map shows the local government areas (LGA's) in the region and agricultural GVP. The biggest individual contribution is the Incorporated Area followed by Central Darling.



Agricultural highlights of the Far West Sub Region

This section highlights the key industries for the Far West Sub Region

Livestock production - beef, lamb and wool

The grazing of sheep and cattle are the main livestock enterprises conducted in this Sub Region. Wool and meat production on the rangelands known as the 'pastoral zone' relies on native grasslands and shrublands. The enterprises are highly variable in response to the variability in climate especially rainfall, soil moisture and native vegetation. There has been a shift from wool sheep to meet sheep in recent times (principally Dorpers and managed goats) (URS, 2015). There has also been a modest increase in the number of cattle grazed in the Sub Region.

The grazing pressure of livestock and other pressures from non-domestic grazing animals (kangaroos, goats, rabbits) contribute to stock density and vegetation management issues.

Kangaroos in particular have a major impact on pasture management and production. Currently the commercial kangaroo industry that assists in managing kangaroo populations is also uneconomic due to processing and demand (WRI, 2016) making it more difficult for producers to manage. Wild dog predation also requires careful management to avoid major production losses.

Meat and fibre production have competitive advantages due to expansive areas and the warm dry climate, which decrease disease susceptibility resulting in lower chemical use. This also provides opportunity for regional branding for organic or 'rangeland' production (WRI, 2016).

Industry requirements

The livestock industry needs unconstrained land with access to transport links and reliable water supply. Graziers also need ability to manage pest species on farm to reduce competition for pasture. Value adding opportunities are limited in the Sub Region but need to be maintained to capitalise on locational advantages of rangeland production that result in market demand.

Rangeland goats

Goat meat production is a growing industry in the Far West. More than 95% of goat meat in Australia is exported, with NSW significantly contributing to the processing in other states and national export. Goat prices have been stable due to strong export demand hence contributing to the growth of this industry. The Meat and Livestock Association's (MLA) goat meat supply trends report (February 2019) using 2017/18 data showed that the largest goat supply came from the NLIS (National Livestock Identification System) areas around Broken Hill as well as Bourke and Cobar (that are in the Western Plains Sub Region). Producers in these areas predominantly operate harvest enterprises, capturing goats from the wild population.

In a survey of producers conducted during 2017, only 20% of producers in these areas reported operating a managed or semi managed enterprise.

The MLA reported that about half the goats supplied for processing from NSW entered the meat supply chain through a depot (central wholesaling), and the other half were directly to abattoirs. Less than 1% were sourced through saleyards. DPI figures indicated that there was a 20% reduction in goat abundance between 2016/17 and 2017/18 (DPI, 2018). 50% of NSW goats produced in that financial year were processed in Victorian abattoirs, with 30% processed in Queensland. The rest were processed in both NSW and South Australia. It is reported that 73,982 goats were processed in NSW during the 2019-2020 FY (Information supplied to DPI from Department of Agriculture, 2020).

This proportion may have changed with the opening of the new Bourke Small Stock Abattoir in early 2019, and the prevailing drought reducing numbers of rangeland goats and other small stock that has seen the Bourke abattoir temporarily close in mid 2019.

The goat industry is considered to be in its infancy and there is a knowledge gap in knowing about the industry, its supply chains and markets for the far western region (WRI, 2016). DPI considers that it is more advanced in its supply chain and market development, and now supports the industry's transition to an activity managed production system. This will also assist to improve resource management across the rangelands particularly in managing total grazing pressure and issues associated with vegetation decline, native animal decline, erosion etc.

There are currently a number of projects that seek to improve data and supply forecasting, on farm productivity and grazing management in the goat industry that DPI and other collaborators are contributing to collection of data.

Broadacre crops

The alluvial plains of the mid Darling Valley between the Cobar peneplain and mulga lands bioregion support grey clays on the back plains and lake beds (Darling Riverine Plains Bioregion). Crops are grown generally as flood waters recede to take advantage of soil moisture (Briggs and Jenkins,1997). Irrigated cotton is the main broadacre crop grown primarily in the Unincorporated Area and Central Darling Shire. Wheat is the other main crop grown, with other minor crops including canola, oats and barley.

Climate change and ongoing variability will be an ongoing adaptation challenge for the industry. Growers make the most of the paddock environment and encourage conditions to maximise water storage and management in the soil. Technology and knowledge of cropping systems, water holding capacity, management of soils to retain water, and crop types and varieties are key areas required to be able to crop in this area. Carbon farming will provide options for the conversion of cropping lands to other systems.

Industry requirements

Reliable transport networks are important to move crop product from farms to storage facilities and ports, and inputs such as labour, seed, machinery etc. Broadacre cropping also relies economies of scale for profitability, requiring large tracts of land to deal with modern machinery and growing systems. Improving technologies are increasing the ability of the industry to deal with both climate and market changes.

Horticulture

The horticultural industry showed returns of $150,000 in the total value of production returns in 2015/16. In the past this has been much higher. The warm dry climate in the southern half of the Far West Region along with access to water provides opportunities for horticulture. The climate allows the region to have a three week period supply to the market before cooler areas can sell their fruit. This has been reduced to 10 days with competition from other warm climate regions (Western Research Institute, 2016).

The water resources at Menindee Lakes in the past supported substantial horticultural operations. These are now ceasing as access to water is reduced with changes to water allocation. Menindee has supported a table grape industry that requires a higher level of security being a permanent planting. Other permanent plantings include small areas of citrus, olives and stone fruit. Other crops that include broccoli, pumpkins and tomatoes can take advantage of water availability of one season, and do not require water as an annual crop.

WRI (2016) recommended that the remaining horticultural producers develop a plan to build on local industry, and then identify opportunities for value adding and advice. There is still a place for this industry especially in the supply of produce to the area. Local agricultural opportunities were also identified as a way to support the horticultural industry using settlement resources (water supplies) and site agreements to produce food with community, council and business interests.

Far West Sub Regional assets for agriculture

The Sub Region is geographically isolated from major population centres (Sydney is located 1148 km, Melbourne 837km, Adelaide 516km by road). Road is the main transport network. Rail is available with Broken Hill being on the main Perth to Sydney Line, but this is mainly limited to mining transport. Broken Hill airport provides links to Adelaide, Melbourne and Sydney (via Dubbo). The main sea links are with rail, but again primarily for mining purposes are also important to the area.

The area outside of the Broken Hill urban area supports the 'outback environment' that includes the pastoral industries of sheep and cattle production. Goats have long been recognised as a pest animal with opportunistic harvesting occurring although now coming in as a recognised industry due to economic returns and enterprise diversification opportunities. The 'outback experience' for tourism is an increasingly attractive option, and diversification into kangaroo and goat meat as permanent income is identified by the REDs as future industries.

Supporting industries and infrastructure

The Far West has a range of support services and infrastructure, transport, professional services and farm supplies. Before agricultural produce makes it to market, there are inputs such as fertiliser, fuel, technical support services such as agronomists, vets and mechanics, processing facilities, transport and infrastructure, etc. There is also substantial movement of produce within and out of the Sub Region.

Fowlers Gap Research Station

The Fowlers Gap Research Station is located 112km north of Broken Hill. This 39,000ha station is part of the University of New South Wales and undertakes ecological based research in the area. This also includes land management research involving pastoral activities. It has a small management team, but hosts many research personnel who undertake a wide range of research activities on the station and in the area.

Biophysical characteristics

The Sub Region is described by Hill (2004) as including areas of undulating broad plains between 60-200m above sea level with areas of low hills and mountains up to 473m in the Barrier Ranges (Mount Robe).

It occupies three major drainage basins:

1. 1The Murray Darling basin in the south and east including the Darling River.
2. The Lake Eye basin in the east with drainage flowing to the Lake Frome basin.
3. The Bulloo- Bancannia Basin in the central north.

Chenopod shrublands are the most widespread vegetation community and Mitchell grasslands also occur in some of the lowlands south of Broken Hill and north of Fowlers Gap. These areas are the most valuable to grazing activities in the Sub Region.

Climate

The Far West Sub Region is identified as being in the Western Pastoral Agro-climatic zone (Williams, Hook and Hamblin 2002). It is described as being an erratic rainfall area characterised by a tendency to summer dominance in this area of the Sub Region.

More recently the Western NSW Climate Guide (BOM and CSIRO 2019) have reported that the rainfall over the last 30 years, with dry years occurring over nine years and wet years over 10 years in that time. Rainfall is still unreliable which supports the erratic description, with the last 30 years seeing Broken Hill having increases in rainfall in February, March and June, with corresponding decreases in June, late winter and early spring. Temperatures have also increased in summer with evaporation also increasing in January and February.

The seasonal quality and quantity of vegetation is dependent on a number of factors including rainfall. The Broken Hill Bioregion reporting (that area that covers the southern half of this Sub Region) (Department of Environmental, Energy and Science) notes that species diversity is a reflection of seasonal conditions. The mean rainfall for the Broken Hill is 259.8mm (BOM climate statistics).

Challenges for Agriculture in the Far West Sub Region

Challenges for agriculture are connected to climate change, biosecurity, and access to markets outside the region. Agricultural growth and diversification are currently limited by communications and transport (RDA, 2016). Although agriculture is a major land-based activity in this Sub Region, it is not impacted by the issues associated with land fragmentation, urban encroachment and land use conflict. Both regional conductivity and transport logistics are identified by the Far West Regional Economic Development Strategy (REDS) (2018) to support growth in agriculture and mining to better access markets.

This section highlights some of the challenges faced and planning solutions.

Transport and access

There is a need for better road infrastructure, rail transport openings, but the cost is high. The Far West REDS 2018 also reinforces the strategic need for regional connectivity and transport logistics to better access markets, noting that there was significant room to improve transport infrastructure and deal with the high costs and lack of access to rail transport for non-mining business.

Communications

Communication is also a major issue due to the low population density, and poor internet conductivity especially for farm businesses. This was a major issue highlighted in interviews with the (WRI, 2016). Economic and social resilience also noted to be delivered by the delivering of telecommunications infrastructure by the REDS strategy to help grow agriculture.

Agricultural tourism

This sector is highlighted as tourism is a major industry in Broken Hill (WRI, 2016) Agricultural tourism is a smaller scale industry in the Sub Region and predominantly occurs as farm stay businesses.

The study also highlighted that an agricultural focused event could provide for more farm or community tourism. There is also the opportunity for local food to be available through restaurants and food retailers. Farmers markets that sell seasonal produce was also seen as an opportunity for future tourism interest.

A major planning issue is the need for the local government (Central Darling Shire) to support farm tourism development through planning and development coordination. The Council is currently in administration. There is also a need to initiate and support a central tourism body (preferably through Broken Hill City Council) to develop a network with tourism related businesses.

Climate change

The Far West is expected to experience an increase in all temperature variables (average, maximum and minimum) by 2030. Summer temperatures are projected to increase by 0.7°C in 2030 and 2.1°C by 2070. Minimum temperatures are projected to increase by 0.7°C by 2030 and 2.1°C by 2070. Changes in cold nights are important in the maintenance of natural ecosystems ad agricultural/horticultural industries.

Rainfall is projected to decrease over spring by 2030 but is expected to increase in autumn by 2030. Across the Far West summer rainfall is expected to increase by 2030 and 2070. Climate models indicate both wetter and drier scenarios for annual rainfall with the range of change -13% to +17% by 2030 and -12% to +17%.

Drought conditions directly affect dryland crops and reduce water availability for irrigation. The Far West will also experience an increase in the accumulation of the number of day degrees (a measure of heat accumulation throughout a growing season). Higher temperatures will extend the length of the growing season. However, warmer temperatures also accelerate the rate of crop development and could potentially shorten the time to maturity, reduce water use efficiencies resulting in reduced yields.

Biosecurity

Rural land in the Sub Region is exposed to pests and diseases that could threaten agriculture, the environment and community safety. Biosecurity hazards are managed by the NSW Government through Western Local Land Services. The distribution, abundance and management of insects, pathogens and weeds is also being affected by climate change. The likelihood that tropical or semi-tropical pests will spread southward in Australia, or become established after an incursion, increases with climate warming. Stressed plant systems (crops) become more vulnerable to insect and disease outbreaks as the efficacy of current control measures are altered.

The combination of rangelands, open farmland, forested areas and water sources results in serious pests such as foxes, wild dogs, pigs, cats, rabbits and goats. Numerous pest plants are already in the landscape and have a large impact on remnant vegetation and rural land.

Social licence

A social license to operate refers to the perceptions of local stakeholders that an industry that operates in a given area or region is socially acceptable or legitimate.

It is important for agricultural industries to maintain a 'social licence' for their operations. The agriculture industry's right to farm agricultural land and retain access to water needs to be balanced with responsible, ethical land and livestock management and adherence to best practice operations to minimise potential environmental impacts. Producers can help to protect their 'social licence' through open communication and education and positive contributions to their communities. Further detail can be found in the NSW Government Right to Farm Policy.

Opportunities for agriculture in the Far West Sub Region

The REDS (2018) identified opportunities for the Sub Region through growth in food manufacturing industries on industrial land to obtain economies of scale, and sustainable energy generation and storage.

Most of the land within the unincorporated area is Crown land administered under the *Crown Land Management Act 2016* by the Department of Planning, Industry and Environment as Western Lands leases held predominately for grazing purposes. Other agricultural related development can be facilitated on Western Lands leases through an alteration of lease purpose or lease conditions or through the approved activities provided for in the Crown Land Management Regulation 2018. Some parcels of leasehold land have been converted to freehold title, where the legislative eligibility criteria has been satisfied (DPIE). This has not inhibited agricultural development in this area (this includes agricultural tourism activities etc) (pers. comm. S Hawke).

The Far West Regional Plan 2036 also sets out a range of actions that Councils can implement to encourage diversification, investment in freight and logistics and value adding:

a. Review local plans to remove barriers to diversification and the location of value adding industries.
b. Promote and encourage co-location of advanced and related value-added industries to reduce impacts on the supply chain and minimise land use conflict.
c. Encourage and facilitate investment in value added manufacturing industries and the agricultural supply chain by critical infrastructure and development from incompatible development.
d. Agri-tourism (farm stays, bed and breakfast accommodation) should be associated with and complement the continued agricultural production on the land.
e. Agri-tourism should be directed away from intensive agricultural operations or precincts.

Planning toolkit

Best practice land use planning for agriculture includes recognition of the industry as a significant contributor economically, environmentally and culturally, providing recognition and management through all levels of the planning framework. Dedicated land use zones, provisions and minimum lot sizes are available to Councils and can effectively support primary production even in contested areas. This section highlights the parts of the planning system to facilitate this.

Strategic planning

Local strategic planning statement

A local strategic planning statement (LSPS) identifies the vision and trends for agriculture in an LGA and sets out the direction for agricultural land uses for the next 20 years. It is important that agriculture, the land it depends upon and the infrastructure and other secondary industries which interact with agricultural land uses are considered at this initial strategic planning stage. The LSPS should explain the economic contribution that agriculture makes to the local economy and reflect the community's expectations for the provision of food and fibre locally. Further information can be found in the following DPI guideline Local Strategic Planning Statements – Agricultural Planning Advice for Councils.

Local land use strategy

The Far West Regional Plan 2036 sets out the framework and expectations for preparation of local land use strategies in the Sub Region. A land use strategy is also an effective tool in communicating to the community the scale and importance of agriculture in the LGA economically, physically and socially. It is an important step in identifying where agricultural land should be protected from incompatible land uses such as lifestyle subdivision and housing.

Local environmental plan

A LEP allows councils to tailor planning controls to address the issues facing agricultural industries in their LGAs. The LEP is informed by the rural land use strategy. The following are mechanisms that can result in positive outcomes for agriculture:

Land use zones: the RU1 Primary Production zone is the most appropriate zones to apply to land which is currently used for agriculture and/or is suited to future agricultural land uses.

Land use zone objectives and tables: The use of specific zones for agricultural land allows the zone objectives to be specific for agricultural land uses and require other permissible land uses to be compatible with agriculture.

Limiting permissible land uses: LEPs can reduce the potential for land use conflict by restricting the range of permissible land uses where incompatible with agriculture. This is executed by careful construction of land use tables for rural zones.

Minimum lot sizes: The minimum lot size specified in an LEP for rural land needs to be of a scale to prevent fragmentation into lots which cannot support the locally typical agricultural land uses. Generally larger minimum lot sizes facilitate the establishment of larger and more appropriate buffer distance between potentially conflicting land uses.

Development control plans and other approaches

Development control plans

A development control plan (DCP) for rural zones should include practical guidance for agricultural land uses. A DCP can specify buffer distances to be applied to all land uses, both agricultural and non-agricultural, to ensure that new land uses do not increase the potential for land use conflict with existing neighbouring properties. Guidance on appropriate buffer distances is provided in the Department's Buffer Zones to Reduce Land Use Conflict with Agriculture - An Interim Guideline.

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Acknowledgments:

Information for this profile was sourced from publicly available statistical and spatial data. This is supported by industry intelligence from NSW DPI staff and industry reports. Compiled by the NSW DPI Agricultural Landuse Planning Team. Special acknowledgement to Elton Consulting for editing and Epiphany-PR for graphic design. The Snapshot will be reviewed once updated ABS data on an LGA level is publicly available.

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