



TABLELAND RURAL INDUSTRY WORKFORCE SURVEY – REPORT

December 2010



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The Tableland Industry Workforce Group acknowledges the funding and support provided by the Queensland Department of Education and Training in conducting this survey and report.

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Who are we and why survey?

The Tableland Industry Workforce Group Inc is an industry and community group, originally set up by the Department of Education and Training as the primary point of contact for Workforce issues on the Tableland region, west of Cairns. The group was formed through the Tablelands Skills Formation Strategy and funded out of the *Queensland Skills Plan 2008*; the group became incorporated in 2010. The group is made up of ‘Industry Champions’ from across a range of industry sectors who come together to identify, improve and expand a sustainable workforce within the Tablelands. This may include but not be limited to, the attraction, retention, skilling or up-skilling of a sustainable workforce in order to meet present and future Tableland industry’s employment needs.

The group includes local government representation, representatives from industry and chambers of commerce, community-owned not-for-profit organisations and other community leaders with ex-officio representation from the Department of Education and Training and Department of Employment, Economic Development and Industry. Our mission is *to make the Tablelands a region of choice by creating a skilled and sustainable workforce*. We do this by breaking down into working reference groups to identify issues and provide suggested actions to all levels of government, training providers, industry and community groups who are able to respond. Our strategy has been on identifying issues common to the region or to specific local industries that are best addressed through combined efforts. The group has discussed the critical issues impacting on workforce in local industries, such as an exodus of young people from the region, an ageing workforce, and skills shortages in sectors like aged care, childcare and community services, agricultural and horticulture industries, professional and semi-professional jobs and in the trades.

The need for a direct survey of Tableland agribusiness was identified as the best way to primarily engage with this sector and canvass workforce issues. According to the latest OESR data (2006), the largest employment sector on the Tablelands is Agriculture, Forestry and Fishing sector with 14.1% of people employed on the Tablelands engaged in the sector. Whilst there has been surveys conducted by various government departments within the sector or regionally, no survey has provided this depth of survey by way of representative sample or questioning. The group also found that information collected was not freely available or did not appear to be acted on and workforce issues remain unaddressed. Furthermore, no one from the Tablelands region, in fact, North Queensland has been included on DEEDI Rural Skills, Training and Labour Strategy Industry Advisory Group - and industry want input into this crucial planning.

For its part, the Tableland Industry Workforce Group aims to deliver a level of leadership not seen to date on skills and workforce development in the regional rural sector and is collecting this strategic rural industry intelligence at regional level. A number of the group’s members participated in AgriFood Skills Australia’s Environmental Scan to identify the skills sets required in rural business and the preferred method of delivery. The goal is for regional rural industry to become an ‘industry of choice’. While leadership and clever enabling policy is required at the Commonwealth level, the enduring workforce solutions must be owned and executed regionally by their ‘community of interest’. Only then will they be self sustaining and

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capable of withstanding the peaks and troughs of the global marketplace (Agrifood Skills Australia 2010).

Rural Industry feels both over-engaged and over-surveyed, particularly in the area of workforce - but not listened to. There is a feeling that information is collected '*for information's sake*' but does not result in action to satisfactorily address issues. The regional horticulture sector alone has been surveyed at least six times in the last 12 months and our group was aware of another three upcoming surveys. Hence the need to do it once and comprehensively.

The information provided will assist us in identifying the employment and vocational education and training needs within Primary Industries sector on the Tablelands. The group wanted to survey the regional agricultural sector once and comprehensively as to gain accurate and current information on this sector's workforce needs and issues. This information will be provided to Commonwealth and State Departments involved in rural workforce, industry bodies and training providers who can then act on issues and recommendations made.

Important Considerations and Interpretation of this Survey and Report

The Tableland Industry Workforce group, assisted by DET, conducted a survey of Tableland agribusiness. The survey was based on size of industry (to be representative), coverage of industries, geographic range and size of enterprise (to include both small and larger enterprises). Input into the design of the questionnaire was sought from DET regional planning officer, DEEWR and regional industry.

In total 55 agribusinesses were surveyed from across all Tablelands rural industries (mango, banana, avocado, citrus, other tropical fruits, beef, dairy, poultry (eggs), pork, potato, field crops – maize, peanuts, grass seed and hay, feed milling, food processing and rural resellers - Elders, Landmark, CRT.

Interviews were conducted as a semi-structured interview of roughly 2 hour duration in a ‘conversation style’. Direct responses were taken to the questions. To our knowledge, a survey of this size and representation has not been conducted on a regional rural sector.

This report has provided direct quotes as to provide the ‘qualitative’ response to questions. The quotes are powerful and directly relate to the nature of problems, demonstrate depth of feeling and also suggest possible actions. Responses have not been diluted in any way. No respondent has been identified in responses. Responses have been grouped by rural industry sector.

Respondents or their personal information will not be disclosed to any other third party without their consent, unless authorised or required by law.

Executive Summary

Career pathways in many rural industries have been mapped... but opportunities for promotion/advancement are not like other industries and pay is less. The opportunities for progression with larger rural enterprises, rural resellers and industry are available regionally, but are limited within smaller enterprises. Attraction and retention will always be an issue unless rural industry becomes more profitable and consumers begin to pay the true-cost of food production (including environmental costs).

The biggest workforce issue facing rural industry on the Tablelands was the **image of rural industry** (as a sector to work in). Image issues centred firstly around pay, then secondly around working conditions, long hours (particularly in dairy industry) and lastly remote location/s. Despite having a good quality, clean, green and healthy image of their produce, respondents felt rural industry is portrayed as low paid, low income and dirty work with farmers being “*slave drivers*”. Responses were that rural people were thought of as “*Dad and Dave*” and “*intellectually inferior*” when the true image is very high tech and that Australian producers are amongst the most efficient in the world. Currently agriculture is not well respected or appreciated and agribusiness wants to become an “industry of choice”.

The next biggest issue centred on employment issues surrounding not so much a lack of workers (which is well serviced both with local workers and supplemented by itinerant backpackers) but **a lack of suitably-trained, skilled local workers with the right attitude. A lack of suitable skills and or required skills sets within existing workers** was seen as equally important as this second issue.

Government employment policy was seen as just as important as a lack of skilled workers and required skills sets within existing workers. Government employment policy is unpopular and centres on a lack of flexibility in working conditions, payment of penalty rates (particularly in horticulture - an industry that is reliant on a short-intense picking/packing season) and payment of superannuation to backpackers which is seen as unnecessary. Other major issues identified were **a lack of career pathways** within the rural sector, **transport around farms**, particularly in the horticulture industry and **accommodation** (lack of affordable accommodation for rural workers and casuals).

The average size of the workforce in a Tablelands agribusiness is 32 workers, made up of 22 casual workers and 10 fulltime (69% casual, 31% fulltime). This figure is no doubt inflated by the large reliance on a casual, itinerant workforce in the tree-horticulture sector and the fact that food processing operations and rural agencies were included in this survey. The ‘average’ of other rural agribusiness operations (beef, dairy, intensive livestock, potato, field crops) surveyed was a casual workforce of 3.9 and a fulltime workforce of 3.2 (54% casual, 46% fulltime).

69% of owners or managers said that their workforce is stable/remaining the same, 22% of enterprises growing and 9% decreasing. Surprisingly, even with industries that have had recently low commodity prices, the overwhelming response was that workforce was to remain stable.

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In the main, the Tablelands rural sector relies on a core, stable local workforce. However, the largest rural industry sector – tree horticulture (banana, mango, avocado, papaya, other tropical fruits and citrus) rely heavily on a transient non-local labour source of mainly backpackers to pick and pack their produce when in season. This is an intense and busy period... but because of seasonality it does not provide continued employment on individual farms.

There is a dearth of professionals in rural industry in general. Agronomists, animal nutritional specialists, advisory services, pasture specialists, people with management experience, higher-level chemical, plant and animal expertise are highly sought after. This is reflected on the Tablelands with a shortage of professional, Para-professional and suitable people for middle level management (supervisors etc) in the field crop (potato, maize, peanut, grass seed, hay etc) and horticulture industries.

There is a lack of employment opportunities within Tableland livestock industries. There are only 65 dairy farmers left with most operations being smaller family operations with fewer than 300 cows so don't employ much external labour. Reality is there is no real job creation within the regional dairy industry and employment opportunities come from staff turnover on the 6 or so larger operations. Likewise, the Tableland beef industry suffers from inadequate scale of operations, significant cost escalations in both overheads and direct costs, and a low return on assets. Only 3 or 4 Tablelands beef producers actually employ a person, apart from themselves, with most deriving the majority of their income off-farm. **The main employment opportunities lie within the horticulture, field crop and sugar industries** worth approximately \$320M at farm gate as opposed to \$60 M for the livestock industries.

Currently, the three schools that deliver agriculture on the Tablelands appear to be geared around training for livestock industries. One dairy producer is quoted as saying that there are *“Not too many jobs in beef or dairy – agriculture or horticulture may be more appropriate”* and another who is a large producer in field crops said *“a focus on agriculture (is required) – need to build relationship between crops & pastures (agronomy) and livestock at school level. It is crops and fodder that make good livestock. Not enough focus on agronomy and production economics. Need a whole systems approach...”*

A number of respondents' thought **local school's need to engage rural industry**. To quote *“increase awareness and job availability in farming and rural industry”*. Rural **industry would like to see more work experience opportunities and promote farm work availability**. One producer stated *“Currently there is a 'sterile-type' attitude from schoolteachers – we need more interaction from them and to give students a more 'world' view”*. Language, literacy and numeracy were cited as a prerequisite for employment. *“As an industry we cannot keep perpetrating the myth that if you are a failure you can get a job on the farm”*. Most Tablelands agribusiness' support the idea of a **mentoring scheme or work placement idea with the Schools'** with 57% responding favourably.

Rural employers prefer new employees to have some basic knowledge/ training and/or experience and then be able to train them 'on-the-job' to acquire the skills they need in the enterprise. 89% of respondents said that they prefer part qualifications (i.e. skills sets) leading towards a full qualification where trainees or employers can elect

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the subjects that are required. Overwhelmingly the most popular style of training that best suits Tablelands rural industry was on-the-job training. References to employee attitude were made by almost all employers. This meets with the old adage “*hire for attitude and train for skills*”. Agribusiness’ want employees to have a good attitude to the job, reliability, commonsense, good literacy, good work ethics, and an ability to witness / absorb information and perform.

There was a high recognition for training for management as well as workers within the survey results. The skills and competencies that were repeatedly mentioned as being required by rural enterprises were chemical certification, machinery handling (forklift, tractors), WHO&S, business and finance knowledge, farm management, supervisor skills, production economics, marketing and trading skills and human resource management. In the livestock industries – animal nutrition and pasture management were frequently mentioned.

The most significant barriers to addressing training needs were identified as cost of training, availability of suitable courses, the timing of training (in relation to season and management practices) and location of courses. There are several training providers already meeting the training needs of local industry at the entry-middle level (Cert I, II, and III) in production horticulture. Business and financial management skills, marketing and production economics were identified as training needs for management. There is opportunity in the entrepreneurial, marketing and business skills training to regional agribusiness. One advisory person who services local industry stated that many in the industry “...*may be good at farming but not good at investment/ financial decisions*”. This is particularly required as there has been a “*loss of specialist knowledge – extension staff, cattle husbandry officers, agronomists*” and “*private industry is not filling the void*”.

When public funding is not available, agribusiness indicated that they would be prepared to pay half the cost of training. As expected, the main reasons for this training were cited as job knowledge, product quality, productivity increase and WHO&S. Interesting that “Government regulations” came up a number of times as a reason for training even though it was never presented as an option for response.

Many respondents saw the image of the Tablelands as being an attractive rural area and an excellent place to live, work and raise a family – clean, picturesque, low crime and cooler than the coast. However, on the flip side were a lack of night-life and a lack of facilities. To quote one respondent a “*Lack of facilities; things to do for teens. Hard to get decent, affordable accommodation (rentals). No entertainment (night-life, café latte set); Good hospital, schools – but lacking specialty facilities*”.

The lack of a Tablelands regional brand was cited as an issue. The Tablelands is potentially a better tourist destination, with its scenic beauty, waterfalls, proximity to rainforest, reef and Gulf Savannah, than regions like Margaret River, the Hunter Valley and the Dandenong’s. To quote “*Potentially the Tablelands is better than Margaret River. We have more to offer. We have not got the regional branding worked out. Need local identification, not Cairns Highlands – needs to be Tablelands*”.

Key Recommendations - Tableland Industry Workforce Group Inc

Rural Industry (through Tableland Industry Workforce Group Inc.)

- Establish Tablelands Agribusiness cluster linked to a regional Agribusiness Professionals Network through representation.
- Establish strong schools/industry program to highlight Tableland opportunities for local students, parents and teachers (together with EQ).
- Influence industry extension focus and services to complement needs of producers on the Tableland.

Training Providers

- Enhance the ability of rural businesses to attract, manage and retain employees.
- Within Agribusiness - increase staff supervision/team management ability of senior/supervisory staff.
- Target business management skills of Agribusiness owner/managers.

Commonwealth Government (through DEEWR, NESAs and RDA)

- Reformation of the public funding model for training is required - a singular focus on 'training' and full qualifications fails to acknowledge the complexity of skills formation or preferred learning culture within rural industry (funding of 'skills sets' rather than whole qualifications).

Education Queensland (EQ)

- Align school curriculum to better reflect nature of local industry.
- Work with industry and take industry lead in establishing a strong schools/industry program to highlight regional Agribusiness opportunities for local students, parents and teachers.

Department of Employment & Training (Training Queensland)

- Influence VET delivery policy and funding to ensure relevance and to industry needs and way of operation.

Department of Employment, Economic Development & Industry (DEEDI)

- Establish a regional Agribusiness Professionals Network for owner/managers and rural industry professionals throughout Far North Queensland to further training opportunities, promote careers, examine marketing opportunities and build collaboration within sector.
- Improve the capacity of Tableland Agribusiness to innovate and adopt new technology, research and practice through enhanced communication and Agricultural extension.
- Influence training, higher education and extension offerings.

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Local Government

- Promote the Tablelands as a “region of choice”.

University

- Development / adoption of business assessment tools for rural and regional industry.

Value of Agricultural production & Agricultural ‘need’

There is a shortage of professional, Para-professional and suitable people for middle level management (supervisors etc) in the field crop (potato, maize, peanut, grass seed, hay etc) and horticulture industries (i.e. tree crops) on the Atherton Tablelands. No school is delivering specifically to these industries and there are no real jobs in the beef/dairy areas (other than in Food Processing) with dairy being small and beef being family enterprises/smaller enterprises.

Currently, horticulture (mango, banana, avocado, citrus, tropical fruits etc) is worth in excess of \$180M at farm gate on the Tablelands alone (not including Wet Tropics Coast); Sugar ~ \$20-25M; field crops (Potato, peanut, maize, grass seed & hay, pumpkin and watermelon) - approx \$108M; Dairy is between \$32 - 34M; Beef fattening (store cattle industry) \$24M and Pigs and poultry \$8M.

Career pathways in many Rural Industries have been mapped... but opportunities for promotion/advancement are not like other Industries and pay is less... attraction and retention will always be an issue unless Rural Industry becomes more profitable and consumers begin to pay the true-cost of food production (including environmental costs).

Regional Rural Industry Profile

Innovation is strong across the Tablelands agricultural and associated industries, backed by the resilience and perseverance of its people. An example of this is in the Mareeba – Dimbulah Irrigation area, which was heavily impacted by the demise of Tobacco. A comparison of crop production values for the irrigation area, between ABS figures for 2000/01 compared to Department of Primary Industry and Fisheries estimates for 2004/05 indicated a 40% increase (to some A\$146 million), despite the loss of the tobacco industry, demonstrating remarkable recovery and resilience. Much of the array of innovative activity is at the cutting edge of technology. In many cases it is a practical application of ‘Tropical Expertise’ derived from living and working in the tropics. The area covered in this profile is the Mareeba Dimbulah Irrigation Area (MDIA) and Southern Atherton Tablelands to Ravenshoe using the Eastern and Western Tableland ranges as the boundary points for the analysis.

The base production data has been extracted from a range of sources. These include: publications from the former DPI&F, industry reviews and interviews with industry representatives and DEEDI extension staff. A number of industries were not covered within the analysis due to; small area size and/or difficulty in gaining meaningful information which could be formatted into the current presentation. These industries include: Macadamia, cashews, tea- tree, table grapes, pineapples, small crops, flowers, aquaculture, hydroponics, nurseries and amenity horticulture. Initial analysis indicates that forestry, nurseries and amenity horticulture are significant industries within the Tablelands region and are worth about \$8M to the local economy.

Production Horticulture

The production horticulture industry is relatively labour intensive, particularly for harvesting and packing. Many fruits and some vegetables, particularly for the fresh

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market, must be treated carefully to avoid contamination, bruising and to maintain a good appearance. These need to be harvested by hand and requires the pickers to have a basic understanding of the importance of their task and how the product needs to be handled, treated and stored to maintain marketability and quality assurance traits. TAFE, the Ag College and QITE all offer courses in this industry for opportunities to progress. Table 4 shows horticultural cropping industries, which includes mango, avocado, lychee, longan, citrus banana, papaya industries, generate an estimated \$153,670,716.76 in farm gate revenue from 744 business entities across a total cropping area of 4,906 ha. This information was based on figures in mid 2008 and a leading industry representative stated that the industry currently generates between \$180M - \$200M at farm gate.

A number of major issues affect the vegetable industry's access to a skilled workforce including a lack of a training culture with employees are seen as an expense and not as an asset. Training is also seen as an expense and not as an investment in the future; a high reliance on casual workers; industry image – industry is not known to be an employer of choice; human resource management and supervisory skills are required; Career paths are also lacking with many of the smaller to middle-size producers; Often businesses cannot afford to send workers away for training when they are needed on farm.

Table 1: Major Horticultural Crops Grown on Tablelands, mid-2008

Mango				
Total Revenue of the current industry	\$	53,200,970.3	16%	<= % of total farm gate revenue
Total Area (ha)		2,492.43	3%	<= % of total area under production
Approx Agricultural Business Entities		450	25%	<= % of total business entities
Total yield (Tonnes)		26,170.54		
Avocado				
Total Revenue of the current industry	\$	22,929,600.00	7%	<= % of total farm gate revenue
Total Area (ha)		749.33	1%	<= % of total area under production
Approx Agricultural Business Entities		80	5%	<= % of total business entities
Total yield (Tonnes)		6,744.00		
Lychee				
Total Revenue of the current industry	\$	9,437,493.51	2.8%	<= % of total farm gate revenue
Total Area (ha)		322.65	0.4%	<= % of total area under production
Approx Agricultural Business Entities		45	2.5%	<= % of total business entities
Total yield (Tonnes)		1,887.50		
Longan				
Total Revenue of the current industry	\$	5,211,456.25	1.6%	<= % of total farm gate revenue
Total Area (ha)		134.75	0.16%	<= % of total area under production
Approx Agricultural Business Entities		20	1.13%	<= % of total business entities
Total yield (Tonnes)		1,042.29		

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Citrus			
(oranges, mandarins, lemons, limes, grapefruit)			
Total Revenue of the current industry	\$ 7,388,335.20	2.2%	<= % of total farm gate revenue
Total Area (ha)	310	0.4%	<= % of total area under production
Approx Agricultural Business Entities	120	7%	<= % of total business entities
Total yield (Tonnes)	5,649.44		
Banana Industry			
Total Revenue for the current industry	\$ 33,195,461.5	10%	<= % of total farm gate revenue
Total Area (ha)	735.00	1%	<= % of total area under production
Approx Agricultural Business Entities	20	1%	<= % of total business entities
Total yield (Tonnes)	19,767.00		
Papaya Industry			
Total Revenue for the current industry	\$ 22,307,400.0	6.7%	<= % of total farm gate revenue
Total Area (ha)	162.00	0.20%	<= % of total area under production
Approx Agricultural Business Entities	9	0.49%	<= % of total business entities
Total yield (Tonnes)	17,058.60		

Courtesy of Queensland Department of Primary Industries, Unpublished data 2008.

Field crop industries

Field crop industries within the region, which includes potatoes, sugar, peanuts, grass and legume seeds, maize, watermelons, pumpkins, coffee and tea have a total cropping area of 21,354.6 ha and account for 26.3% of agricultural land under production. The total farm gate revenue of these combined industries is approximately \$108 million from 383 business entities as shown in Table 5.

Table 2: Major Field Crop Industries on Tablelands, 2008

Sugar Industry			
Total Revenue for the current industry	\$ 19,086,228.0	5.7%	<= % of total farm gate revenue
Total Area (ha)	7,400.00	9.0%	<= % of total area under production
No. of Businesses	65	3.6%	<= % of total business entities
Total yield (Tonnes)	666,000.00		
Potato Industry			
Total Revenue for the current industry	\$ 50,746,150.0	15%	<= % of total farm gate revenue
Total Area (ha)	2,348.00	3%	<= % of total area under production
No. of Businesses	70	4%	<= % of total business entities
Total yield (Tonnes)	82,180.00		
Grass and legume seed Industry			
Total Revenue for the current industry	\$ 12,959,650.0	3.9%	<= % of total farm gate revenue
Total Area (ha)	3,916.56	5%	<= % of total area under production
No. of Businesses	50	3%	<= % of total business entities

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Maize Industry			
Total Revenue for the current industry	\$ 9,398,550.00	2.8%	<= % of total farm gate revenue
Total Area (ha)	5,000	6.1%	<= % of total area under production
No. of Businesses	45		
Total yield (Tonnes)	35,000.00		
Peanut Industry			
Total Revenue for the current industry	\$ 5,781,000.00	1.7%	<= % of total farm gate revenue
Total Area (ha)	1,500.00	1.8%	<= % of total area under production
No. of Businesses	34	1.9%	<= % of total business entities
Total yield (Tonnes)	7,050.00		
Pumpkins Industry			
Total Revenue for the current industry	\$ 4,050,000	1.2%	<= % of total farm gate revenue
Total Area (ha)	180.00	0.2%	<= % of total area under production
Approx Agricultural Business Entities	50	2.7%	<= % of total business entities
Total yield (tonnes)	5,400.00		
Tea Industry			
Total Revenue for the current industry	\$ 2,625,000	0.8%	<= % of total farm gate revenue
Total Area (ha)	750	0.9%	<= % of total area under production
Approx Agricultural Business Entities	4		<= % of total business entities
Total yield (Tonnes)	2,625.00		
Watermelon Industry			
Total Revenue for the current industry	\$ 2,400,000	0.7%	<= % of total farm gate revenue
Total Area (ha)	80.00	0.1%	<= % of total area under production
Approx Agricultural Business Entities	15	0.8%	<= % of total business entities
Total yield (Tonnes)	3,000.00		
Coffee Industry			
Total Revenue for the current industry	\$ 1,815,000	0.5%	<= % of total farm gate revenue
Total Area (ha)	180.00	0.22%	<= % of total area under production
Approx Agricultural Business Entities	50	2.7%	<= % of total business entities
Total yield (Tonnes)	5,400.00		

Courtesy of Queensland Department of Primary Industries, Unpublished data 2008.

Dairy Industry

Despite National Foods Malanda scooping four awards at the 2010 Dairy Industry Associations of Australia's Queensland Dairy Products Competition, the local industry continues to contract. Currently just 60 farmers supply National Foods and only about 5 of these would be larger operations that have over 300 milkers. There were 185 Dairy farmers, just prior to deregulation in April 2000 producing 130ML, and this year throughput is forecast to be 65ML, a forecasted drop by 8.4% from 2009-10 (DEEDI, 2010). The Malanda plant has the capacity to process 130ML/annum (both market and manufacturing milk). The National Foods Malanda currently processes a vast a range of white and flavoured milks under the Dairy

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Farmers, Dare and Classic Oak brands, as well as Mozzarella cheese, butter and cream. Recently National Foods invested \$5.5M into the Malanda site for a new bottle filling line as well as upgrades to the current milk processing system and infrastructure, on top of another \$1.2M last year for another bottle filling line and other infrastructure (Tablelands Advertiser, Friday, September 24, 2010).

In total the size of the Tablelands dairy industry is 65 dairy farmers. The other 5 farmers supply a biodynamic producer, Mungalli. Around half the farms employ minimal external labour, usually 1 person; with around 6 of these employing more than one. The local industry will experience further contraction, over the next few years, because of a number of farmers nearing retirement. The reality is there is no real job creation within the regional dairy industry and employment would be through job vacancies, from staff turnover, on the larger operations.

Despite world-wide growth in demand for dairy products, measured in billions of litres annually, being predicted, Queensland producers are ill-prepared to benefit. The Queensland market is domestic-orientated without surplus for export. Export capacity takes time to develop and adjust. The domestic market wants fresh milk, yoghurt, cream and cheese. Because of transport issues, off-shore products need to have a much longer shelf life such as UHT (ultra-high temperature treated milk) or ingredient products like milk powder (*Tablelander, 28 September 2010*).

To grow, the industry would require outside investment. From Queensland Department of Primary Industry figures in 2008/09, gross margin per cow was in the order of \$769/cow/annum (based on Industry Benchmarking figures). However, average GM/cow does not take in the variability within enterprises where more profitable ones may be over \$1,000/cow and less profitable ones below \$300/cow/yr. What this means is there is opportunity to make some money with good farm, herd and financial management. However, on current real estate figures, it would cost at least \$1.6M to purchase a farm with an operating dairy of about 180 – 200 acres that would milk approx 80 cows (with no irrigation). 80 cows would cost in the order of \$120,000. On these figures average return on investment (ROI) is in order of 3.8% (not including cost of borrowing funds). Accelerated growth of this industry, on sheer economics, is problematical.

The future of the regional dairy Industry may be with the development of niche markets and producing for these. For example Mungalli dairy, Gallo's Dairyland and a Tablelands Regional Brand. Depending on contractual arrangements with the large supermarket chains, National Foods facility in Malanda could steady at 50-55ML. There is scope for another small processor or a 'niche' to source the current extra 15-16ML of milk and provide another outlet for it, however that would need to eat into either the local suppliers' current markets, or into markets supplied from SEQ. We have recently seen the creation of another local milk brand "Misty Mountains Milk" by Mungalli which sources Jersey milk and whilst it is pasteurised - is not homogenised. Possibly there are other value adding opportunities such as another small cheese processor or expansion of an existing one.

However, there is neither the excess capacity at present nor the incentive within the regional dairy industry to produce UHT or long life milk even though the land could easily support extra production. From the above the real skills required are not so

much in the 'hands-on' behind farm gate 'technical aspects' of the industries, as the number of employment opportunities at regional level just are not there. However, there is opportunity in the entrepreneurial, marketing and business skills side of the local dairy industry.

Beef Industry

Whilst the northern and western areas of the former Mareeba shire and Southern former Herberton shire have large extensive cattle breeding operations, this section will focus on cattle production spread across the 50,000 hectares in the closer-settled 'wet coastal' area of the Tablelands region (which includes the former Atherton and Eacham shires, the Wetter parts of the former Herberton shire and the Mareeba-Dimbulah irrigation area and Mt-Molloy Julatten areas of the former Mareeba Shire. There are some 289,293 estimated head of beef cattle within the total Tablelands Regional Council area.

The region, dominated by sown pastures, is described as an intensive grazing system. The DPI&F Beef Extension team estimate there is about 62,000 head of which 60% would be fats and store cattle (37,200) and 40% Breeders and followers (24,800). There are estimated 491 beef producers across this area with herds ranging from a few head to 250 head. Over 80% of producers have off-farm income. The dairy deregulation has seen a number of dairy farms being converted to beef cattle production. The Tableland store cattle industry is worth an estimated \$24 million. From a local DPI Beef Extension Officer - there are only about 3-4 or so producers that actually employ someone else apart from themselves here on Tablelands, with most deriving the majority of their income off-farm.

The major issues facing the local industry include inadequate scale (more closely settled areas), significant cost escalations in both overheads and direct costs, doubling of debt per LSU over the last decade while return on assets (ROA) has declined to very low levels of 0.3% to 2.0% on average (MLA Northern beef situation analysis 2009). Beef fattening on the Atherton Tablelands averages a Gross Margin/head of between \$150 and \$200/head so returns on a GM/ha basis is about a 1/3 of dairy.

The story with employment in the beef industry is a little better further out in the Dry Tropics (Gulf Savannah, North-west etc). Larger cattle properties do employ station hands, jackaroos'/jillaroos etc. Larger Companies like AACo, NAPCo, and Stanbroke etc do employ and often have advertisements in Country Life etc. However, potential employees must want to leave home and work in remote environs. The work is long, dirty and pay is not great... but the lifestyle appeals to some and it has its fringe benefits like accommodation, food supplied, vehicle etc. Skills required are horse riding, fencing, poly-pipe repair, riding motorbikes/quads, small motor repair, welding, stock-handling, Low-stress stock handling, some basic animal nutrition etc.

The DPI&F Beef Extension team estimate the wet coastal grazing industry on the Tablelands has the potential to turn off 21,700 head of high quality cattle on a yearly basis (MSA grade). Major influences on the local market include:

- The abattoir closure in Innisfail

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- Swift & Co in Townsville is the nearest abattoir of large scale and recently is paying for MSA grade
- Rocky Creek Abattoir is the nearest abattoir but is small
- Local slaughter yards and butchers take only limited numbers
- Local store and private sales for good quality cattle - weekly cattle sales are conducted at the Mareeba Sale Yards and a store sale at Malanda monthly.
- Increased meat consumption due to improved, consistent eating quality (MSA)
- Local MSA accredited operations – Bingil Bay to IGA stores and Swifts in Townsville
- Increased feed costs and cost price squeeze on inputs increasing due to increasing prices of molasses, fertiliser, grain, protein and fuel.
- Land prices increasing astronomically – not able to repay money from beef production alone

This industry will also experience further contraction in employment as labour is a major cost input in extensive breeding operations. The industry is always adopting more efficient, innovative ways of doing things out of sheer necessity. We are already seeing yard design focus on cattle movement aimed at reducing the labour requirement and stress to animals. Mustering is being done less often and more efficiently. The labour requirement to manage a herd is coming down (i.e. more Livestock units/person).

Other intensive livestock industries

Other intensive livestock industries (pork and poultry) are worth a combined \$8.14M from 15 business entities. Table bird production and processing is a significant industry and major employer for the Tablelands. The major table bird processor Baiada-Steggles established a plant in Mareeba some years ago. Presently some 10 producers supply 5 million birds per year, worth approx \$4,456,000 to the Mareeba plant for distribution throughout Tropical North Queensland, west to Mount Isa and south to Ayr. The plant employs 150 persons and is reportedly operating at capacity. It has doubled its output in recent years. (*Mareeba Chamber of Commerce 2006*). Baiada-Steggles are currently in the process of doubling this production and another 12 poultry sheds are under construction. The Tableland Pork industry has total revenue of \$3,685,762 from 5 producers (*DPI 2008 Unpublished data*)

Regional Training in Rural Industry

There are several training providers already meeting the training needs of local Industry at the entry-middle level (say Cert I, II, and III) in production horticulture. These being Australian Agricultural College Corporation, Q.I.T.E (Quality Innovation Training and Employment) and TAFE – TNQIT. Q.I.T.E. put over 100 people through Cert II in Horticulture in the last two years. RITE (Charters Towers) caters to the needs of traineeships in the more extensive pastoral industry.

There is no Regional Higher-level Agricultural Training Institution, unlike University of Queensland, Gatton that offers Diploma and degree level qualifications for professional end (i.e. Agronomists, Extension staff etc). It is recognised that there are a shortage of professionals in Agriculture and Horticulture here in North.

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Often, owners/managers of Rural Enterprises don't recognise the value of formal training. Some may think that employees gaining formal qualifications mean that they may have to pay more. Often skills gained, have been gained 'on the job'... and could be readily transferable to other Industries, but have not been formally recognised.

There is a need for business skills, financial skills, people management skills, marketing, leadership and entrepreneurial skills within Rural Industry here on Tablelands.

Agrifood Skills Australia, in partnership with (and through) the Tablelands Skills Formation Strategy and Q.I.T.E. have recently run training in:-

- Managing your Team
- Plan and manage your business finances; and Plan for your business
- People are your best asset - a workshop aimed at building employee management capability within small to medium-sized agrifood businesses in order to enhance productivity, profitability and competitiveness.

Workforce Questions

What are the major issues in relation to Workforce within your Industry?

The biggest Workforce issues facing Rural Industry on the Atherton Tablelands (from a survey of 55 Agribusinesses) was the **Image of rural industry** (as a sector to work in). Image issues centred firstly around pay, then secondly around working conditions, around long hours (particularly in dairy industry) and lastly remote location/s.

The next biggest issue centred around Employment issues surrounding not so much a lack of workers (which is well serviced by itinerant backpackers) but a lack of suitably-trained, skilled local workers with the right attitude.

A lack of suitable skills and or required skills sets within existing workers was seen as equally important as the second issue.

Government employment policy was seen as just as important as a lack of skilled workers and required skills sets within existing workers. Government employment policy is unpopular and centres around a lack of flexibility in working conditions (work choices), payment of penalty rates on weekends and over 38 hours (particularly in tree horticulture - an industry that is reliant on a short-intense picking/packing season). Payment of superannuation to backpackers is unpopular and seen as not necessary.

The fifth issue was identified as a lack of career pathways within the rural sector. The sixth identified issue was transport around farms, particularly in the horticulture industry.

Number of Responses to Question:

- Employment – lack of workers (particularly local, skilled) **22**
- Lack of suitable skills/required skills sets within existing workers **21**
- Accommodation **8**
- Transport **10**
- Government employment policy **22**
- Secondary education – not preparing school leavers to industry standards for employment within workforce **3**
- Literacy and numeracy levels **3**
- Training issues **8**
- Lack of career pathways **14**
- Industry image – **27** Unable to attract workers due to:-
 - Working conditions **10**
 - pay, **15**
 - hours **7**
 - location **5**
 - Other etc.

What is the size of your workforce?

The average size of the workforce in a Tablelands Rural enterprise (Agribusiness) is 32 workers, made up of 22 casual workers and 10 fulltime (69% casual, 31% fulltime). This figure is no doubt inflated by the large reliance on a casual, itinerant workforce in the tree- horticulture sector and the fact that food processing operations and rural agencies (i.e. Landmark, Elders, and CRT etc) were included in this survey.

In tree horticultural operations, where the overall workforce figure is inflated by a number of larger company and family business operations, the average workforce was 82 casual and 13 fulltime employees (86% casual, 14% fulltime).

The 'average' of other Rural Agribusiness operations (includes Beef, Dairy, intensive livestock, Potatoes, Agricultural) surveyed was a casual workforce of 3.9 and a fulltime workforce of 3.2 (54% casual, 46% fulltime).

Is your workforce growing, remaining the same, or decreasing?

Of the 55 Agribusiness enterprises surveyed across the Tablelands region, 69% of owners or managers said that their workforce is stable/remaining the same, 22% of enterprises growing and 9% decreasing.

In the largest sector surveyed, tree horticulture – 69% said that their workforce is stable/remaining same, whilst 26% said that their workforce is growing and only 4% said that their workforce is decreasing.

Surprisingly, even with industries that have had recently low commodity prices, the overwhelming response was that workforce was to remain stable. In dairy 60% said that their workforce was to remain stable, whilst 40% said that their workforce was growing. Possibly this could be attributed to the need to grow to obtain viable 'economies of scale'.

In beef 75% said that their workforce was to remain same, 12.5% was to grow and 12.5% to decrease.

Potato growers' response was that 60% nominated that their workforce was growing, whilst only 20% said that their workforce was to decrease.

Workforce – Mainly Local or transient?

Overall, the Tablelands Rural Industry sector relies on a core, stable local workforce. However, the largest Rural Industry sector – tree Horticulture (Banana's, Mangoes, Avocado's, Papaya, other tropical fruits and Citrus) rely heavily on a transient non-local labour source of mainly backpackers to pick and pack their produce when in season. This is an intense and busy period... but because of seasonality it does not provide continued employment on individual farms. However, there is some opportunity for labour-hire organisations to provide more continued employment for locals between farms and crops across the year. The split of employment on these tree horticulture enterprises is 63% itinerant (non-local) and 37% local. However, within

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this sector the banana growers have a preference for more local labour with a 70% local employment and 30% itinerant split.

The Tablelands Livestock Agricultural Industries (Dairy, Beef, intensive - pigs, poultry & feedlot) rely heavily on local employment. Local people who can be trained and relied upon to look after animals. This is based on a 'level of trust' and training, mainly on-the-job. It is important to these farmers to have a stable workforce.

Training and Skills Questions

Table 3: What level of skills do you want people to have when you employ them; and Are there any skills shortages or training required by enterprises that are not being met by current VET programs?

Sector	Question: What level of skills do you want people to have when you employ them?	Question: Are there any skills shortages or training required by enterprises that are not being met by current VET programs?
Dairy	<ul style="list-style-type: none"> • Good attitude to the job x 3 • Secondary level of education • Good literacy • Interest in farming husbandry/cattle training • Cattle husbandry • Food handling • Animal health knowledge (Mastitis/cow soreness) x 2 • Operate tractors/machinery x 2 • Basic mechanical knowledge (small motor, machinery) x 2 • Silage system • Pasture management – how long on pasture • Manage animal water supply - Poly/delivery/clean • Time management • Computer knowledge • Retail/customer service (one dairy operation that value adds through Food tourism etc) 	<ul style="list-style-type: none"> • Relief milking courses • Chemical cert courses • Staff management • Artificial insemination/preg testing/heat detection x 2 • Computer • Business management • Animal nutrition • Pasture management • Animal behaviour • Production economics(margins etc) – cost per kilo as fed • Business and finance management specific to farming practices
Beef	<ul style="list-style-type: none"> • Good work ethics x 3 • Ability to witness/absorb/perform • Common sense 	<ul style="list-style-type: none"> • Accountancy/ business and finance management x 4 • Marketing • Artificial insemination

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Sector	Question: What level of skills do you want people to have when you employ them?	Question: Are there any skills shortages or training required by enterprises that are not being met by current VET programs?
	<ul style="list-style-type: none"> • Basic skills • Business management skills • Animal husbandry x 2 • Stock work/mustering/stock handling • Observation powers – animal health • Some knowledge of breeding – bloodlines (genetics) • Basic electrical – check leads etc • Small motor skills/ fix things • Fencing – mending yards • Poly pipe mending/leaks • Welding • Operate tractor x 2 • Cattle handling skills – Low stress stock-handling x 2 • licence – car/bike • Truck licence HR • Communication – verbal, some written • Keep records • Chemical certification • Pasture agronomy skills • Weed recognition • Minimal practical farm experience • One prominent beef producer said that <i>“fully trained mature workers preferred”</i> 	<ul style="list-style-type: none"> • Pregnancy testing • Production economics • OHS • Nutritional skills • Business awareness • Chemical certification x 2 • <i>“loss of specialist knowledge – beef extension staff, cattle husbandry officers, agronomists – private industry not filling the void”</i> • Trading/marketing/selling • Pasture agronomy/fertilisers • Property resource mapping • <i>“there’s no shortage of information out there but we need to be trained in it because of the speed of change”</i> (legislation) • Cattle handling • Fencing skills • Chain saw use • Tractor use • Human resource management • Pasture agronomy
Potatoes	<ul style="list-style-type: none"> • Right attitude x 2 • Common sense 	<ul style="list-style-type: none"> • Machinery skills • Speciality advice through Chemical/fertiliser resellers

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Sector	Question: What level of skills do you want people to have when you employ them?	Question: Are there any skills shortages or training required by enterprises that are not being met by current VET programs?
	<ul style="list-style-type: none"> • English Pickers/packers – nil skills required x 3 	<p>(TGT ,Elders, CRT etc)</p> <p>Basic agronomy/soil microbiology</p>
Rural resellers	<ul style="list-style-type: none"> • Two tiers of Employee – basic employment & professional specialist. • Professionals are hard to get (agricultural/chemical knowledge/degree in Agricultural science etc.) x 2 • Attitude x 2 • <i>“Want to employ locals – have family in area better for business”</i> • Prefer to bring juniors through • Employees must have people skills first and foremost • Animal health • Experienced sales staff in rural industry e.g. horticulture • Local crop knowledge • Chemical/fertiliser knowledge • Industry experience • Employees must have a Customer focus. A managing director of a chemical/ fertiliser reseller said <i>“the delivery driver is still a salesman”</i> • Greater emphasis “on job” training in transport – in transport staff start at bottom and learn business 	<ul style="list-style-type: none"> • Frontline management – costs a fortune • Customer service skills • <i>“Happy to send people on courses wherever. If we need it we’ll source it”</i> • Transport – start with general freight – get the logistics right first
Food processing - feed mill, egg	<ul style="list-style-type: none"> • Common sense • Conscientious • Integrity good attitude x 2 	<ul style="list-style-type: none"> • Business and financial management skills are missing within much of the client base. One advisory person who services local industry stated that many in the industry

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Sector	Question: What level of skills do you want people to have when you employ them?	Question: Are there any skills shortages or training required by enterprises that are not being met by current VET programs?
production, milk products	<ul style="list-style-type: none"> • Money smarts • Life skills • LLN x 2 • Punctuality and reliability • Word, Outlook, Excel – basics • MYOB learn on the job • Personal presentation • Food handling Cert 1 • Tradesman – electrical and fitter and turner lose to mining 	<p><i>“...may be good at farming but not good at investment/ financial decisions”</i></p> <ul style="list-style-type: none"> • Hard and find and retain management professionals
Intensive livestock	<ul style="list-style-type: none"> • Attitude – need to care about job and themselves • Ability to witness, absorb, perform • Common sense • Electrical skills maintenance • Animal welfare • Environment • Food safety 	<ul style="list-style-type: none"> • Business awareness • Financial management • Nutritional skills • WHO&S • Skills sets <i>“split training into modules so producers can take up the components that fit their businesses”</i>
Field crops	<ul style="list-style-type: none"> • Basic machinery skills x 2 • All types of machinery • Background in farming • Physical fitness • Desire to work x 3 • Train on the job • Packing – train on the job 	<ul style="list-style-type: none"> • <i>“no training available on Tableland for farming / horticulture”</i> (in schools) • Extension services • Basic hygiene • Basic machinery skills • Chemsafe/Chem.Cert x 3 • Chainsaw

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Sector	Question: What level of skills do you want people to have when you employ them?	Question: Are there any skills shortages or training required by enterprises that are not being met by current VET programs?
	<ul style="list-style-type: none"> • Mechanical/building skills • Some experience x 3 • Life skills • Reliability • Tractor • Office administration • Seed grading • Client skills • Sales 	<ul style="list-style-type: none"> • Forklift • Welding • WHO&S • forklift • Supervisor skills • Management • Work ethics • Behaviour • Production parameters • Financial management in agricultural context • Seed production <i>“we are a national seed production growing area”</i> • <i>“agronomy skills in schools – all main jobs in horticulture (bananas, avocados, cane) need skilled people – agronomists”</i> • <i>“We require very skilled tractor drivers/ machinery operators”</i> • <i>“takes a lot of years to train our staff”</i>
Horticulture	<ul style="list-style-type: none"> • Tractor driving x 4 • Chemicals x 3 • WHO&S • Basic farming experience • Chainsaw x 2 • Forklift x 4 • Honesty and reliability • Truck 	<ul style="list-style-type: none"> • Basic machinery operation skills/tractor driving x 5 • Chemical use and certification x 4 • Forklift x 3 • Basic farm skills x 2 • Pest control • Weed control • Knowledge of IPM integrated pest management – spray rates – working across farms to stop resistance (DPI)

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Sector	Question: What level of skills do you want people to have when you employ them?	Question: Are there any skills shortages or training required by enterprises that are not being met by current VET programs?
	<ul style="list-style-type: none"> • Previous banana experience • Attitude x 4 • Willingness to work x 7 • Common sense x 3 • Willingness to learn x 2 • Experienced machine operators • Integrity x 2 • Honesty • Down to earth • RSA (responsible service of alcohol) • English • Care with fruit <i>“if bruised fruit tell me about it can’t be found later in the supply chain”</i> • Avoid bruising • Pruning x 2 • Horticulture course • Mechanical basics x 2 • Experienced in table grape growing • Basic fruit picking skills • Life skills • Reliability • Basic machinery skills 	<ul style="list-style-type: none"> advisory) • Fruit handling/blemish/quality • Harvesting • Packing • Pruning • Mechanical • General maintenance • Business management • Marketing • Identification of fruit stages – difference in grades • Work ethics • Behaviour • Office skills • WHO&S • Supervisor skills for management • <i>“local AACC not providing much’ (to much focus on CLM?)</i> • <i>“no training available on Tableland for farming/ horticulture”</i> • <i>“no extension officers available to help farmers”</i>

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Table 4: With the training required by rural enterprises in the Tablelands area, are Full or part qualifications (i.e. skills sets) required?

Industry	Full or part qualifications (i.e. skills sets) required (or both)?
Overall (i.e. all Rural Industry)	89% part qualifications (skills sets); 6.5% full qualifications; 4.5% Both full and part
Horticulture	100% part qualification (20 responses)
Field crops	100% part qualification
Potato	100% part qualification
Dairy	100% part qualification
Beef	75% part qualification; 25% full qualification
Intensive livestock	50% full; 50% part qualification
Rural resellers	50% part qualification; 50% both full and part
Food processing (feed mill, egg production, milk products)	67% part qualification (skills sets), 33% Both

Table 5: What is the level of the training that is needed (if known)?

Industry	Cert 1	Cert 2	Cert 3	Cert 4	Diploma	Advanced Diploma or higher
Overall (all Rural Industry)	26	19	5	7	8	4
Horticulture	18	13	1	1	1	
Field crops	2	2				
Potato	1	1	1	2	1	
Dairy	1	1	2	1		
Beef	3	1		1	3	2 (managers)
Intensive livestock				1	1	
Rural resellers					1 (Professional)	1 (professional)
Food processing	1	1	1	1	1	1

There is a dearth of professionals in rural industry in general. Agronomists, animal nutritional specialists, advisory services, pasture specialists (Agristology), people with management experience, higher-level chemical, plant and animal expertise. Whilst these issues may not necessarily come out in ‘tick-box’ format of the questionnaire; and may not be directly pertinent to individual enterprises who may not be able to employ such expertise on a fulltime basis... they have come out in comments and responses made by a number of smaller enterprises in responding to questions, particularly Question 12 and larger Agribusiness enterprises and re-sellers (like Elders, Landmark and CRT).

Table 6: If part qualification list the competencies/skills if known

Sector	If part qualification list the competencies/skills if known
Horticulture	Machinery handling x 1 – forklift x 4, tractors x 2 Chainsaw x 3 Chemical certification x 3 Pruning x 2 Picking Pest control Weed control Harvest handling Basic mechanical Basic welding Work ethics Personal Presentation WHO&S Basic introduction to horticulture Business knowledge Export knowledge Knowledge of Potable water, food safety (requirements for Woolworths etc)
Field crops	Mechanical skills x 2 Machinery handling x 2 Work ethics Behaviour Office skills Chemical certification WHO&S Supervisor skills Farm management Welding Pest control Weed control Grazing land management Animal nutrition Fodder production Production economics Seeds science technology (seed industry) x 2 (One person in pasture seed industry stated “...we need a course on seed production/production of fodder agristology”)
Dairy	Chemical certification x 2 Milking skills x 2 Animal health (i.e. mastitis control, lameness) x 2 Cattle husbandry Nutrition Animal behaviour Pasture management Artificial insemination

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Sector	If part qualification list the competencies/skills if known
	Farm management Computer Business management Finance management Attitude training – <i>“attitude towards hard work is disgraceful as teenagers leave school”</i> Small motors Poly-water
Beef	Finance management x 2 The comment was made by one leading local beef industry identity who stated the following <i>“...producers cannot see the need that they should be looking more at their business and business parameters, rather than looking at the animal. This is a common industry mindset... they are too busy arguing over price, focussed on animal size, weight and look of animal rather than business parameters, financial, performance parameters (i.e. \$ /kg/beef/ha). They don’t collect the information”</i> . Marketing, trading skills x 2 Cattle handling x 2 Fencing skills x 2 Chemical certification x 2 Chainsaw use Tractor use Property resource mapping General station management Maintenance Small motor skills Welding Management and consultants - animal nutrition, pasture management Bike/horse riding Animal nutrition Cattle husbandry Artificial insemination/ pregnancy testing Business management Human resource management WHO&S Attitude training
Potatoes	Production economics x 2 Basic agronomy x 2 Soil management/soil microbiology skills x 2 Chemical certification Human resource management Marketing Machinery operations

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Sector	If part qualification list the competencies/skills if known
Rural resellers	Life skills Attitude
Food processing - feed mill, egg production, milk products	Marketing Office management Forklift license Truck drivers HR and semi Food handling Cert 4 frontline management for supervisors Food processing Cheese – food safe audits <i>“Only one place but not to our standards” (cheese making)</i> <i>“would like to get junior trainee but would need to stay... If we lose our cheese maker we would be very hurt”</i>
Intensive livestock – pigs, poultry, feed lot	Nutrition Reproduction Husbandry Maintenance WHO&S Chemical certification (Agvet)

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Table 7: What is the reason for this training?

What is the reason for this training?	Overall (all Rural Industry)	Horticulture	Field crops	Potato	Dairy	Beef	Intensive livestock	Rural resellers	Food processing
Job Knowledge	43	20	5	3	4	8		1	2
Product quality	38	17	4	2	6	6		1	2
Productivity increase	33	18	3	1	3	6		1	1
WHO&S	28	14	4	1	2	5		2	
Skills shortage	16	3	2	3	2	4		1	1
New technology	13	4	1		2	4	1	1	
Emerging industry	6	2			1	2	1		
Government regulations*	4	2			2	1			
Major projects	1					1			
Maintenance	1								1

* Interesting that “*Government regulations*” came up a number of times as a response in ‘other’ as a reason for training. It was never presented as an option for response... so where these responses were received it was unsolicited. I would suggest that this response would be far higher if it was presented as an option. This was aside from other categories of reason to train and I would suggest that this is a major reason for training and is no doubt another “hidden” cost to running an Agribusiness.

Table 8: If lack of skills – who needs this training?

Who needs this training?	Overall	Horticulture	Field crops	Potato	Dairy	Beef	Intensive livestock	Rural resellers	Food processing
New workers	10	6	1		1	1			1
Existing workers	6	5				1			
Both	35	12	5	4	6	5		2	2
Management	34	12	4	4	5	4	1	2	2

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There is a high recognition for training for management as well as workers within the survey results. One producer made the comment that they prefer to receive the training so that they can then pass the knowledge and skills on to their staff. This goes in hand with the preference of on-the-job training.

Table 9: Are there any significant barriers to addressing training needs in your region?

The most significant barriers to addressing training needs in the Tablelands region (in order of highest response) were identified as Cost of Training, availability of suitable courses, the timing of training (in relation to season and management practices) and location of courses.

Barriers to addressing training needs.	Overall	Horticulture	Field crops	Potato	Dairy	Beef	Intensive livestock	Rural resellers	Food processing
Cost of training	32	19	5		2	4			2
Availability of suitable courses	30	10	3	3	5	6	1	1	1
Timing of training	26	10	3	3	4	3		1	2
Location (of courses)	26	10	4		3	7		1	1
Quality of delivery	8	1	2		2	2	1		
Willing participants	1	1							
Knowledge of what's available	1	1							
Other	2	1			1				

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Table 10: What style of training do you think best suits your industry/business needs (tick more than one box if applicable)?

What style of training do you think best suits your industry/business needs?	Overall	Horticulture	Field crops	Potato	Dairy	Beef	Intensive livestock	Rural resellers	Food processing
Courses from a vocational education and training institute, e.g. TAFE or a private registered training organisation	16	3	1	2	1	5	1	2	1
Apprenticeships or traineeships	9	1	1	1		4		1	1
Community-organised training (i.e. organised through not-for-profit group)	6	3		2	1				
Industry Association (i.e. Growcom, MLA, Dairy Australia etc)	25	7	1	3	6	5		3	
University	7	1	1	1	1	2			1
On-the-job	55	28	5	3	6	8	1	1	3
Classroom-based	4				1	2			1
DPI Extension/Advisory	4		1	1	1	1			
Agents	1	1							

Overwhelmingly the most popular style of training that best suits Tablelands rural industry was on-the-job training.

Table 11: Do you prefer that new employees have already completed training or that they are trained while on the job?

Sector	Do you prefer that new employees have already completed training or that they are trained while on the job?
Horticulture	On-the-job x 10 Not formal qualifications – but prefer some farm experience x 6 <u>Other responses:-</u> <i>“Both – basic skills but farming may be done differently”</i> <i>“Some training – but we can build on that”</i> <i>“Prefer basic knowledge and good attitude”</i> <i>“As long as they have the right attitude”</i> <i>“Handy to have machinery licences”</i> <i>“Prefer some level of skills and prior knowledge in industry to minimise bruising”</i> <i>“Must be experienced for table grapes”</i> <i>“Relevant skills are great and a benefit”</i> <i>“Older people with experience & who have good work ethics”</i>
Field crops	On-the-job x 4 Depends on what job they are doing/employed for. Both
Dairy	Prefer to train on-the-job to individual standard On-the-job x 2 <i>“Prefer some knowledge and common sense”</i>
Beef	Combination of both x 2 <u>Other responses:-</u> <i>“Some basic training prior to employment”</i> <i>“Employees to have completed training and then fine tune”</i> <i>“Some basic experience – can then train them. However, there are some over-educated smart arses”</i> <i>“Preference for already trained in basic farming techniques”</i> <i>“On-the-job mostly”</i>
Potatoes	<i>“On-the-job”</i> <i>“Both”</i> <i>“Some basic training is very important”</i> <i>“Prefer employees that have had previous training, have interest and some knowledge”</i>
Rural resellers	<i>“Prefer already trained”</i> <i>“Both on-the-job and already having been trained”</i>
Food processing - feed mill, egg production, milk products	<i>“Prefer employees with the right attitude”</i> <i>“Professionals - completed training; process workers – trained on-the-job”</i> <i>“Trained while on-the-job”</i>
Intensive livestock – pigs, poultry, feed lot	<i>“Some level of skills is good”</i> <i>“Hire for attitude and train for skills (on-the job)”.</i> <i>“On-the job and train to fit into workplace”</i>

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Tablelands Rural industry employers prefer new employees to have some basic knowledge/training and/or experience and then be able to train them ‘on-the-job’ to acquire the skills they need in the enterprise. Overwhelmingly attitude came up. This meets with the old adage “*hire for attitude and train for skills*”.

Table 12: When public funding is not available, what percentage of this training would you be prepared to pay for?

Industry	
Overall	48%
Horticulture	37.3%
Field crops	72%
Potato	33%
Dairy	58%
Beef	50.7%
Intensive livestock	75%
Rural resellers	75%
Food processing	50%

The “average” (mean) answer to this question from 48 responses from across all sectors was 48%. 50% was the most common (modal) response.

By sector the average (mean) response was: Horticulture 37.3%, pasture seed producers 100%, Chemical/fertilizer resellers/agencies 75%, Beef 50.7%, Dairy 58% Potato growers 33%, food processors 50%.

This response reflects the level of “support” provided by Government and training providers to these sectors. In particular, horticulture, where a number of employment and training providers have run horticulture courses to meet the needs of the local horticulture sector (a significant employer – particularly seasonal work) and ensure employment outcomes.

The local dairy industry has been “traditionally” instrumental in providing training, knowledge and support to regional dairy farmers to grow and ensure continuity of milk supply. Likewise, the local Beef industry traditionally has been well-supported by Beef extension officers and MLA.

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Table 13: What licence types are required by your employees?

	Overall	Horticulture	Field crops	Potato	Dairy	Beef	Intensive livestock	Rural resellers	Food processing
Car	52	23	5	4	6	8	1	2	3
Tractor	47	24	4	4	7	7	1		
Cherry Picker	12	12							
Truck	33	14	3	3	3	7		1	2
LR	13	10	1		1			1	
MR	8	4	1	1		1		1	
HR	10	2	1		1	4		1	1
Semi	2							1	1
B-double	1							1	
Forklift	47	27	3	4	4	2	1	3	3
Bike*	1					1			
Backhoe*	1	1							
Loader/dozer*	2		1			1			
Chainsaw*	2	2							
Chemsafe/Chemcert*	3	3							
Security clearances* (for fertiliser)	1							1	
Bluecard*	1	1							

* Note that responses marked with an asterisk are unsolicited responses under ‘other’ and may indicate a need for training in these certificates. The survey above does not gauge their need relative to industry.

Table 14: Future development needs – what do you want to achieve for yourself, your family, your industry or community through training?

Sector	Future development needs – what do you want to achieve for yourself, your family, your industry or community through training?
Beef and pigs (intensive livestock)	<ul style="list-style-type: none"> • <i>“refocus on extension – the problems in beef industry are a lack of people to freely share knowledge, local knowledge through extension”</i> • <i>“providing safe workplace, producing healthy and safe food, ease of working in the workplace, respecting the environment with long term viability of the planet”</i>
Food processing	<ul style="list-style-type: none"> • <i>“Develop skilled casual pool, farmers wives etc, people who feel they can contribute”</i> • <i>“basic food handling training - Cert 1”</i> • <i>“State book keeping course”</i>
Rural resellers	<ul style="list-style-type: none"> • <i>“our industry and community needs smarter, safer and productive people to push our sector beyond 2010”</i> • <i>“to open up more markets for our fresh produce, cattle, grain industry – we have the land, water and resources – just lack know-how and markets”</i> • <i>“being able to achieve superiority over our competitors - being no.1 for service, knowledge and ability to adapt to change, not necessarily because of volume”</i> • <i>“would like local development for young people who are interested in our industry”</i>
Potatoes	<ul style="list-style-type: none"> • <i>“Developing people’s skills on the job”</i> • <i>“Agricultural management, marketing/production economics/DPI - \$/hectare gross margins, compare crops”</i> • <i>“There is a lack of DPI extension advisors”</i> • <i>“Taxation/wills/succession planning - difficult to sit through but need it”</i> • <i>“(Plant) nutrition training”</i> • <i>“For industry – production economics - need independent advice” (as opposed to chemical/fertiliser resellers who advise with profit in mind)</i> • <i>“To increase productivity and marketability of local produce” (in relation to potatoes, avocado’s and beef)</i>
Beef	<ul style="list-style-type: none"> • More stable industry • Education to retailers – how to cook meat <i>“massive education within beef industry to meet consumer needs i.e. MSA</i> • <i>“Trading, marketing, selling i.e. marketing edge, RCS”</i> • Permaculture • <i>“Natural resource management/pasture management – trying to grow grass in rainforest soils”</i> • Nutrition courses • Breeding edge workshop 11 – bull/female selection • Managing for climate workshops • Computer /IT – computerising records • <i>“Networking – learning from each other”</i>

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Sector	Future development needs – what do you want to achieve for yourself, your family, your industry or community through training?
	<ul style="list-style-type: none"> • <i>“better selection of workers so we can grow and invest further in the industry”</i>
Dairy	<ul style="list-style-type: none"> • Animal nutrition 11 • Nutrition Plus (Dairy Australia) • Computers • Total mixed ration to meet cows maintenance and production needs • Identification of cow health issues i.e. mastitis, lameness • Production economics • Taxation, wills, succession planning • <i>“up skill to keep industry alive and attractive”</i> • <i>“security, stability, safety, profitability, marketability”</i> • <i>“a pool of skilled workers to reduce the load on dairy farmers”</i> (i.e. relief milkers)
Field crops	<ul style="list-style-type: none"> • Business expansion • More skilled workforce • <i>“to be able to get away from farm for better lifestyle”</i> • <i>“profitable, sustainable business that employs local people”</i> • <i>“business networking/mentoring – would like to start an agricultural managers/producers network”</i> • <i>“VET training for workers ... could pay more as train more”</i> • <i>“currently agriculture (Rural Industry per se) is not well respected or appreciated” - would like agriculture to become a profession of choice”</i> • <i>“make profit margins higher to enable farmers to have a break”</i>
Horticulture	<ul style="list-style-type: none"> • Productivity increase/Efficiency/profitability/ progression of our business x 13 • WHO&S x 8 • To semi-retire/have faith in workforce to do job without supervising/peace of mind/ handing over of business x 7 • Quality control x 4 • Marketing - market compliance – what market wants/ Accreditation to be able to sell on as is required/ create more export opportunities x 3 • Outsource specialist skills i.e. marketing <i>“nature’s fruit – doing good job work on specific markets very clear, consistent – good supply chain”</i> • Availability of trained people pool/ adding to community/ regional resources base/ ease of hiring x 4 • Sustainable, reliable workforce/retain skilled staff x 2 • Cohesive/team orientated workforce x 2 • Upskilling of workforce / Training to farmers standards x 2 • Job satisfaction • Ethical workforce • People who want to work • To have funding available for training

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Sector	Future development needs – what do you want to achieve for yourself, your family, your industry or community through training?
	<ul style="list-style-type: none"> • Chemical accreditation • Product knowledge • Less stressful mango season “<i>most of our locals are too blasé</i>” • “<i>Make a good living while still having a good lifestyle</i>”

Table 15: In terms of Agriculture/Horticulture being delivered in our local Secondary Schools – what would you like to see in terms of training, skills and experience?

Sector	In terms of Agriculture/Horticulture being delivered in our local Secondary Schools – what would you like to see in terms of training, skills and experience?
Beef and pigs (intensive livestock)	<ul style="list-style-type: none"> • “Balanced” training in environmental management, welfare and food sciences • “<i>Need school leavers trained above “entry level” (the bottom) – employers don’t want “the bottom”.</i>” • Require good pass marks in English, maths etc • “<i>As an industry we cannot keep perpetrating the myth that if you are a failure you can get a job on the farm</i>” • “<i>Success attracts success</i>”
Food processing	<ul style="list-style-type: none"> • LLN – to add up x 2 • Hygiene – instils discipline • Attitude, reliability – Beacon foundation x 2 • “<i>Polish – good program. Ned Beacon foundation to get stronger... schools don’t spend enough time on attitude, polish, deportment</i>” • “<i>Life skills</i>” • “<i>Work here at plant is not difficult but need commonsense</i>” • “<i>On farms they need chemical courses, safety, handling chemicals etc.</i>” (from farm advisor)
Rural resellers	<ul style="list-style-type: none"> • Land management • Financial skills x 2 “<i>teach them how to budget and know the costs of inputs and plan a financial outcome... have students research the market and see where they will place their harvest</i>” (tie maths to production economics and marketing... better in teaching these subjects). • Animal husbandry • Basic fundamentals of growing a crop • Basic farm skills • WHO&S x 2 • Chemical certification • “<i>... need to identify the students that have an interest in the industry and encourage them</i>”
Potatoes	<ul style="list-style-type: none"> • Tractor/farm machinery operation • Work experience – go through packing sheds, work on digger etc x 2

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Sector	In terms of Agriculture/Horticulture being delivered in our local Secondary Schools – what would you like to see in terms of training, skills and experience?
	<ul style="list-style-type: none"> • Shelf-life • Fertilisers • Water/irrigation management • <i>“has to be an increase in awareness and job availability in farming and rural industry”</i> • <i>“some farmers send kids to school to get an education and not to come back on to the farm”</i>
Beef	<ul style="list-style-type: none"> • Basic animal husbandry • Agriculture/cropping/horticulture knowledge x 2 • Basics – fencing etc • <i>“More of a variety - Provide students with “taste” of industry – different animals and crops, horticulture”</i> • Presentation, cattle judging, ability to speak, Deportment, confidence, attitude • Beacon Foundation – “Polish” – Indigenous • <i>“a broad introductory knowledge of animals, crops, farming techniques etc. Some knowledge of grasses, legumes, chemicals is desirable”</i> • <i>“More experience/ on the job training”</i> • <i>“More closer link between schools and industry”</i>
Dairy	<ul style="list-style-type: none"> • Tractor/farm machinery operation • Cattle management (Dairy/beef specific) • More practical – get out on farm more x 3 • Animal husbandry • Fencing • computing • <i>“Students may do those courses even though they lack any real interest in agriculture”</i> • <i>“not too many go on to do Agriculture”</i> • <i>“Not too many jobs in beef or dairy – Agriculture or horticulture may be more appropriate”</i>
Field crops	<ul style="list-style-type: none"> • Work experience opportunities • Tractor/farm machinery operation x 2 • General awareness of farming • Basic Agriculture/horticulture/farm techniques • Agronomy x 2 • Production economics • Environmental sustainability – <i>“a study in UK showed that organically-produced chooks actually produced more methane than a conventional shed chook because of the efficiencies of production of the chook itself and the grain produced. There are some myths out there”.</i> • <i>“shortage of agronomists...encourages young folk to work on the land”</i> • <i>“A focus on agriculture – need to build relationship between crops & pastures (agronomy) and livestock at school level. It is crops and fodder that make good livestock. Not enough</i>

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Sector	In terms of Agriculture/Horticulture being delivered in our local Secondary Schools – what would you like to see in terms of training, skills and experience?
	<p><i>focus on agronomy and production economics. Need whole systems approach. Plants/animals/soils/climate – currently there is a poor linkage of these”.</i></p> <ul style="list-style-type: none"> • <i>“Needs to be focussed on certain industries”</i> • <i>“Believe it is in your blood and if someone interested, they’ll be involved in industry regardless of school”</i> • <i>“Kids themselves need to know that food production (environmentally and employment-wise) is not the big bad wolf that is sometimes portrayed”</i>
Horticulture	<ul style="list-style-type: none"> • More work experience opportunities x 8 • Tractor/farm machinery operation x 4 • Forklift licence • Basic Agriculture/horticulture/farm techniques x 4 • Mechanics x 2 • Engineering • Welding x 2 • Irrigation x 2 • Experience and understanding of running farms/orchards • Teach the right workplace attitude – willingness to work x 2 • Value-promotion farming • Self-awareness/esteem • Plant biology • Soil biology • Soil science • Nutrition/Chemistry • Chemical usage - basics • Food production • First Aid • WHO&S • Promote farm work availability/rural lifestyles x 2 • <i>“Should be more packages to allow SATs on farms. To give them experience and encourage them to get on the land and hopefully remain on the land”</i> • <i>“Students to gain exposure to farming”</i> • <i>“Need more property visits – familiarisation – get some connect with farming. Give the opportunity and see what happens”.</i> • <i>“Currently there is a ‘sterile-type’ attitude from schoolteachers – we need more interaction from them and to give students a more ‘world’ view”</i> • <i>“Understanding the perspectives of the farmer to back up the theoretical aspect. They want to aspire to be on the land... but need the farm to make it work”</i> • We need <i>“enormous assistance to encourage school leavers to work on farm or return to the farm”</i> • <i>“Time-slots on local farms by students to learn farm jobs”</i> • <i>“Bring courses in to encourage them back on the land”</i>

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Sector	In terms of Agriculture/Horticulture being delivered in our local Secondary Schools – what would you like to see in terms of training, skills and experience?
	<ul style="list-style-type: none"> • “Should be more skills training delivered to allow students to get a taste of (the rural sector)” • “Farming is totally a choice decision – not something you can learn really” • “Place a Cert 1 or Cert 2 in frontline management in the schools as they are more employable” • “Be aware of different cultures” (Cross-cultural training – not just focussed on indigenous) • “I don’t want to promote Agriculture to students as it is no longer viable and extremely stressful. All because of regulation and not strong enough Government support towards the man on the land (the tertiary-educated world is destroying it for us)”

Table 16: Would you be interested in a mentoring scheme or work placement idea?

Sector	Would you be interested in a mentoring scheme or work placement idea?		
	Yes	No	Comments
Overall	31	22	
Beef and pigs (intensive livestock)	2		<ul style="list-style-type: none"> • “We have got to get away from Agriculture being seen as a dead end. We need to be portrayed as successful”
Food processing	2	1	<ul style="list-style-type: none"> • “Already do this – school-based apprentices. At least 16 years old – 2 weeks/yr. Normally with a trade” • “Not sure how would handle the WHO&S aspects. Possibly interested in office trainee – 1 or 2 days a week perhaps. Personally happy to be involved in Beacon, speaking etc” • “No. You would get the odd exception but no. If so, I would do it with family – they know what the job is”
Rural resellers	2		
Potatoes	2	1	<ul style="list-style-type: none"> • “Yes – Atherton, Ravenshoe and Malanda” • “Yes – once or twice a year, not weekly” • “Currently doing this with young, new farmers to give them advice when needed”
Beef	4	3	<ul style="list-style-type: none"> • “Tableland Veterinary Service training for testing bulls – Vet student coming” • “Yes – if coinciding with work times” • “Probably not – too old. Consider the idea of mentoring/placement is a good one”
Dairy	4	1	<ul style="list-style-type: none"> • “Currently have mentoring program with TVS.

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Sector	Would you be interested in a mentoring scheme or work placement idea?		
	Yes	No	Comments
			<p><i>Had SAT previously – problems with Government. Hours not necessarily suitable for student or parent</i></p> <ul style="list-style-type: none"> • <i>“Do this already with Vet students with TVS/JCU... I have no problem doing that with schools if such a scheme was in place”</i> • <i>“Yes – but question of Timing. I’m time poor”</i> • <i>“High school kids used to come from St Augustine’s and Vet students come from TVS/JCU”</i>
Agriculture	3	3	<ul style="list-style-type: none"> • <i>“We could look at it”</i> • <i>“If right candidate”</i>
Horticulture	12	13	<ul style="list-style-type: none"> • <i>“Had a bit to do with it. Not sure. Happy if asked”</i> • <i>“good idea but probably not suitable for bananas as work is really tough and long”</i> • <i>“Used to do that with indigenous...but usually costs more money because of mistakes through wrong pruning techniques, handling”</i> • <i>“No. Coming from being a teacher, the legal side scares me”</i> • <i>“No... flat stick but happy to accommodate property visit. Happy to accommodate chemical training – i.e. spray calibration etc for a day”</i> • <i>“Not here – due to supervision issues”</i> • <i>“Yes – rang the school 2 or 3 years ago to tell them that I am interested in this”</i> • <i>“No... I have no time, unless someone pays for my time and they get training while working for me. Otherwise No”</i>

In the main most Tablelands Agribusiness’ support the idea of a mentoring scheme or work placement idea with the Schools’ with 57% responding favourably.

Image & Perception Questions

Table 17: As a person who operates within the rural sector – What do you think of the Image & perception of your Industry (to work in)?

Sector	What do you think of the Image & perception of your Industry (to work in)?
Feedlot beef and pigs (intensive livestock)	<ul style="list-style-type: none"> • <i>“General public opinion is not positive due to misinformed knowledge”.</i> • <i>“Seen as Dad and Dave when true image is very high tech”.</i>

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Sector	What do you think of the Image & perception of your Industry (to work in)?
Food processing	<ul style="list-style-type: none"> • <i>“OK – it’s a job. Mediocre – but we pay above award”</i> • <i>“Perception that it’s what people do if they cannot do anything else – farm workers - ‘bottom of food chain’; industry itself – lack of understanding of what the industry actually is... they just expect that there will be food on the table”</i> • <i>“Good image on Tablelands – built around rural”</i>
Rural resellers	<ul style="list-style-type: none"> • <i>“Not enough known about our industry by local people”</i> • <i>“Perceived as a tough industry based on farms in general. Look at costs up front and not looking at the end result as in bottom line”</i>
Potatoes	<ul style="list-style-type: none"> • <i>“Seasonal; always a ‘window’ of opportunity – provides market at a particular time of year; new varieties”</i> • <i>“Hard work – do it tough”</i> • <i>“Lack of career opportunities”</i> • <i>“Lack of skills within farming industry”</i> • <i>“Good lifestyle in some respects”</i> • <i>“The potato industry is dying every year – the industry is declining every year”</i> • <i>“A booming industry with banana’s, Avocado’s etc – plenty to do”</i>
Beef	<ul style="list-style-type: none"> • <i>“Romantic image; influence of media is large”</i> • <i>“Low paid, low income, dirty, tough working conditions”</i> • <i>“It is RURAL and TOWNS are big attraction – image that rural people are ‘hicks’, ‘stupid’ and intellectually-inferior. Country bumpkin – Dad and Dave image”</i> • <i>“Good – but do lose to other industries i.e. mining when get skilled – wages and conditions”</i> • <i>“Ignorance by people about meat – people are removed from farms (compared to how they were in 50’s, 60’s, 70’s and even 80’s)”</i> • <i>“The industry looks fine to work in; however, the people now don’t like hard work”</i> • <i>“Industry is seen by media and portrayed as large scale, enjoyable business and lifestyle”</i> • <i>“Image of an industry that is sound. Little knowledge or appreciation of difficult conditions farmers face”</i> • <i>“When first arrived dairy farmers looked down on beef (producers)”</i>
Dairy	<ul style="list-style-type: none"> • <i>“Not good image of industry to work in; 2 x day; 7 days a week. People don’t have a good perception of industry. People don’t like working with animals”</i> • <i>“Poor perception as a place to be employed – no career path”</i> • <i>“Not a good perception. Too hard, too many long hours; can’t get away”</i> • <i>“Good lifestyle. If you want to work in industry you like it”</i> • <i>“Has always kept up to population growth and has future. Good foundation to future. Reliable income – cash flow wise.”</i>

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Sector	What do you think of the Image & perception of your Industry (to work in)?
	<p><i>Generally reliable. AI and productivity gains can still be achieved</i></p> <ul style="list-style-type: none"> • <i>“Hardest to be into; very intensive; early start, long hours; misconception from non-business orientated farms due to lousiness of set-up”</i>
Field crops	<ul style="list-style-type: none"> • <i>“Hard work, boring and hot”</i> • <i>“Not very good image as some farmers are good but others... I’ve heard some horror stories about them. Also a hard and dangerous job”</i> • <i>“Not good – seen as peasant farmers”</i> • <i>“Good image – appeals to a lot of people”</i> • <i>“Dusty, itchy industry to work in (seed industry). Not very hard labour - not very sexy industry (to work in)”</i> • <i>“We are the industry that helps feed the world (seed industry). We lift production. Beef for world. Securing Nations’ prosperity. People are not aware of industry. We add to the rest of the supply chain – 3 x effects – increase beef production at farm gate”.</i>
Horticulture	<ul style="list-style-type: none"> • <i>“Uncertain – have to ask people”</i> • <i>“Not very high – not glamorous, limited enthusiasm”</i> • <i>“Bananas – hard work, long hours, not appealing”</i> • <i>“Bottom of barrel”</i> • <i>“For unskilled”</i> • <i>“Very hard work; physically demanding”</i> • <i>“Under-resourced”</i> • <i>“... Takes them (workers) for granted... Customers are naïve regarding what we produce”</i> • <i>“The public think that farmers are slaves”</i> • <i>“...pretty good for us (farmers) but easier life elsewhere and more financially secure”</i> • <i>“Too hard” x 3</i> • <i>“Long” (hours, days & season) x 6</i> • <i>“Tough, hot” x 2</i> • <i>“Days of family farm are long gone”</i> • <i>“Think farming is easy and good lifestyle – but when they experience it first hand – different”</i> • <i>“Experienced people have an idea of reality – hard work, long hours and sometimes little rewards”</i> • <i>“It’s an industry that you could make a lot of money and we are going to lose workers through IR laws (time and a half, double time). No incentive there (38 hours max – workplace agreements)”.</i> • <i>“They think you make too much money and workers should be paid more”</i> • <i>“Any hands on work seem like the last resort. It is hard, hot work and people are getting softer too”</i> • <i>“I think a lot of people think we work very hard for very little reward – what you put into it is what you get back”</i>

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Sector	What do you think of the Image & perception of your Industry (to work in)?
	<ul style="list-style-type: none"> • <i>“Realise what our problems are (weather, prices). (People) think they (farmers) are made of money – the growers are making all the money and we cannot pass costs on too much either (freight, wages)”</i> • <i>“They think we are wealthy – got it easy”</i> • <i>“Don’t take it seriously as a real job”</i> • <i>“Seen as ‘hic’ redneck lifestyle”</i> • <i>“Fill-in job til something better comes along”</i> • <i>“Think we are rich”</i> • <i>Own boss, working outdoors/Easy job/Good lifestyle x 2</i> • <i>“Different to reality. Perception of being easy and being rich”</i> • <i>“People don’t know/appreciate time/effort that goes into product; work hard; not as glamorous as you may think”</i> • <i>“Local people – bad experience because of hearsay in pub etc”</i> • <i>“Happy with our business – want to come back as we pay above award wage. Our workplace is of high standard... neat, clean. Provide smoko’s”</i>

Table 18: What do you think the public’s image & perception of your product is?

Sector	What do you think the public’s Image & perception of your product is?
Feedlot beef and pigs (intensive livestock)	<ul style="list-style-type: none"> • <i>“Healthy food”</i> • <i>“Very good”</i> • <i>“Misconception perhaps about feedlot linked to battery chicken operations”</i> • <i>“Good – especially support for DF product versus other brands”</i> • <i>“Meat that consumers eat – very high expectation – if it is not met then want to know why; Good value, wholesome; Very high; flavoursome”.</i> • <i>“Beef is not as easy to cook as chook and pork”</i>
Food processing	<ul style="list-style-type: none"> • <i>“Clean, chemical and anti-biotic free. Premium product... little bit dearer”</i> • <i>“Hopefully customers believe it is good, quality, consistent, value-for-money. Nutritionally-balanced – you get what you pay for. Competitive business driven by volume”</i>
Rural resellers	<ul style="list-style-type: none"> • <i>“Our brand is strong”</i> • <i>“I think our product i.e. Tableland Fertiliser and Mareeba Transport is good. Has high acceptance by its customers and sets a high standard of service and knowledge”</i>
Potatoes	<ul style="list-style-type: none"> • <i>“Still have the image that it is fattening but the staple potato is reasonably good. Branding of spud for specific boil, mash, roast etc”</i> • <i>“Good product but lost identity and image due to packaging in major food outlets”</i>

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Sector	What do you think the public's Image & perception of your product is?
	<ul style="list-style-type: none"> • <i>“Good; nearly spot on – all the red tape that you go through. Could do more with packaging – but how much do you spend? Regional Branding – Atherton Tablelands – would compete against ‘select’ (which is all currently out of S. Africa)”</i>
Beef	<ul style="list-style-type: none"> • <i>“Expensive. Mince \$12/kg”</i> • <i>“Consistency issue – inconsistent”</i> • <i>“Nutritious”</i> • <i>“Top-end i.e. MSA beautiful”; Improving – more cuts, plenty of choice. Presentation in butchers shops, supermarkets – excellent”</i> • <i>“Fine”</i> • <i>“Generally good. Image is shaped to a large degree by media”</i> • <i>clean, green, healthy, good X 2</i> • <i>“Average – people don't understand how to cook it - ‘some people know how to wreck a good fillet steak’ – MLA working hard on (correcting) this”</i>
Dairy	<ul style="list-style-type: none"> • <i>“Product is safe and wholesome”</i> • <i>“Really good – clean, green”</i> • <i>“Good”</i> • <i>“Near perfect food”</i> • <i>“Good perception – recently won 4 Gold awards. People like dairy products”</i> • <i>“Good. Highly regarded”</i>
Field crops	<ul style="list-style-type: none"> • <i>“Good Quality”</i> • <i>“In sales (seed industry) – perception that we are all used car salesmen – though some in industry have probably caused this through lack of integrity (and selling poor quality seed)”</i> • <i>“Good”</i> • <i>“Hopefully it's clean and green and it is a sustainable industry”</i>
Horticulture	<ul style="list-style-type: none"> • <i>“Glamorous, financially rewarding”</i> • <i>“Extremely good”</i> • <i>“Very Good” x 6</i> • <i>“Excellent” x 5</i> • <i>“Good”; “Pretty good” (Quality) x 8</i> • <i>“Clean, reliable; if damaged after leaving (farm), out of our hands”</i> • <i>“Great – but don't want to pay the price for mango's so as I can be sustainable”</i> • <i>“Great”</i> • <i>“Australian fruit has good reputation. Need even playing field with imports. Urban voting is a big issue”</i> • <i>“It's a healthy product, fresh and great quality – don't need a pineapple every day though”</i> • <i>“The farmer is ripping the consumer off which is not the case”</i> • <i>“Avocado eating on increase, healthy, good oils – captured markets. Never any trouble – growing market”</i>

Table 19: What do you think the Image & perception of the Tablelands (or this area's) Community is like?

Sector	What do you think the Image & perception of the Tablelands (or this area's) Community is like?
Feedlot beef and pigs (intensive livestock)	<ul style="list-style-type: none"> • <i>“Friendly”</i> • <i>“Some farmers ‘backwards’ – happy to continue doing what they have always done; won’t adapt to new technology like other areas (i.e. CQ etc); some with lack of professionalism in farming and maybe because earn main income elsewhere... high end”</i>
Food processing	<ul style="list-style-type: none"> • <i>“Day trippers – not too many stay up here; Lack of night life... no café latte at night; best place in the world; Lack of specialty services – health (even in Cairns)”</i> • <i>“Attractive rural area. Good quality lifestyle area – non-violent, quiet, rural, attractive”</i> • <i>“Lack of facilities; things to do for teens. Hard to get decent, affordable accommodation (rentals). No entertainment (night-life, café latte set); Good hospital, schools – but lacking specialty facilities”</i>
Rural resellers	<ul style="list-style-type: none"> • <i>“We need to promote our area better”</i> • <i>“The image of the Tableland is excellent place to live. But opportunities are limited for jobs i.e. aging population”</i>
Potatoes	<ul style="list-style-type: none"> • <i>“For young - No nightlife – rather be in Cairns; For backpackers – ‘be in Sydney for New Year’s eve’ – always have plan to move on”</i> • <i>“Community – good; but poor access to quality, locally grown produce – inability to sell produce locally”</i> • <i>“Great; been to a lot of places and very few as good – it is just not promoted enough and we don’t have the population; hidden little secret”</i> • <i>“From industry point of view Tablelands are well-known but with public, not so well”</i>
Beef	<ul style="list-style-type: none"> • <i>“Nice area. I’d rather go to pub than clubbing (grazier’s daughter attending Uni)”</i> • <i>“Cooler than Cairns – would rather be here than Cairns. Lots of great little hidden places to eat”</i> • <i>“Minds are stuck in the past, having difficulties moving forward”</i> • <i>“Good climate; easy lifestyle. Large retirement group”</i> • <i>“Area seen as picturesque farming location. Area is little known probably because there is no one large urban centre”</i> • <i>“Distant; so far away; once here – love it!”</i> • <i>“Clean, scenic – but not heard of. Rainy – weather can put people off. Unique part of Australia; paradise; Green; not a lot of serious crime; Laid-back; warmth to cool nights”</i>
Dairy	<ul style="list-style-type: none"> • <i>“For a non-rural person it is seen as remote/distant”</i> • <i>“Really good – clean, green”</i> • <i>“Good”</i>

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Sector	What do you think the Image & perception of the Tablelands (or this area's) Community is like?
	<ul style="list-style-type: none"> • <i>“Clean, green. Great place to live and work”</i> • <i>“Potentially the Tablelands are better than Margaret River. We have more to offer. We have not got the regional branding worked out. Need local identification, not Cairns Highlands – needs to be Tablelands”</i> • <i>“Tourist orientated; not much consideration for farming/ agriculture”</i>
Field crops	<ul style="list-style-type: none"> • <i>“Good”</i> • <i>“Very good”</i> • <i>“Good place but a lot don't know where it is – Mareeba is good”</i> • <i>“Nice place, scenic. Not known about – it wasn't until I took a job that I discovered it. Only an hour from Cairns. Not too cold, not too humid, not too wet (Mareeba). Perfect place to raise family. Footstep to GBR, On Savannah way. We reckon you could do something new each weekend for two years before you would double up on what you have done”</i> • <i>“Laid-back, ‘she'll be right’ attitude – bit of curse to business”</i> • <i>“Impression that because of north... we're backward... when, in fact, we're innovators”</i> • <i>“It is a sustainable area and we are hard working people”</i>
Horticulture	<ul style="list-style-type: none"> • <i>“Good” x 4</i> • <i>“Very good” x 2</i> • <i>“Good – more marketing required to be promote” x 2</i> • <i>“Fairly Good”</i> • <i>“Good opportunity for work”</i> • <i>“Great place to live”</i> • <i>“lovely”</i> • <i>“Prosperous and nice lifestyle”</i> • <i>“Ultra conservative”</i> • <i>“Strong agriculturally – ‘best of best’; Growing – great place to live. Diverse – range of climate and soils. ‘Salad bowl of Queensland’; abundant water, volcanic soils, temperature”.</i> • <i>“Hidden little secret – need to be branded as Atherton Tablelands and no further” (as opposed to this Far North Queensland whole of region branding).</i> • <i>“Tablelands not known about. Politicians have got no idea of what is produced so what hope have we got”</i> • <i>“Broad community does not see us as being the best at anything. We need our own branding and being the best”</i> • <i>“I think it is very good. Very difficult to get change though as farmers are set in their ways”</i> • <i>“Moved here permanently 8 years ago. Perceived as a great growing area for fruit and vegies. Brilliant Township (Mareeba). Mareeba Gold advertises Mareeba”</i> • <i>“It is good but not well known – need to brand it better. Stickers put on fruit”.</i>

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Sector	What do you think the Image & perception of the Tablelands (or this area's) Community is like?
	<ul style="list-style-type: none"> • <i>"Fruit is branded 'Mareeba' I think. A lot of people know Cairns and I then say 'an hour from Cairns' as they all don't know where Atherton and Mareeba is"</i> • <i>"Supportive to a limited degree"</i> • <i>"Don't realise hardships farmers go through"</i> • <i>"The community keeps growing so attractive"</i> • <i>"Could be better in Mareeba – housing, delivery to farms, sourcing"</i> • <i>"Very nice area, lot of potential"</i> • <i>"Banana's – dodgiest part of Australia – under hand dealing – high income earners; Rumours"</i>

Table 20: What do you think the Public Image & Perception of your Industry's WHO&S/Safety record?

Sector	What do you think the Public Image & Perception of your Industry's WHO&S/Safety record?
Feedlot beef and pigs (intensive livestock)	<ul style="list-style-type: none"> • <i>"Good"</i> • <i>"Not very good – farming in general. Poor and that is probably the reality"</i>
Food processing	<ul style="list-style-type: none"> • <i>"Excellent in poultry & egg industry"</i> • <i>"High – good. Feels like it is in spotlight – but do the right thing with regular inspections and there are no major issues. Most hazardous aspect is climbing ladders into bins etc on farm for delivery drivers"</i> • <i>"The company's is fantastic but rural industries' is not good – the farming community is not safety conscientious. Most deaths on farm – machinery, tractors, 4WDs, bikes etc"</i>
Rural resellers	<ul style="list-style-type: none"> • <i>"The safety focus as a whole (within rural industry) is very poor"</i> • <i>"Below average i.e. wrongful use of chemicals and truck related accidents – but I believe this is media drawn – not a true indication"</i>
Potatoes	<ul style="list-style-type: none"> • <i>"Potato harvester is considered a dangerous machine – generally one serious accident per year – not terribly dangerous though"</i> • <i>"Pretty Bad"</i> • <i>"Fairly good – particularly ours; Good as long as people do as they are told"</i>
Beef	<ul style="list-style-type: none"> • <i>"Not too bad"</i> • <i>"Feel people don't have a (real) perception of farming"</i> • <i>"Perception is that work can be dangerous. Farmers generally need to be more safety conscientious".</i> • <i>"Depends if got commonsense or not. Rules & regulations making it better"</i> • <i>"Dangerous, rugged"</i>

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Sector	What do you think the Public Image & Perception of your Industry's WHO&S/Safety record?
	<ul style="list-style-type: none"> • <i>“Very average – improving though; Careless operating tractors, bikes – dealing with difficult terrain, unpredictable animals, less supervision”</i>
Dairy	<ul style="list-style-type: none"> • <i>“Fine reputation”</i> • <i>“Very good”</i> • <i>“Haven’t got a good record – not as good as it could be”</i> • <i>“Always room for improvement – not enough money in industry – trying to get there (margins are tight)”</i> • <i>“Has been a lot of accidents on farms in general... onus is no longer on commonsense”</i> • <i>“Limited knowledge of obligations and responsibilities by farmers. Getting better”</i>
Field crops	<ul style="list-style-type: none"> • <i>“Good record within seed industry”</i> • <i>“Good”</i> • <i>“Average”</i> • <i>“It think it is considered pretty safe in relation to bad accidents”</i> • <i>“It is a dangerous job but as long as you utilise commonsense”</i>
Horticulture	<ul style="list-style-type: none"> • <i>“Pretty good... but then you look at the statistics I guess it is not that good”</i> • <i>“Good”</i> • <i>“OK”</i> • <i>“No idea”</i> • <i>“Not sure - but statistically has a high incident record”</i> • <i>“Improving due to regulations and awareness”</i> • <i>“I think it is fair because we are pretty safe”</i> • <i>“Fairly good – but lot of misuse of chemicals over years. Improving now – but wasn’t good”</i> • <i>“Fruit & Veg Industry – Nil”</i> • <i>“Deaths & minimal injuries”</i> • <i>“Not very good”</i> • <i>“Fairly low”</i> • <i>“Media proclaims lots of accidents but little amount considering amount of farms/machinery”</i> • <i>“Unclear – could be dangerous” x 2</i> • <i>“Either negative or indifferent. But not positive towards us – public don’t care”</i> • <i>“Pretty good but will improve through training”</i> • <i>“Government doesn’t think we have a good track record”</i> • <i>“Poor record, rednecks taking shortcuts”</i> • <i>“Quite severe – sprays etc. Public would not have a clue. It is mandated. It is costly but we are safer. Safety of workers and others. Costing farmer to meet these regulations – but the public would not know about it. In fact, safety may go to the point that it would make avocado growing untenable if they remove certain chemicals from use”.</i> • <i>“Worst Record”</i>

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Sector	What do you think the Public Image & Perception of your Industry's WHO&S/Safety record?
	<ul style="list-style-type: none"> • <i>“A lot of hobby farmers out there – accidents happen – but as long as you don't take risks and follow procedure”</i> • <i>“Always hear farmers ‘attacking the reef’”</i> • <i>“We do have due to the nature of farming of course we are more prone to accident and there is no rule to prevent our percentage of accidents”</i> • <i>“Mixed bag – some are doing good job, but smaller ones are still doing things wrong”</i> • <i>“If you use your common sense it is reasonably safe but accidents do happen everywhere”</i> • <i>“Reasonable – could have more money spent on it”</i>

Table 21: WHO&S - Do you have the following in place: - Written work method statements; Written WHO&S Policy; Written Standard Operating Procedures?

Sector	WHO&S - Do you have the following in place:-					
	Written work method statements		Written WHO&S Policy		Written Standard Operating Procedures	
	Yes	No	Yes	No	Yes	No
All Rural Industry	36	19	37	18	44	11
Horticulture	17	7	16	8	18	6
Field crops	2	4	3	3	5	1
Beef	1	5	1	5	3	3
Feedlot beef and pigs (intensive livestock)	3		3		3	
Potatoes	4		4		4	
Dairy	3	3	4	2	5	1
Rural resellers	3		3		3	
Food processing	3		3		3	

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Table 22: Do you require training or assistance in the above?

Sector	Yes	No
All Rural Industry	13	37
Horticulture	6	17
Field crops	1	3
Beef	3	3
Feedlot beef and pigs (intensive livestock)		3
Potatoes	1	2
Dairy	2	3
Rural resellers		3
Food processing		3

Table 23: Any suggestions/ideas for Improvement that you would be happy for us to advance?

Sector	Any suggestions / ideas for Improvement that you would be happy for us to advance?
Feedlot beef and pigs (intensive livestock)	<ul style="list-style-type: none"> • "... See the need for extension services. Need that conduit of information" • "Concerns where Tableland Farmers/farming is headed for future; flow on effect to all – shops etc"
Food processing	<ul style="list-style-type: none"> • "Have good DVDs – Biosecurity etc" • "More knowledge of Tablelands overseas than domestically; Require marketing of region/regional branding. Image and perception – had not heard of area before we came here; Regional branding is required – as a Tablelands brand (and person)"
Rural resellers	<ul style="list-style-type: none"> • "We need to better skills our local kids to retain them in the area after leaving school"
Potatoes	<ul style="list-style-type: none"> • "To keep DPI advisory system. Soil conservation services. Government will come in with 'big stick' but do not offer the companion extension/advisory services – there is a place for both. No one is really left in DPI (and private enterprise has not filled the void)" • Awareness of industry to younger generation and opportunities available. System where skills and experience are recognised to accredited standard"
Beef	<ul style="list-style-type: none"> • "Tableland Regional Brand – the way we have to go to get recognition of our product" • "Professional information to do within Industry; Better accommodation" • "Don't paint the pretty picture; keep potential workers realistic when it comes to work requirements (in industry)" • "Progressing/promoting local products" • Signage on roads – dangerous things – lines etc"

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Sector	Any suggestions / ideas for Improvement that you would be happy for us to advance?
Dairy	<ul style="list-style-type: none"> • <i>“people need to be more aware of the need for extra water – not just for environmental flow, but also for food production; the need for food production security”</i> • <i>“Good to have MALANDA milk – farmers, including me, do promotions for product”</i> • <i>“Create an outcome instead of same questions year in/year out; provide what you say”</i>
Field crops	<ul style="list-style-type: none"> • <i>“Overtime on a farm – cannot pay overtime - rather let it (fruit) rot on tree – need for flexibility on a farm (workplace agreements better)”</i> • <i>“Agricultural network for managers, owners, professionals within industry; Links with schools; links to industry”</i>
Horticulture	<ul style="list-style-type: none"> • <i>“Government needs to support local farmers & family farms if industries are to survive and support community small business”</i> • <i>“Need more farmers willing to pass on responsibility to sons/younger generations as average age is in 60’s; also people willing to work”</i> • <i>“Good staff is essential but difficult to find for this industry unless you have local knowledge of industry and workforce”</i> • <i>“Promotion of value of farming; lift image of farming – not bottom of rung work; the ‘loser/dead end job’ perception needs to change”</i> • <i>“Bring more tourists to the Tablelands”</i> • <i>“Primary producers should all be working together to have their own chain store; farmers unhappy, customers unhappy – currently; this would allow for a cheaper, quality product on shelves”</i> • <i>“More cooperation between farmers; less greed i.e. reduce production to stop glut”</i> • <i>“Top of the line – introduction to workplace health & safety. This is essential”</i> • <i>“Incentives for local people to work”</i> • <i>“Promote benefits of working in healthy open environment”</i> • <i>“Improving retail competition – minimise imports or place same expectations on imports – promotion to increase per capita consumption of fruit and vegetables”</i> • <i>“Less red tape”</i> • <i>“Extra advisory services; Government subsidised tutors – back in DPI; Government short-sightedness that these services have been removed”</i> • <i>“Wholesaler of local grown products; local accommodation available for workers; Local and regional branding; increase margins for farmers; open export doors more – VHT (Vapour heat treatment)”</i> • <i>“If employees want to work more than 38 hours/week without time and a half and double time – then they should be allowed to”</i>

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Sector	Any suggestions / ideas for Improvement that you would be happy for us to advance?
	<ul style="list-style-type: none"> • <i>“Stop time and a half and double time as farmers cannot afford this”</i> • <i>“Need increased prices across primary industry; have to be viable to remain here”</i> • <i>“Locals are not willing to work (go thorough motions to get dole); more financial assistance for training”</i> • <i>“Provision of accommodation or reduce Government and Council red tape to allow accommodation on farms”</i> • <i>“Biggest threats are imports – need to cease these”</i> • <i>“One stop shop for prospective employees to gain basic training in various horticultural practices and Government funding of such”</i> • <i>“Too many rules/regulations; make policies different to make Centrelink clients have to work”</i>

Table 24: What are there opportunities for promotion, progression with your business or industry?

Sector	What are there opportunities for promotion, progression with your business or industry?
Feedlot beef and pigs (intensive livestock)	<ul style="list-style-type: none"> • <i>“Not currently – but if things pick up - maybe”</i> • <i>“Limited”</i> • <i>“Not much because industry is full of owner-managers”</i>
Food processing	<ul style="list-style-type: none"> • <i>“Yes. Up to overseer/farm manger – but need right person. Esp. now at 69 and wanting to semi-retire”</i> • <i>“Limited – could start as ‘bagger’ then on to press operator (multi-skilling); Training in-house”</i>
Rural resellers	<ul style="list-style-type: none"> • <i>“Very good – endless opportunities”</i> • <i>“As our staff skills improve so will our opportunities”</i> • <i>“Over the past 10 years we have mainly promoted staff to sales roles either on farm sales or in-office sales””</i>
Potatoes	<ul style="list-style-type: none"> • <i>“Recognition of skills and establishment of training facilities for employers/employees; Incentives to put people on in industry. We are in competition with mining (attracts because of higher dollars and have career path)”</i> • <i>“Certainly within industry. Could advertise more ‘clean, green’ product. Particularly within marketing – need more population”.</i> • <i>“No promotion of potatoes at all; sadly lacking – all other industries are but we do not. Payment issues – still riddled with issues. Hard to get money from merchants. No ombudsman anymore”.</i>
Beef	<ul style="list-style-type: none"> • <i>“There are opportunities for that in any business and industry”</i> • <i>“Reasonable – stock hand/farm managers/feedlots etc”</i> • <i>“At farm level there are limited opportunities. Over whole</i>

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Sector	What are there opportunities for promotion, progression with your business or industry?
	<p><i>industry – many varied pathways are available”</i></p> <ul style="list-style-type: none"> • <i>“Feed efficiency off grass; promotion of our breed to Tablelands”</i> • <i>“In promotion – regional branding of food product is good. JB Swift doesn’t care about Tablelands. Almost need to go back to co-ops. Want some bright people to start it off... everything is so tight. Need economies of scale”.</i> • <i>“Not many – tread water”</i>
Dairy	<ul style="list-style-type: none"> • <i>“Limited due to low number of farmers in region”</i> • <i>“Security and stability (required in industry); Increase marketing and demand”</i> • <i>“Finding someone with right skills to do more farming so they can get percentage of proceeds (share farming?)”.</i> • <i>“Farm manager – dairy”</i> • <i>“In branding ‘Malanda’ on milk products – branding local product”</i> • <i>“Lots of opportunity to do more – esp. as industry and food tourism grows. Presently people not sticking together. They are doing their own thing – need to promote and regulate as an industry. Australian tourists ranked the Tablelands 10th as a destination above Cairns and the Daintree. No other area has as much to offer in terms of crops and products as Tablelands. A taxi driver in Melbourne, who had no idea of where the Tablelands were - thought it was all be ‘snakes and crocodiles”.</i>
Field crops	<ul style="list-style-type: none"> • <i>“Within business – opportunity to move from cleaning to sales etc”</i> • <i>“No”</i>
Horticulture	<ul style="list-style-type: none"> • <i>“People are dictated to by price – not by local produce”</i> • <i>“Minimal chance for advancement”</i> • <i>“Always looking for someone to come through the ranks for leading hand – so yes there is”</i> • <i>“Yes. More land going under vines soon”</i> • <i>“Yes. With AMIA (Aust. Mango Industry Assn)”</i> • <i>“Not much opportunity – just farm hands”</i> • <i>“Not here really – but with the bigger operators there is”</i> • <i>“Yes. Very limited due to viability though”</i> • <i>“Not here”</i> • <i>“In export opportunities, wholesaler/sale place”</i> • <i>“In growing better standard of product, chemical knowledge, market knowledge; little opportunity within business; R&D contained within levee – some opportunity within industry”</i> • <i>“If funding available; promote products – tee tree & benefits”</i> • <i>“Not so much here because we are small”</i> • <i>“Limited. Multi-skilling is important to keep staff happy. Business relies on good staff”</i> • <i>“If we got bigger, opportunity for second manager”</i> • <i>“Yes – I think so”</i>

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Sector	What are there opportunities for promotion, progression with your business or industry?
	<ul style="list-style-type: none"> • <i>“Promotion of staff in higher levels is available; Recognition of skill levels”</i> • <i>“Workers can advance to supervisors”</i> • <i>“Unlimited opportunities providing we can get the tourists/locals here”</i> • <i>“In more marketing of product; Employees can progress in industry if they have the right attitude; recognition of skills”</i> • <i>“Limited, but available for right person if they are keen/persevere”</i> • <i>“Yes”</i> • <i>“Not at this stage”</i> • <i>“Only new in industry so not sure – best to sell overseas not in Australia to make reasonable dollars – otherwise will go broke”</i>

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Availability of Labour & Retention

Table 25: When you recruit - how do you recruit (links to informing local jobseekers)?

Industry	Newspaper	Job services agency	Word-of-mouth	Internet	Professional placement agency	Repeat (same person/s employed each year)	Intermediary Agent (i.e. Labour hire)	Walk-ins
All Rural Industry	21	31	38	6	5	22	1	13
Horticulture	4	20	14	2	3	16		13
Field crops	2	4	2			1		
Beef	4	1	6	1		1		
Feedlot beef and pigs (intensive livestock)	1		2	1		1		
Potatoes	1	3	4			2	1	
Dairy	3	2	5			1		
Rural resellers	3		3	1				
Food processing	3	1	2	1	2			
Comments	<ul style="list-style-type: none"> • JSA - Used previously but not good results (dairy). • JSA - Don't select enough. Need more selection before they send out (dairy). • JSA – QITE know what we want and they are good at it (Horticulture). • JSA – they do OH&S course prior to coming on farm... then I do more (Horticulture). • JSA – just QITE that is all. 							

Infrastructure & services affecting Workforce

Table 26: If any - What Infrastructure and services are limiting you in attracting or retaining your workforce (for example lack of accommodation in area, transport around farms, lack of “Night-life”, Education, Health facilities etc)?

Sector	What Infrastructure and services are limiting you in attracting or retaining your workforce?
Horticulture	<ul style="list-style-type: none"> • <i>“People just not interested in working on farm as it is seasonal. Pumpkins – July-Nov; Mango Dec-Jan”</i> • <i>“Nightlife (or lack of) but that is good as they are here to work but they are only an hour away from Cairns on weekends”</i> • <i>“The fact of the matter in this survey is that people need to be willing to do an honest days work, not much skills is needed. Our line of work is hard but rewarding so our employee do not need many skills. This survey does not fill the need of a farmer. We need Government’s support to keep this Industry going – because farming is becoming a dying breed. I think people need to start eating bricks and mortar to appreciate what farmers are all about. Without farmers there will be no food... so start a survey for us please”</i> • <i>“Transport around farms”</i> • <i>“Mostly the accommodation and night life for the young people”</i> • <i>“Transport around farms is the biggest issue”</i> • <i>“If they don’t have a car have given some our Ute to get groceries etc in Town. Lack of internet facilities in Mareeba and it is very expensive... maybe some more in town”</i> • <i>“More night-life; more accommodation availability; hostel-style set up – food, accommodation, IT, fast-food”.</i> • <i>“Accommodation – cost – being skinned; Social activities after hours; transport; Lack of hospital, specialist services”</i> • <i>“Accommodation in area – Dimbulah; Transport – currently QITE pick up and drop off but now charging”.</i> • <i>“N/A – backpackers are here to work so no problem”</i> • <i>“Accommodation concerns within Mareeba during the season”</i> • <i>“Lack of night-life”</i> • <i>“Cheap accommodation for young singles – basic”</i> • <i>“Need national farming body with a vision to understand that our Primary Industry needs to form own chain stores to supply Aussie families with cheap, quality products and give everyone – farmers, truckies, consumers a fair go!”</i> • <i>“Accommodation, transport”</i>

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Sector	What Infrastructure and services are limiting you in attracting or retaining your workforce?
	<ul style="list-style-type: none"> • <i>“Boring lifestyle – not much to do after hours”</i> • <i>“Backpackers can be a bit grubby, but also nightlife as they leave for weekend then don’t come back. But we employ more mature age now”</i> • <i>“Transport, accommodation, closeness to entertainment”</i> • <i>“Continual work throughout the year; transport/accommodation in area”</i>
Field crops	<ul style="list-style-type: none"> • <i>“Came here for the job, ‘the carrot’ and the area. Lack of night life (restaurants, coffee shops)... ‘Locals are not regarded as essential to tourist operators – they are not offering incentives to locals i.e. reef trips’. Locals by word-of-mouth will spread the word. ‘Word-of-mouth’ is best form of advertising. ‘The Tableland is it’s own cappuccino with the coffee, the sugar, milk, the ingredients... but it is not presenting itself putting it all together’ It is not presenting the area like Margaret River, King Island, the Barossa, Hunter regions etc”</i> • <i>“I think there is enough accommodation etc. They get dropped off by QITE and they come here to work (go to Cairns for night life”</i> • <i>“Not a lot to do – here to work I guess. They like to work for 3 months then go off travelling – if some more shops are open on Sundays that would be good”</i>
Beef	<ul style="list-style-type: none"> • <i>“Education – lack of simple, basic agricultural education”</i> • <i>“Lack of transport; lack of entertainment for young workers”</i> • <i>“Health – specialist”</i> • <i>“Need a bit more promotion for attraction of professionals”</i> • <i>“Lack of night life – in keeping young people”</i> • <i>“Location/distance - Night life”</i>
Feedlot beef and pigs (intensive livestock)	<ul style="list-style-type: none"> • <i>“(Lack of accommodation area, transport around farms, lack of night life, Education, Health facilities) ... all of the above do contribute to ability to attract on Tablelands but all these combined don’t meet the beauty and attraction of area... and those who want to work here are here”</i>
Potatoes	<ul style="list-style-type: none"> • <i>“Lack of night life for backpackers”</i> • <i>“Location/distance - Night life”</i> • <i>“Backpackers will get out here as they need money. Locals (unemployed) are lazy and would need starving before they’ll be employed”</i> • <i>“Atherton is considered as a retirement centre and the young ones move on from here”</i>

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Dairy	<ul style="list-style-type: none"> • <i>“Transport, accommodation on Southern Tableland; Lack of night life”</i> • <i>“People who want to work in this industry, it doesn’t bother”</i> • <i>“Transport – distance to nearest decent town is 18km. Lack of entertainment for young people”</i> • <i>“Good backpacker accommodation; Lack of night life for those inclined. Good services, hospitals, schools. Community bought the dialysis machine (Rotary). Cannot expect people to drive down to Cairns. Need to keep our current hospitals”</i>
Rural resellers	<ul style="list-style-type: none"> • <i>“... Location, lack of entertainment”</i> • <i>I guess for the younger people it is the fact that we are a long way from home i.e. SE QLD/NSW and also the social side of life is tame unless they are interested in sport”</i>
Food processing	<ul style="list-style-type: none"> • <i>“Lack of specialty services; larger tourist accommodation; café latte places at night”</i>

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