

Report

**Greater Dandenong Regional
Food Strategy 2014: Report**
Consultation, Context &
Technical Analysis

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Glossary

ABS	Australian Bureau of Statistics
ANZSIC	Australia and New Zealand Standard Industry Classification
CMA	Catchment Management Authority
DAE	Deloitte Access Economics
DEEWR	Department of Education, Employment and Workplace Relations
ETS	Emission Trading Scheme
LGA	Local Government Area
MDB	Murray Darling Basin
MDBP	Murray Darling Basin Plan
NBN	National Broadband Network
NRM	Natural Resource Management
NSW	New South Wales
NVIRP	Northern Victorian Irrigation Renewal Project
SALM	Small Area Labour Market
SLA	Statistical Local Area
SDL	Sustainable Diversion Limit
SWOT	Strength, Weaknesses, Opportunities, Threats
VET	Vocational Educational Training

Scope & Introduction

The Food Innovation Alliance has been commissioned to produce the Greater Dandenong Regional Food Strategy and Action Plan, July 2014 – June 2019.

The City of Greater Dandenong requires this strategic document to articulate the local food economy, to describe the economic benefits of the local food value chain, and to recommend actions to grow and build the resilience and sustainability of the local food sector into the future.

Objectives

The central goal of the Greater Dandenong Regional Food Strategy and Action Plan, July 2014 – June 2019, is:

A local food strategy can advance the policy and practice of the local and regional food system development and expand both the opportunity for food processors (and subsequently their supply chains) and the affordability and access to healthy food for the local community.

- City of Greater Dandenong, Council Brief

A local food strategy can advance the policy and practice of the local and regional food system development and expand both the opportunity for food processors (and subsequently their supply chains) and the affordability and access to healthy food for the local community.

1. Consultation, Engagement & Co-Design

The Greater Dandenong Regional Food Strategy has been developed through consultation and co-design with a broad cross-section of business and community stakeholders from across the municipality.

Overview

Throughout the development of this Strategy the Project Team have engaged within the community on multiple levels to seek out existing activity, leadership, and innovation. Along with this consultation activity a design-led process has been utilised to integrate useful insights and generate innovative ideas for the future. This has been done in collaboration with many people working with and thinking about food in Greater Dandenong on a day-to-day basis.

Much of the material generated through this process has been published in an open source blog and shared with participants. This information then informs the development of a set of final ideas and actions that react to the key issues and opportunities identified.

In this way, the process of strategy and policy development empowers participation by embedding people within the process and sharing information with all stakeholders.

The Consultation, Engagement and Co-design process has been warmly embraced by all participants in the process, people have generously contributed their time and ideas to proactively shape the future of the Greater Dandenong regional food system.

This consultation and co-design clearly reinforces the importance of business and community leadership in bringing progressive visions for the food system to fruition.

The role of the City of Greater Dandenong has so far been to enable and lead this process as a catalyst to look at what is currently going on and to imagine what the future might look like.

Consultation through surveys, interviews, meetings and workshops has been used to gather important information about the existing strengths and weaknesses within the food system while also recording many of the ideas and visions held across the City for the future.

As an important step in the process, many of the people who contributed their ideas and insights during the consultation process then continued their involvement by joining together to co-design the recommended actions put forward within this document.

Co-design is a process that can be used to enable individuals to work together to test and refine creative ideas that solve problems or address identified issues.

The co-design process used for this Food Strategy allowed the people who know the Greater Dandenong regional food system best to actively generate, shape, and refine a set of ideas that can optimise existing activity or address gaps around food related economic, social, cultural and health activities with new programs and initiatives.

In this way the process of research, strategy and design is participatory and the outcomes encapsulate the shared creativity, vision and intelligence of the group.

This detailed approach to engaging and co-designing with stakeholders ensures the recommendations and action plan is fully informed by food leaders in Greater Dandenong.

The results of the process speak for themselves – together the stakeholders have co-designed a food strategy and action plan that enunciates progressive visions for economic and social innovation to take place in the production, processing, distribution, consumption and celebration of Dandenong's food.

It is envisioned that the Food Strategy and the accompanying Food Brand will inspire future policies and activities that define the City of Greater Dandenong as a leading 'city for food'.

By developing this strategy in this way, the aim has been to unlock a new way of thinking within the Dandenong food system, and encourage the establishment of new networks and alliances based on common ground, that can ensure ongoing collaboration for food growers, manufacturers, distributors, traders, local government and consumers into the future.

Through objective of the consultation & co-design is for the City of Greater Dandenong to act as an enabler of an interactive ideation and innovation process. In this way Council can establish a ongoing framework within which to play an ongoing role as advocate for and facilitator of the ideas put forward within this strategy.

This will be achieved via actionable projects, policies, activities and services.

The methodology: Co-design and Design-led Innovation

Co-design is a product, service, or organisation development process where design professionals empower, encourage, and guide users to develop solutions for themselves.

Co-design encourages the blurring of the role between user and designer, focusing on the process by which the design objective is created.

This process believes that by encouraging the trained designer and the end user to create solutions together, the final result will be more appropriate and acceptable to the context and the end user. It is generally recognised that the quality of design increases if the end user is engaged as a stakeholder and has their interests considered throughout the design process.

To enable successful co-design outcomes the strategy team utilised the Design-led Innovation process (Bucolo & Matthews, 2011b) for assist with the development of this Food Strategy.

The term 'Design-led Innovation' aims to show the value that design can bring about a different way of thinking, of framing situations and possibilities, doing things and tackling problems.

Design-led Innovation is a practical approach used to enable the development of solid prototypes (early examples that can be tested) of projects, services and potential policies.

Design-led Innovation (DLI) offers a framework, which can help to address large-scale cultural and transformative changes in business and society.

“DLI is the process of utilising design thinking in the holistic context of a businesses innovation strategy” (Behrendorff, Bucolo, & Miller, 2011)

“Developing strong business models and social enterprises that scale local food systems is a significant opportunity to address with a DLI framework” (Manzini, 2011 and Meroni, 2013).

The strategy team has used several DLI tools to enable actionable outcomes. These include a custom designed Business Model Canvas, Project Canvas, Ownership & Governance Canvas and Story-Telling Canvas.

Figure 1. Illustrates how the process can assist companies, communities and social enterprises to evolve through realising the strategic value that design brings to organisations and activities. Central to this process is the opportunity, or proposition, that all aspects of the organisation's business or activity can inform design. In DLI consultation is used to identify and understand the insights behind observations via a participatory user-centered approach.

Why utilise the design process to generate a Food Strategy?

Today design is much more than a tool to enable the creation of buildings, products and services. The design process itself provides powerful methodologies to systematically interpret broad considerations and to assist in deciphering the complexity that rests around modern problems so that it is possible to ideate new propositions or solutions that may not have been considered utilising traditional linear consulting processes.

The design process is particularly relevant when there is a need to integrate multiple layers of information across a complex system like a city or major organisation, so as to unlock new forms of value including product innovation, process efficiency or long-term growth.

Design-led consulting methodologies are non-linear. They look broadly, consider diverse user groups, prototype ideas, iterate, gain insights and visualise. Design-led processes do ultimately create tangible outputs such as reports and policy documents, however there is unique collateral value delivered 'on the journey' through the participatory nature of the process itself.

This process leads to detailed customer insights, speculative concepts, prototypes and propositions. User sentiment, possible scenarios and conceptual ideas are gathered, tested, refined and carried forward through the process.

In a policy design situation the design process is a powerful tool to understand and articulate the needs and opinions of those who will be affected by a policy. The process can 'step ahead' and visualise what success might look like and assess the necessary policy adjustments or associated programs necessary to bring about the desired set of conditions.

An additional benefit is that the process invites the involvement of representatives from key user groups, and as a consequence the resultant policy is the outcome of a participatory co-design process.

This goes far further than simply integrating feedback and opinion. The design process facilitates the situations necessary for key stakeholders to search for common ground and to adopt a long-term mindset so as to actively engage and to integrate ideas with those of others in co-designing a shared output.

Design-Led Methodology

1. **DATA:** Data collection, desktop research and analysis. Understanding the context.
2. **PLANNING:** Consultants workshoped and planned consultation based on initial research.
3. **INTERNAL MEETINGS:** Internal City of Greater Dandenong Council meetings and insights.
4. **EXTERNAL MEETINGS:** Meetings with diverse stakeholders and gained insights. Included, food leaders from Manufacturing, Community, Health and Retail sectors.
5. **COMMUNICATIONS:** Shared insights on Food Strategy blog to keep stakeholders in the loop.
6. **CONVIVAL EVENT:** Convivial Breakfast to bring together all food leaders engaged internally within council and with external food leaders.
7. **CO-DESIGN WORKSHOP:** Co-design workshop to develop prototypes and actions with food leaders.

8. **SHARE STRATEGY:** Share findings on Food Strategy blog and with major stakeholders
9. **OUTCOME IS AN ACTIONABLE STRATEGY:** Food Strategy comes alive and is actionable

DATA: Extensive data collection and quantitative analysis was undertaken to understand the broader context of the food system in the Greater Dandenong region. This built a strong rationale for the Food Strategy to be successfully implemented.

PLANNING: In-depth workshops were used to scope the development project, visioning future scenarios to assist with guiding the consultation and analyse data (both qualitative and quantitative) based on initial interviews with Council and research undertaken about local and global trends on food. Consultants planned the overall Food Strategy consultation through these workshops.

INTERNAL WORKSHOPS: Facilitated workshops were conducted with key members of the Economic Development, Health, Community Development, Planning, Environmental Health and Urban Design teams. Insights were gathered from key City Council team members.

EXTERNAL MEETINGS: Meetings are held with diverse stakeholders to gather insights from food leaders in the Manufacturing, Community, Health and Retail sectors. These insights are essential in designing the overall strategy, because the people on the ground who work in food related business and projects have a strong sense of what needs to be done to develop a solid food strategy for the city. Insights give the team clues to assist with developing disruptive and innovation actions and projects.

COMMUNICATIONS: Throughout the consultation ongoing communication occurs with stakeholders engaged through a project blog. Communications also occur through ongoing meetings with stakeholders, in particular the Convivial Breakfast and Co-design Workshop offer opportunities for communications and networking to occur amongst food leaders.

CONVIVIAL EVENT: *“Convivial – To be fond of feasting, drinking, and good company”.*

The ‘Convivial Breakfast’ was used as a way to bring diverse business, community and government leaders together at the Dandenong Market. The event allowed the strategy team to listen to the thoughts and opinions of food leaders while celebrating the essence of what food means to many people – good company, sustenance and enjoyment. The breakfast was a beautiful morning to enjoy the strengths of food in Dandenong, celebrate local leaders, connect people, share the vision for the food strategy and invite people to participate in the strategy.

CO-DESIGN WORKSHOP: The Co-design workshop was used as an opportunity to develop actionable ideas for new projects and initiatives with food leaders. The aim of co-design was, in this instance, to develop solutions with users and leaders who understand the food system. A diverse array of food leaders attended the workshop from manufacturing, retail, health, community and government sectors. The outcomes from the workshop include the development of progressive and economically sound food projects for the city over the next 5 years, such as the Greater Dandenong Food Consortium, Food Innovation Hub, Micro Business Incubator and ‘Think outside the Shop’ strategy.

Consultation & Insight Generation

Through extensive face to face interviews, meetings and workshops the Food Strategy team listened to many voices from across the Greater Dandenong food system – these represented diverse perspectives from Agriculture, Industry, Community, Health, Education & Government.

Food Leader Consultation.

Individuals from organisations identified as ‘food leaders’ across the Food Production & Processing, Retail and Government sectors were engaged and interviewed to capture ‘Food Leader Insights’ - a range of insights and visions for the future of Greater Dandenong’s food system. This provides a snapshot of priorities, issues and expectations for the Strategy.

Food Leader Insights

- 1. Robyn Coslovich** – Dandenong Neighbourhood House
“Community kitchens enable us to develop a place for people to learn new skills, cook and connect. A kitchen like this helps people who have limited budgets, no community connections and in some cases little English language and cultural understanding.”
- 2. Katrina Stevenson** – Monash Health
“It would be great to develop and foster more integration between community gardens, community kitchens, and increased accessibility to affordable, and quality food produce.”
- 3. Rachel Carey** – Food Alliance
“A sustainable, fair and healthy food system for Dandenong that connects food producers in surrounding areas to local businesses and residents.”
- 4. Jodi Clarke** – Cultivating Community
“Where healthy, fresh, and affordable food is accessible to all and people are connected through growing food locally within the community.”
- 5. Trish Keilty** – Avocare
“I believe in the simple philosophy of “help where help is wanted”. This philosophy sums up Avocare in a nutshell; we are providing workplace-training opportunities for hundreds of people in the Greater Dandenong region. Avocare has achieved great results for this community: 45-55% of people that have been through our training programs have entered into or returned to work. I also have future visions for developing a supermarket for the elderly in Dandenong, setting up a best practice worm farming facility, continue to provide diverse training opportunities such as with the South East Food Hub and inspire the Avocare model Nationally.”
- 6. Peter Meek** CEO of Chobani Yogurt
“I believe a Food Strategy can enable us to be a part of a wider food innovation network, which will connect us with other food organisations and people to share knowledge and expertise. We are happy to be in Greater Dandenong, located on the edge of Gippsland Farmland - the “gateway of Gippsland” - so fresh milk is easily delivered to our factory.”
- 7. Leanne Fitzgibbon** from Birubi Foods
“Greater Dandenong has the ability to have a very strong multi-cultural food identity

providing great food variety that taps into the exciting flavours and food styles represented in the area. Greater Dandenong has a long history in all aspects of food, in particular as entrepreneurs in manufacturing and distribution where there are opportunities to nurture further development of these capabilities.”

8. Peter Steedman – Tip Top

“I want to see Tip Top maintain employment for the community of Greater Dandenong as a first class manufacturing facility.”

9. Gary Castricum – Castricum Master Meats

“Greater Dandenong is the gateway to Gippsland, lets make the most of this perfect geography and become a leading food city.”

10. Sam Brown – Waterwheel

“Greater Dandenong is uniquely placed to become a Food manufacturing centre, and a centre of excellence for food manufacturing.”

11. Nitin Patrichot – Green Coriander Cafe

“I’d love to see public spaces such as the new municipal library square activated by food focused push carts or small multi-cultural stalls with food offerings – maybe market style – once a month, or one night a week.”

12. Andrew Lipiszko – Polish Rye Crust Bakery

“Greater Dandenong diversity. It is a city for opportunity and the fruits of hard work.”

13. Afghan Rahimi

“My vision is to welcome everyone the City of Greater Dandenong. Use marketing, only deal with the local economy, provide advice and share with other businesses and quality food provision – making standards across all business of freshness, of hygiene, of quality.”

14. Keah from Restaurant ‘Lalumba’

“My dream is for business to grow – to employ someone, go back to study as well. Will not leave the business, it is the help to the community! I am hoping the future will give this.”

15. Karl – My Cambodia

“Dandenong is multicultural, convenience and very strong community. Everyone tends to know each other – customers sometimes pay each others bills.”

16. Rob – Ginger Jones

“I want to see Greater Dandenong accepted as a food destination. On the whole lift this means listing the identity and other people’s awareness of Greater Dandenong and what’s on offer.”

17. Bamyan Fresh Food

“Health is 100% important to our business as we grow – very important fresh, good quality, quality food.”

2. Community & Health Sector Consultation

The consultation process gathered data and insights from community-based, food related programs, groups and organisations with the objective of establishing how programs, projects and groups were working currently, how these could be integrated further with economic development in the city and scale their potential.

Community & Health engagement outcomes form an overall snapshot of the Dandenong food system with a focus on the aspects contributing to health and wellbeing. This is utilised to develop relevant aspects of the co-design inputs and has informed multiple layers of the resultant Food Strategy recommendations.

This process had a parallel outcome – developing clearly articulated networks of community practitioners and organisations that were engaged and active within the realms of food, health and community support services so that outcomes of the strategy already have local ‘buy in’.

The questions centred around finding out about how the current work being done in Community & Health programs and related projects can be united with other food related projects and the wider food economy of Dandenong. It is clear that healthy food and healthy people play a fundamental role in the development of a city whose economy will thrive into the future.

Upon conclusion of the engagement process the project team distilled this information to draw out key understandings that could inform the co-design process and broader Food Strategy. These insights formed the foundation for the design concepts for programs, outputs, policy changes and cultural change within City programs to incorporate the factor of health into wider economic and planning strategies.

Community & Health Group:

1. City of Greater Dandenong
2. Department of State Development Business and Innovation
3. Mapcap Café Fountain Gate
4. Avocare Ltd
5. Southern Migrant and Refugee Centre
6. Australian Food Sovereignty Alliance
7. Brand New Day
8. Pop-up Park
9. Dandenong Neighbourhood House
10. Dandenong Market
11. Monash Health
12. South East Food Hub
13. Noble Park Community Garden
14. The Social Studio
15. 3000 Acres
16. Urban Commons
17. Food Alliance

Community & Health Insights

The key overall insights gained from the consultation process were:

- Health food access or the consideration of community health factors and how they relate to food could be better integrated across the Health, Economic Development and Planning units within the City of Greater Dandenong offices.
- Internal City of Dandenong team members recognise the connections across silos yet need new protocols or methods to empower them to enhance connectivity between and across the Health, Economic Development and Planning Units.
- It is increasingly clear that there are significant community health and placemaking and place branding benefits to enlightened economic development and planning policy favouring the enablement of community focused food business initiatives and social enterprises.
- Planning policies and teams need to more proactively engage with, address and enhance future access to affordable, fresh, accessible healthy food.
- There is growing national and international value being placed on community health outcomes from food related projects by state, federal and local councils. This value needs to be leveraged further through pilot programs and a willingness to test and prototype new ideas.
- Social Enterprise as an accepted business and health creating strategy is growing, however a deeper understanding of health projects having an economic output needs to be further explored.
- The manufacturing and processing sector is interested in partnering with the community and health sector, however there do not seem to be enough clearly established avenues for enabling these relationships to form.
- The relevance of food production, culture and consumption as an enabler of health in the city is not yet seen as a major competitive advantage for food focused urban strategy. There is a strong focus on innovative manufacturing and food retailing as marketable leaders in food, however urban agriculturalists, local food distributors and healthy food programs are not yet seen as a 'leaders'. This reality seems set to shift with the growing focus on relocalisation within middle-class and aspirational consumer groups.
- Solid business, community and council partnerships are required to enable more sophisticated 'business models' for the establishment, growth and organisational sustainability of many community based food programs.
- An overall 'food brand' for the City of Greater Dandenong needs to be developed that incorporates healthy and local food programs and projects. This has potential to become a national and international flagship if implemented well.
- There is strong leadership with the City of Greater Dandenong Council, community groups and related organisations to implement innovative programs which could improve the food and place branding of the city, however to enable this community and industry food leaders need to collaborate and be empowered by the City through new Council initiated policy and programs.
- Planning laws and guidelines can often reduce the capacity of community food initiatives to establish and succeed. More work is needed to test and refine planning guidelines and policies to facilitate greater urban and peri-urban agriculture and to create broader, more flexible opportunities for food based interventions, activations and production initiatives within the urban context.
- New and innovative funding and investment models need to be explored to increase the likelihood of social innovation and entrepreneurship within the community food sector.

Community & Health Ideas

A range of relevant ideas were gathered through the consultation process:

- Establish a system or program to procure more healthy local food within Council and encourage Council staff to access and endorse healthy local food.
- Consistently brand the current food projects and programs being implemented by the City of Grater Dandenong Health team and implement a process to evaluate their outcomes in economic development terms.
- Develop a feasibility study for the Social Enterprise Zone within the City
- Incubate several healthy food projects under the banner of City Council
- Continue to support the South East Food Hub Project in partnership with Avocare.
- Continue to grow food related health programs at the Dandenong Market, building on the success of programs such as 'The Kitchen'.
- Enable community kitchen program for the Dandenong Neighbourhood House
- Enable Avocare to implement best practice organic waste recycling facility in partnership with Cultivating Community.
- Tie in the aims and objectives of local and healthy food strategy into state and national plans i.e. Food Alliance, National Food Plan and the Australian Food Sovereignty Alliance Local Food Act
- Develop a local Food Policy (similar to that of Bristol or even Melbourne) to enable the issue of food to be at the forefront of decision makers aims for the city.

3. Food Production & Processing Consultation

Stakeholder consultation was undertaken with a wide range of food producers and processors throughout the Greater Dandenong area. The following sub-sectors were covered:

- Dairy & Meat
- Cereals
- Bread and baked goods
- Biscuits, crackers and snacks
- Heath Products

Consultation also included Industry bodies and government departments:

- City of Greater Dandenong
- Department of State Development, Business and Innovation (DSDBI)
- Regional Development Australia (RDA)
- Gippsland Agrifood

A survey instrument was drawn up to provide structure to the interviews. Broadly, the topics covered were as follows:

- Pertinent locational factors contributing to doing business in Greater Dandenong
- Greater Dandenong's position within its regional context, especially in the context of raw food inputs being sourced from Gippsland and surrounding regions
- Staff and training opportunities and challenges
- The role of innovation and design integration
- The role of City of Greater Dandenong Council in enabling enhanced productivity, and relevant Council programs
- The role of supply chain linkages, and the importance of sourcing quality food inputs
- The vision for food in the City of Greater Dandenong

Virtually all food manufacturers and stakeholders that were interviewed value the prospect of improved business linkages, enhanced access to local business capabilities and customer insights information.

Production & Processing Group:

- | | |
|---------------------------|---|
| 1. Agribusiness Gippsland | 13. Birubi Foods |
| 2. Supreme Quality Foods | 14. Enterprise Connect |
| 3. Chobani Yogurt | 15. Tasty Trucks |
| 4. Castricum Master Meats | 16. M+K Lawyers Food Division |
| 5. Tip Top | 17. Pitcher Partners – Dandenong office |
| 6. Jurgens Swiss Bread | |
| 7. Water Wheel | |
| 8. Popina Foods | |
| 9. Cadbury Kraft Foods | |
| 10. Noisette Bakery | |
| 11. Muffin Box | |
| 12. Super Pop Group | |

Food Producer and Processor Insights

Popina

Interviewed: Arnold May, CEO

In 2010, re-located the Popina business to Greater Dandenong area from Moorabbin. Previously, was situated in 4 separate factories in Moorabbin, and chose to relocate to the Greater Dandenong area to take advantage of affordable land prices, and the proximity to freight and logistics, as well as to other complementary businesses.

Availability of appropriate skilled labour is a factor, as the business is growing, and innovation is a key driver of this growth.

Popina has jointly developed the “BarleyMAX” recipe through a strategic partnership with CSIRO, which caters to an ageing demographic.

The company is engaged in new product development on an ongoing basis, and values innovation within the company, and also within the food industry. The company is engaged in export activities, and values the resources that have enabled this element of the business to prosper.

Gippsland Agrifoods

Interviewed: Paul Ford, Chairman

Gippsland Agrifood has a focus on regional development, and enabling the production of raw food inputs in the Gippsland area.

The Gippsland Food Plan was recently published, with a focus on being aligned with Australia’s National Food Plan, bringing a focus on harnessing regional strengths towards enhanced health outcomes and efficiencies within the supply chain.

Gippsland Agrifood acknowledges that there are significant external forces, such as an expected future rise in the middle class throughout Asia, which will significantly impact the demand for food grown in Australia, due to the high quality of Australian produce.

As such, improved linkages, enhanced freight and logistics infrastructure, and support for organisations engaged in export are all acknowledged as being significant factors within the regional food economy.

The organisation sees the potential for the continuation of the historical link between the food growing regions of Gippsland, and the food manufacturing and processing region of Greater Dandenong.

Chobani Yogurt

Interviewed: Peter Meek, Managing Director

The Australian subsidiary of this American company has undergone rapid growth since entering the Australian market in 2011, with significant growth in its employee base as well as product range.

Chobani sources many raw food inputs from the Gippsland area, and supplies its products to the major supermarket operators. As such, the company is focused on efficient supply chain management, and sees the potential for the City of Greater Dandenong – and the many food manufacturers and processors located there – to play a role in ongoing improvements in this area.

The company also exports a number of products to Asian markets, and has used innovation and foresight to anticipate and respond to the subtleties and nuances of customers in Asian markets.

Innovation is embedded within the culture at Chobani, whereby employees are encouraged to take part in the innovation process, irrespective of their role within the company. Appropriate skills, ready access to training and ongoing professional development was all acknowledged as key success factors in building and maintaining a strong organisational culture around high quality food.

Castricum Master Meats

Interviewed: Gary Castricum, CEO

Castricum Meats has been based in the Greater Dandenong area for approximately 50 years. With a deep awareness of the history of Greater Dandenong, a number of issues were acknowledged as being part of the “fabric” of the area. In particular,

- The role of Greater Dandenong as a destination for people seeking employment, and
- The role of the Greater Dandenong area as a market place for food.

As more businesses have come to be located in the Greater Dandenong area, the manufacturing and industrial focus of the area has provided opportunities for those seeking work.

The food industry is well positioned to participate in this employment story, and Castricum has a strong organisational culture of employee participation. However in recent times, a number of challenges in the local workforce have resulted in some difficulties sourcing new employees to undertake apprenticeships.

Strengths of the local area are seen as being well priced land, the recent upgrade to the East Link Freeway, and good road and rail connectivity to airports and shipping ports.

Jurgen’s Swiss Bread

Interviewed: Michael Thomas, Business Development Manager

The Jurgen’s Swiss Bread Company relocated to the Greater Dandenong area in 2010. Factors driving this move were the need for a larger facility, and benefits of freeway and road linkages.

Being a wholesale business, supply chain management is a focus for the company, and relationships with key suppliers are acknowledged as being a key driver for growth.

Opportunities were identified for enhanced business-to-business linkages in the area, as a means to unleash the potential for partnerships to drive greater collaboration.

New product development was acknowledged as an ongoing part of the business’s operations, with innovation and product testing being key components of success.

Employment and recruitment processes were seen as adequate, but room for improvement, with employment agencies not always having access to current information pertaining to relevant and required skills and training certifications in the baked goods sector.

Opportunities were identified for increase access to information, especially pertaining to opportunities for collaborative partnerships, contract manufacturing, tendering and business development, and enhanced business networks.

Terra Harvest

Interviewed: Greg Ince, Quality Manager

Terra Harvest has been operating in the Greater Dandenong area since 2001, when it moved into a custom-built facility.

The company has large range of biscuits and crackers, which are supplied in significant volumes throughout national and international markets.

Raw inputs are sourced domestically and internationally, resulting in a strong focus on maintaining high quality across international standards.

Innovation is an ongoing part of operations, with new flavour development and new product development having been executed successfully numerous times over the years, in both Australian and international markets.

A high awareness of recent trends in nutrition and health has proven to drive demand for the company’s range of rice cracker products.

With significant export activities, the Greater Dandenong's locational attributes were acknowledged as a key strength in relation to accessibility to road, rail and shipping ports.

Noisette Bakery

Interviewed: Gary Geremia, CEO

Noisette is active as both a retailer and wholesaler of high quality baked goods. The company located its operations in the Greater Dandenong area in approximately 2012, due to a need for a larger facility resulting from rapid business expansion, and to take advantage of transport links.

In 2013, the company won the City of Greater Dandenong Chamber of Commerce "Service Excellence Award", and was also a nominee for the "Employment, Manufacturing and Premier Regional Business" awards.

Noisette has experienced significant growth in its workforce, and actively encourages equal opportunity employment practices. Opportunities to streamline the employment and recruitment processes were identified, by enhancing the provision of information for required food handling standards across different food sub-sectors.

With customers throughout the Melbourne metropolitan area and some regional areas, transportation linkages were acknowledged as a key strength of the Greater Dandenong area.

New product development is an ongoing activity, with new product tasting and feedback embedded within the organisational culture. The company has formulated unique operational methods through a focus on innovation and customer focus.

Birubi

Interviewed: Leanne Fitzpatrick, GM

Birubi produce a range of pastries, baked goods and other food products, and have been operating in the Greater Dandenong area for approximately 10 years.

With wide ranging experience in the food industry, the management team at Birubi brings a focus on quality, new product development and strategic business relationships to the organisation.

Opportunities to enhance the sector in the local Greater Dandenong area were identified, including strategic partnerships with research organisations, and enhanced provision of information and capabilities of food manufacturers and processors within the area.

Since many food organisations conduct a large degree of on the job training, these standards must be understood and communicated across the industry.

Opportunities for improvement to the existing training and certification frameworks were identified, especially in relation to the HASP and ISO standards, as well as food handling and safety. Opportunities were also identified to increase mentorship, guidance and support for local businesses seeking to expand their operations and develop new food products.

A strong focus on trends in health and nutrition guides the innovation process for new product development and product testing.

Engagement with the City of Greater Dandenong 'South East Business Network' (SEBN) and South East Manufacturing Alliance was noted as having a positive impact on local businesses, as is the presence of the Dandenong Market.

Water Wheel

Interviewed: Sam Brown, Operations Manager

The Water Wheel Company, producing a range of biscuits and crackers, has been located in the Greater Dandenong area for approximately 15 years. The proximity to road and freeway linkages such as the Monash Freeway and Citi-Link, as well as major distribution centres for large retailers are among the locational benefits of being situated in Greater Dandenong.

A high priority is placed on appropriate training, skills and qualifications for the workforce, which has expanded in number over previous years. Ongoing professional development opportunities are provided by the company, with a focus on fostering a culture of quality.

The company that is innovation as a key success factor, and has produced a number of new food products in recent years. The potential to leverage existing business networks towards enhancing local capabilities was acknowledged as a key opportunity for the area, as is the potential to provide enhanced resources for companies seeking to expand export activities.

The company has a significant level of community engagement, with Water Wheel providing food to “Food Bank” as well as to local schools in the Greater Dandenong area.

4. Retailer Consultation

A range of food retailers across the City of Greater Dandenong were engaged in the consultation process with the goals of gathering insights about the health of the food retail environment and generating insights that would inform projects and initiatives to stimulate retail activity and overall food culture within the City.

As part of the retail consultation process the Food Strategy team carried out in-depth retailer interviews with Greater Dandenong based restaurants, grocery stores and food related businesses to provide a range of qualitative data and insights. The objective of this was to find out how businesses were working currently, what the existing food economy looked like for each business and what would be of most support to these businesses to grow locally, sustainably and healthily in the future. From this the Team developed a series of design concepts for food related business within Greater Dandenong to feed into the co-design process.

The engagement outcomes formed an overall snapshot of the Greater Dandenong retail food system. This was then utilised to develop the co-design inputs that inform multiple aspects of the Food Strategy recommendations. This process had a parallel objective – to develop a network of retailers who were engaged and active within the project. This is seen as fundamentally important to making the strategy a locally owned ‘reality’.

The Team interviewed 12 retailers from diverse backgrounds including Afghan, Sudanese, Indian, Polish, Mauritian, Middle Eastern, Burmese and Cambodian. A number of other traders were briefly interviewed.

The insights gathered reflect a deep affection for Greater Dandenong as a place and the highlight the value of life and business in Greater Dandenong. The level of positivity was both inspiring and a testament to the areas rich multicultural heart of the community.

The questions centred around finding out about existing business and having a discussion about how the Food Strategy could benefit their business, and other businesses within the community.

The process mapped the existing way of working, examined produce supply chain and participation in the local economy and the community. Consultation explored why businesses chose to locate in Greater Dandenong and what were the greatest difficulties in doing business in the City.

Insights were gathered on the importance of health as part of the food offering and ideas were captured for how council and local businesses could better collaborate to develop the local food economy and support a sustainable healthy community.

Upon conclusion of the engagement process the project team distilled this information to draw out key understandings that could inform the co-design process and larger Food Strategy. These insights formed the foundation for the design concepts for programs, outputs, policy changes and street activation.

The Dandenong retail community represents a rich melting pot of culture, ideas, passion, ambition and community. This is an incredible strength and existing network to build and implement an effective Food Strategy. Each retailer was supportive of this strategy and very quickly saw the value in a locally based, resilient, healthy food economy – both for their business’s success and for community wellbeing.

The key goals of the retail consultation were:

- To gather food usage and supply information
- To understand whether 'healthy food' played a part in the retail proposition or was a priority
- To establish the capability to react to changes within the business ecosystem
- To gather new ideas and examining ways to stimulate business growth
- To gauge the level of interest in concepts such as vertical integration, street activation and business extension through external activities
- To gauge the general level of satisfaction and listen to issues concerning running a business in Greater Dandenong

Retail & Consumer Group:

- | | |
|-------------------------------|------------------------------------|
| 1. Dandenong Market | 16. Best Way Supermarket |
| 2. My Cambodia Restaurant | 17. Gold Leaf Restaurant |
| 3. Green Coriander Cafe | 18. Dandenong Pavilion |
| 4. Afghan Rahimi Restaurant | 19. Gibe African Restaurant |
| 5. Afghan Pamir Restaurant | 20. African Village Kitchen – Café |
| 6. Ginger Jones Café | 21. The Dandenong Club |
| 7. A1 Bakery | |
| 8. Polish Rye Crust Bakery | |
| 9. Free Burma Café | |
| 10. Bamyang Shop | |
| 11. C J Spices | |
| 12. Lalumba Restaurant & Café | |
| 13. Gulistan Supermarket | |
| 14. Rob's British Butchery | |
| 15. Klushka Polish Restaurant | |

Retailer Insights

The key overall insights gained from this process were:

- All of these traders wanted to develop their business and are open to new ways that this can happen. Each was very passionate and very proud and excited about the Food Strategy.
- Food businesses are generally located in Greater Dandenong due to migrant community ties.
- All of these businesses considered health important – how much this was true of their food varied. Most businesses associated health with hygiene and freshness.
- There was a disconnection in some cases between the value they put on health and the actual health value of the food being sold.
- Businesses were generally very supportive of the local economy and wanted to buy locally first – and most traders were doing this by default. Grocery stores were an exception, which were primarily using importation wholesalers - however a number of these wholesalers were based within Dandenong.
- Produce was bought according to both ease of delivery/pick up/shopping and price of produce.
- The biggest success stories had a direct correlation with well-designed, brand aware or culturally specific decor, with a rich development of atmosphere (music, scent and lighting) within the eating experience.
- There was a common feeling that the lack of appropriate parking times suited to specific business activity could impact business (15 minute for grocers, 2 hour and night time for cafés and restaurants).
- There were three common types of food retailers:
 - **Destination** – Those retailers that people came from many other suburbs to visit, a

- special occasion, functions and many return customers. Not specific to migrant community.
- **Cultural** – Restaurants or grocers where specific migrant communities can get produce or dishes that are from their homelands. Sometimes visited by other communities however not as a majority.
 - **Community** – Restaurants that are running on a shoestring and rely solely on family and friends visiting from the surrounding suburbs. These are most likely to suffer inconsistent business.
- There were many existing strengths in the local food economy that could be utilised and drawn upon to inform the Food Strategy actions. There were very exciting examples of local resilience and informal trade based communities. This confirmed for the Project Team that innovation mixed with locally customised responses could be most effective in delivering desired outcomes from the Food Strategy.

Retailer Ideas

A range of relevant ideas were gathered through the consultation process:

- Many traders within the community had also thought of ideas that are part of the Food Strategy – however the access and support for this to become a reality was their current difficulty. For instance – the start-up capital for a Food Truck or Food Cart.
- Nearly all traders were heavily supportive of a significant annual food event or festival that brought more people to Greater Dandenong.
- All retailers were supportive of the need for a unified and consistently branded web platform that showcased the multiple offerings within the retail sector and embraced social media.
- Ginger Jones, Polish Rye Bakery, Green Coriander, Afghan Rahimi, My Cambodia and CJ Spices all saw great value in being able to utilise the street or mobile vending to sell product. They differed in which way was best to do this.
- A majority of the food traders saw value in a Greater Dandenong based brand that developed a branded product line for the area that could be distributed in stores throughout Melbourne.
- Most businesses felt access to mentoring services was already available.
- A number of businesses saw value in a buy local campaign to support local supply and development. Many felt they already did this for most of their supplies.

5. Public Consultation

Public consultation 'in the street' used pop-up activation and a custom designed survey to gather opinion and listen to what's important to people across the City.

The Food Strategy Team hit the street and Dandenong Market to gather community opinion and data to inform the development of the food strategy. The insights generated are being used to inform the production of the Food Strategy for the municipality.

The Project Team held a pop-up community consultation in the Dandenong Market – a major food hub located in the commercial centre of Dandenong. Over the course of a day, facilitators spoke with 60 shoppers on their food practices and experience, access to fresh food, healthy eating, and ideas on how the City of Greater Dandenong might grow as a major food destination.

As Dandenong is the second most culturally diverse municipality in Australia, language was a barrier to some people. The facilitators made sure to approach and engage a wide variety of people and help them understand and move through the 21 questions survey.

Demographic Snapshot

- 65% - female
- 26.7% - male
- 1.7% - DSG
- 6.6% - did not to disclose gender.

- Participants were mostly aged between 40 and 60 years of age. 30% were over the age of 60. There was a very small proportion of shoppers (8.4%) between the age of 26 and 40.
- 83% of participants had travelled less than 30km to reach the Dandenong Markets. 18.3% had to travel less than 5km, while 8.3% had travelled over 50km to get there.
- Participants came from as far as the Mornington Peninsula and South Gippsland, Mount Dandenong and Berwick, as well as St. Kilda and Camberwell.
- People were visiting Greater Dandenong mostly because: it is good value for money (55%), they like the variety (43.3%), and because fresh food is important to them (40%).
- Most participants shop for food two or three times a week (38.7%) or once a fortnight (37.1%).

Public Insights

Eating Habits

- 35% of participants said that the food they eat is 'really healthy.' 28.3% of people described their food as 'a little unhealthy.'
- 46% of participants said that the food they eat is mostly vegetables.
- Participants said that their food mostly came from: their local fruit and vegetable store (71.7%), a Coles or Safeway (63.3%), and an IGA or independent supermarket (63.3%).
- 28.3% said that most of their food came from the Dandenong Market. 38.3% said that it came from a farmer's market.

- 15% of participants said they grow their own food.
- Most participants said that they rarely eat out in Greater Dandenong. 13.3% said they would eat out only on a special occasion, and 31.7% said they never eat out in the area.
- 11.7% of participants said they eat fast food a few times a week. 28.3% of participants eat fast food every couple of weeks. 36.7% said they eat fast food hardly ever or never.
- Those who buy fast food say that they mostly do it because: it's what they feel like (33.3%) and they don't have time to cook (25%). Price and family size were not major reasons to buy fast food.
- 60% of participants said they prepare their lunch at home and bring it to work.
- 5% of participants said they mostly eat lunch at a local café.

Access to Food

- A majority of participants (53.3%) said that it was very easy to find fresh food in Dandenong – scoring it 10/10.
- 65% of participants said that access and availability of fresh food was very important to them – scoring it 10/10/
- 38.3% of participants said that it would be easier for them to access fresh food if the Market were open more frequently.
- Participants did not see price as being a barrier to accessing fresh food.

Food Culture

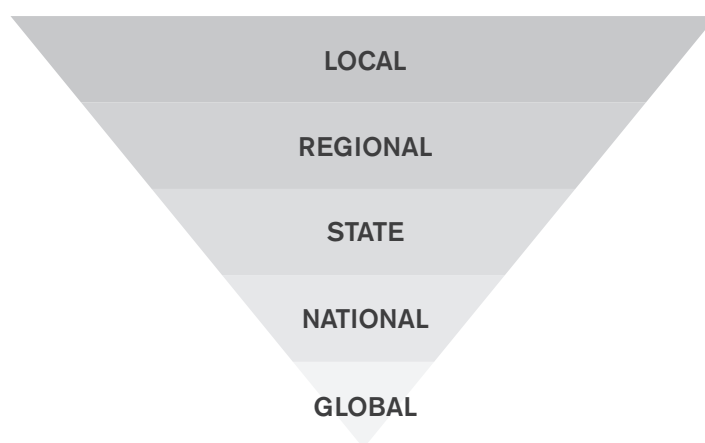
- 38.3% of participants strongly agree with the statement 'Greater Dandenong is a destination for diverse multicultural food experiences.'
- For Greater Dandenong's food culture to be more exciting, participants recommended: more food festivals and major events (36.7%), more café seating on footpaths (30%), and a website about what's on offer (26.7%).
- Participants also thought that food tours (20%) and community gardens (15%) would make food culture in Greater Dandenong more exciting.
- 55% of participants said they would like to see more programs for kids that are about healthy food choices.
- 38.3% of participants said that they would like to attend a multicultural food festival.
- 45% of participants said that the City of Greater Dandenong should promote food culture and access to healthy food through events and festivals.
- 30% said that the City of Greater Dandenong should promote food culture and access to healthy food through better food in schools.

6. Strategic Context & Literature Review

The City of Greater Dandenong's food sector operates within the context of an inter-connected food system, with influences acting on the City of Greater Dandenong at a "macro" level (such as globalisation, the historically high value of the Australian dollar, etc), right through to the "micro" level (such as the preponderance of socially disadvantaged residents within City of Greater Dandenong requiring assistance to access basic meals).

This section sets out a number of key forces relevant to the City of Greater Dandenong food sector, at the Global, National, State, Regional and Local levels.

Figure 1. Forces acting upon the City of Greater Dandenong food sector



Source: Food Innovation Alliance (2014)

The City of Greater Dandenong's Regional Food Strategy seeks to propose local initiatives that are responsive to these influences, and relevant to this inter-connected food system.

7. Global Context

A dramatic growth in the demand for food from Asia (particularly from China) is expected over the next decade. This has been widely reported in documents such as Australia in the Asian Century White Paper and The National Food Plan, and will be driven by two key trends:

- Population growth in those countries
- The rise of the middle class within the populations of those countries

The world's population is projected to reach around 8 billion by 2025 with most of the growth coming from Asia, and Australia is uniquely positioned to benefit from this growth, as a producer of high quality food, and endowed with rich natural resources.

Australia in the Asian Century – White Paper

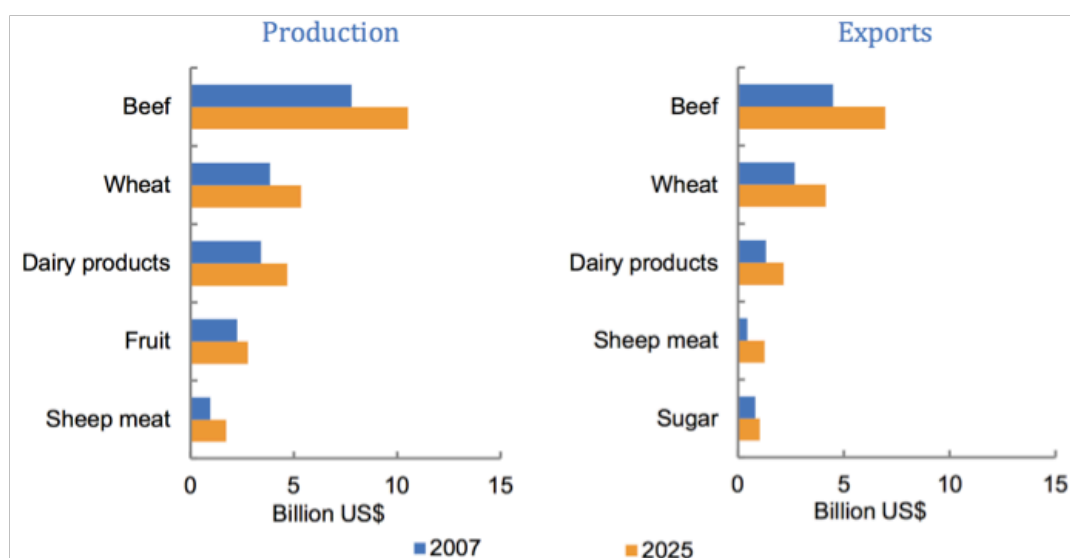
Key strategic documents produced by the Australian Government addressing these global food trends are

- Australia in the Asian Century – White Paper
- What China Wants: Analysis of China's Food Demand to 2050

These strategic documents help to shape the specific nature of the opportunities in terms of specific food categories expected to experience increased demand in the next decade, and provide the context for a National policy approach to food.

Specifically, a significant rise in Australian food exports is forecast, to meet the significant rise in demand for food in the Asian region.

Figure 2. Outlook for Australian agrifood production and exports, 2007 - 2025



Source: Australia in the Asian Century – White Paper (2013).

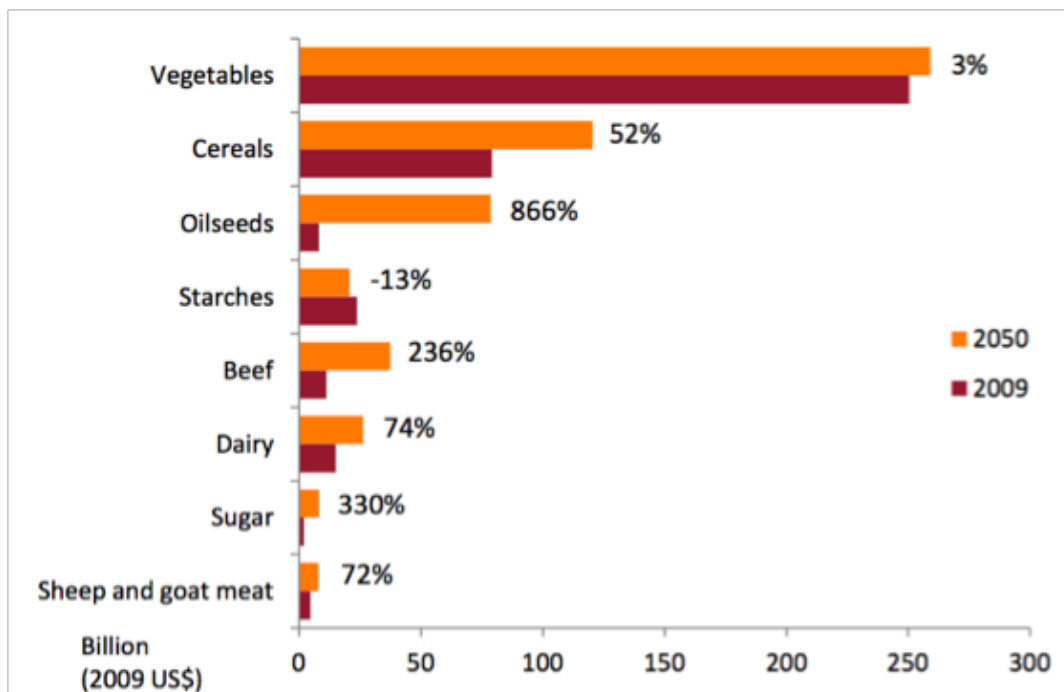
What China Wants: Analysis of China's Food Demand to 2050

This report, produced by Australian Government Department of Agriculture, Fisheries and Forestry, addresses a number of large-scale trends occurring within China, and expected to continue over the coming decades:

- Continued population growth
- Rising income levels throughout China across three main income categories:
 - Urban high,
 - Urban medium,
 - Rural
- Continued increase in the rate of urbanisation (ie, Rural – urban migration)
- Changes in food consumption trends, whereby rising income levels result in an increase consumption of food. (Ie, Shifting food consumption patterns for the urbanised population within China, towards supermarkets and hypermarkets.)
- Food production and associated constraints within China

The centrepiece of the report is a series of forecasts, produced by an econometric model with the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES), which estimates specific food categories expected to experience increased demand within China over the coming decades to 2050.

Figure 3. Consumption of selected agricultural commodities, China



Source: ABARES model output, "What China Wants: Analysis of China's Food Demand to 2050" (2014)

The following food groups are expected to experience increased demand in China over the next 30 years (to 2050):

- Beef
- Meat, including beef, sheep and goat
- Dairy, including eggs
- Eggs
- Fruit, including berries
- Sugar

It is worth noting that the expected increase in demand for these food categories is so vast, that Australia will never have the capacity to meet all of China’s demand. That said, Australia is certainly well positioned to help meet some of this demand, especially in food categories where Australia enjoys a strong position, such as meat, fruit and dairy.

In particular, it is significant that the City of Greater Dandenong is well positioned, with respect to an existing manufacturing base, which services much food manufacturing, and food processing businesses, many of who currently engage in export activities. Furthermore, the proposed Port of Hastings development would, once operational, provide a locational strategic advantage to the City of Greater Dandenong, for companies seeking to increase their export activities and leverage their logistics linkages.

Building the Lucky Country: Positioning For Prosperity – Deloitte

The Deloitte “Building the Lucky Country – Positioning For Prosperity” report outlines 25 major trends expected to provide major growth opportunities for Australia over the coming two decades.

An excerpt of this list appears below. Number 2 Agribusiness and Number 11 Food Processing have been highlighted with bold; to indicate that these crucial food sectors are both expected to rise in prominence in the coming decades.

Given the recent emphasis on forward-looking food policy and strategic initiatives in the Gippsland and Southern Melbourne RDA regions towards their respective agrifood sectors (see below for further discussion), and City of Greater Dandenong’s strategic position as a food manufacturing and processing hub for those regions, these trends bring significant opportunity for the food sector within City of Greater Dandenong.

Figure 4. The Deloitte Global 25 trends (DG25)

Growth Opportunities for Australia	
Current wave	1. Mining
Next Waves	<i>Fantastic Five</i> 2. Agribusiness 3. Gas 4. Tourism 5. International education 6. Wealth management
Future Waves	<i>Slipstream Stars</i> 7. ICT – gateway to the future 8. Financing the Fantastic Five 9. Clean coal 10. Gas transport 11. Food processing

Source: “Building the Lucky Country: Business imperatives for a prosperous Australia. Positioning for prosperity? Catching the next wave”, Deloitte Touche Tohmatsu (2014); Food Innovation Alliance (2014)

8. National Context

National Food Plan

Australia's first National Food Plan also developed through the Australian Government Department of Agriculture, Fisheries and Forestry, provides a vision for the future of food in Australia, and serves as a "roadmap" for the future of Australia's food industry.

The National Food Plan addresses Australia's food industry within the context of the global trends outlined above, and seeks to establish clear priorities for Australia's food industry to both benefit from the enormous opportunities in Asia via exporting, as well as addressing local issues such as health, nutrition, sustainability and food security. The four key pillars of the National Food Plan are:

- Growing exports
- Thriving Industry
- People
- Sustainable Food

Key priorities set out in the "Vision to 2025" which are especially relevant to the City of Greater Dandenong, are:

- Australia will produce food sustainably and will have adopted innovative practices to improve productivity and environmental outcomes.
- Australia will have reduced per capita food waste.
- Innovation in Australia's food manufacturing industry will have increased, building scale and capability through collaborations to make the most of emerging opportunities in the Asian region.
- Participation by Australian food businesses in the digital economy will have increased, driving productivity gains and innovation and creating connections with global markets.
- Australia will have stronger food trade and investment relationships with countries across the region and the capabilities to promote Australian interests.

The Food Processing Industry Strategy Group operates with a clear goal of working towards objectives stated in the National Food Plan. Their Final Report (2012) is produced by the Department of Industry, Innovation, Science, Research and Tertiary Education (DIISRTE). This report acknowledges the priorities set out in the National Food Plan, and sets out specific initiatives that the food processing and food manufacturing sectors may undertake, in order to strive for (among other things) the increased 'competitiveness' established in the National Food Plan's "vision" for the food sector.

In undertaking a SWOT analysis of the Australian food processing industry, the Food Processing Industry Strategy Group identified strengths and weaknesses of the sector, as follows.

Figure 5. Strengths and weaknesses of the Australian Food Processing Sector

Strengths	Weaknesses
1. Reputation for product safety and high-quality including disease-free status	1. Small domestic market means manufacturing economies of scale are difficult to achieve, profit pool in Australia is shallow and shrinking.
2. Large, high-quality public research institutions	2. Labour costs are higher than in the developing countries
3. Available energy, raw materials and land (that crosses multiple latitudes) for large-scale food production. Counter-seasonality with northern hemisphere	3. Land and factories are expensive to set up
4. Educated innovative, motivated and multi-cultural workforce	4. Freight costs (at current scale) to reach market are high whether domestic or international
5. Economic fundamentals are sound and domestic market is growing (albeit slowly)	5. High levels of regulatory burden; inconsistent regulation, and/ or poor design of regulation/programs
6. Stable and open political system including intellectual property enforcement	6. Competition for skilled/unskilled workers is high, especially in low unemployment periods
7. R&D Tax Incentive encourages innovation and investment	7. Declining numbers of food scientists and food technologists
	8. Vast majority of food companies are small

Source: Food Processing Industry Strategy Group Final Report, 2012 (DIISRTE)

The City of Greater Dandenong – and the food processors and food manufacturers located within the City of Greater Dandenong – certainly benefit from the majority of ‘strengths’ listed in the table above. Stakeholder consultation bears this out, as will be seen in later sections of this report.

A number of items listed as ‘weaknesses’ are likely to be beyond the scope of the City of Greater Dandenong to influence. For example, the fact that Australia is a small domestic market, within the context of the global food economy cannot be changed by the City of Greater Dandenong (although an enhanced understanding of the significance of this can be harnessed towards beneficial policy outcomes).

The City of Greater Dandenong is, however, in a position to address a number of items in the ‘weakness’ column, as set out below.

Figure 6. National 'weakness' areas, and potential for City of Greater Dandenong to address these.

Identified 'weakness' for the Australian Food Processing Industry	Potential for CoGD to address this
<ol style="list-style-type: none"> 1. Land and factories are expensive to set up 2. Freight costs to reach market are high 3. Competition for skilled/unskilled workers is high, especially in low unemployment periods 4. Vast majority of food companies are small 	<ul style="list-style-type: none"> • Potential to 'streamline' planning, permits and applications processes for new and existing food related businesses • Potential to monitor and leverage the benefits of the proposed Port of Hastings development for food businesses located within City of Greater Dandenong • City of Greater Dandenong experiences high levels of new migrant intake in comparison to other municipalities, providing a pool of available labour for companies in the area to draw from. • Potential to enhance business linkages, networks and provide support to Small and Medium Sized (SME) food related businesses in the area.

Source: Food Processing Industry Strategy Group Final Report, 2012 (DIISRTE); Food Innovation Alliance (2014)

If these issues – identified as 'weaknesses' within the Australian Food Processing industry – can be addressed and improved by the City of Greater Dandenong, companies are more likely to view the City of Greater Dandenong as having relative 'strengths' in these areas and are thus likely to serve as locational benefits to establishing their businesses within City of Greater Dandenong in the future.

Food Innovation Australia Limited (FIAL)

Food Innovation Australia Limited (FIAL) were launched as part of the government's Industry and Innovation Statement: A Plan for Australian Jobs. It is an industry-led, government funded initiative, which has an over-arching goal to accelerate commercially-driven collaboration and innovation in the Australian food and beverage industry. FIAL is based at La Trobe University in Bundoora, and has a national focus.

Key activities include:

- Participating and partnering with inbound and outbound trade missions, through organisation such as AusTrade
- Asian and Australian market insights
- Innovation and capability gaps
- Funding opportunities
- Providing information and resources for export-readiness
- Subsidised training opportunities
- FIAL's membership base includes commercial food businesses, food industry associations, research and educational institutions, and government service providers. Founding members include the following organisations (non-exhaustive).

FIAL members

- AgriFood
- Ai Group
- Alchemy Cordial
- ANSTO
- Ashgrove Cheese
- AusBiotech
- Australian Beverages Council
- Australian Food and Grocery
- Bulla Dairy Foods
- Campbell Arnott's
- Central Coast Manufacturing Connect
- Charles Stuart University
- Coles
- CSIRO
- Curtin University
- Dairy Innovation Australia Limited
- Deakin University
- East Gippsland Food Cluster
- Food South Australia Inc
- Food Technology Association of Australia
- Geoffrey Gardiner Dairy Foundation Ltd
- George Weston Foods
- Heinz
- Huon Aquaculture Group Pty Ltd
- Ian Locke Consulting
- Industry Capability Network (NSW) Ltd
- LaTrobe Uni/RMIT Joint Venture
- Mars Food Australia
- Meat and Livestock Australia
- Mondelez International (formally Kraft Foods)
- Murdoch University
- National ICT Australia
- National Union of Workers
- NSW Farmers Association
- PepsiCo Australia Holdings Pty Ltd
- Petuna Pty Ltd
- Queensland University of Technology
- Southern Forests Food Council R WA
- Tassal Group Ltd
- The University of Newcastle
- The University of NSW
- University of Ballarat
- University of Melbourne and Carlton Connect Initiative
- University of QLD
- University of South Australia
- University of Tasmania
- University of Technology Sydney
- University of Western Sydney
- Victoria University

Food Innovation Australia Ltd (2013)

Of FIAL's wide range of objectives, those that are pertinent to the City of Greater Dandenong Regional Food Strategy, are:

- Establish a stronger culture of collaboration amongst Australian firms.
- Encourage business support and innovation.
- Help the industry to capitalise on local and Asian demand for premium and sustainably-produced food.

These objectives show a close alignment to the City of Greater Dandenong's objectives with the Regional Food Strategy, and provide the basis for ongoing investigation into partnership opportunities.

9. State Context

Food to Asia Action Plan (Victorian Government)

The Food to Asia Action Plan has been produced by the Victorian Government. The Action Plan opens with the statement, “By 2030, the number of consumers in Asia with discretionary spending will increase six fold to around 3.5 billion”, and states an explicit goal “to put more Victorian food and beverages on Asian tables.”

Incorporating extensive industry input, seven areas have been identified by the Food To Asia taskforce across the food export supply chain where government and industry can work together to grow Victorian food exports to Asia:

- Improved access to Asian markets
- New markets for premium products
- The right workforce to supply Asia
- More efficient movement of products to Asian markets
- Better targeted R&D, extension and innovation
- Streamlined regulation and reduced red tape
- Increased capital investment

The Report notes that Victoria’s food sector is well positioned to benefit from emerging global opportunities, and this is certainly applicable to the sector within City of Greater Dandenong. Indeed, in a section noting Victoria’s food sector’s “capabilities and credentials”, the following are noted for Victoria (left column) and those being especially relevant for the food sector within City of Greater Dandenong, (appearing in the right column):

Victoria’s food sector’s “capabilities and credentials”	Relevance for food sector within City of Greater Dandenong
Potential to lift production	High
A highly skilled workforce	Medium
Sustainable natural resources	Low
World class export infrastructure	High
Diverse products and markets	High
Responsive industry structure	Medium
Strong ties with Asia	Medium
An attractive investment destination	Medium

Of particular relevance to the food sector within City of Greater Dandenong, are the action items under area 3 “The right work force to supply Asia”, and Area 4: More efficient movement of products to Asian markets”. These are:

- 3.1: improve training courses and qualifications for Victoria’s food and agriculture workforce
- 3.2: support the development of leadership, management and export skills in the sector
- 3.3: work with industry to build risk and business management skills
- 4.1: improve our capacity to move export products efficiently

A number of investment programs are set out as part of this Action Plan which warrant further investigation by the City of Greater Dandenong to explore opportunities for synergy and partnerships with initiatives proposed by the City of Greater Dandenong Regional Food Strategy and Action Plan.

The Inquiry into Sustainable Development of Agribusiness in Outer Suburban Melbourne, Parliament of Victoria May 2010

This comprehensive study details many key facets of Victoria’s Agrifood industry.

A number of “interface” Councils are investigated to explore key industries, and the role each Council area plays within the Victorian agrifood sector. The “interface” Councils are:

- Cardinia Shire
- City of Casey
- Hume City
- Melton Shire
- Mornington Peninsula Shire
- Nillumbuk Shire
- City of Whittlesea
- City of Wyndham
- Shire of Yarra Ranges

Although the City of Greater Dandenong is not included in this group of “outer suburban” municipalities, food businesses located within the City of Greater Dandenong can play a vital role within their regional food supply chains, as they interact with primary food producing entities within these outer suburban municipalities.

Plan Melbourne: Metropolitan Planning Strategy

The “Plan Melbourne: Metropolitan Planning Strategy” was first published in October 2013, and outlines the vision for Melbourne’s growth to the year 2050. It seeks to define what kind of city Melbourne will be and identifies the infrastructure, services and major projects, which need to be put in place to underpin the city’s growth.

Key strategic initiatives that are relevant to the City of Greater Dandenong are:

The Integrated Economic Triangle, which will encompass the following elements:

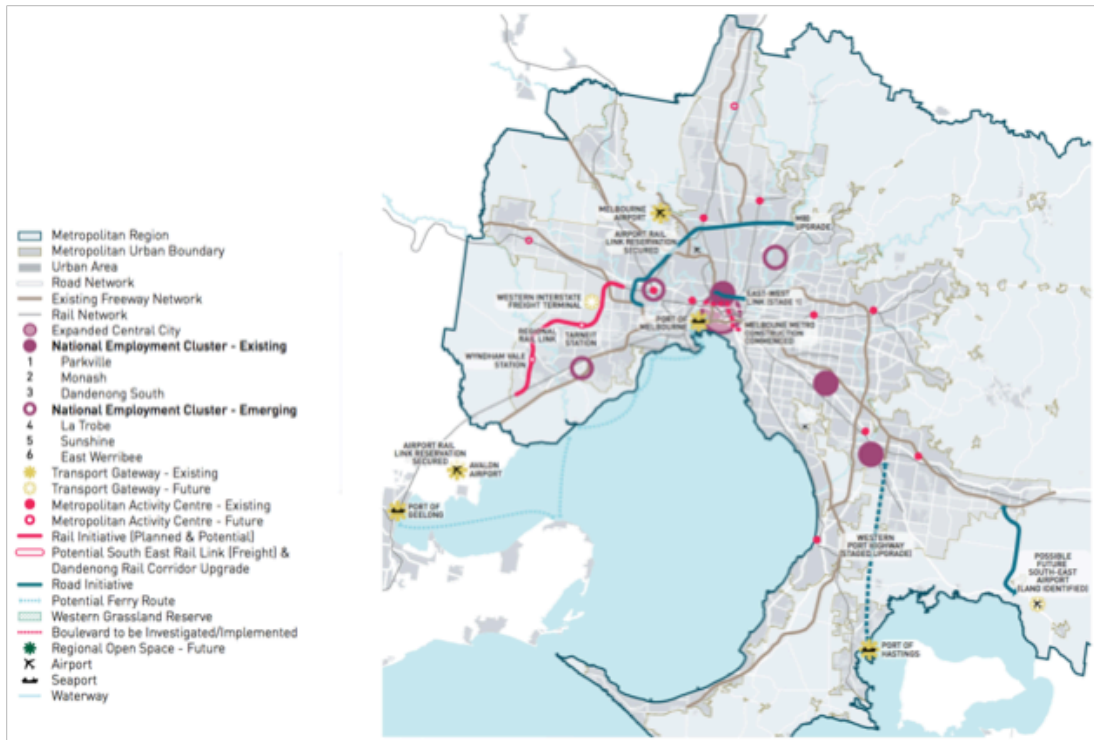
- The Port of Hastings
- The East West Link and the North East Link
- The Melbourne Metro project (that will connect Dandenong and Sunbury)

Furthermore, the Port of Hastings is expected to be fully operational in the future as Melbourne’s main container port, with good links to freight and industrial precincts in the city via the upgrade of the Western Port Highway and a rail link between Port of Hastings and Dandenong.

Under ‘Plan Melbourne’, Dandenong South is stated as one of three existing ‘National Employment Clusters’, (being Parkville, Monash and Dandenong South). National Employment Clusters are defined as “designated geographic concentrations of interconnected businesses and institutions that make a major contribution to the national economy and Melbourne’s positioning as a global city.”

The existing and future expected employment generated by the food sector within the City of Greater Dandenong is significant. Furthermore, many food processing and food manufacturing businesses have cited strategic considerations for locating within the City of Greater Dandenong (ie, to benefit from advantageous freight and logistics connectivity, and access to shipping and air freight ports) as being significant factors in their operations. Thus, the strategic initiatives set out within Plan Melbourne are significant and beneficial for the City of Greater Dandenong, and if harnessed effectively, could contribute substantially to the local food economy in the future.

Figure 7. Medium Term Initiatives to Achieve a Plan For Melbourne



Source: Plan Melbourne (Map 4), Dept Planning, Transport & Local Infrastructure (2013); Food Innovation Alliance (2014)

Melbourne 2030 and Melbourne @ 5 Million

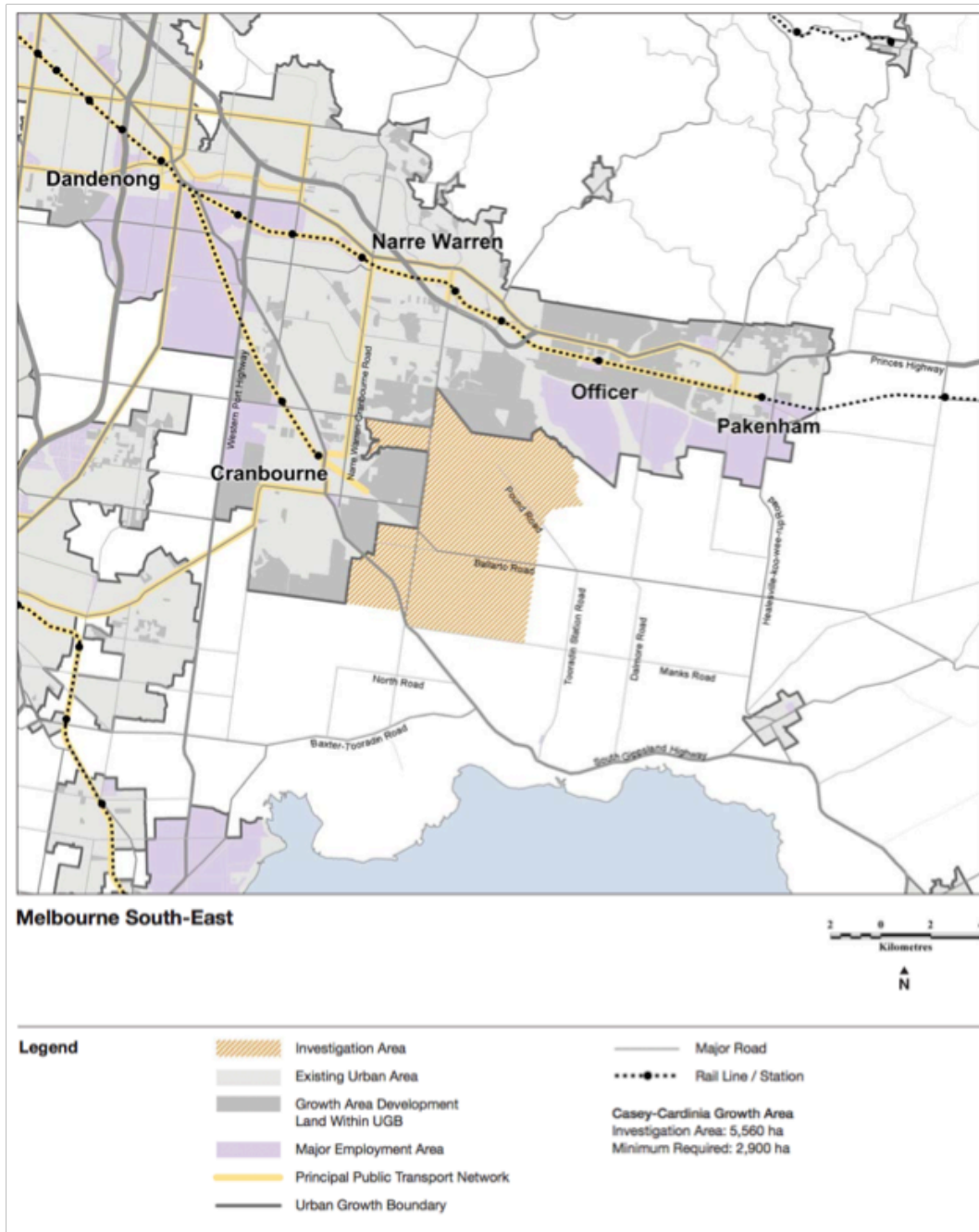
“Plan Melbourne” updates and supersedes the Melbourne 2030 and Melbourne @ 5 Million planning documents. The Melbourne 2030 policy was amended in late 2008 to become Melbourne @ Five Million in response to increased population forecasts and an increased demand for housing.

The update provisioned for an extended growth boundary and reinforced the aim of a multi-centre metropolitan area by lifting the hierarchic level of six Principal Activity Centres (CAD) to Central Activities Districts (CAD). The centres of Box Hill, Broadmeadows, Dandenong, Footscray, Frankston and Ringwood were envisioned to provide similar services and functions as central Melbourne.

Central Activities Districts were defined within the Melbourne 2030 Update policy, as providing:

- Significant CBD-type jobs and commercial services;
- A strong and diverse retail sector;
- Specialised goods and services drawing on a large regional catchment;
- Significant opportunities for housing redevelopment in and around these centres;
- High levels of accessibility for walking, cycling, public transport or car by being located at a junction in the Principal Public Transport Network; and
- Vibrant centres of community activity with a range of public facilities.

Figure 8. Melbourne Metropolitan Area, Melbourne 2030



Source: Melbourne 2030; Field Institute (2014)

10. Regional Context

Southern Melbourne Regional Development Australia (RDA)

The Southern Melbourne Regional Development Australia (RDA) covers the local government areas of Bayside, Casey, Cardinia, Frankston, Glen Eira, Greater Dandenong, Kingston, Mornington Peninsula, Port Phillip and Stonnington.

A number of key documents have been commissioned by Southern Melbourne RDA:

- Southern Melbourne RDA – Agrifood Master Plan – Vol.1 (2013), by McKinna et al.
- Southern Melbourne RDA – Agrifood Master Plan – Vol.2 (2013), by McKinna et al.
- Performance issues impacting the development of the Victorian agrifood sector (2010), by McKinna et al.

Agrifood Master Plan Vol. 1 & 2

The “Southern Melbourne RDA 2013 Agrifood Master Plan” makes the following recommendations in relation to Sustainable Food (p.30):

The Australian Government aims to produce food sustainably, whilst reducing per capita food waste. To achieve this, the following recommendations have been suggested:

- **Support sustainable agriculture and natural resource management.**
- **Address the cause of climate change and its consequences**
- **Reduce food waste through the National Waste Policy**
- **Invest in \$1.5 million to support community food initiatives.**

Performance issues impacting the development of the Victorian agrifood sector (2010)

“Performance issues impacting the development of the Victorian agrifood sector (2010)” is a comprehensive document detailing and documenting opportunities and challenges in the agribusiness and family-farming sector throughout Victoria.

Of particular relevance to food businesses within the City of Greater Dandenong, is:

- The observation that there is increasing interest in Australian agrifood investment from overseas
- Over recent years, retailers have had a refocus on supply chain efficiency drives because of their potential to improve product integrity and drive down costs. Having efficient supply chains, based on best practice principles, is critical to the effectiveness of the Victorian agrifood sector
- Whereas ‘vertical integration’ was once a dominant trend – and continues today – some more recent phenomena to appear involve ‘virtual supply chains’, where contract manufacturing, contract processing, contract freight and logistics, and contract marketing are utilised to leverage strategic alliances within food supply chains.

Given the importance of the major retailers' within the food sector in Australia, and their emphasis on efficient supply chain management, in conjunction with the increasing demand for food in Asia (which will require significant freight and logistics management to deliver that food via export), these observations hold important implications for food processing and food manufacturing businesses located within City of Greater Dandenong, since many of these businesses are instrumental within the broader region's food supply chains.

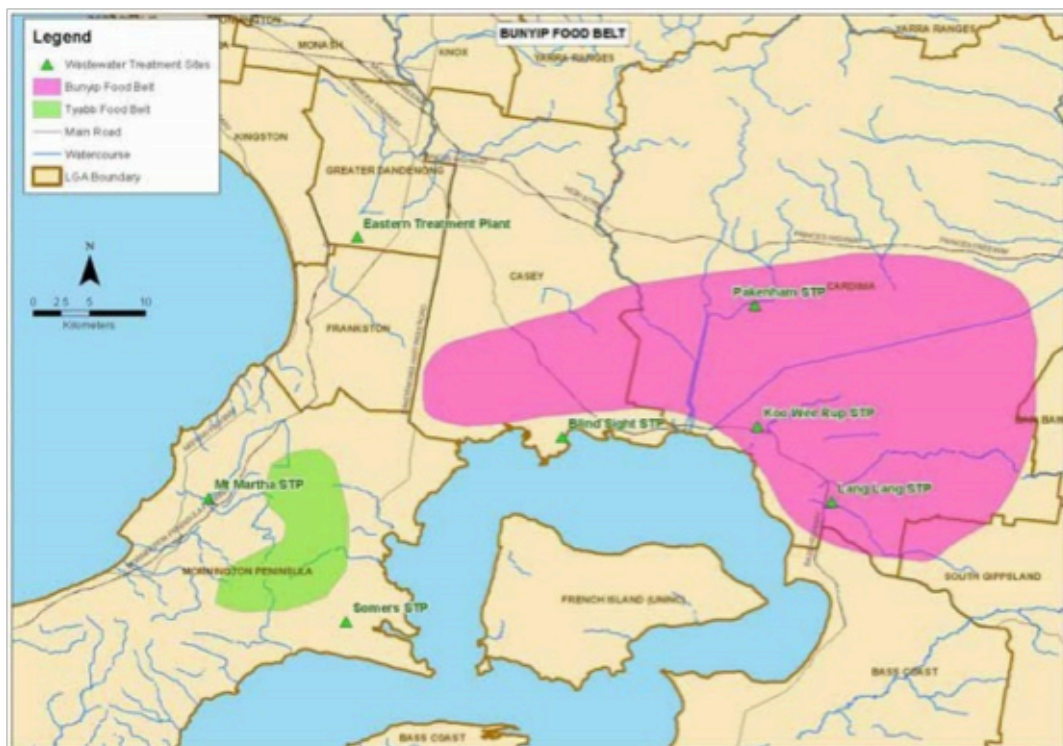
Bunyip Food Belt – Submission to the National Food Plan: Green Paper & Pre-Feasibility Phase Ancillary Impacts Analysis

The Melbourne South East alliance of ten municipalities, including the City of Greater Dandenong, have commenced investigations into the feasibility of establishing an intensive farming region to the south east of Melbourne, known as the 'Bunyip Food Belt', a project led by Cardinia, Casey and Mornington Peninsula Councils.

Under the proposed plan:

- A dedicated agricultural farming region would be established to the south east of Melbourne (known as the 'Bunyip Food Belt')
- The region could be supplied with recycled water from the Eastern Treatment Plant (located within the City of Greater Dandenong), by building a pipeline to carry the water.
- Strategic Partners include the Cardinia, Casey and Mornington Peninsula Councils, Department of Sustainability and Environment (DSE), South East Water, Melbourne Water, with close consultation to the remaining 7 municipalities in the alliance, in particular the City of Greater Dandenong.

Figure 9. Possible Location - Bunyip Food Belt



Source: Bunyip Food Belt – Submission to the National Food Plan: Green Paper

SEMIP Regional Economic Strategy 2009 – 2030

The Melbourne South East alliance (now defunct) was a regional economic development alliance of 10 local government authorities, utility companies and state and federal government departments. Member organisations of MSE included:

Member Councils	Associate Members
<ul style="list-style-type: none"> - Cardinia Shire Council - City of Casey - City of Greater Dandenong - City of Kingston - Frankston City Council - Knox City Council - Monash City Council - Mornington Peninsula Shire - Whitehorse City Council 	<ul style="list-style-type: none"> - ConnectEast – owner and operator of East-Link - Department of Innovation, Industry & Regional Development (State Govt) (DIIRD) - South East Water - UED / Multinet Gas

Import substitution is a key strategy to stimulate local economic activity, in product areas to have known levels of demand, as evidenced by their import to Australia.

The SEMIP Regional Economic Strategy identifies a number of food-related opportunities for import-substitution. These are as follows:

Figure 10. Opportunities for import substitution

Category	\$ Million
Confectionary	\$26.346
Diary products	\$28.415

Source: SEMIP Regional Economic Strategy 2009-2030 (2010);
Field Institute (2014)

These opportunities for import substitution could be capitalised upon by focusing efforts towards increasing awareness around these opportunities, and shifting productive energies towards engaging with these product categories.

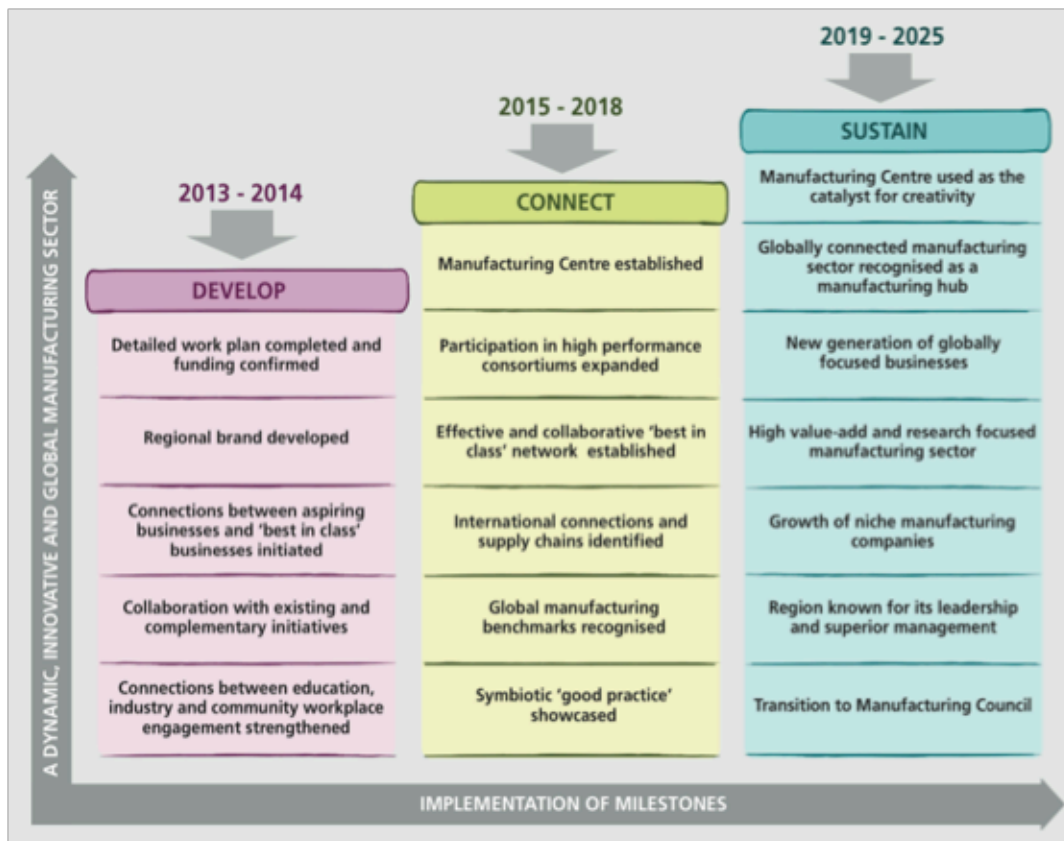
City of Greater Dandenong/SEMMA Future of Manufacturing project – under development

This project is driven by the following strategic partners:

- RDA: Regional Development Australia Committee (Southern Melbourne)
- SEBN: South East Business Networks (Part of the City of Greater Dandenong)
- SEMMA: South East Melbourne Manufacturers Alliance (Membership based industry organisation)
- SEMIP: South East Melbourne Innovation Precinct (strategic alliance incorporating key research facilities with 4 municipalities including City of Greater Dandenong)

The report sets out a vision and program of activities, as seen below.

Figure 11. SEMMA Future of Manufacturing Milestones



Source: SEMMA Future of Manufacturing (2013)

The Future of Manufacturing in South East Melbourne report was informed by extensive consultation with manufacturers in the region.

The following firms took part in the consultations:

- Jayco
- Uneek Bending
- Advanced Polymer Technologies
- Britannia Metals
- Corex
- Nissan Castings
- Hygain
- Susan Day Cakes
- Aluminium Industries
- Wolters Steel Mesh
- Hilton Manufacturing
- Andrew Donald Design
- Successful Endeavours
- AW Bell
- TRJ Engineering
- Gelpack
- Northern Bodyworks
- Norden
- Fyna Foods
- Trimas
- Catten Industries
- Surdex Steel
- CGD

Although no food companies were involved in these consultations, the project's forward-looking vision and focus on innovation highlight the manufacturing excellence that the Dandenong region is known for, and serve as an inspiring example for what is possible in future-focused food manufacturing and food processing endeavours.

11. Local Context

The City of Greater Dandenong LGA is located in the southeastern suburbs of Melbourne Metropolitan area, approximately 24km from the centre of Melbourne. In 2013, the City of Greater Dandenong was home to approximately 145,000 people with an area of 129.6 square kilometres.

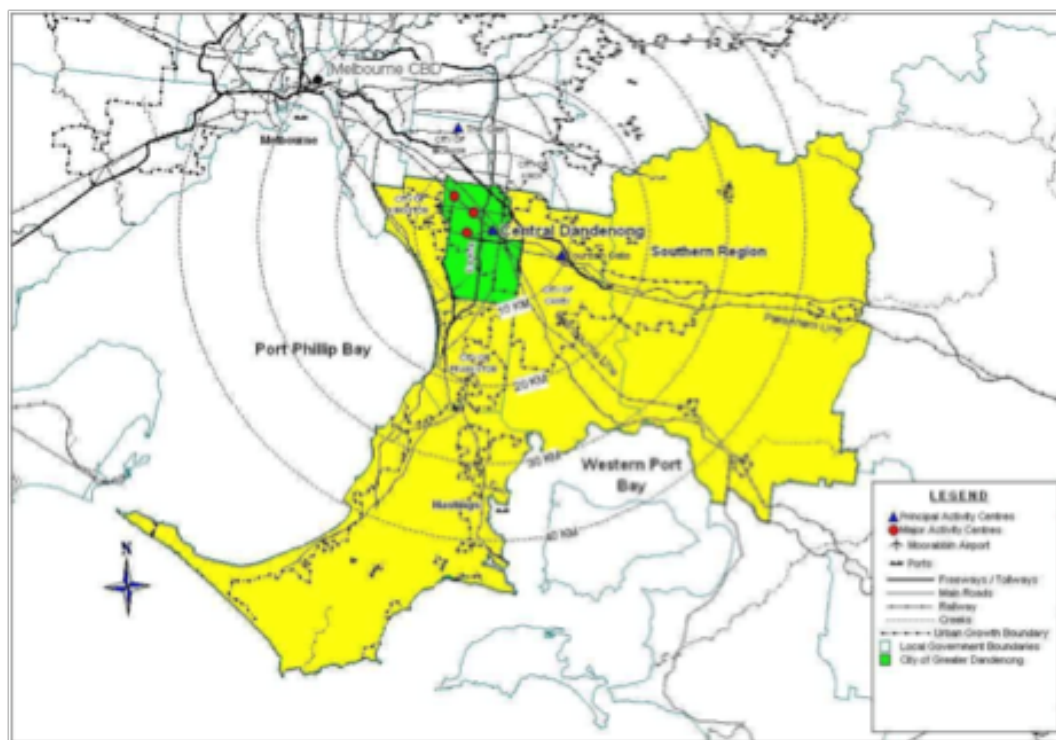
Key activity centres are

- Dandenong
- Springvale
- Noble Park
- Keysborough (Parkmore)

Melbourne 2030 recognised Central Dandenong as one of the State's initial and major Transit Cities. The important role of Central Dandenong in State Planning Policy is further emphasised in the refined plan Melbourne @ 5 Million, which designated Central Dandenong as one of 6 Central Activity Districts that would fulfil CBD like functions. As a result of these strategic initiatives, the focus for development has been on integrated transport interchanges, mixed-use development and higher density residential land uses.

Dandenong has been stated as an existing National Employment Precinct in the most recent State Planning instrument "Plan Melbourne", which further consolidates its position as an important employment, transit and urban node within Melbourne.

Figure 12. Dandenong Planning Scheme – Clause 21.02



Source: Dandenong Planning Scheme – Clause 21.02

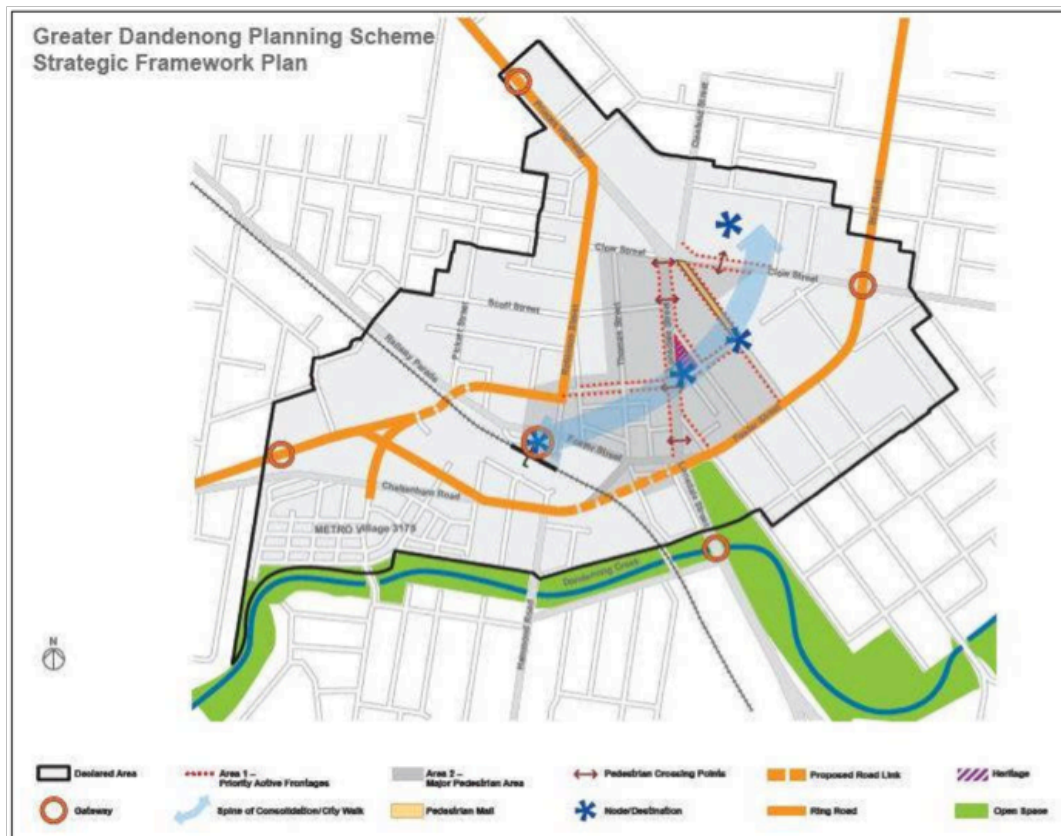
Central Dandenong – Strategic Framework Plan

The City of Greater Dandenong has undergone major redevelopment including large-scale infrastructure projects: the Revitalising Central Dandenong (RCD) partnership between Greater Dandenong City Council and the State Government (through Places Victoria) which is delivering the Central Activity District as the principal focus for major urban renewal projects and will continue to draw investment from both public and private sources.

The EastLink Freeway, the Drum Theatre in Lonsdale Street, Metro Village 3175 residential development, George Street Bridge link into central Dandenong and Dandenong Market staged re-development (now completed), the Services Office in Thomas Street, along with the recent completion of a new municipal building and city square are some of the developments, which are contributing to Greater Dandenong’s growth.

The Greater Dandenong Planning Scheme sets out the Strategic Framework Plan for the Central Dandenong area.

Figure 13. Central Dandenong – Strategic Framework Plan



Source: Greater Dandenong Planning Scheme, Strategic Framework Plan (Clause 22.07, p.7); Field Institute (2014)

The Dandenong Market

The Dandenong Market is located in the heart of the town centre, and holds an historic position within the context of Dandenong town centre as a place where the community comes together to buy, sell and enjoy food. The Dandenong Market currently attracts approximately 3 million – 4 million visitors per year, and has recently undergone re-development to enhance the food offer, upgrade facilities, and extend trading hours.

Greater Dandenong Planning Scheme – Clause 22.07-5 states “The Dandenong Market and Dandenong Plaza complexes are well-established retail uses in the Central Dandenong Activity Centre.” Furthermore, the Dandenong Market forms part of the Spine of Consolidation, (as mentioned in Greater Dandenong Planning Scheme – Clause 22.07 – 4), and provides an important ‘anchor’ role of the town centre.

In fact, the Spine of Consolidation is defined as follows: An area between Dandenong Transit Interchange (Dandenong Railway station), the new Municipal Offices, the former Town Hall and the [Dandenong] market which is the focus of land use consolidation and compaction.

The Dandenong Market Strategic Plan 2013, states

Accessibility to Dandenong Market remains limited to a degree by the days on which the market is open (Tuesday, Friday, Saturday) which provides only one day on which the average family can access the market. Saturdays are further a day where typically there is higher level of competing activities for families to balance between than Sunday.

“Market Day” in the eyes of the general community and families is typically seen as Sunday with a host of community markets being held. Is the day when families who are ‘looking for something to do’ will attend a market compared to the shop that is solely looking to acquire the contents of shopping list?

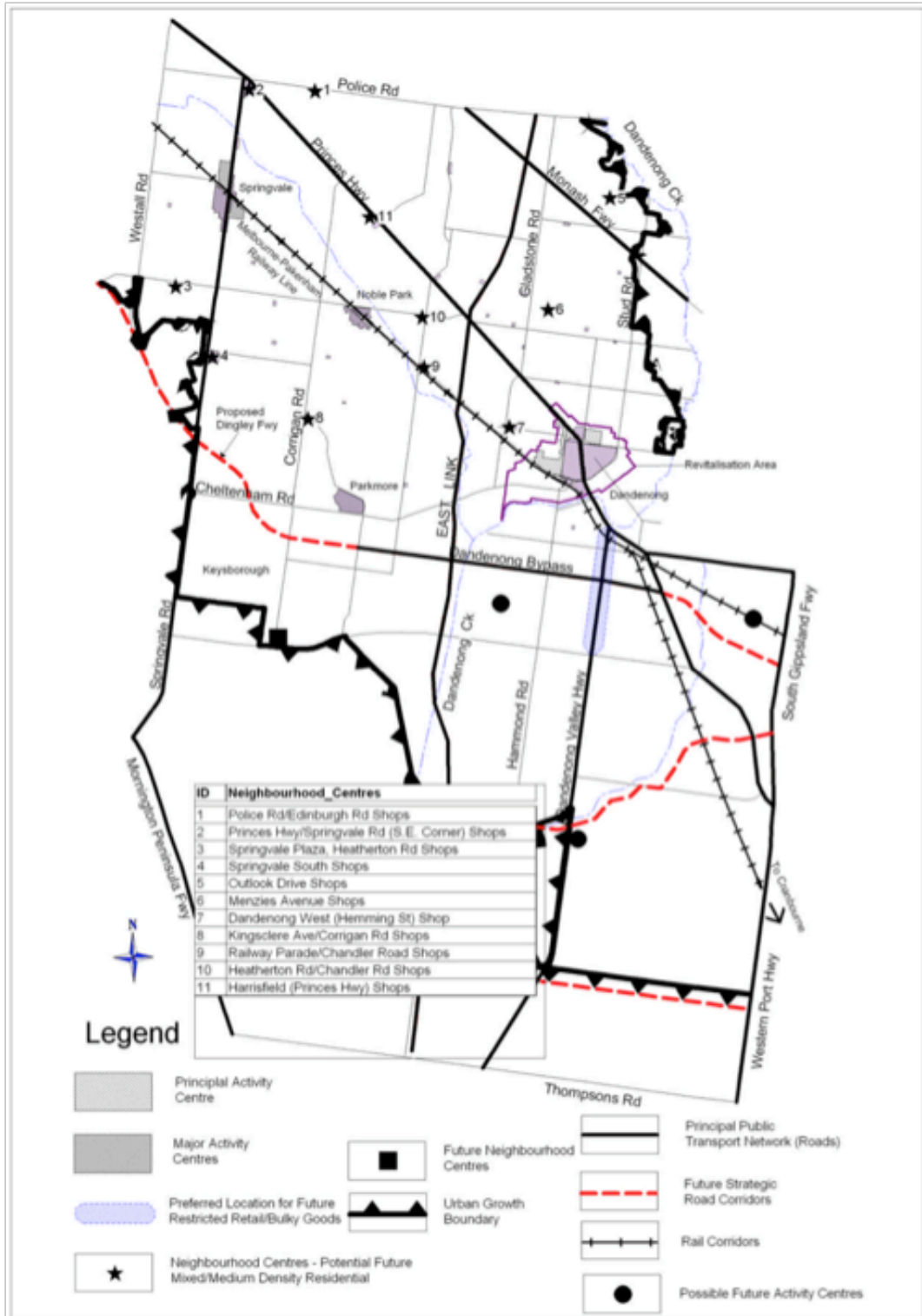
Based on these comments in the Dandenong Market Strategic Plan 2013, there was a significant opportunity to increase visitation to the Dandenong Market, by increasing access for the community. Since publication in 2013, trading times have been extended: the Dandenong Market is now open on Sundays, thus providing increased access for the community.

Benchmark analysis reveals the following trading times for similar markets throughout Melbourne. The table below shows that Dandenong Market’s recent variation to opening hours to include Sunday trading, has made the Dandenong Market one of only 7 fresh produce markets operating in Metropolitan Melbourne on Sundays (on a regular trading basis).

Strategic Retail / Commercial Framework

The City of Greater Dandenong's Strategic Retail Commercial Framework appears below.

Figure 14. Strategic Retail / Commercial Framework



Source: Greater Dandenong Planning Scheme, Strategic Framework Plan (Clause 22.07, p.7); Field Institute (2014)

City of Greater Dandenong Draft Green Wedge Management Plan

Green Wedges are defined in the Plan Melbourne document (2013) as follows:

Open landscapes around Melbourne's outskirts, originally set aside in the 1970s to conserve rural activities and significant natural features from Melbourne's outward growth. Green wedges are defined in the Planning and Environment Act 1987 as land outside the Urban Growth Boundary, as described in a metropolitan fringe local government-planning scheme.

The green wedges fulfil a range of specific roles that include:

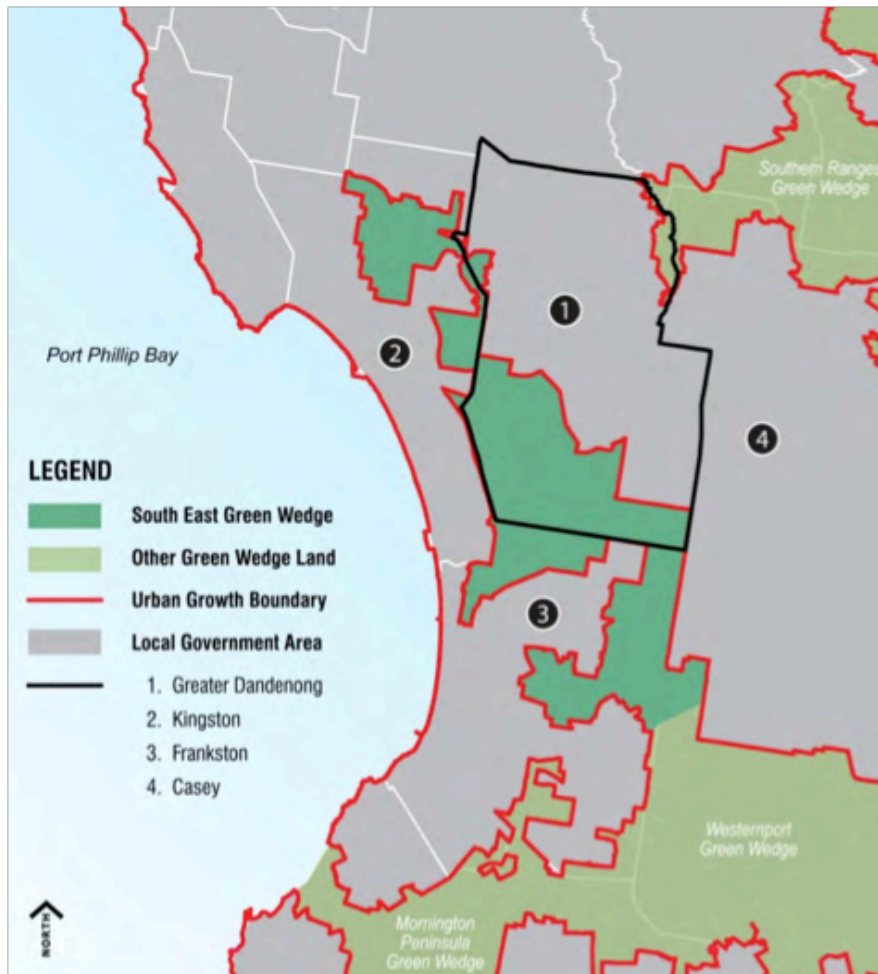
- Providing opportunities for agricultural uses, such as market gardening, viticulture and broad hectare farming
- Preserving rural and scenic landscapes
- Preserving conservation areas close to where people live
- Preserving renewable and non-renewable resources and natural areas (such as water catchments)
- Providing and safeguarding sites for infrastructure that supports urban areas (such as airports and sewage plants)
- Allowing industries such as sand and stone extraction to operate close to major markets
- Enabling the development of networks of open space
- Providing opportunities for tourism and recreation.

A City of Greater Dandenong Green Wedge Management Plan is being developed to provide Council and the community with a clear vision and direction for the City of Greater Dandenong's part of the Green Wedge over the next 15–20 years.

The plan will provide Council, residents, landowners and business operators with certainty about the Green Wedge and all the land within it.

The study area, known as the Greater Dandenong Green Wedge comprises all land outside the Urban Growth Boundary within the City of Greater Dandenong, covering a total of 3,741.3 hectares.

Figure 15. Greater Dandenong Green Wedge – Study Area



Source: City of Greater Dandenong Draft Green Wedge Management Plan (2014); Field Institute (2014)

The Dandenong South Green Wedge includes many facilities and land uses of strategic importance to the surrounding region and to the wider metropolitan area, including :

- The Eastern Treatment Plant and related odour buffers (Economic, environmental values)
- Areas of landscape and environmental significance (Social, environmental values)
- Areas with potential for waste-water recycling (Economic, environmental values)
- Designated odour and safety buffers near Dandenong South industrial area (Economic, environmental, social values)
- Locations with productive agricultural potential (Economic value)

Decisions about the future of the Dandenong Green Wedge cannot be made without consideration of its wider role and impacts of changes, but must also be made in the context of local impacts and needs.

There exists the potential to enhance existing food producing lots, and provide increased awareness, training and skills to those seeking to produce food on agricultural lots within the City of Greater Dandenong.

Healthy Food Access, Supply and Demand in the City of Greater Dandenong

This report explores the extent to which the diet of Greater Dandenong residents may be influenced by geographic and economic food access issues, saturation of food retail spaces with non-essential or takeaway options, and limited consumption of fruit and vegetables.

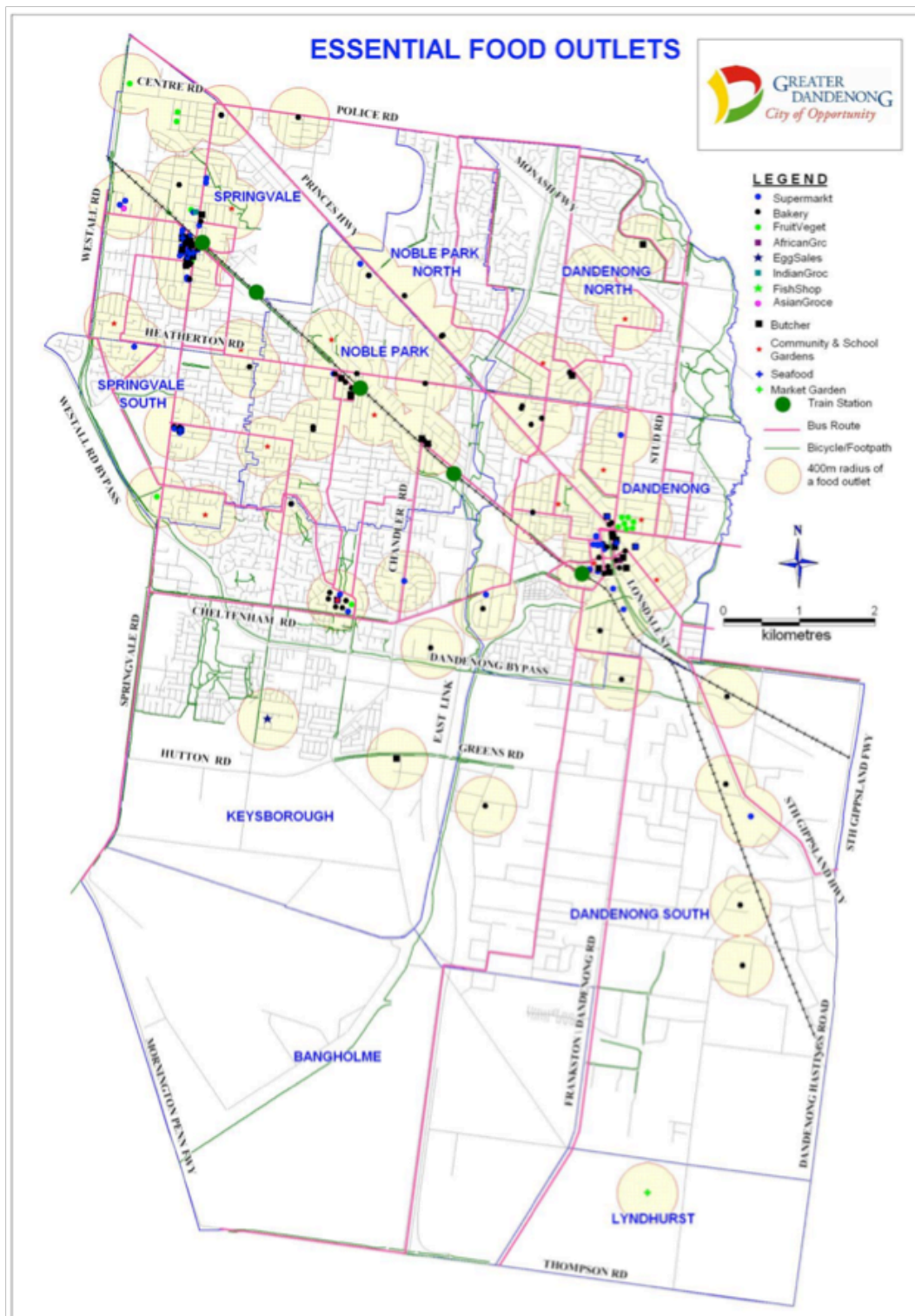
Key findings are as follows:

- Income, land use and geographic location of food retail and residential areas - including surrounding infrastructure - are barriers to food access for many Greater Dandenong residents and local workers.
- Low-income residents face acute difficulty in securing regular access to nutritious food, with up to a third of their income expended on food and up to half of their income spent on rent.
- While the local emergency food relief and food access sector supplies free meals, food vouchers and food parcels, it does not meet the needs of all residents who face regular financial strain, or promote economic participation and social capital. Thus, there is a reliance on emergency food relief food programs for a portion of the local community to meet their basic food access needs. Local facilities for parents of infants and toddlers, such as baby change room and private breast-feeding rooms, are limited.
- Many residents live in 'food deserts' – where their access to healthy food is more than 400 meters away.
- Greater Dandenong is saturated with food outlets that are not essential to a healthy diet, with the ratio of non-essential to essential food outlets exceeding 1:2 in all suburbs, and reaching 1:7 in some.
- Community gardens exist in certain suburbs, though their affect on food access is unknown and likely to be limited. Evidence has emerged indicating wide community interest in participating in community gardens, which exceeds their present availability.
- Water fountains are only located in certain parks and reserves.
- Bicycle and walking paths don't always conveniently link residents with food retail areas.

GIS mapping work undertaken as part of the Health Food Access, Supply Demand in City of Greater Dandenong project, indicates a high concentration of food retail around urban centres, however a number of 'food deserts' are identified, indicating areas where residents are beyond 400 meters from health food options.

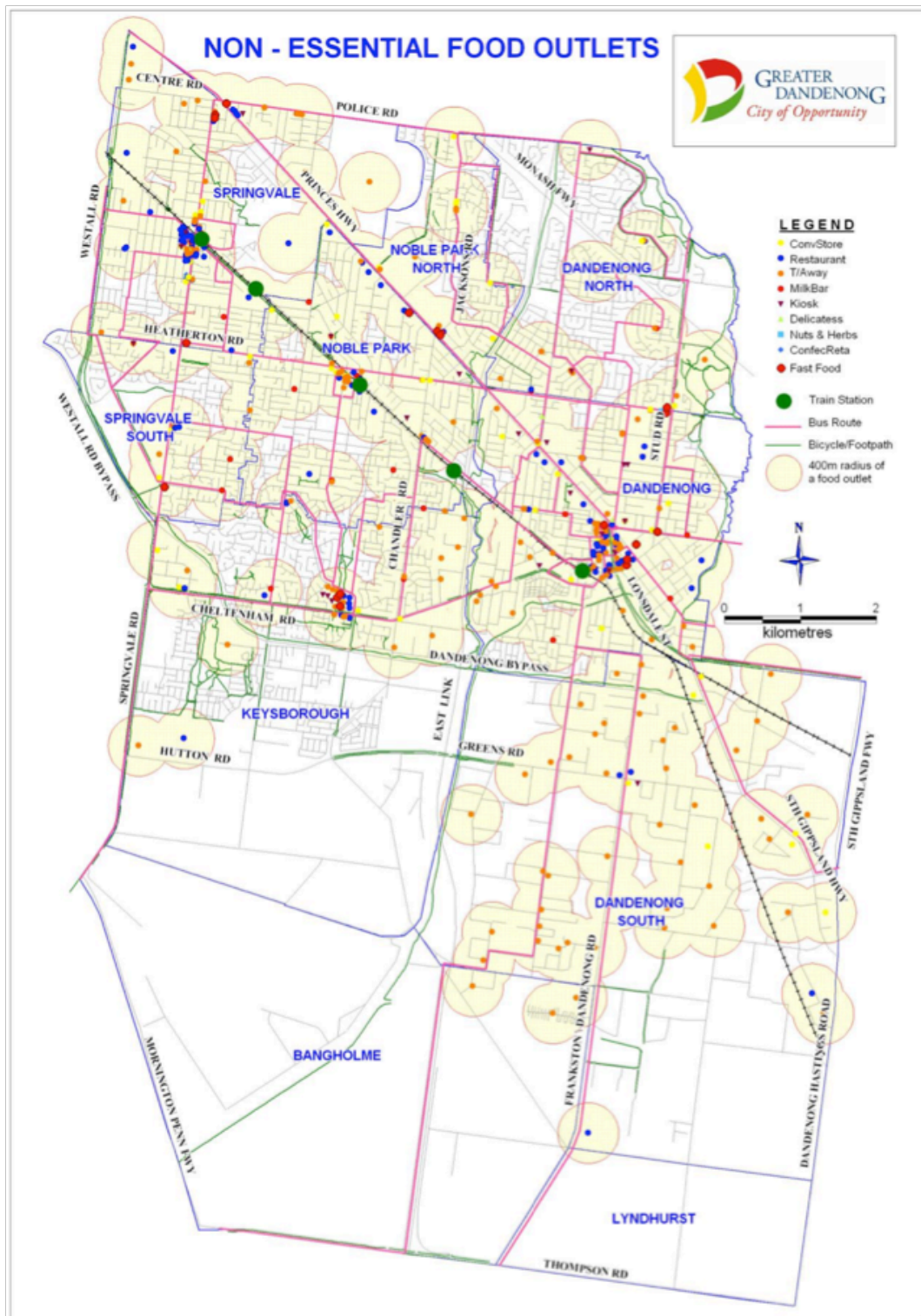
There is potential to investigate future health and nutrition focused programs and initiatives which address the lack of health food options for residents located in these 'food deserts', as identified in the report. Such initiatives may need to be considered in the context of the City of Greater Dandenong's Strategic Retail Commercial Framework (see previous section).

Figure 16. Map of Essential Food Retail within Dandenong LGA



Source: Healthy Food Access, Supply and Demand in the City of Greater Dandenong – Interim Report (2014): Field Institute (2014)

Figure 17. Map of Non-Essential Food Retail within Dandenong LGA



Source: Healthy Food Access, Supply and Demand in the City of Greater Dandenong – Interim Report (2014): Field Institute (2014)

City of Greater Dandenong – Community Engagement Policy and Planning Framework

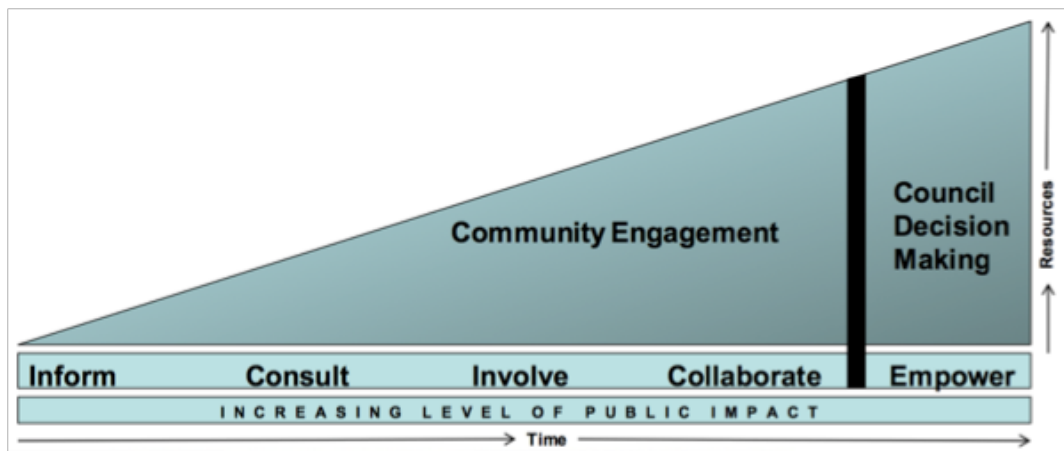
Following on from the City of Greater Dandenong's strong commitment to engaging with the community in the Council Plan 2013-2017, the City of Greater Dandenong Community Engagement Planning Framework is a practical and useful tool for Council to use to successfully engage with the community and stakeholders about key issues or decisions that Council is considering.

The City of Greater Dandenong has developed a framework that tailors community engagement to the specific service area, project, activity or topic based open-ended community engagement where this is decided to be embarked on, based on community advocacy.

The framework is based on the International Association for Public Participation Spectrum, and includes the following key levels of community engagement:

- **Inform:** To provide the public with balanced and objective information to assist them in understanding the problems, alternatives and/or solutions.
- **Consult:** To obtain public feedback on analysis, alternatives and/or decisions.
- **Involve:** To work directly with the public throughout the process to ensure that public issues and concerns are consistently understood and considered.
- **Collaborate:** To partner with the public in each aspect of the decision including development of alternatives and the identification of the preferred solution.
- **Empower:** To place final decision-making in the hands of the public.

Figure 18. City of Greater Dandenong – Community Engagement Framework



Source: City of Greater Dandenong – Community Engagement Framework

These core principles and framework have been adopted into Council policy, as borne out in the City of Greater Dandenong Community Engagement Policy, which was formally adopted by Council on 14th October 2013.

The tools and principles have been observed closely throughout the stakeholder engagement of the City of Greater Dandenong Regional Food Strategy and Action Plan, as a wide range of stakeholders throughout the food supply chain have been engaged.

City of Greater Dandenong – Council Plan 2013–2017

The City of Greater Dandenong Council Plan 2013 – 2017 sets the following Vision:

“Greater Dandenong is a City of Opportunity with quality buildings, places and facilities, and where people of all ages, cultures and backgrounds can reach their potential to live secure, happy and fulfilling lives for generations to come.”

Towards this vision, the Council Plan sets the following objectives:

- A City Planned for the Future
- A Thriving and Creative city
- A Healthy Community and Environment
- A City of Respect
- A Leading Council

These objectives and the Council Vision are backed up with a Strategic Resource Plan, which sets out the budget allocations for major infrastructure and programs over the period 2013 – 2017.

The Strategic Objectives within the Council Plan that are of relevance to the Regional Food Strategy and Action Plan are set out below

Figure 19. Strategic Objectives within the Council Plan (excerpt)

Activity & Economy Objectives:

- **Objective 2.8 Promote Greater Dandenong as a place to invest and establish a broad range of businesses.**
- **Objective 2.9: Establish and promote the Dandenong Market as a regional hub for shopping and activity.**

Wellbeing in the Community Objectives:

- **Objective 3.6: Promote the accessibility of fresh, nutritious, safe and culturally appropriate food.**

Source: City of Greater Dandenong Council Plan 2013 – 2017

City of Greater Dandenong – Community Plan, Imagine 2030

The City of Greater Dandenong – Community Plan (Imagine 2030) presents a set of visions for the year 2030 developed during community consultation and research during 2008 and 2009, and details on the findings, which led to these visions.

The City of Greater Dandenong Council endorsed this Community Plan on 22 February 2010, and contains visions grouped under three main categories:

- People
- Place
- Opportunity

Key findings from the research undertaken as part of the process, was the Top 5 Community Priorities, which were agreed across the majority of survey sectors, regardless of consultation methods:

- Livelihood – employment, business opportunities and pathways to each.
- Travel and transport – local travel choices and travel to outside Greater Dandenong.
- Feeling and being safe - safety in streets and public places, and improving perceptions of safety.
- Education and information – Pathways to jobs, information for personal and community wellbeing, and for literacy.
- Friendly and helpful people.

The Regional Food Strategy will align with the first of these priorities, in providing enhanced business opportunities for food retailers and food manufacturers and processors within the City of Greater Dandenong, as well as contributing to community wellbeing by boosting the availability of healthy food options throughout the municipality.

City of Greater Dandenong – Community Wellbeing Plan

The City of Greater Dandenong Community Wellbeing Plan links with key Council strategic documents, such as the City of Greater Dandenong Council Plan and the City of Greater Dandenong Community Plan (Imagine 2030).

CWP Priorities and Objectives 2013-17 strategic pillars are aligned to the Council Plan, by grouping Objectives into three board categories of:

- People
- Place
- Opportunity

A key objective pertinent to the Regional Food Strategy is 'Priority Five – Building Healthy and Sustainable Communities', which encourages enhanced healthy options and access to food and healthy lifestyles for members of the community, in conjunction with partner organisations such as Monash Health Community, Enliven and Mission Australia.

Casey Food Hub (aka South East Food Hub)

The Casey Food Hub is the result of Vic Health and City of Casey joining with an alliance of social enterprises and non-profits (led by Eaterprises Australia) to scope, design and explore the feasibility of a regional food hub located within the City of Casey.

The Scoping Report (March 2012) sets out critical success factors, opportunities and constraints for the establishment of a Food Hub designed to leverage the Casey-Cardinia region's highly productive food producing output towards an innovative supply chain enterprise, that would distribute local produce to local consumers.

The Casey Food Hub is located within Greater Dandenong, based at the Avocare facility in Mason Street Dandenong. Stated proposed benefits include

- Increase fruit and vegetable consumption / healthy eating of Casey residents
- Opportunities for skill development, community interaction and job creation through creation of local socio-ecological enterprises;
- Better marketing outlets and fair prices for producers
- Increased maintenance of food dollar in Casey (local economy)

- Reduced oil / emissions in Casey residents' food supply chain (resilience and reduce vulnerability to the anticipated impacts of peak oil);
- Strengthen cultural connection and valuing of farming – including cultural heritage and pride

In 2012, extensive stakeholder engagement, research and mapping of current local food systems was undertaken. In 2013, the Casey Food Hub project has now moved to Phase 3: Feasibility and Business Case development and potential Piloting of models.

The hub itself is located with Greater Dandenong, based at the Avocare facility in Mason Street Dandenong.

The East Gippsland Food Strategy

The Gippsland Food Plan's intent is to promote further development of the Gippsland Food System as a principle driver of economic activity and employment in the region. The Plan advocates and informs government agencies at all levels, industry leaders, investors, entrepreneurs and community leaders of the opportunities for the food sector to make greater contributions to the region's economic growth and wellbeing.

The Plan establishes four key priorities:

- Promoting growth and attracting investment
- Enabling infrastructure and logistics
- Innovation and adaption to change
- Advocacy and policy development

The Gippsland region is a major producer of food in the dairy, meat, horticulture, seafood and organic food categories, and as such has a strong interest in ensuring continued resilience in the food system for the Gippsland area.

Many food manufacturers and food processors acknowledge the crucial importance of raw food inputs received from the Gippsland region in their businesses, and cite linkages and proximity to the Gippsland area as a key strategic locational factor in the establishment of their businesses in the Greater Dandenong area.

Greater Dandenong Local Economic and Employment Development Strategy “Achieving Greater Dandenong’s Potential”

The City of Greater Dandenong's Local Economic and Employment Development (LEED) Strategy outlines a vision and pathway for the development of Greater Dandenong's economy.

The Strategy sets the following goals:

- Goal 1: Education, Training and Skills Development
- Goal 2: Business, Industry and Employment
- Goal 3: Economic and Social Wellbeing
- Goal 4: Local Government Leadership in Building a Sustainable Region

The strategy includes strategic objectives within the above goals including:

- Encourage and support activities which promote resident engagement into the workforce;
- Foster a culture of entrepreneurship which can lead to growth in enterprise formation through business support programs for local entrepreneurs;
- Facilitate job sustainability and growth through business support services and investment attraction activities;
- Continue to support an export development/import replacement strategy amongst local firms;
- Provide and support effective and active networking activities which support business sustainability and growth and provide opportunities for local supply chain development;
- Provide leadership and extend current business engagement activities to a broader audience including socially focused organisations;
- Support activities that facilitate cluster development and the subsequent opportunities for cluster participants;
- Support activities that create viable and inviting activities centres, maximising local retail spend and encouraging increases in employment opportunities;
- Promote Greater Dandenong as a place to invest and establish a broad ranges of businesses and employment opportunities;
- Foster pride in local history and positively influence the existing culture through promoting the Dandenong Market, cultural precincts, the strong industrial base, and other unique 'offers' within Greater Dandenong;
- Support activities that help connect local businesses to local social enterprises, to develop a culture of CSR and community involvement;
- Promote actions which encourage environmentally friendly ways of living, working, producing and doing business;
- Facilitate and/or support local leadership groups that support the development of Greater Dandenong's economy and are aligned with Council's objectives.

The Greater Dandenong regional food strategy and action plan seeks to highlight opportunities to further activities, which will address (in part) the above strategic objectives.

12. Key Findings: Strategic Context & Literature Review

This section has reviewed the broad context of the food system in which the City of Greater Dandenong, and the businesses, residents and communities involved in food production and food consumption, is operating.

A number of key trends and themes have been identified, notably

- A national and local rise in nutrition awareness and a focus on localised food production, preparation and consumption as a driver of improved health outcomes
- A strong local investment in programs that improve access to healthy food
- A trend towards the long-term reduction of peri-urban land currently available for food production in the South East of Melbourne
- Strong ongoing population growth and migration to the City of Greater Dandenong LGA
- A growing industry trend in utilising R&D innovation and 'value adding' to access new markets including export
- Strong opportunities for collaboration between food producing areas (such as Gippsland) and City of Greater Dandenong as base for processing and value addition
- Increased awareness of the value of social enterprise as a new business model approach to addressing disadvantage and fostering innovation
- Increased interest in enabling greater connectivity between health, retail and production activities within the City of Greater Dandenong food sector
- a reliance on emergency food relief programs to meet the food access needs of a portion of the community within the City of Greater Dandenong
- Increased interest in re-localisation and the shortening of food supply chains as a driver of access to healthy food and micro / social enterprise opportunities
- Growing awareness of food production and retailing as cross-sector driver of economic growth
- Enormous opportunities from the rising middle class in Asia,
- Local innovations in food production, and
- Positive national outlook towards food policy in Australia.

The City of Greater Dandenong is timely in its initiation of the Regional Food Strategy, since forward looking policies and action taken now will position Council and entities throughout the supply chain to take advantage of these broader trends.

13. Trends and Opportunities

Overview of Australia's Food Industry

The food, beverage and tobacco processing industry produced \$24.4 billion of industry value added in 2012-13, which represents 23.5 per cent of manufacturing GDP and was 1.6% of total GDP².

In 2011-12 the Australian processed food and beverage industry spent around \$548.3 million on research and development³.

In 2012-13, employment in food and beverage manufacturing in Australia was approximately 225,100 people, representing around 23.6 per cent of total manufacturing employment⁴.

Import/Export:

- Australia exported \$18.9 billion of processed food and beverage products in 2012-13 while it imported \$11.8 billion worth of food and beverage products creating a net trade balance of \$7.1 billion⁵.
- Australia exported \$17.6 billion in substantially transformed food products and \$335 million in elaborately transformed food products in 2011-12⁶.

In 2011 Australia exported 2.2 per cent of the value of world trade in processed food and imported 1.0 per cent of the value of food trade in processed food.

Crops

Crops are a key agricultural commodity within the Australian economy.

- The gross value of principal crops in 2012-3 rose by 5% to \$13.9 billion.
- The gross value of wheat increased by 4% nationally, to \$7.0 billion in 2012-13. The year saw significant increases in the price of wheat, which offset a decrease in local production due to poor growing conditions. Western Australia, the largest wheat producing state, experienced dry weather during the period.
- Canola, the second most valuable principal crop, recorded the greatest increase in value in 2012-13, up 25% to \$2.2 billion, a new record. The increase was attributed to good growing conditions and a strong demand from export markets in Europe and Asia.
- Steady demand for barley both domestically and internationally saw its value in 2012-13 increased by 16%, to \$2.0 billion. The increase was driven primarily by increased prices, which more than offset the 10% drop in production.
- The gross value of cotton fell by 18% in 2012-13, to \$1.9 billion. Area and production of cotton fell due to a drop in prices following record production and consequent oversupply in the previous year.

² ABS, *Australian National Accounts: national income, expenditure and product*, Cat No. 5206.0

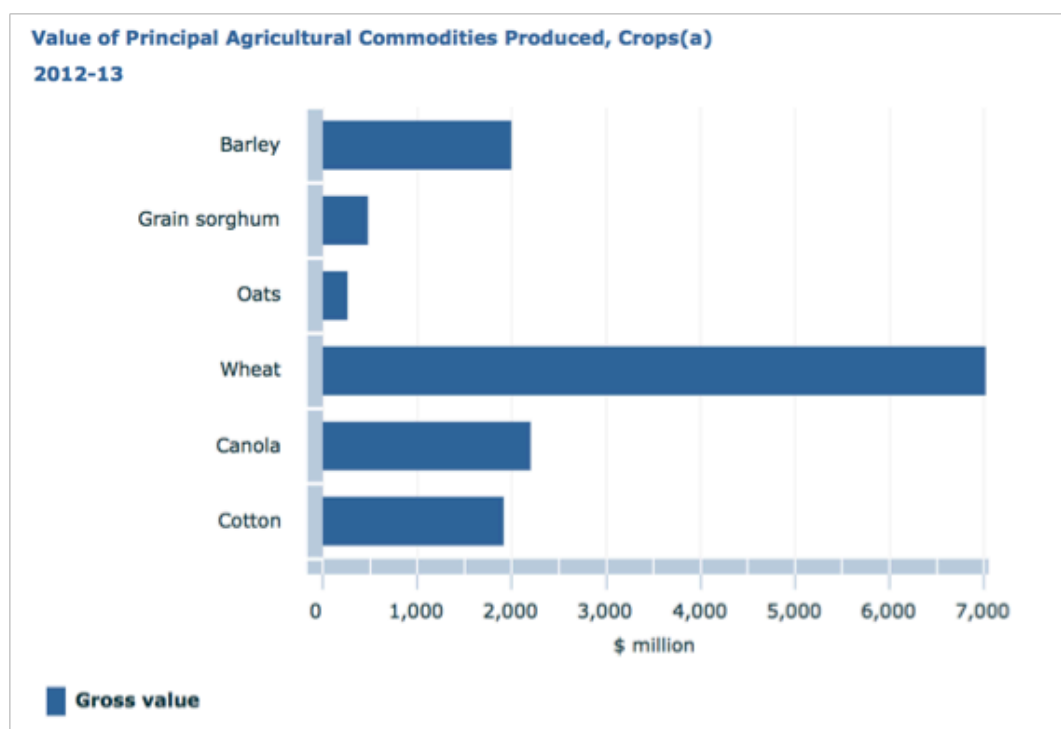
³ ABS, *Research and Experimental Development, Businesses, Australia* Cat No. 8104.0

⁴ ABS, *Labour Force, Australia, Detailed, Quarterly, Original* (Cat No. 6291.0.55.003)

⁵ ABS, *International Trade in Goods and Services, Australia*, Cat No 5368.0

⁶ *Australian Food Statistics 2011-12 – Department of Agriculture, Fisheries and Forestry*

Figure 20. Value of Principal Agricultural Commodities Produced, Crops: Australia, 2012-13

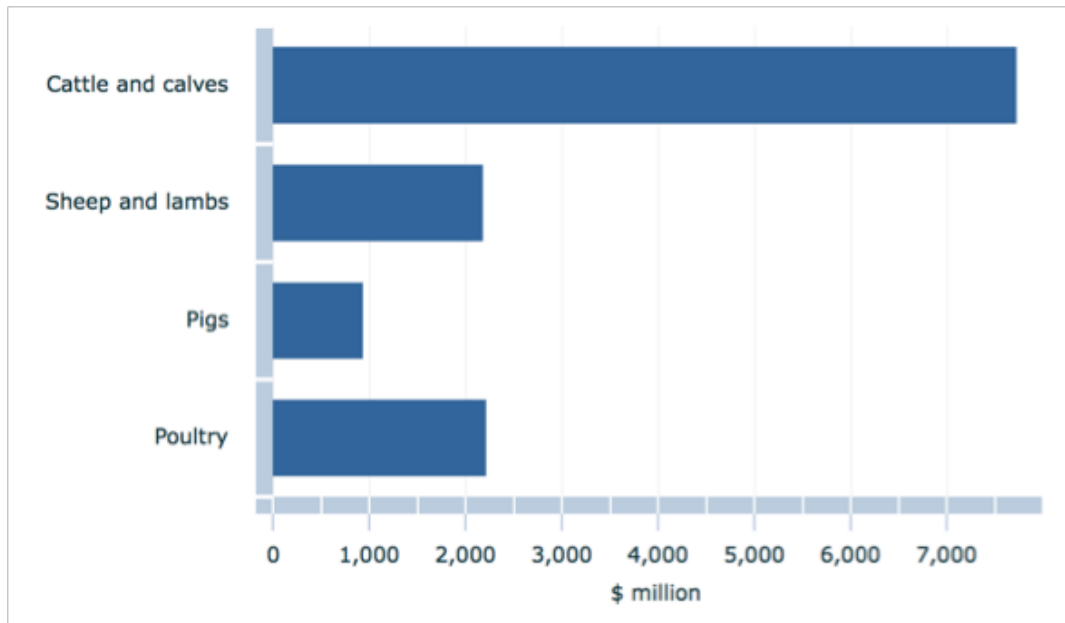


Source: ABS Cat No. 7501 (2012-13); Field Institute (2014)

Livestock slaughter and other disposals

- The gross value of total livestock slaughtering and other disposals in 2012-13 fell by 5% to \$13.1 billion.
- The gross value of cattle and calves remained steady nationally at \$7.7 billion. Although production in 2012-13 increased, driven mainly by drought-induced adult cattle slaughter, the average prices decreased per head.
- The gross value of sheep and lambs fell by 25% to \$2.2 billion in 2012-13. Widespread dry conditions caused sheep producers to turn off large numbers of stock, resulting in a high supply available for slaughter and causing a fall in prices. The live sheep export industry also experienced trade issues, with the fall in gross values reflecting lower prices and the decline in numbers.
- The gross value of pigs remained steady at \$934 million, with a slight increase in slaughter numbers offset by a fall in average prices.
- In 2012-13 the gross value of poultry increased by 7% to \$2.2 billion. Higher meat production and higher average prices occurred as a result of increase in consumer demand.

Figure 21. Value of Principal Agricultural Commodities Produced, Livestock: Australia, 2012-13



Source: ABS Cat No. 7501 (2012-13); Field Institute (2014)

Food Processing and Food Manufacturing

Industry gross value added by the Australian food, beverage and tobacco processing sector was \$23.6 billion in 2010-11, which represented approximately 22 per cent of the gross value added of the Australian manufacturing industry and 1.9 per cent of Australian gross domestic product. The food and beverage processing industry also accounted for nearly 24 per cent of Australian manufacturing sector employment in 2010-11. The value of Australian food exports increased to \$27.1 billion in 2010-11. Processed foods represent approximately 63 per cent or nearly \$17 billion of total food exports for 2010-11.

A key table indicating the performance of food and beverage processing sub-sectors within Australia appears below. The table below provides an outline of the comparison of relative performance of the food and beverage processing sub-sectors measured in terms of industry value added; industry revenue and revenue growth; net profits as a percentage of industry revenue; employment and exports. Shaded cells show the top eight values in each measurement.

This is a point-in-time representation of the industry and does not show historical trends nor predicted future performance. However, sub-sectors where the food and beverage processing industry currently enjoys competitive advantage are likely candidates for future prioritisation.

t

Figure 22. Food and beverage processing sub-sector performance 2011-12

ANZSIC Class	Industry Value Added (\$m)	Net Profit (% of industry revenue)	Industry Revenue (\$b)	Average Annual Revenue Growth 2007-08 to 2011-12 (%)	Employment No.	Exports (\$ m)
Meat Processing	2,172.6	4.0	13.00	-2.4	29,906	6,830.0
Tea, Coffee and Other Food Manufacturing (flavourings, seasonings, prepared meals)	2,141.3	6.0	8.42	2.6	19,820	505.3
Wine Manufacturing	1,741.0	9.1	6.98	-0.5	13,208	1,921.6
Poultry Processing	1,350.5	2.4	6.65	6.1	17,356	106.4
Fruit and Vegetable Processing	1,301.4	7.6	5.17	0.1	8,037	631.3
Beer and Malt Manufacturing	1,129.0	16.1	5.13	1.9	4,042	458.1
Chocolate and Confectionery Manufacturing	1,110.0	6.8	3.09	2.2	8,784	358.6
Milk and Cream Processing	1,066.1	2.3	7.37	7.1	7,751	133.1
Soft Drink Manufacturing	961.4	9.8	3.45	1.6	4,445	30.7
Cereal Food and Baking Mix Manufacturing	878.3	6.8	3.10	2.0	7,056	421.0
Bread Manufacturing	840.5	2.5	2.80	2.5	13,586	14.4
Snack Food Manufacturing	731.5	5.3	2.87	-0.3	7,133	220.2
Bacon, Ham and Smallgoods Manufacturing	671.8	1.4	3.42	2.0	9,375	18.8
Prepared Animal and Bird Feed Manufacturing	642.9	3.8	3.77	1.1	4,709	800.2
Milk Powder Manufacturing	568.5	1.3	3.04	3.1	3,605	955.1
Cake and Pastry Manufacturing	529.3	7.1	1.60	1.9	8,595	-
Cheese Manufacturing	502.4	2.2	4.25	4.1	4,112	1,376.8
Biscuit Manufacturing	481.6	3.6	1.34	1.9	5,225	134.5
Flour and Starch Manufacturing	443.2	4.0	2.62	7.4	1,578	368.0
Fruit Juice Manufacturing	382.4	5.4	1.89	2.2	2,870	27.5
Sugar Manufacturing	378.7	4.3	1.66	-13.2	4,870	1,530.5
Cooking Oil and Margarine Manufacturing	325.1	6.2	2.38	2.0	2,093	318.3
Butter and Other Dairy Product Manufacturing (such as condensed milk, evaporated milk)	306.4	1.4	2.72	4.3	2,495	657.1
Seafood Processing	230.2	11.0	1.37	-3.0	2,993	343.5
Ice Cream Manufacturing	110.0	5.1	0.50	2.5	1,183	45.1
Total	20,996.1		98.6		194,827	18,206.1

Source: Food Processing Industry Strategy Group Final Report, 2012 (DIISRTE), IBIS World data, various reports; Field Institute (2014)

14. Overview of City of Greater Dandenong's Food Industry

Economic Profile

The output generated by the Greater Dandenong economy is estimated at \$28.69 billion. Greater Dandenong represents 5.4% of the \$527.16 billion in output generated in Greater Melbourne and 17.3% of the \$165.81 billion in output generated in Melbourne's South East.

Of the \$28.69 billion output generated by the Greater Dandenong economy, approximately \$15,846.16 billion comes from the Manufacturing sector, representing approximately 55% of total output. The next most significant contributor towards total output is Wholesale Trade, which produced \$2,558.71 billion of output, representing approximately 9% of Greater Dandenong's total output.

Figure 23. Economic Profile – City of Greater Dandenong

Employment Category	Output	Value Added	Exports	Businesses	Jobs
	(\$ m)	(\$ m)	(\$ m)	No.	No.
Manufacturing	\$15,846.16	\$3,166.35	\$10,784.03	1,402	22,853
Wholesale Trade	\$2,558.71	\$1,290.48	\$1,513.07	949	8,032
Construction	\$1,634.74	\$504.05	\$141.75	1,831	3,853
Rental, Hiring & Real Estate Services	\$1,623.05	\$1,023.93	\$284.37	1,261	1,068
Transport, Postal & Warehousing	\$1,273.23	\$574.12	\$388.85	1,663	5,034
Financial & Insurance Services	\$934.20	\$593.76	\$194.06	627	1,772
Health Care & Social Assistance	\$725.56	\$496.83	\$19.42	400	6,802
Retail Trade	\$696.69	\$407.45	\$25.31	1,074	6,936
Professional, Scientific & Technical Services	\$580.72	\$267.04	\$49.28	771	2,339
Public Administration & Safety	\$577.90	\$324.86	\$0.57	32	3,184
Education & Training	\$459.55	\$345.75	\$22.27	120	4,412
Other Services	\$439.32	\$216.80	\$110.77	696	3,306
Administrative & Support Services	\$421.69	\$200.91	\$35.12	589	1,724
Electricity, Gas, Water & Waste Services	\$256.91	\$141.98	\$67.25	52	807
Information Media & Telecommunications	\$249.99	\$119.78	\$30.48	42	482
Accommodation & Food Services	\$220.62	\$99.45	\$17.17	464	2,081
Arts & Recreation Services	\$79.72	\$29.25	\$6.18	79	411
Agriculture, Forestry & Fishing	\$69.96	\$33.18	\$5.79	136	279
Mining	\$42.80	\$20.65	\$12.71	15	30
Unstated				493	
Total	\$28,691.52	\$9,856.62	\$13,708.45	12,696	75,405

Source: Australian Bureau of Statistics (ABS) June 2013 Gross State Product; 2009 / 2010 National Input Output Tables; 2011 Census Place of Work Employment Data; ABS Cat No. 8165 Count of Businesses (2013); Field Institute (2014)

Number of Businesses – City of Greater Dandenong

Within the context of the overall food supply chain, the City of Greater Dandenong has a relatively small proportion (1.1%) of businesses involved in primary production listed in "Agriculture, Forestry and Fisheries" in the table below. Of those 136 businesses, notable food producing businesses are involved in the production of eggs and lettuce.

However, there are a significant number of businesses that contribute to first stage and second stage food processing, appearing in the following categories:

- Manufacturing
- Transport, Postal and Warehousing
- Wholesale Trade

Still more businesses operating at the 'downstream' end of the food supply chain as food retailers, categorised in the following categories

- Accommodation and Food Services and
- Retail Trade.

Figure 24. Number of Businesses – City of Greater Dandenong

Industry Name	SA2 Name							LGA	
	Springvale	Springvale South	Noble Park	Noble Park North	Dandenong	Dandenong North	Keysborough	Dandenong LGA	Share
Accommodation and Food Services	113	33	57	32	137	39	53	464	3.7%
Administrative and Support Services	80	28	93	38	210	63	77	589	4.6%
Agriculture, Forestry and Fishing	6	9	16	6	38	19	42	136	1.1%
Arts and Recreation Services	9	3	18	3	25	6	15	79	0.6%
Construction	225	62	225	96	661	291	271	1,831	14.4%
Education and Training	18	14	14	14	30	11	19	120	0.9%
Electricity, Gas, Water and Waste Services	6		6	6	19	3	12	52	0.4%
Financial and Insurance Services	77	11	72	22	320	52	73	627	4.9%
Health Care and Social Assistance	84	13	65	15	133	40	50	400	3.2%
Information Media and Telecommunications	3	3	9	3	12	6	6	42	0.3%
Manufacturing	128	28	56	40	943	43	164	1,402	11.0%
Mining	-		-	-	12		3	15	0.1%
Other Services	102	35	71	19	359	28	82	696	5.5%
Professional, Scientific and Technical Services	121	27	105	24	298	83	113	771	6.1%
Public Administration and Safety	15	3	5		6	3	-	32	0.3%
Rental, Hiring and Real Estate Services	195	30	62	46	706	71	151	1,261	9.9%
Retail Trade	248	52	96	41	442	83	112	1,074	8.5%
Transport, Postal and Warehousing	389	130	361	72	385	182	144	1,663	13.1%
Wholesale Trade	133	15	39	48	553	53	108	949	7.5%
Unknown	96	28	68	16	169	47	69	493	3.9%
Grand Total	2,048	524	1,438	541	5,458	1,123	1,564	12,696	100.0%
Share	16.1%	4.1%	11.3%	4.3%	43.0%	8.8%	12.3%	100.0%	

Source: ABS Cat No. 8165 Count of Businesses (2013); Field Institute (2014)

In total, there are 1,224 food premises located within the City of Greater Dandenong, registered under the Food Act. Within this total are approximately 196 premises which are non-commercial premises (such as child care kitchens, canteens, hospital kitchens, public halls, etc), making a total of 1,028 food businesses located within the City of Greater Dandenong.

These are shown below within their respective categories. These 1,224 food businesses represent approximately 8% of the total of 12,696 businesses operating within the City of Greater Dandenong.

Figure 25. Businesses within City of Greater Dandenong, registered under the Food Act.

CoGD Category	Registered businesses w/in CoGD	
	No.	Proportion
AfricanGrc	1	0.1%
AsianGroce	2	0.2%
Bakery	78	6.4%
Caterer	9	0.7%
ChildCKitc	28	2.3%
ConfecReta	1	0.1%
ConvStore	93	7.6%
Delicatess	17	1.4%
EggFooProc	2	0.2%
EggSales	1	0.1%
FacCanteen	7	0.6%
FishShop	1	0.1%
FoodDist	2	0.2%
FoodManufa	29	2.4%
FoodManufH	47	3.8%
FoodWareh	126	10.3%
FoodWarPac	5	0.4%
FruitVeget	20	1.6%
HomeOccupa	18	1.5%
HospKitche	3	0.2%
HostKitch	6	0.5%
Hotel.	3	0.2%
IndianGroc	1	0.1%
Kiosk	34	2.8%
NursHomKit	13	1.1%
PackFood	3	0.2%
PackLiquor	2	0.2%
PublicHall	16	1.3%
Restaurant	171	14.0%
RetHomKitc	5	0.4%
SchCanteen	39	3.2%
SocialClub	19	1.6%
SpecAccKit	10	0.8%
SportClubs	47	3.8%
Supermarkt	68	5.6%
T/Away	297	24.3%
Total	1,224	100.0%

Source: City of Greater Dandenong (2014); Field Institute (2014)

In considering the 'whole of food supply chain' perspective, it is important to remember that many home-based businesses within the City of Greater Dandenong are involved in producing food. However these home-based businesses may not be registered with the City of Greater Dandenong under the Food Act, and their activities would therefore not be captured in the tables above.

However, the activity of these entities contributes to the overall food supply chain via community gardens, school nutrition and healthy eating programs, festivals and events.

Food Supply Chain – Employment (Place of Work)

An examination of employment within City of Greater Dandenong reveals many jobs in the food sector, at numerous points in the food supply chain.

A supply chain analysis of employment by industry has been undertaken to examine the level of employment within the City of Greater Dandenong. These 'stages' within the supply chain have been determined in conjunction with Australian Bureau of Statistics industry of employment data, and further details are provided in Attachment 1.



As can be seen from the table below, City of Greater Dandenong contains approximately 6,916 jobs in the food sector, being a similar number of overall jobs to neighbouring municipalities of Casey (approximately 7,677 jobs), and Knox (7,014).

The City of Greater Dandenong LGA clearly provides an important role within the broader food economy, as indicated by:

- 2,235 jobs contained within the Stage 2: Food Manufacturing category
- 982 jobs contained within the Stage 3: Food Wholesale category; and
- 3,415 jobs contained within the Stage 4: Food Retail, Café, Hotel & Restaurants category.

Figure 26. Food Supply Chain – Employment (Place of Work)

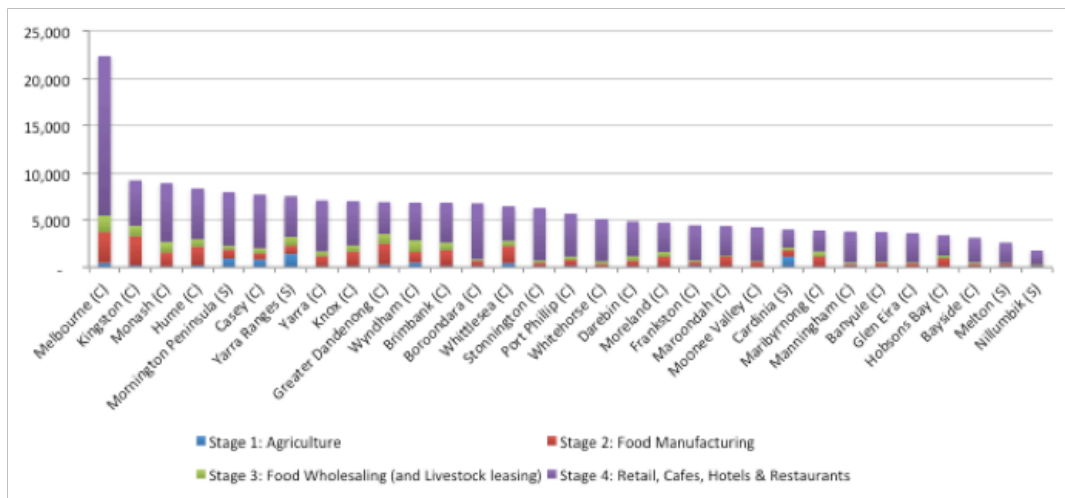
LGA	Stage 1: Agriculture	Stage 2: Food Manufacturing	Stage 3: Food Wholesaling (and Livestock leasing)	Stage 4: Retail, Cafes, Hotels & Restaurants	Total Jobs, involved in the Food Sector
Greater Dandenong (C)	284	2,235	982	3,415	6,916
Frankston (C)	141	376	175	3,765	4,457
Kingston (C)	174	3,084	1,148	4,808	9,214
Cardinia (S)	1,104	684	298	1,917	4,003
Casey (C)	789	667	566	5,655	7,677
Mornington Peninsula (S)	904	969	409	5,642	7,924
Monash (C)	64	1,489	1,124	6,234	8,911
Knox (C)	90	1,568	654	4,702	7,014
Yarra Ranges (S)	1,405	873	893	4,337	7,508

Source: ABS (2011); Field Institute (2014)

Jobs in the Food Industry

The City of Greater Dandenong LGA contains the 10th highest number of food industry jobs in Metropolitan Melbourne, as indicated by the 6,916 jobs in food-related businesses manufacturing, as at 2011. Of these, 3,415 jobs are in Food Retail, Cafes, Hotels & Restaurants, a further 2,235 are in food manufacturing, and 982 are in food wholesaling.

Figure 27. Number of jobs, Food Industry

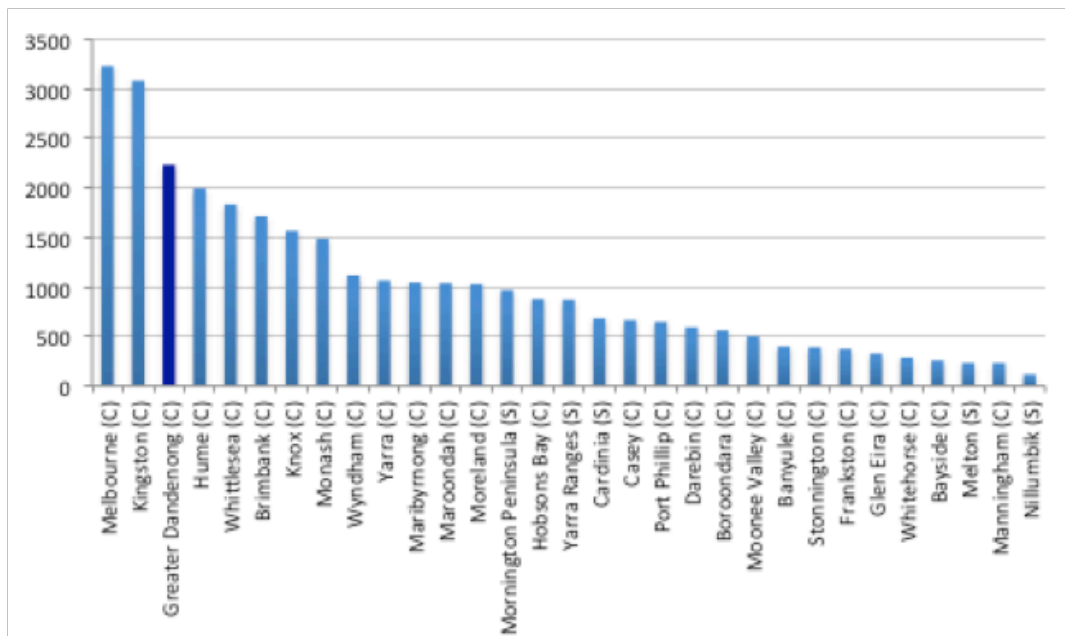


Source: ABS Census (2011); Field Institute (2014)

Jobs in Food Manufacturing

City of Greater Dandenong LGA contains the third highest number of jobs in Metropolitan Melbourne, as indicated by the 2,235 jobs in food manufacturing, as at 2011. The Kingston LGA contained 3,084 food-manufacturing jobs, while the City of Melbourne LGA contained 3,230 food-manufacturing jobs.

Figure 28. Number of jobs, Food Manufacturing



Source: ABS Census (2011); Field Institute (2014)

Employment by Occupation (Usual Residence)

The most common occupations in Greater Dandenong (C) (Local Government Area) included Labourers 17.0%, Technicians and Trades Workers 15.9%, Machinery Operators And Drivers 13.6%, Clerical and Administrative Workers 13.1%, and Professionals 12.4%.

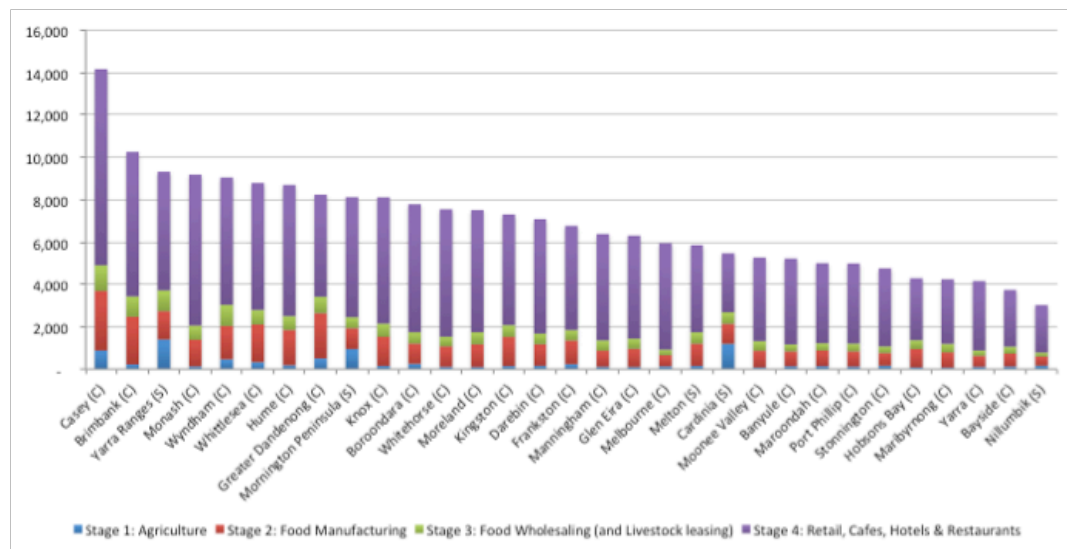
Figure 29. Employment, by Occupation

Occupation	Greater Dandenong (C)	%	Victoria	%
Employed people aged 15 years and over				
Labourers	9,213	17	227,185	9
Technicians and Trades Workers	8,583	15.9	350,758	13.9
Machinery Operators And Drivers	7,342	13.6	154,543	6.1
Clerical and Administrative Workers	7,093	13.1	364,498	14.4
Professionals	6,691	12.4	564,781	22.3
Community and Personal Service Workers	4,787	8.9	234,381	9.3
Sales Workers	4,731	8.7	245,334	9.7
Managers	3,788	7	332,929	13.2

Source: ABS Census (2011); Field Institute (2014)

There are 8,239 City of Greater Dandenong residents employed in the food sector (as at 2011 Census), with 4,821 employed in the 'Food Retail, Cafes, Hotels & Restaurants' stage of the food supply chain, and a further 2,136 employed in the Food Manufacturing stage of the food supply. (Note that not all of these City of Greater Dandenong residents are necessarily employed within the City of Greater Dandenong Council boundary).

Figure 30. Employment by Occupation (Food Sector)



Source: ABS Census (2011); Field Institute (2014)

Count of Businesses

Businesses Registered in Dandenong LGA, by Industry appear below. There are 464 Accommodation and Food businesses, and a further 136 Agriculture, Forestry and Fishing businesses within the City of Greater Dandenong. These account for 3.7% and 1.1% respectively of all businesses within the LGA.

Figure 31. Count of Businesses

Industry Name	SA2 Name							LGA	
	Springvale	Springvale South	Noble Park	Noble Park North	Dandenong	Dandenong North	Keysborough	Dandenong LGA	Share
Accommodation and Food Services	113	33	57	32	137	39	53	464	3.7%
Administrative and Support Services	80	28	93	38	210	63	77	589	4.6%
Agriculture, Forestry and Fishing	6	9	16	6	38	19	42	136	1.1%
Arts and Recreation Services	9	3	18	3	25	6	15	79	0.6%
Construction	225	62	225	96	661	291	271	1,831	14.4%
Education and Training	18	14	14	14	30	11	19	120	0.9%
Electricity, Gas, Water and Waste Services	6		6	6	19	3	12	52	0.4%
Financial and Insurance Services	77	11	72	22	320	52	73	627	4.9%
Health Care and Social Assistance	84	13	65	15	133	40	50	400	3.2%
Information Media and Telecommunications	3	3	9	3	12	6	6	42	0.3%
Manufacturing	128	28	56	40	943	43	164	1,402	11.0%
Mining	-		-	-	12		3	15	0.1%
Other Services	102	35	71	19	359	28	82	696	5.5%
Professional, Scientific and Technical Services	121	27	105	24	298	83	113	771	6.1%
Public Administration and Safety	15	3	5		6	3	-	32	0.3%
Rental, Hiring and Real Estate Services	195	30	62	46	706	71	151	1,261	9.9%
Retail Trade	248	52	96	41	442	83	112	1,074	8.5%
Transport, Postal and Warehousing	389	130	361	72	385	182	144	1,663	13.1%
Wholesale Trade	133	15	39	48	553	53	108	949	7.5%
Unknown	96	28	68	16	169	47	69	493	3.9%
Grand Total	2,048	524	1,438	541	5,458	1,123	1,564	12,696	100.0%
Share	16.1%	4.1%	11.3%	4.3%	43.0%	8.8%	12.3%	100.0%	

Source: ABS 8165 Count of Businesses (2013); Field Institute (2014).

Socio Economic Assessment

A number of socio-demographic variables play an important part of determining food consumption. This section details a number of these key factors. The Dandenong LGA is characterised by:

- High household size
- Young age cohorts
- Lower average household incomes

Figure 32. Socio Economic Assessment (2011)

Socio-Demographic Indicator	Gr. Dandenong (C) Bal SLA	Gr. Dandenong (C) - Dandenong SLA	Greater Dandenong (C) LGA	Greater Melbourne SD
People	76,831	58,778	135,605	3,999,982
Male	38,602	29,923	68,521	1,966,503
Female	38,229	28,855	67,084	2,033,479
Median age	35	35	35	36
Families	20,373	15,272	35,641	1,055,604
Average children per family	1.8	1.8	1.8	1.8
All private dwellings	27,834	22,175	50,009	1,636,167
Average people per household	2.9	2.8	2.8	2.6
Median weekly household income	\$967	\$936	\$953	\$1,333
Median monthly mortgage repayments	\$1,532	\$1,517	\$1,517	\$1,810
Median weekly rent	\$255	\$250	\$250	\$300
Average motor vehicles per dwelling	1.6	1.6	1.6	1.7

Source: Australian Bureau of Statistics (2014); Field Institute (2014)

Population Assumptions

In projecting the future population within the City of Greater Dandenong LGA, Field Institute has considered the following:

- City of Greater Dandenong Strategic Plan and Precinct Plans
- 2001 and 2006 ABS Census of Population and Housing
- ABS Regional Population Growth for the City of Greater Dandenong Statistical Local Area
- ABS Building Approvals data
- Residential development within the catchment

Historical population

Recent population growth throughout the City of Greater Dandenong LGA has been moderate, albeit below some (historic) forecasts, with recorded average annual growth of around 310 people or 0.25% between 2001 and 2006, and growth of approximately 2,000 people p.a. or 1.6% between 2006 and 2011. The majority of this growth has been occurring within the Gr. Dandenong (C) – Dandenong SLA, reflecting the popularity of these areas.

Figure 33. City of Greater Dandenong – Historical Population

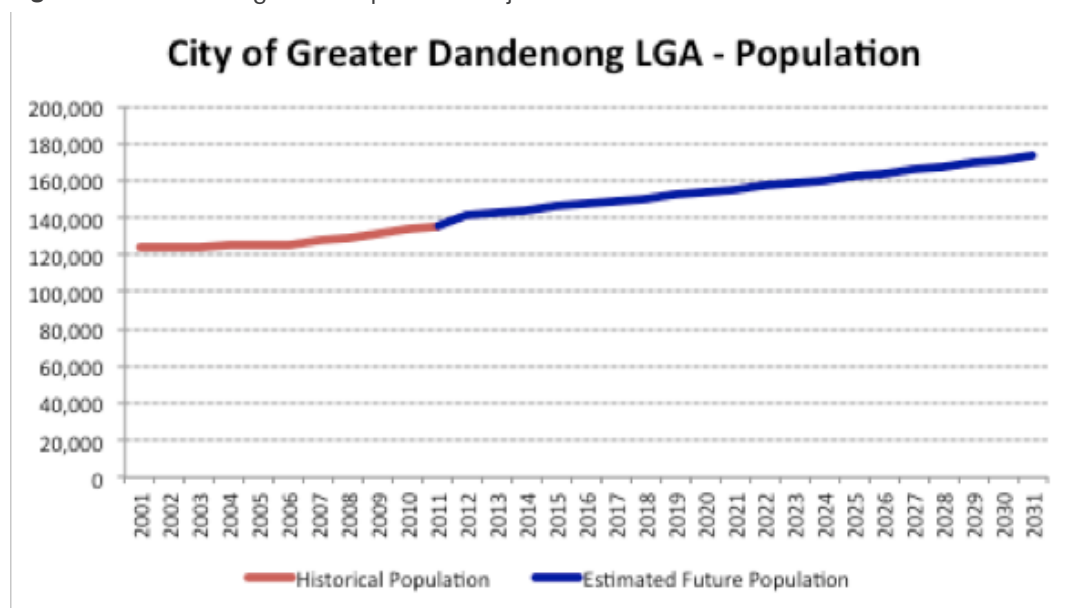
	2001	2006	2011
City of Greater Dandenong LGA	123,965	125,520	135,605
Average Annual Growth (%)		0.25%	1.56%

Source: ABS (2014); Field Institute (2014)

Future Population – Dandenong LGA

City of Greater Dandenong LGA is estimated to experience reasonably strong population growth over the coming period from 2014 – 2031, of approximately 1.1% average annual growth.

Figure 34. Dandenong LGA: Population Projections



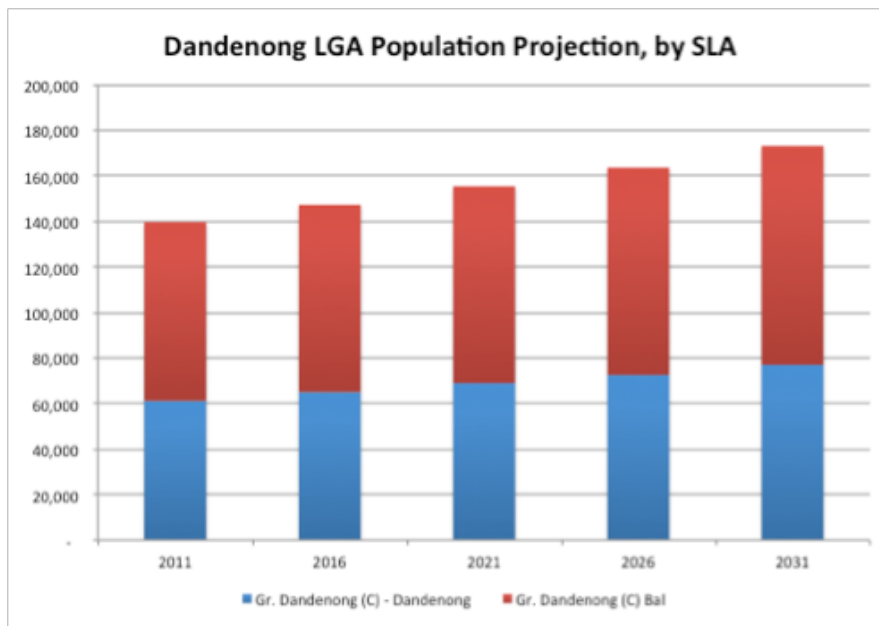
Source: ABS (2011 Census); Vic In Future (2013); Field Institute (2014)

The City of Greater Dandenong LGA comprises two Statistical Local Areas (SLA):

- Gr. Dandenong (C) – Dandenong
- Gr. Dandenong (C) – Balance

These two SLAs are estimated to experience slightly different population growth over the coming period from 2014 – 2031, with Gr. Dandenong (C) – Dandenong SLA expected to experience an average annual growth rate of approximately 1.2%, and the Gr. Dandenong (C) – Balance SLA expected to experience an average annual growth rate of approximately 1.0%.

Figure 35. Dandenong LGA: Population Projections



Source: Vic In Future (2013); Field Institute (2014)

Unemployment

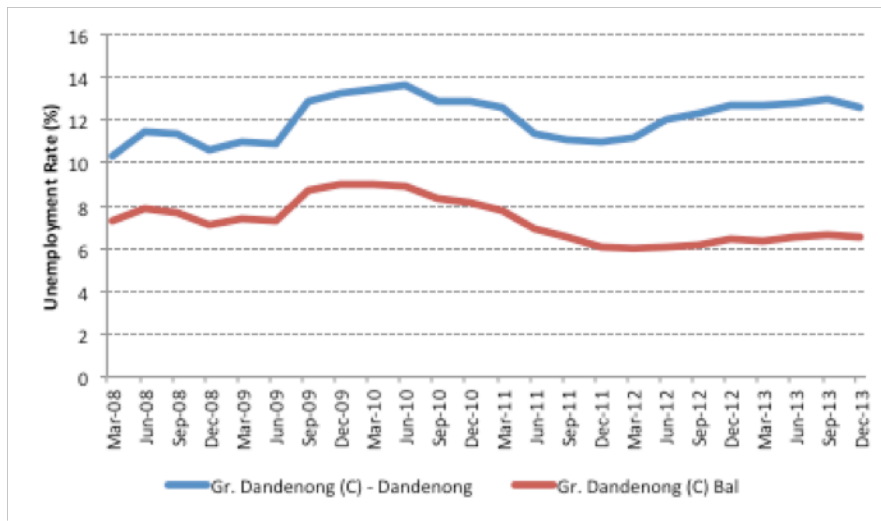
The unemployment rate in the Greater Dandenong – Dandenong SLA has been approximately 10% - 14% since 2008, which is above the Melbourne average of approximately 7%.

A rise in unemployment rate within both SLA regions can be observed from September 2009 through to approximately September 2011, coinciding with the Global Financial Crisis.

Throughout this same period, the labour force in these two regions has remained steady, indicating that the rise in unemployment rates shown in the chart below are due to a reduction in the number of jobs.

Therefore, should initiatives be undertaken by Council which may provide employment opportunities, this could assist reduce the unemployment rate in these regions.

Figure 36. Unemployment rate, by SLA – Dandenong LGA



Source: Department of Employment, Small Area Labour Markets (2013); Field Institute (2014)

Tourism

The City of Greater Dandenong Tourism Strategy (under development) is being undertaken in order to enhance the capacity of Greater Dandenong as a visitor destination.

On average, a dollar spent by a visitor to Greater Dandenong benefits local industries. These estimates are based on the unique structure of the Greater Dandenong economy, in particular, the number and type of tourism related jobs observed in the region. In 2012-13, the local manufacturing industry received the greatest proportion of visitor expenditure, receiving \$0.28 cents for every \$1.00 spent.

Figure 37. Tourism Expenditure Per Dollar - Greater Dandenong

Industry	Benefit to local industries
Manufacturing	\$0.28
Transport, Postal & Warehousing	\$0.23
Retail Trade	\$0.15
Wholesale Trade	\$0.10
Accommodation & Food Services	\$0.08
Arts & Recreation Services	\$0.03
Rental, Hiring & Real Estate Services	\$0.03
Administrative & Support Services	\$0.03
Education & Training	\$0.02
Health Care & Social Assistance	\$0.01
Ownership of Dwellings	\$0.01
Other Services	\$0.01
Information Media & Telecommunications	\$0.01
Agriculture, Forestry & Fishing	\$0.00
Financial & Insurance Services	\$0.00
Mining	\$0.00
Electricity, Gas, Water & Waste Services	\$0.00
Construction	\$0.00
Professional, Scientific & Technical Services	\$0.00
Public Administration & Safety	\$0.00
Total	\$1.00

Source: ABS Tourism Satellite Account (2012-13); City of Greater Dandenong (2014); Food Innovation Alliance (2014)

Targeted research and survey data was produced by the City of Greater Dandenong Tourism Strategy (under development). Broadly the findings indicate a number of opportunities to enhancing Greater Dandenong as a destination, as well as a number of barriers to realising those opportunities.

Key food-related findings are:

- Of all day trip motivating factors, “for a food/dining experience” was the 6th highest motivating factor (section 4.1), with 23% of respondents indicating this motivation “to a large extent”.
- Of all overnight trip motivating factors, “availability of affordable dining options” was the 1st ranked response, with 47% of respondents indicating this motivation “highly important”, and a further 47% of respondents indicating this motivation as “somewhat important”.
- Of all overnight trip motivating factors, “availability of a variety of dining options” was the 2nd ranked response, with 45% of respondents indicating this motivation “highly important”, and a further 47% of respondents indicating this motivation as “somewhat important”.
- Of all overnight trip motivating factors, “availability of dining that utilises the unique produce of the region” was the 4th ranked response, with 47% of respondents indicating this motivation “highly important”, and a further 47% of respondents indicating this motivation as “somewhat important”.
- 87% of respondents indicated either “agree” or “strongly agree” with the statement “I enjoy food experiences that are unique to the region I am visiting”
- Respondents were asked to outline their preferred method of enjoying a unique and unique food experience. 47% of respondents indicated they prefer a “freestyle” method of exploration (ie., in their own time, and in their own way). 36% of respondents indicated they prefer a “self guided tour” method of exploration.

In assessing individual attractions within the City of Greater Dandenong:

- The Dandenong Market scored the highest of all individual attractions within the City of Greater Dandenong, with 40% of respondents “have visited”, and a further 34% “aware but have not visited”.
- Springvale’s South East Asian Precinct scored the 3rd highest of all individual attractions within the City of Greater Dandenong, with 27% of respondents “have visited”, and a further 25% “aware but have not visited”.

Overall, food-related attractions such as The Dandenong Market and Springvale’s South East Asian Precinct stand out as opportunities to enhance the visitor experience within the City of Greater Dandenong, and demonstrate the capacity to showcase the historic and future potential for excellent food retail experiences for new and repeat visitors to the area.

15. Attachments

Attachment 1: Food Supply Chain Employment Analysis

The 'stages' within the supply chain have been defined according to Australian Bureau of Statistics industry of employment categories, for Place of Work, as set out in the table below.

Figure 38. Food Supply Chain Employment Analysis

Stage 1:	Agriculture	Agriculture, Forestry and Fishing <ul style="list-style-type: none"> - Nursery and Floriculture Production - Mushroom and Vegetable Growing - Fruit and Tree Nut Growing - Sheep, Beef Cattle and Grain Farming - Other Crop Growing - Dairy Cattle Farming - Poultry Farming - Deer Farming - Other Livestock Farming - Aquaculture - Forestry and Logging - Fishing, Hunting and Trapping - Agriculture, Forestry and Fishing Support Services
Stage 2:	Processing & Manufacturing	Food Product Manufacturing <ul style="list-style-type: none"> - Meat and Meat Product Manufacturing - Seafood Processing - Dairy Product Manufacturing - Fruit and Vegetable Processing - Oil and Fat Manufacturing - Grain Mill and Cereal Product Manufacturing - Bakery Product Manufacturing - Sugar and Confectionery Manufacturing - Other Food Product Manufacturing - Beverage Manufacturing - Agricultural Product Wholesaling - Grocery, Liquor and Tobacco Product Wholesaling - Farm Animal and Bloodstock Leasing
Stage 3:	Retail, Cafes, Hotels & Restaurants	Food Retailing <ul style="list-style-type: none"> - Supermarket and Grocery Stores - Specialised Food Retailing - Accommodation and Food Services - Food and Beverage Services - Cafes, Restaurants and Takeaway Food Services - Pubs, Taverns and Bars

Source: ABS (2011); Field Institute (2014)

Attachment 2: Summary Of Policies And Strategies

The following is a summary of key strategic and policy documents, and their bearing on the City of Greater Dandenong Regional Food Strategy.

Figure 39. Summary of strategies assessed

Document	Year	Author	Description	Region	Opportunities	Challenges	Strategies	Status	Relevance to Project
National Food Plan White Paper	2013	Australian Government	Outlines goals for next 12 years - growing exports, improving productivity, improving food security and sustainability	Australia	Increased Asian demand.	Climate change, population growth, changing economic conditions, competition for resources, health issues	Reduce trade barriers, investing in innovation, investment in infrastructure, investing in VET, agricultural sustainability, water for future	Implementation mode until 2025.	High
Australia in the Asian Century	2012	Australian Government	Roadmap for the whole of Australia in next phase of Asian engagement	Australia			Reduce trade barriers, build partnerships between governments, industry and community, innovation, develop Asia-relevant capabilities through education and training.		High
	2014	Dept. Agriculture, Fisheries & Forestry		Australia	Increased Asian demand and changing consumer preferences - increased demand for food (all sectors)	Cultural sensitivities, exporting compliance, shifting consumption patterns	na	Implementation mode until 2025.	High
What China Wants: Analysis of China's Food Demand to 2050	2013	Victorian Government	Specific food categories forecasted and analysed	Australia	Specific food categories to experience increased demand are beef, fruit, dairy, sheep & goat meat	Carbon price, access to water	Regional Growth Fund (\$1 billion) - large investment in R&D to boost agricultural productivity, Victorian Food Plan, Food Innovation Hub.		High
Securing Victoria's Economy	2010	Red Meat Advisory Committee	Victorian Coalition Government's strategy to strengthen Victoria's economic future	Victoria	Port expansion and other infrastructure projects (increased export opportunities), trade missions, proximity to Asia,	Community perceptions of industry, climate change	Promote environmental sustainability, increase market access, promote single coordinated voice for industry, develop and retain skilled people, innovation, marketing and promotion, foster economic reform and infrastructure.	Current	Medium
Meat Industry Strategic Plan 2010-2015	2014	DAFF, ABARES	Strategic plan for Red-meat from 2010-2015	Australia		Australian production constraints, and responding to international customer preferences		Current	Medium
What China Wants: Analysis of China's Food Demand to 2050	2010	McKinna; Regional Development Victoria	Trend and forecasts for China food industry	Australia	Opportunities for export, specific food categories, significant growth of middle class in the future	Water management, Globalisation, Dominance of major Australian super-markets, Food security, Labour, education & the workplace	Product differentiation, Sustainable farming models, New farm ownership models, Market-driven production, New industry development.	Current	High

Document	Year	Author	Description	Region	Opportunities	Challenges	Strategies	Status	Relevance to Project
Performance issues impacting on the development of the Victorian agrifood sector	2013	McKinna; Regional Development Victoria	Broad analysis of agrifood sector	Victoria	Opportunity to capitalise on export markets; demand for food expected to outstrip supply in the near future	na	na	Current	High
Southern Melbourne RDA, Agrifood Master Plan (Vol. 1)	Aug 2013	McKinna; Regional Development Victoria	Data profile of agrifood sector within Cardinia Shire, City of Casey, Mornington Peninsula Shire	Southern Melbourne RDA	na	Changing consumer preferences, labour shortages in agrifood sector	Opportunity to establish Casey as a food processing, value-adding and agrifood support centre for South East Victoria;	Current	High
Southern Melbourne RDA Regional Plan – (Vol. 2)	2014	DIISRT	Roadmap of activities for Cardinia Shire, City of Casey, Mornington Peninsula Shire	Southern Melbourne RDA	Escalating global demand for food, proposed upgrade to Port of Hastings			Current	High
Food Processing Industry Strategy Group	2014							Current	Medium
Gippsland Food Plan	2010	Access Economics						Current	Medium
Bunyip Food Belt			(COMMERCIAL IN CONFIDENCE)					Current	Low
The Inquiry into Sustainable Development of Agribusiness in Outer Suburban Melbourne, Parliament of Victoria May 2010	2013				To Come			Proposed	Low
Plan Melbourne: Metropolitan Planning Strategy	2009				To Come			Current	Medium
SEMP Regional Economic Strategy 2009 - 2030	2013				To Come			Current	High
City of Greater Dandenong/ SEMMA Future of Manufacturing project - under development	2012				To Come			Current	Medium

Document	Year	Author	Description	Region	Opportunities	Challenges	Strategies	Status	Relevance to Project
Central Dandenong - 2012 Strategic Framework Plan	2012				To Come			Proposed	Medium
Strategic Retail / Commercial Framework	2014				To Come			Current	High
City of Greater Dandenong Draft Green Wedge Management Plan	2014				To Come			Current	High
Healthy Food Access, Supply and Demand in the City of Greater Dandenong	2013				To Come			Current	Medium
City of Greater Dandenong - Community Engagement Policy and Planning Framework	2013				To Come			Current	Medium
City of Greater Dandenong - Council Plan 2013-2017	2013				To Come			Current	Medium
City of Greater Dandenong - Community Plan, Imagine 2030	2013				To Come			Current	Medium
City of Greater Dandenong - Community Wellbeing Plan	2013				To Come			Current	Medium
Casey Food Hub (aka South East Food Hub)	2014				To Come			Current	High
The East Gippsland Food Strategy					To Come			Current	
The Mornington Peninsula Food Plan	2013				To Come			Current	Medium

Document	Year	Author	Description	Region	Opportunities	Challenges	Strategies	Status	Relevance to Project
Greater Dandenong Local Economic and Employment Development Strategy "Achieving Greater Dandenong's Potential"	2013				To Come				Medium
City of Greater Dandenong - Community Wellbeing Plan	2013				To Come			Current	Medium
Casey Food Hub (aka South East Food Hub)	2013				To Come			Current	Medium
The East Gippsland Food Strategy	2014				To Come			Current	High
The Mornington Peninsula Food Plan					To Come				
Greater Dandenong Local Economic and Employment Development Strategy "Achieving Greater Dandenong's Potential"	2013				To Come			Current	Medium

Source: Food Innovation Alliance (2014)

Attachment 3. Summary of existing City of Greater Dandenong programs

Figure 40. City of Greater Dandenong Programs & Initiatives

Program Name	Run By	Affects Supply Chain (Manufacturer; Retailer; Community)
StreetLife	CoGD Program	Retailer
Healthy Bites (Publication)	CoGD Publication	Retailer
Food News (Publication)	CoGD Publication	Retailer Community
FoodStart	CoGD Program	Retailer
"We Made It" in Dandenong (Trade Fair / Expo)	CoGD Program	Manufacturer Retailer Community
'Dandenong Edible Gardens Project'	CoGD Program	Community
Healthy Cooking Demonstration Kitchen at the Dandenong Market	CoGD Program: Health & Wellbeing Unit	Community
School Garden Network	CoGD Program: Health & Wellbeing Unit	Community
Cooks Network	CoGD Program	Retailer Community
Community Gardens	CoGD – Health & Wellbeing Unit	Community
Emergency Food Relief Programs	Various organisations	Community
"Social Enterprise Network program"	CoGD – Economic Development	Community
Healthy Food Connect (sub-project of Healthy Food Victoria)	Victorian Department of Health.	Community
Kitchen Gardens	CoGD Program	Community
Dandenong Kids	CoGD Program	Customer

Source: Field Institute (2014)

Program Name	Run By	Affects Supply Chain (Manufacturer; Retailer; Community)
Schools Clusters (for healthy canteens)	CoGD Program	Customer
Dandenong World Fare (part of Melb Food & Wine Festival)	CoGD Program	Retailer Community
Small Business Mentoring Network (SEBN)	CoGD Program	Manufacturer Retailer
'Food For All' Program	VicHealth (and CoGD)	Retailer Community
Healthy Basket Surveys	VicHealth (and CoGD)	Retailer Community
'Food For Everybody' Project	VicHealth (and CoGD)	Retailer Community
Emergency Food Relief Distribution Warehouse & operation established	Partnership between CoGD & local agencies	Community
Dandenong's 'Meals on Wheels' Program	CoGD Program	Community
Dandenong's 'Community Meals' Program	CoGD Program	Community

Source: Field Institute(2014)

16. Thanks & Team

Steering Group Members

Our thanks to the members of the Food Strategy Steering Group for their time and input.

Paula Brennan	Economic Development Coordinator, City of Greater Dandenong
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Rachael Duncombe	Coordinator Health & Wellbeing, City of Greater Dandenong
Miranda Harwood	Communications Officer, City of Greater Dandenong
Anita Buczkowsky	Manager Southern Melbourne RDA
Julie Busch	Chair Dandenong Market Board

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Public Consultation	Bec McHenry and Hugo Lamb at Policy Booth

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This food strategy was produced in 2014 for
The City of Greater Dandenong Economic Development Unit
by The Field Institute.

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The Field Institute is a design-led research, communications and strategy office focused on the food and agriculture sector.



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