HillPDA CONSULTING

TANGARATTA FEED MILL

Economic Impact Assessment

Prepared for Baiada Tangaratta

October 2025

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EXECUTIVE SUMMARY

HillPDA was commissioned by Tangaratta Stockfeeds Pty Limited, part of the Baiada Group (Baiada), to prepare this economic impact assessment to inform and accompany an amended State Significant Development Application (SSDA) for a new feed mill (the project) at 771 Wallamore Road, Wallamore NSW (the subject site). The amended SSDA proposes construction of a new feed mill with a maximum production capacity of 14,000 tonnes per week (broiler feed), operating up to 24/7, alongside the continued operation of the existing on-site mill, which will produce up to 2,200 tonnes per week (breeder feed) during daytime hours. The revised scheme reflects a reduction in total site capacity from 17,500 to 16,200 tonnes per week.

This report is among one of the technical documents within the Environmental Impact Statement (EIS) for the project. Prepared to meet the Planning Secretary's Environmental Assessment Requirements (SEARs) set by the NSW Department of Planning and Environment, it specifically focuses on assessing the economic impacts associated with the construction and operation of the project.

Legislation and policy

The project aligns with regional and local policies through supporting significant growth in agriculture, agribusiness, and livestock meat production. It supports the vision of the New England North West Regional Plan 2041, positioning the region as a leading agricultural hub, and meets the expected demand for poultry feed and supporting related industries as outlined in this plan. The project generates additional jobs in the agriculture sector, maintains rural land viability, strategically promotes livestock industry growth, optimises site capabilities, maximises potential, and addresses future needs. As such, it contributes to objectives relating to coordinating land use planning for economic development and expanding agribusiness and food processing sectors.

The project also aligns with the Tamworth Regional Blueprint 100, supporting the vision of a prosperous region where primary industries (including poultry production) thrive. It supports job creation, enhances economic foundations, and contributes to the growth of the meat and food processing industry, aligning with the plan's strategic priorities.

The project is also permissible with consent under the Tamworth Regional Local Environmental Plan 2010 and is consistent with the objectives of the applicable zone.

Economic benefits

The economic benefits of the project as compared to the base case are shown in the table below.

During construction*		Base case	Project
Gross output directly generated and supported through multiplier impacts ($m)		-	$248.6
Total FTE** jobs		-	122
Gross Value Added directly generated and supported through multiplier impacts ($m)		-	$98.5

Post construction benefits		Base case	Proposed development	Difference from base case
Job creation (direct)		15	21	6
Jobs directly generated and indirectly supported		34	48	14
Staff remuneration $m (direct)		$1.4	$1.9	$0.6
Staff remuneration $m (direct and indirect jobs)		$7.3	$10.2	$2.9
Gross Output $m (direct)		$241.8	$391.7	$149.9
Gross Output $m (direct and indirect)		$539.8	$874.5	$334.7
Gross Value Added $m (direct)		$29.1	$47.2	$18.1
Gross Value Added $m (direct and indirect)		$65.6	$106.3	$40.7

* Based on an estimated construction cost of $80.8 million.
** FTE – full time equivalent job

As such, it is anticipated that the project would create new local job opportunities, lead to increased economic activity on the site and an overall stronger economic outcome.

The project is also essential for sustaining the projected growth in poultry production in the New England region, particularly in supporting increased production at Baiada's Oakburn Processing Plant (SSD-9394). This aligns with the vision for the region, as outlined in the regional strategies, which aim to foster significant growth in agriculture, agribusiness, and livestock meat production.

INTRODUCTION

1.0 INTRODUCTION

HillPDA was engaged by Tangaratta Stockfeeds Pty Limited (the Applicant), part of the Baiada Group (Baiada), to prepare an economic impact assessment to accompany accompany an amended State Significant Development Application (SSDA) for a new feed mill (the project) at 771 Wallamore Road, Wallamore NSW (the subject site).

1.1 Purpose and structure of this report

This report is among one of the technical documents within the Environmental Impact Statement (EIS) for the project. Prepared to meet the Planning Secretary's Environmental Assessment Requirements (SEARs) set by the NSW Department of Planning and Environment, it specifically focuses on assessing the economic impacts associated with the construction and operation of the project.

The structure and content of this report is as follows:

- Chapter 1 - Introduction (this Chapter): Provides an overview of the project's background, necessity, and the purpose of this report.
- Chapter 2 - Legislation and policy context: Reviews pertinent state and local strategies, planning instruments, and policy documents. It assesses the project against applicable statutory requirements and strategic objectives. The review will consider matters relevant to the local and regional economy such as economic impacts, job creation and economic development.
- Chapter 3 - Economic benefits of the project: Describes the economic benefits of the project during the construction and operational phase.

1.2 Project overview

The Applicant is seeking to amend a previously submitted State Significant Development Application (SSDA) for a new feed mill at 771 Wallamore Road, Wallamore. The original proposal involved constructing a new poultry feed mill in two stages, with a total production capacity of up to 17,500 tonnes per week, supported initially by the existing on-site mill. Under that scheme, Stage 1 would reach 12,500 tonnes per week through a new mill line and the existing mill operating during daytime hours, while Stage 2 would fully transition to the new mill lines to achieve the total output.

As part of the current amendment, the project has been revised to reduce the total production capacity across the site. The new feed mill is now proposed to produce up to 14,000 tonnes per week (broiler feed), operating up to 24/7, while the existing mill is to be retained to produce up to 2,200 tonnes per week (breeder feed), operating during daytime hours only. This results in a combined site-wide capacity of 16,200 tonnes per week-representing a reduction from the originally proposed 17,500 tonnes.

The revised scheme maintains the original intent of enhancing feed production capacity to support growth in regional poultry farming, particularly to service Baiada's Oakburn Processing Plant (SSD-9394). The subject site remains the preferred and most viable location, given its established infrastructure, strategic proximity to supply chains, and planning compatibility. Earlier assessments determined that increasing production at the existing mill, outsourcing feed supply, or relocating to an alternate site were each unviable due to regulatory, operational, and logistical constraints.

1.3 State Significant Development Application

The SSDA seeks approval for the construction and operation of a new feed mill at 771 Wallamore Road, Wallamore, NSW. The proposed facility will form part of Baiada's vertically integrated poultry production network, supplementing the existing on-site mill, which will be retained for specialised production.

When operating at full capacity, the proposed feed mill will produce up to 14,000 tonnes of broiler feed per week. The existing mill will continue to operate on a reduced basis, producing up to 2,200 tonnes of breeder feed per week during daytime hours. Combined, both mills will enable a total site output of 16,200 tonnes per week, representing a reduction from the previously proposed 17,500 tonnes per week under earlier iterations of the project.

As with the current operations, the new feed mill will import and process a range of ingredients, including cereal grains (such as wheat, oats, barley, and sorghum), protein meals, vitamins, and minerals-blended on-site to meet Baiada's nutritional standards. Around 80% of inputs are expected to be sourced through company-owned or contracted suppliers, primarily located within the New England region. The feed will be distributed to Baiada-owned farms and selected third parties.

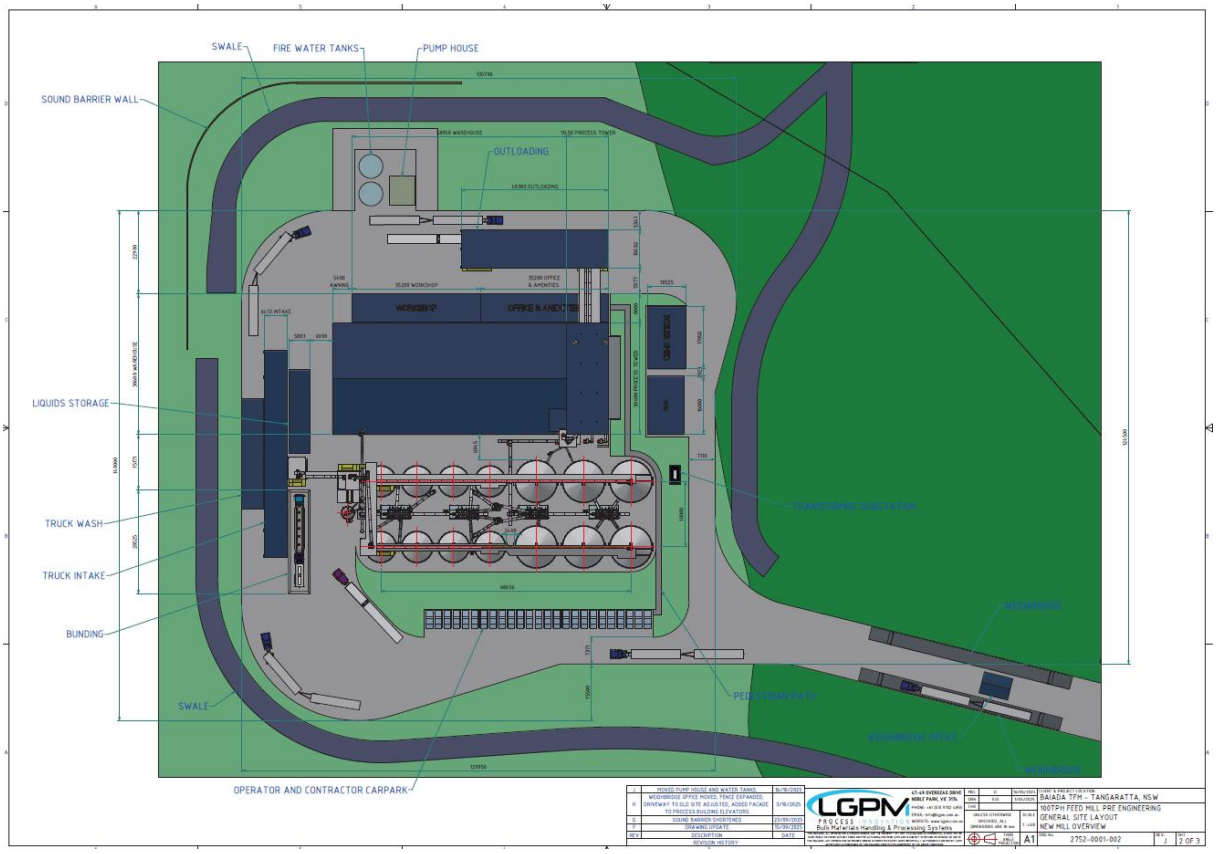
Key components of the new development include weighbridges, an ingredient intake building, storage silos, a processing mill tower, out-loading bins, a boiler house, a maintenance workshop, an administration office, and supporting infrastructure such as internal driveways, truck wash facilities, manoeuvring areas, and staff parking.

The feed milling process involves grain storage, hammer milling, mixing with protein meals, pelletising, applying enzymes or coatings, and transferring the finished product to out-loading bins. The facility will be designed for continuous operation (24 hours a day, 7 days a week) to ensure responsiveness to supply needs across the region.

The SSDA also includes provision for a new on-site office adjacent to the inbound weigh station, with segregated access for light vehicles to minimise conflict with heavy vehicle movements. Site access will be via the existing approved driveway on Wallamore Road, which supports a double vehicle.

The figures below provide a general layout of the proposed development.

Figure 1: General layout of the site



Source: LGPM

1.4 Local context

The subject site, formally known as Lot 4 on DP578865, spans an area of 40.62 hectares. Historically, the land has been cleared and utilised for agricultural activities, with re-vegetation efforts concentrated in the central portion, where the proponent has planted native species.

The SSDA also involves Lot 1 on DP1077646 due to the presence of the existing access driveway, which crosses the Main Northern Rail Line Corridor. This corridor, owned by the NSW State Rail Authority and managed by UGL Regional Linx, runs along Wallamore Road in a North/South direction and remains unconstructed.

RU1 Primary Production and RU4 Primary Production Small Lots zoned land surround the subject site. These areas primarily accommodate agricultural and rural industrial activities, including cropping, poultry farms, dairy, and rural supply businesses. The nearest residential dwellings are approximately 310m to the North, 530m to the West, 690m to the Northeast, and 710m to the East of the subject site. As such, the SSDA is consistent and compatible with the current on-site activities and surrounding area.

The figures below display current images of the facilities and property.

Figure 2: Images of facilities and subject site

Source: Photos taken by HillPDA site visit undertaken 23/01/24

LEGISLATION AND POLICY CONTEXT

2.0 LEGISLATION AND POLICY CONTEXT

This Chapter reviews the pertinent state and local strategies, planning instruments, and policy documents. It evaluates how the modified SSDA aligns with the objectives outlined in these documents, particularly focusing on economic impacts, job creation, and economic development.

2.1 Regional plans and policies

2.1.1 The New England North West Regional Plan 2041

The *New England North West Regional Plan 2041* (Regional Plan) outlines a strategic framework for land use planning over the next 20 years, aiming to safeguard and enhance regional assets while ensuring sustainability. The plan envisions the region as a leading Australian agricultural hub, capitalising on the projected global demand for food and resources. Key economic opportunities identified include intensive agriculture, food, and fibre processing.

The key objectives of the Regional Plan which are of relevance from an economic perspective to this SSDA include:

- Objective 1: Coordinating land use planning for future growth, community need and regional economic development: This objective stresses identifying growth opportunities and initiatives to elevate the region's profile, and foster employment and business prospects.
- Objective 2: Protect the viability and integrity of rural land: This objective focuses on safeguarding rural land viability. It recognises agriculture as a key economic pillar, that employs over 13,000 people (14% of the region's workforce) and contributes significantly to the NSW economy. It promotes implementing strategies that aim to preserve agricultural land productivity while ensuring land use planning considers land quality and scarcity for agriculture.
- Objective 3: Expanding agribusiness and food processing sectors: This objective acknowledges the existing food processing clusters and their contributions to the region's economy, especially in chicken meat production and processing which are centred around the Baiada processing plant in Tamworth. It encourages growing these sectors to meet future demand.

The project strongly aligns with the above objectives and regional vision by contributing to and supporting significant growth in agriculture, agribusiness, and livestock meat production. It addresses the anticipated rise in demand for poultry feed within the cluster, supporting poultry farming and associated industries. This project brings added economic advantages by creating employment opportunities during both the construction and operation phase and boosting local spending.

Moreover, the project will, directly and indirectly, generate additional jobs in the agriculture sector, maintain the viability of rural land, strategically promote livestock industry growth, optimise site capabilities, maximise the site's potential and respond to growing needs.

2.2 Local plans and policies

2.2.1 Tamworth Regional Blueprint 100 – Local Strategic Planning Statement 2020

The *Tamworth Regional Blueprint 100 - Local Strategic Planning Statement 2020* (LSPS) has been developed in compliance with Section 3.9 of the *Environmental Planning and Assessment Act 1979* (EP&A Act 1979). It translates the Regional Plan into actionable measures and serves to guide the government on infrastructure service delivery concerning transportation, education, health/emergency services, police and social housing,

among others. The vision in the LSPS emphasises fostering a prosperous region, where “primary industries continue to be the backbone of the region”. Consistent with this vision, the project plays a pivotal role in increasing poultry feed production commensurate to the projected rise in livestock numbers. By doing so, the project contributes significantly to the growth and sustainability of a vital primary industry within the region.

2.2.2 Tamworth Regional Blueprint 100

In 2020, the Council released the *Tamworth Regional Blueprint 100*, a comprehensive strategy aimed at steering the Tamworth Region toward its vision of a thriving economy, with improved living standards and a target population of 100,000 people. A key aspect of this plan focuses on job creation, particularly by primary employers. Priority 3 in the strategy emphasises the aspiration to foster a prosperous region by leveraging Tamworth's strong economic foundation, attracting new businesses, enhancing skill levels, and reducing business operation costs.

Action 3.4 of the strategy acknowledges Tamworth as a hub for beef, lamb, and poultry production and processing, that serves the entire New South Wales region. It recognises the competitive advantage offered by existing grain, livestock, feedlots, sale yards, and processing facilities for producers in this sector. Moreover, it identifies significant potential within the meat and food processing industry to expand meat processing capabilities and enhance expertise in advanced agribusiness solutions, while contributing to cost reduction in the process. The project aligns with this strategy by: creating additional job opportunities; supporting the growth of the food processing industry; and contributing to cost-reduction efforts.

2.2.3 Tamworth Regional Local Environmental Plan 2010

The subject site falls within the RU1 Primary Production zone under the *Tamworth Regional Local Environmental Plan 2010* (LEP). The project, which is an agricultural produce industry, is a permissible use with consent under this zone.

The zone’s objectives aim to encourage sustainable primary industry production, promote diversity in enterprises, prevent land fragmentation, manage conflicts between land uses, restrict certain uses along main roads, and ensure appropriate land management. The proposed development is consistent with these objectives, enabling the continued supply of poultry feed to the New England poultry cluster while supporting local agricultural producers. The existing mill is progressively reducing operations and will be largely superseded by the new facility, which is designed to increase production capacity and improve operational and environmental performance. The project is therefore consistent with the intent and provisions of the applicable LEP.

ECONOMIC IMPACTS

3.0 ECONOMIC IMPACTS OF THE PROPOSED DEVELOPMENT

This Chapter examines the economic impacts that would likely eventuate from proceeding with the proposed development (i.e. the site is developed in accordance with the modified SSDA). Economic impacts are assessed during the construction and operation phases and include employment generation, gross output, wages and Gross Value Added (GVA).

3.1 Economic impact assessment approach

3.1.1 Economic multipliers and impact indicators

Economic multipliers refer to the level of additional economic activity generated or supported by a source industry. There are two types of effects captured by multipliers:

Production induced effects, which are made up of:

- *First round effects:* which are all outputs and employment required to produce the inputs for the source industry, and:
- *Industrial support effects:* which is the induced extra output and employment from all industries to support the increased production by suppliers in response to increased sales.

Consumption induced effects, which relate to the demand for additional goods and services due to increased spending by the wage and salary earners across all industries arising from employment.

Modelling sources, scenarios and economic metrics assessed

The modelling for this report is based on the Australian National Accounts Input Output tables 2022-23. Input-Output modelling estimates economic activity through the examination of four types of impacts described in the table below.

Table 1: Economic impact metrics assessed

Metric	Description
Output	Output is a gross measure of the total sales generated by the types of land uses present on the site or in the proposal
Employment	Employment refers to the jobs generated by existing or proposed activities on the site, including both full-time and part-time roles. For the purposes of our analysis, employment has been expressed in Full-Time Equivalent (FTE) terms.
Remuneration	The wages and salaries paid to employees on the site or in the proposal, plus other benefits such as superannuation, bonuses, overtime, commissions, allowances,
Gross Value Added	Gross Value Added (GVA) of an industry refers to the value of outputs less the costs of inputs. It measures the contribution that the industry makes to the country's wealth or gross state product (GSP).

The economic impacts have been assessed at NSW State level.

Two scenarios are assessed in this study to gauge the total net benefit (if any) of the proposed development, described as follows:

- **Base case:** refers to the 'do nothing' or 'business as usual' scenario. In the base case scenario, the existing feed mill continues to operate at its current and approved production level.

- **Proposed development:** The subject site is developed in accordance with the modified SSDA (refer to Section 1.3).

3.1.2 Economic impact phases

Economic impacts are further assessed and discussed regarding the specific phases of construction and operation.

- **Design and construction phase:** the economic activity supported through the design and construction phase of the proposed development. These impacts are foreseen as short-term, ceasing upon the completion of development activity. The base case assumes no redevelopment of the existing mill, and therefore construction impacts are not assessed for this scenario.
- **Operational phase (post-construction):** the economic activity supported by the proposed development once completed will be compared to the base case.

3.1.3 Limitations with multipliers

Both the ABS and the NSW Treasury Employment Calculator describe several limitations with input-output multipliers, or at least shortcomings with typical interpretations of the multipliers, which may result in an over-estimation of impacts. The main shortcomings or limitations are as follows:

- Production induced impacts can leave the impression that extra output can be produced without taking resources away from other activities.
- Multipliers assumed fixed input ratios and hence measure impacts based on average effects rather than marginal effects.
- The impacts are nationwide and are not regional or local impacts, which would be smaller.

Other limitations are described in both the NSW Treasury Guide and on the ABS website.[1]

3.2 Proposal design and construction phase economic impacts

3.2.1 Estimated construction cost

The Estimated Development Cost (EDC) is in the order of $80.8 million, excluding GST[2]. This includes $79.6 million in construction costs.

3.2.2 Construction - gross output

The project will have a direct impact on construction output as well as indirectly stimulating other industries that assist in production and cater to increased consumption.

The table below details the output multipliers and shows the impact of the change in demand supported by the project during design and construction and its impact on NSW's economy. The forecast gross output directly generated and indirectly supported across NSW is estimated at approximately $248.6 million.

[1] https://www.abs.gov.au/statistics/economy/national-accounts/australian-national-accounts-input-output-tables/latest-release
https://www.treasury.nsw.gov.au/information-public-entities/nsw-treasury-employment-calculator
[2] Source: Wilde and Woollard EDC 2025

Table 2: Design and construction impact on gross output ($m)

	Direct effects	Production induced effects		Consumption induced effects	Total
		First Round Effects	Industrial Support Effects		
Output multipliers	1.00	0.62	0.56	0.90	3.08
Gross Output ($million)	80.8	49.7	45.6	72.4	248.6

Source: HillPDA estimate using data from ABS Australian National Accounts: Input-Output Tables 2022-23 – NSW State multipliers

3.2.3 Construction - job creation

Throughout design and construction, Wilde and Woollard[3] estimate that the project will create up to 122 full-time equivalent (FTE) jobs in construction with a large portion of this being around the manufacture and installation of the plant and equipment, civil works and building construction.

3.2.4 Construction - Gross Value Added

The GVA of an industry refers to the value of outputs less the costs of inputs. It also measures the contribution that the industry makes to the economy or gross state product (GSP). The major components of GVA are workers' remuneration, company profits and government taxes from production.

Design and construction of the project would directly contribute around $21.7 million of GVA statewide, including multiplier impacts total GVA increases to around $98.5 million (directly and indirectly).

Table 3: Construction - impact on gross value added (GVA)

	Direct effects	Production induced effects		Consumption induced effects	Total
		First Round Effects	Industrial Support Effects		
GVA multipliers	0.27	0.23	0.25	0.47	1.22
Total GVA ($million)	21.7	18.7	19.8	38.4	98.5

Source: HillPDA estimate using data from ABS Australian National Accounts: Input-Output Tables 2022-23 – NSW State multipliers

3.3 Operational economic benefits

The following assesses the statewide economic contribution of the proposed development upon completion as compared to the base case.

3.3.1 Base case

The existing Feed mill currently employees 15 full-time equivalent (FTE) workers on-site[4]. These workers are estimated to earn $1.4 million[5] in combined remuneration and generate $241.8 million in output[6] and $29.1 million in gross value added[7]. Accounting for multiplier impacts[8], the total number of FTE jobs directly generated and indirectly supported statewide from the existing feed mill is 34, total remuneration of those workers is $7.3 million, gross output is $539.8 million and GVA is $65.6 million.

3.3.2 Gross output

Upon operation, it is estimated that the proposed development would directly generate $391.7 million in gross output per year. Accounting for multiplier effects, total gross output directly generated and indirectly supported

[3] Source: Wilde and Woollard EDC 2025
[4] Source: PSA Consulting (2023) Tangaratta Feed mill scoping report
[5] Source: IBIS World Report
[6] Source: https://www.mla.com.au; PSA Consulting (2023) Tangaratta Feed mill scoping report; HillPDA Research
[7] Source: IBIS World Report, HillPDA Research
[8] HillPDA estimate using data from ABS Australian National Accounts: Input-Output Tables 2022-23 – NSW State multipliers

by the proposed development upon completion is estimated at $874.5 million per year. This represents $334.7 million more (direct and indirect) than the base case.

Table 4: Operational phase - gross output ($m)

Land use	Direct output	Production Induced	Consumption Induced	Total
Proposed feed mill (and existing mill at reduced capacity)	391.7	294.9	187.9	874.5

Source: Australian National Accounts Input Output tables 2022-23, IBIS World Reports 2023, Profile.id, HillPDA
Totals may not total exactly due to rounding

3.3.3 Employment generation

The client has advised that upon completion the proposed development (including reduced capacity of the existing feed mill) will generate 21 FTE jobs at full operation, which represents a net increase of 6 jobs over the base case.

Accounting for multiplier effects, the total number of direct and indirect jobs will increase to 48 jobs on completion of the proposed development. This represents an increase of 14 jobs over base case. The table below provides an estimate of the number of direct and indirect jobs that could be supported statewide upon completion of the project.

Table 5: Operational phase - employment generation

Land use	Direct Jobs	Production Induced Jobs	Consumption Induced Jobs	Total
Proposed feed mill (and existing mill at reduced capacity)	21	15	11	48

Source: Australian National Accounts Input Output tables 2022-23, IBIS World Reports 2023, industry reports, HillPDA
Totals may not total exactly due to rounding

3.3.4 Staff remuneration

Direct remuneration of workers onsite during the operational phase is estimated at approximately $1.9 million per annum, approximately $0.6 million more than the base case. Accounting for multiplier effects, total remuneration directly generated and indirectly supported by the proposed development is estimated at $10.2 million per annum, with the breakdown shown in the table below. This represents $2.9 million more remuneration (direct and indirect) than the base case.

Table 6: Operational phase - staff remuneration ($m)

Land use	Direct remuneration	Production Induced	Consumption Induced	Total
Proposed feed mill (and existing mill at reduced capacity)	$1.9	$4.7	$3.6	$10.2

Source: Australian National Accounts Input Output tables 2022-23, IBIS World Reports 2023, Profile.id, HillPDA
Totals may not total exactly due to rounding

3.3.5 Gross value added

Upon operation, it is estimated proposed development would directly generate $47.2 million GVA per annum statewide, which represents $18.1 million more than the base case. Accounting for multiplier effects total GVA directly generated and indirectly supported by the proposed development is estimated at $106.3 million per annum, with the breakdown shown in the table below. This represents a net increase of total GVA (direct and indirect) of $40.7 million as compared to the base case.

Table 7: Operational phase - gross value added ($m)

Stage	Direct GVA	Production Induced	Consumption Induced	Total
Proposed feed mill (and existing mill at reduced capacity)	$47.2	$33.8	$25.3	$106.3

Source: Australian National Accounts Input Output tables 2022-23, IBIS World Reports 2023, Profile.id, HillPDA
Totals may not total exactly due to rounding

3.4 Other economic impacts

3.4.1 Supports growth in poultry production

The new feed mill is a crucial element in the projected growth of poultry production in the New England region and is essential to support the anticipated increase in production at Baiada's Oakburn Processing Plant (SSD-9394). Regarding economic impacts, the proposed feed mill, within the broader context of poultry expansion plans, is anticipated to have a positive effect.

To accommodate the heightened poultry processing in the region, a substantial increase in the supply of birds is necessary. It is anticipated that approximately 300 additional poultry sheds will be needed to meet the ultimate capacity of the Oakburn processing plant. This growth is expected to occur through the expansion of existing farms and the establishment of new farms in suitable locations within a 2-hour drive of the Oakburn processing plant, adhering to animal welfare considerations. All of these farms will rely on the feed produced at the proposed feed mill. Consequently, the project is crucial for facilitating this growth, and will contribute to job creation in poultry production and stimulating the regional economy.

3.5 Impact conclusion

On completion and full operation, the proposed development would directly and indirectly support 48 jobs, $874.5 million per annum in gross output, $10.2 million per annum in combined remuneration and $106.3 million GVA per annum statewide. This represents a net increase in $334.7 million in gross output (direct and indirect), $2.9 million in combined remuneration (direct and indirect) and $40.7 million in GVA (direct and indirect) statewide, as compared to the base case.

There would also be benefits during construction, including contributing an additional $248.6 million (direct and indirect) in gross output Statewide and $98.5 million in GVA statewide. The project would also create up to 122 FTE jobs in construction.

The proposed development would have additional economic benefits of supporting the projected growth of poultry production in the New England region.

The above evaluation has assessed the economic merits of the proposed development. Based on this assessment, the proposed development is supported from an economic standpoint and is expected to deliver stronger economic outcomes for the region than the base case.

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