



Equine Industry Scoping Report





This Equine Industry Scoping report has been developed by RDA Far South Coast NSW in collaboration with the Equine Industry Steering Committee and Hasler Accounting & Consulting Pty Ltd.

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1. Executive Summary

The Far South Coast region of NSW, covering the Local Government Areas of Shoalhaven, Eurobodalla and Bega Valley, hosts a large number of enterprises and activities associated with the professional and recreational equine sectors. The region is home to a growing range of equine therapists and professional practitioners in fields such as veterinary, dentistry, farriery, chiropractic, massage and other support services. It is also home to enterprises with unique export/import markets such as breeding, training and performance horses. In addition, the region has established racing and recreational equine industries.

In January 2011, a number of stakeholders within the equine industry of the Far South Coast held discussions regarding the need for a cohesive industry representative group, believing there to be significant potential and capacity to grow this sector. An Equine Industry Steering Committee was formed consisting of:

- Mr. John Wells (Chair) Director, Shoalhaven City Turf Club
- Mr. Paul Goodwin (Secretary) TAFE Illawarra. Extensive thoroughbred industry education and workforce development expertise
- Ms. Linda Marquis (Member) Shoalhaven Business Chamber, event management
- Ms. Robbie Collins (Member) University of Wollongong. Education and community development, breeder and equestrian sports competitor
- Jennifer Symes (Industry Member) Belissimo Stud. Performance horse breeder, judge and equestrian competitor
- Dr. David Searle (Industry Member) Illawarra Equine Veterinary Services Centre, qualified equine veterinary professional
- Ms. Anne Bendesi (Industry Member) Saddleworld Nowra. Retail business owner and major industry sponsor, horse owner and competitor in equestrian sports
- Ms. Gail Loose (Industry Member) Shoalhaven Dressage Club, equine tourism operator, administrator for equestrian sports
- Mr. Jim Collin (Industry Member) Horse Trainer, NCAS Coach, equine industry owner operator
- Mr. Les Murphy (Industry Member) Sapphire Coast Turf Club, racing industry administrator and business operator
- Adele Hislop (Industry and Community Member) extensive experience with endurance and showing performance horses
- Mr. Peter Atkinson (Industry Member) Moruya Veterinary Services, Senior Partner and Committee Member, Moruya Turf Club

This steering committee identified the need for an Equine Industry Scoping Report to identify and quantify the diverse industry groups, their level of activity in the region and supply chain linkages which make up this important industry.

Key outcomes of the Report:

- A comprehensive audit of the region's equine industry.
- Number of direct and indirect equine industry jobs in the region.
- The dollar value of the south coast equine industry (both real and including the multiplier effect).
- Identification of obvious skills shortages within the industry.

While there is a paucity of information making it difficult to gauge the number of direct and indirect equine industry jobs, the industry on the south coast appears to be a "sleeper". The findings clearly demonstrate that there is a real opportunity to provide a momentum for growth and excellence.

Obvious skills shortages have been identified within the region and within the industry. A number of professional and allied skills are in short supply or require additional training. TAFE and other training institutions have the opportunity to respond to these shortages.

A directory of the region's equine industry can be found at Appendix 3.

It is estimated that the industry value to the region's economy is more than \$56 million and with the co-operation of both industry and government, there is an exciting opportunity for the south coast to become nationally and internationally recognised as a centre of excellence for all equine services including training, animal husbandry, services, supplies and education.

2. Methodology & Limitations

Requests for information were sent to over 50 equine industry representatives including owners, trainers, breeders, clubs and associations throughout the region. The Report was developed using the following strategies:

- Desk top and web based research
- Personal contact with known industry representatives
- Referrals from industry representatives
- Telephone interviews
- Emails

Turf Clubs across the region provided an insight into racing activity on the south coast. They supplied valuable information for this Report including current strategic plans from the Sapphire Coast Turf Club and the Moruya Jockey Club. Published information from Racing NSW was also provided by Shoalhaven City Turf Club.

Equestrian Australia (NSW), Pony Club Association NSW, known breed associations and local equestrian clubs provided information on memberships, events, estimated horse numbers, income, and expenditure.

Whilst there are harness racing trainers in the region, there is little information available and therefore this group has not been included in this Report.

Where possible, professionals, individuals and support organisation were contacted and data relating to these sectors was used to provide an indicative economic benefit to the industry in the region.

As a result of the difficulties in locating industry representatives, economic sizing parameters to the local industry are based on available data and anecdotal information. The value assumptions in this Report are based on local data sources and published information.

3. About Our Region

The Report into the Equine Industry in the far south coast region of NSW covers the geographic area from Berry in the north to the Victorian border.

The region includes the three local government areas of Shoalhaven, Eurobodalla and Bega Valley.

The far south coast region is renowned for its stunning natural beauty and sandy beaches. The coastline stretches over 400 kilometres attracting high numbers of tourists and increasing numbers of people wishing to relocate permanently for work and pleasure.

The population of the region is 168,606 and this number is expected to grow to approximately 230,000 by 2036 (ABS, 2010; NSW Planning 2010).

3.1 Shoalhaven

Shoalhaven is the largest of the three local government areas in the region with a resident population of 96,967 (ABS, 2010). This number increases to over 300,000 during peak holiday periods. There is strong interest in this region in all horse related activities including training and breeding, thoroughbred racing, performance horse activities in all the Olympic disciplines as well as endurance riding, polo cross, showing, pony clubs and leisure riding.

The Shoalhaven's proximity to Sydney and Canberra makes it an ideal day trip for all equestrians, both amateur and professional. The Shoalhaven City Turf Club holds 14 race meetings each year attracting day trippers, owners, trainers and support staff, all of whom utilise accommodation services and facilities in the region. Five races are held on Sundays and one on Saturday.

While the Shoalhaven is well catered for with equine veterinary services, many ancillary health services including chiropractors, dentists and farriers are in short supply resulting in service providers travelling from areas as far away as Yass and the Hills district in North Western Sydney.

3.2 Eurobodalla

The Eurobodalla Local Government Area is located along the New South Wales south coast, approximately 280km south of Sydney and 150km east of Canberra. The area stretches from Durras in the north to Wallaga Lake in the south.

The Eurobodalla Shire has a resident population of 37,714 (ABS, 2010) and is home to the Moruya Jockey Club, Eurobodalla Dressage Club, Pony Club, Polo Cross, trail riding clubs and many other professional, performance and leisure horse activities.

The Moruya Jockey Club hosts over 10,000 visitors per annum and is supported locally by more than 25 professional trainers with over 80 horses in full time work. A number of licensed jockeys live in the region with other regular riders doing track work riding up to six days per week.

The region enjoys a vibrant and enthusiastic equestrian fraternity with strong dressage, polo cross and leisure riding activities. There is a plentiful supply of suitable land at reasonable prices which attracts industry players to the area.

3.3 Bega Valley

Bega Valley is a pristine area of forest and foreshore stretching from Bermagui in the north to the Victorian border in the south with a current population of 33,925 (ABS, 2010).

Bega Valley has a number of well patronised clubs in show jumping, dressage, leisure riding and other performance horse events. The Bega Show Jumping Championships is one of the premier competitions on the NSW Show Jumping circuit attracting approximately 400 entries each year.

The area is also home to the Sapphire Coast Turf Club, one of the newest and most modern race tracks in NSW. The track is suitable for metropolitan class horses and is well drained for all seasons. Centrally located between Sydney and Melbourne, the club hosts over 10,000 patrons each year. Because of its location, many visitors choose to add additional days to their stay, further contributing to the area's tourism economy.

The Turf Club has identified a need in the region for an all-weather equine arena with stables and an amenities block. Such a facility would eliminate the need to cancel events due to rain or grounds being too wet for horse activities. Whilst the Club can provide space for the facility, funding would need to come from outside sources. A working group is currently investigating the project and would welcome input from federal, state and local governments for the next stage of development.

4. The Equine Industry

Industry categories are defined as either Primary Equine Activity, where there is direct involvement with horses, or Secondary Equine Activity where service providers are indirectly involved with horses. The lack of available data for both categories means cost estimates are based on a cost per horse basis. The industry on the south coast is highly unregulated and reliable information is not available across all industry sectors. However, the information gathered forms the basis of a local industry directory and provides detail on each industry sector, if not each industry member.

4.1 Primary Equine Activity

Horse Training/Coaching – Training of thoroughbred and performance horses in the region accounts for a large proportion of overall training with more than 60 registered trainers listed with Racing NSW (Racing NSW Official Publication April 2012).

Performance horse breeders are usually registered with individual breed associations and therefore are more difficult to identify and quantify as there is limited communication between breed equestrian associations. It is estimated that the number of horses under training with professional trainers in the region is well in excess of 300 at any one time. Add to this numerous riding schools and horses under training and the estimated horse number increases to well over 500.

It should be noted that most professional horses have on average 10 syndicated owners and many syndicates have more than 10 owners. In addition to their owners each horse has a trainer, strapper and jockey.

Horse Breeders – This study identified over 25 listed breeders of thoroughbred and performance horses, warm bloods, Arabian horses, ponies and stock horses.

Information on horse numbers is unreliable with professional and owner breeders listed as having from one horse, to over 30 horses at larger studs. It is estimated that horse numbers exceed 200, however, there is no reliable data to support this.

Racing and Competition (Professional) – Excellent turf and racing clubs are located at Nowra in the Shoalhaven, at Moruya in the Eurobodalla and at Kalaru in the Bega Valley. These clubs provide the south coast with excellent equine facilities and contribute significantly to the local economy with over 40,000 attendees at race meetings, special functions and event days. Racing club attendees include tourists, locals, industry members and staff who are involved in race meetings. These clubs employ local people on a full time and casual basis.

Any flow on from racing and gaming including TAB, wagering and media events has not been considered at this time.

Performance Horses (Dressage, Polo Cross, Showing, Endurance, Jumping and Eventing) - There is a large number of equestrian events throughout the far south coast attended by fully trained and groomed performance horses. Association members involved in these events are estimated at close to 500 with horse numbers of approximately 700. Events and meetings provide immediate economic benefit to the region and support many local businesses including transport, tourism and retail.

Pony Clubs and Associations – Many of these clubs and associations are run by members and volunteers. The clubs provide a place of learning for both horse and rider and focus on having fun. There is a large number of members registered in the south coast regional Pony Club zones 14, 22 and 28 with total membership exceeding 550, as advised by Pony Clubs Association of NSW. Clubs hold regular events which contribute significantly to the local economy with membership fees expended directly into the local economy. Horse numbers vary but for the purposes of this Report have been estimated at one per member, totaling 550.

Tourism Related Equine Experiences - The excellent riding facilities and nature trails offered by the region attract the equine fraternity. Farm stays, trail riding and leisure riding are all important tourist draw cards and although small at present, there is enormous potential for the tourism sector. Horse numbers at riding centres and tourism specific centres are estimated conservatively at 150 horses.

4.2 Secondary Equine Activity

Horse Feed and Supplements - Fodder and nutrition make up a substantial cost component in keeping a horse. Products are sold through local retailers and wholesalers with most products being manufactured outside of the region.

Equine Health – Veterinarians, chiropractors and horse dentists make up the bulk of service providers in this category, supported by a number of equine therapists and healing practitioners. The equine industry has suffered significant challenges in recent years from health issues such as Equine Influenza. The availability of qualified and professional equine health service providers is critical for the local industry. It is estimated approximately 30 equine veterinarians operate in the region.

Land Based Businesses – This critical and often expensive component provides infrastructure, horse accommodation, land and agistment for the equine industry. Land based businesses also include sale yards, racecourses, associated function centres and visitor/tourist accommodation. Anecdotal information indicates a shortage of quality agistment centres that cater for performance horses owned within and outside the region. Existing agistment facilities are either poorly promoted or not promoted at all. The region has limited facilities for large scale auctions or horse sales for the racing or performance horse sectors similar to those located in Tamworth, the Hunter Valley and Orange.

Equine Husbandry – This sector includes professional and para-professional services provided by farriers and saddlers. Breeders and trainers have identified a shortage of locally based skilled professional farriers necessitating the outsourcing of these services. There is no full time professional saddler in the region therefore all significant saddlery

and leather repairs are also outsourced. Saddlers including Peter Horobin from Victoria and Brighton Saddlery from Sydney often visit the area but only when there is an economy of scale to ensure the journey is financially viable.

Support Industries – Other activities that support the equine industry include transport services and equipment, sale of horse and riding equipment, product manufacturing, horse and rider insurance, auctioneer and quarantine services, public relations and event sponsorships.

Summary – Findings indicate a strong, diverse yet disjointed local industry with very few region-wide objectives, strategies or goals. Whilst the quality of industry organisations, skills and services in the region are in many cases world class, their impact on our local economy is yet to be measured. This report is an excellent first step to qualifying and quantifying the industry's contribution to the region's economy. The local equine industry is driven by informal networks rather than by organised communication strategies within and across all sectors. Local saddleries provide excellent retail services and in general are able to source and supply the bulk of the regions' needs. However it should be noted that retailers have expressed concern about the shift to online purchasing which is clearly a significant threat to their bottom line and the local economy.

5. Industry Strengths, Weaknesses, Opportunities and Threats (SWOT)

The south coast region of New South Wales offers many opportunities for the equine industry. However there is strong competition for the equine dollar from other recreational pursuits. A SWOT analysis has identified the following strengths, weaknesses, opportunities and threats:

Strengths

- Broad cross section of activity with potential to build economies of scale and interest.
- Readily available investment land at reasonable prices compared to our major competitors in cities and other regional centres such as the Hunter Valley.
- Regular events held across the region which encourage wide participation and attract valuable dollars to the local economy.
- Skilled and unskilled labour is available at reasonable rates across the region.
- The climate is generally mild and ideal for all types of equine activity.

Weaknesses

- Lack of formal communication across industry sectors.
- Lack of community and government recognition regarding the value of the industry to the local economy.
- Shortages in key husbandry and professional services necessitating outsourcing from other regions.
- Lack of knowledge of training and employment opportunities for those wishing to enter the industry.
- Marketing and promotion of events is limited.
- Shortage of signature events that would attract greater community awareness, participation and investment.
- TAB staffing at race meetings is inadequate on major race days thereby reducing the dollar spend.

Opportunities

- Promotion of the local equine industry benefits to community, government and national and international equine investors.
- Investigate development of a 'Centre of Excellence' for the region.
- Development and promotion of the industry through local TAFE and tertiary training courses that provide students with national and international accreditation.
- Establishment of an 'international standard' indoor, all-weather facility to secure events and support a range of new training opportunities.
- Increase tourism potential through eventing, racing, trekking and other equestrian activities.
- Improvement of facilities for equine industry training and events to a similar level to those located at Orange and Tamworth.
- Establishment of an industry cluster to connect disparate operators and new entrants.
- Development of additional signature events across the region.
- Promotion of the economic value of the equine industry to the region.
- Encourage high profile and elite equine industry people to relocate to the region.

Threats

- Loss of land to other industries or housing development.
- Loss of signature events to other regions through failure to promote the region's benefits.
- Loss of investment to other industries due to lack of education and promotion.
- Limited recognition of contribution of the industry to the regional economy.
- Loss of skills to other regions.
- Young people leaving region to seek industry training and employment.
- Loss of events resulting in reduced participant numbers.
- Continuation of outsourcing of tradespeople and materials resulting in loss of income to the local economy (e.g. horse shoes).
- Competition for the wagering dollar from other sporting codes.
- Increased transport costs.
- Local competition for event dollars.
- Competition for the retail dollar from online suppliers of saddlery, apparel, nutritional supplements and related services.

6. Assessing the Economic Value of the Equine Industry in the Region

The Equine Industry Scoping Report reveals an industry with potential for real investment and significant growth. The Report attempts to provide logical categories for analysis but notes the possibility for overlap and duplication across services. The lack of robust data has meant a reliance on industry estimates which are based on current costs and the expectations of local industry players. Duplication may occur between club memberships with some individuals belonging to more than one club. Where detailed and accurate data is not available, this Report has maintained a conservative approach to member estimates.

This Report estimates a contribution of \$36.45 million to the regional economy by the equine industry as follows:

Cost Estimates by Type

Please note, the multiplier effect applied as per the National Institute of Economic and Industry Research recommendation of 1.5.

Industry Category	Avg cost / year \$	Number of horses	Total Estimate pa \$
Professional Horses			
Husbandry	1000	700	700,000
Training	1850	700	1,295,000
Stabling	3300	700	2,310,000
Feed	3120	700	2,184,000
Supplies other	1000	700	700,000
Veterinary	750	700	525,000
Dentistry	200	700	140,000
Therapy/massage/chiro	600	700	420,000
Transport & accommodation	600	700	420,000
Other (incl. Entry fees)	500	700	350,000
Total	12,670*		\$9,044,000
Performance Horses			
Husbandry	800	700	560,000
Training	1450	700	1,015,000
Feed and Agistment	2550	700	1,785,000
Veterinary	750	700	525,000
Dentistry	200	700	140,000
Therapy/massage/chiro	200	700	140,000
Transport & accommodation	600	700	420,000
Other (incl. Entry fees)	500	700	350,000
Total	6,500*		\$4,935,000

***Industry Sources**

Industry Category	Avg cost / year \$	Number of horses	Total Estimate pa \$
Leisure Horses			
Agistment & feed	1300	750	975,000
Pharmaceuticals & Supplements	750	750	562,500
Coaching	500	750	375,000
Safety/Riding gear	200	750	150,000
Vet and dental	500	750	375,000
Husbandry	620	750	465,000
Membership/ Fees	45	750	33,750
Total	3,265*		\$2,936,250
Total Primary Activity			\$16,915,250
Support Services			
Books Magazines	300	2,150	645,000
Horse/riding Equipment	1000	2,150	2,150,000
Float Hire/Transport	600	1,400	840,000
Sundry (equipment, finance, insurances, quarantine etc.)	500	2,150	1,075,000
Retail other	300	2150	645,000
Land based costs/infrastructure estimate only	1,000	2150	2,150,000
Total	2,400*		\$7,505,000
Racing & Competition			
Avg Cost/Year	Patrons	Total Estimate pa	
Racing Revenues (Total Region) (Industry advice)	0	34,000	3,800,000
Competition/special function/event days	0	6,000	0
Racing specific accommodation (10%) Estimate only 9 nights pa	1,800	3,400	6,120,000
Total	1,800		\$9,920,000*
Tourism Related Accommodation			
Avg Cost/Year	Number of Horses	Total Estimate pa	
Riding Fees (\$200/week)	10,000	150	1,500,000
Accommodation	10,400	150	1,560,000
Total	20,400*		3,060,000
Total Secondary Activity			\$20,485,000
PIC (Property Identification Code fee) approx.			\$50,000
Grand Totals			\$37,450,250

Industry Category	Avg cost / year \$	Number of horses	Total Estimate pa \$
Multiplier of 1.5 applied			\$56,175,375

***Industry Sources**

7. Land Use

Land use and management on the south coast has undergone significant change over the past half century. Urban expansion in some areas has put pressure on suitable agricultural land whilst improved genetics management, nutrition and husbandry practices in the once labour intensive dairy industry have led to significant farm consolidation and productivity increases.

Far fewer farmers are producing substantially higher output.

One consequence of these and other developments (such as the widespread declaration of national parks in the region and the decline in forestry activity) has resulted in such land that is available being transitioned into other uses, for example, viticulture, beef, boutique breeds (equine, bovine and other animals), boutique food production (coffee, olives, tea, berries, etc.).

It is noted that these developments are not unique to the south coast and that other regions are subject to land use transition for the same and additional reasons. Among those 'additional reasons' are mining and coal seam gas exploration and in the Hunter Valley, in particular, there is an emerging confrontation between the equine and viticulture industries and the mining sector. While we understand the NSW government is moving to quarantine existing equine and viticulture land in the Hunter, this also poses a threat as expansion in that region will be severely restricted and uncertain.

Given the traditional access and exploration rights which the extractive industries have enjoyed in Australia, and the growing global demand for energy, one possible outcome of further land use transition could be a pressure on certain sections of the equine industry seeking to relocate. Should this occur in respect of the Hunter, the south coast, given its proximity to Sydney, would prove an attractive place to relocate and invest.

It is suggested that this possibility be explored further, including the identification of areas within the region that might be suitable for large scale horse stud/breeding establishments. It is further suggested that RDA Far South Coast, local Councils and state regional economic development officers monitor developments in this area.

8. Tourism and Events

Stakeholders confirm that the equine industry plays a significant if unquantified role in the region's Tourism and Events industry. The Report has already identified the annual Bega Show Jumping event, however the region hosts many other events which attract intraregional competitors for longer stays. These events include monthly pony club meetings, endurance/trail riding, rider dressage and of course, thoroughbred racing activities and annual championship events that attract competitors from across NSW and interstate.

It is important to note that the region formerly hosted significant events such as the NSW State Show Jumping Championships and Worrigee Horse Trials and included day events which made a significant contribution to the local economy. The only significant annual equestrian event currently operating is the Interschools' Championships which attracts over 400 young riders, parents and horses.

It would be beneficial for the equine industry to initiate a dialogue with the South Coast Regional Tourism Organisation and Shoalhaven Tourism, Eurobodalla Tourism and Sapphire Coast Tourism to develop strategies that explore incentives to attract additional high yield events to the region. This process might include an audit of industry infrastructure, its fitness for staging events and identifying infrastructure shortfalls which might be addressed through modest investment. Further inspection of recently constructed venues at Orange and Tamworth would demonstrate the type of facilities needed in the region.

In 2010 Shoalhaven Dressage Club submitted a proposal to the NSW Dressage Council to host the State Championships. Unfortunately a lack of adequate facilities meant the opportunity was lost to another region.

Apart from organised competitions there are large numbers of horse owners who prefer to pleasure ride, some of whom belong to the Australian Trail Horse Riders Association. Others organise their own informal outings on weekends and holidays, this group is impossible to quantify. The complaint from this group is the lack of suitable legal bridle trails, camping facilities which accommodate horses and 'holiday with your horse' facilities. While there are many fire trails, nature reserves and forests, most areas are off limits to pleasure riders. Accordingly improved bridle paths, trails, camping and accommodation facilities would offer another tourism opportunity that is currently underserved.

One area where there is some empirical evidence which gives an insight into equine tourism is thoroughbred racing. During the Equine Influenza Outbreak of 2006/7, Racing NSW (together with many other peak industry bodies) undertook some research to quantify the value of the industry to the Australian economy. This research showed that in NSW alone, more than 50,000 people were permanently employed in the industry and that nationwide it was one of Australia's biggest industries.

Racing NSW research involves race course facility managers recording the number of horses competing over a full year and their region of origin. Data has been obtained from Shoalhaven City Turf Club which shows that in the 2007/2008 financial year, 622 horses competed at the Archer Racecourse track at Nowra. Interestingly, only 228 of those, or 36.6% were from within the south coast region. The data shows that 394 horses or 63.4% of all competitors came from outside the region. The origin of the horses was as follows:

Intra-Regional	No of Horses	Inter-Regional	No of Horses
Batemans Bay	3	ACT	
Berry	14	Metro Sydney	
Broulee	7	○ Randwick	13
Conjola	15	○ Rosehill	28
Kalaru	5	○ Warwick Farm	74
Moruya	98	Illawarra (Kembla)	95
Nowra	26	Hawkesbury	51
Sapphire Coast	8	Central West & S.W Slopes	75
Shoalhaven Heads	2		
TOTAL	178	TOTAL	336

As most horses have at least two attendants (trainer and strapper) and are usually accompanied by one or more (family and/or syndicate) owners, the number of people the industry brings into the region is significant. Anecdotal evidence provided by Shoalhaven City Turf Club management suggests many visitors, particularly owners, often overnight in the area, while the day visitation component of the industry also purchases meals, fuel and feed and engages the service of local labour such as farmers.

There is another interesting observation which emerges from the table above that relates to the very high participation rates at the Nowra track from Moruya, Kembla and Warwick Farm. The conclusion reached in this regard is outlined below.

8.1 Training Clusters of the 3 Thoroughbred Racing Tracks

Within the region, only Moruya has a cluster or grouping of training facilities located adjacent to the track. Kembla has a similar arrangement with trainers and track sharing the same precinct. Rosehill and Randwick have 'resident' trainers, but it is the convenient proximity to Warwick Farm for the south coast region, which sees metro trainers giving their horses a "hit out" in the country.

In the Shoalhaven, it is apparent that thoroughbred training facilities are spread out across the local government area - Berry, Conjola, Cambewarra and several sites around Nowra. Whilst this might reflect a preparedness to invest significantly in the industry at a local level, it does result in less than optimal use of the Nowra track(s) for training purposes and is arguably wasteful of a scarce resource (land). More intensive use of public infrastructure seems sensible.

As the Nowra-Bomaderry structure plan is articulated over the next two to three decades, the industry would suffer pressure to make way for urban expansion. Industry and government would be wise to consider developing Kembla/Moruya style training clusters on lands contiguous to the racecourse. Zoning and other planning instruments should be cast to facilitate such future development.

A concluding comment from the Shoalhaven City Turf Club advises that they have considered establishing stabling and training facilities within the track, however financial and environmental constraints have to date, been insurmountable in relation to this proposal.

It is suggested that RDA Far South Coast, in conjunction with the three Council's Economic Development Offices, could proceed to investigate the development of training clusters through reasonably priced rural/residential subdivisions available for private investment by the industry.

9. Industry Employment and Training

The supply chain structure of the industry contains a number of diverse sectors. Embedded within these sectors is the increasing need for better skilled and more highly qualified personnel and business owners.

The industry is becoming more sophisticated, with horse owner expectations of specialised knowledge and professional services for the care of their animals requiring higher technical skills and business acumen.

Industry sources advised a shortage of properly skilled and qualified personnel in farriers, grooms and stable hands, riding coaches (NCAS Qualified), judges and allied veterinary health.

Many business operators, particularly performance horse breeders and trainers, have little or no formal business training, knowledge or understanding of recruitment, occupational health and safety and industrial relations practices. The racing segment of the industry in particular engages with big business which demands professional business service delivery from trainers in addition to sound horsemanship.

TAFE NSW has equine training facilities located at the Yalla campus in the upper Illawarra, the Goulburn campus in the Highlands and infrequently conducts outreach training programs further south in NSW. Basic level Animal Studies are delivered at Moruya and Nowra campuses. Access to tertiary equine courses requires travel or distance learning and online delivery.

There is a clear need for targeted and localised training programs and facilities to address the current skills shortages. These shortages have the potential to constrain development and create the risk of the equine industry seeking to develop elsewhere. The industry has identified that building skills will create greater capacity to increase demand for export of equine products and services.

A number of members of the performance horse sector were very vocal about the need for improved indoor and outdoor Olympic standard training facilities in the region similar to those located in Orange and Tamworth.

10. Conclusion

This Report provides a helicopter view of an industry that has gone largely unrecognised. What is clear is that the equine industry is robust and continues to grow whether in the sporting, high performance or racing sectors.

Additionally, the Report identifies a need to further investigate this sleeper industry to accurately quantify the true economic value to the south coast of NSW and to develop a fully costed Strategic Plan to attract investment, provide appropriate infrastructure and create training and employment opportunities. To this end the following actions have been determined:

1. Identification of appropriate funding sources to undertake a qualitative and quantitative economic impact study of the equine industry to confirm the outcomes of this Report and to provide data for an industry growth strategy.
2. Establishment of an Industry Cluster Group comprising representatives from all sectors across the far south coast region.
3. Improved communication between stakeholder agencies, organisations and relevant government departments as partners in an industry growth strategy. Partners would include, but not be limited to: the Industry Cluster Group, NSW Department of Primary Industry, Equestrian NSW, Racing NSW, RDA FSC, TAFE, University of Wollongong, Australian Veterinary Association and others.
4. Identification of necessary infrastructure requirements and the economic benefits arising. Development of plans for implementation.
5. Development of a directory of employment lands.
6. Investigation of the impact on the local economy of media and gaming activities and development of a strategy to attract necessary new investment.

This Report highlights the vibrant nature of the industry and the significant economic benefits to be gained from a coordinated development approach to sustainability and growth. There is now the basis of a comprehensive directory of industry participants (see Appendix 3).

It is necessary to develop an industry wide approach within the region to ensure expansion and certainty. Appendix 1 lists further suggested actions to commence the process.

The evidence clearly demonstrates that there is a real opportunity for the equine industry on the south coast to provide a momentum for growth and excellence. With the co-operation of both industry and government, there is an exciting opportunity for the south coast to become nationally and internationally recognised as a 'Centre of Excellence' for all equine activities ranging from training, animal husbandry, services, supplies and education.

11. Appendices

Appendix 1. Suggested Action Plan

No.	ACTION	Resource	Outcome	Dates
1	Undertake a regional survey of equine businesses and consumers to establish industry groups and activities, including media and gaming, consumer spending and needs, strengths and weaknesses plus opportunities for expansion and growth	Independent Research Group	Current database of industry categories and economic data plus issues arising and further actions required	1st Jul. 2013 to 1st Aug. 2013
2	Develop an Equine Industry Communications Group (ICG) as part of an industry cluster	Project Team	Industry Cluster involved in regular meetings and regional promotion	30th Sept. 2013
3	Establish a Regional structure of industry, RDA and LGA's	Project Team	Common approach to establishing regional influence for the industry	30th Sept. 2013
4	Establish a Regional Infrastructure Committee to raise funding and develop promotional material and activities for major infrastructure projects recommended from the research	Project Team, ICG, RDA, LGA,s, State and Federal Governments	Promote and direct equine projects of influence for the region, attract funding and sponsors. Establish targets.	31st Oct. 2013
5	Establish a Regional Centre of Excellence for equine health	Project Team, DPI and ICG	High standards of equine health attracting additional industry activity locally	31st Jan. 2014
6	Develop Professional standards for the local industry and establish formal training needs and infrastructure to maintain high standards expected. Develop work experience programs to attract young people to the industry	Project Team, ICG, Schools, TAFE and University plus regional representatives of industry	Continuing professional development requirements, work experience and training courses in place	28th Feb. 2014
7	Develop Action Plans for all other issues and opportunities arising from the research stage	Project Team, ICG and industry representatives	Allocate resources to action plans with clear timelines and outcomes.	31st Mar. 2014
8	Develop a recruitment and retention strategy for the industry. Consider possible floating resources where practical	Project Team ICG, Educators and industry representatives	Develop measures to attract, develop and retain quality staff	30th Apr. 2014
9	Develop a comprehensive central listing of industry members, horses and activities for the region.	Project Team, ICG and Industry Representatives	South Coast register of prime equine industry and support players	30th Apr. 2014

Appendix 2. Acknowledgements

The following provided valuable data for this report and have been vital in providing recent and relevant information on organisations, members, industry norms and local issues. We sincerely thank them for their contributions.

Name	Organisation	Position
Wendy Cohen	Equestrian Australia (NSW Branch)	CEO
Tina Murdoch	Pony Club Association NSW	CEO
Lyn Locke	Shoalhaven Turf Club	CEO
Gayle Loose	Shoalhaven Dressage Club	President
Liz Yeatman	Department of Primary Industries Berry	Manager
Judy Sweeney	Berry Riding Club	President
Phaedra Walsh	Dressage Rider/Horse Owner	
Deb Reid	Eurocoast Polocrosse Association	Secretary
Irene Adams	Eurobodalla Dressage Club	Secretary
Shelly Ison	Shoalhaven Endurance Rider's Association	Secretary
Lisa Ferguson	Pony Club Association of NSW	Marketing
Garry Mackrell	Bell View Park Stud	Owner
Brian Cowden	Moruya Jockey Club	CEO
Les Murphy	Sapphire Coast Turf Club	CEO
Paul Goodwin	TAFE NSW	Manager
John Wells	Shoalhaven City Turf Club	Director
Anne Bendesi	Saddleworld Nowra	Owner
Peter Atkinson	Moruya Veterinary Services	Senior Partner
David Searle	Illawarra Equine Veterinary Services	Principal

Appendix 3. Directory of Industry Participants

NAME	ADDRESS	TOWN	STATE	P/CODE	HORSES
Horse Trainers					
Adams B L	68 Albany St	Berry	NSW	2535	
Crossley G J	PO Box 420	Berry	NSW	2535	6
Price L J	8 Gwenda Ave	Berry	NSW	2535	7
Price R J	8 Gwenda Ave	Berry	NSW	2535	15
Robinson T J	539c Coolangatta Rd	Berry	NSW	2535	15
Robinson A	1534 Bolong Rd	Shoalhaven Heads	NSW	2535	4
Minns G	30 Golden Hill Ave	Shoalhaven Heads	NSW	2535	2
Williams W R	105 Albatross Rd	Nowra	NSW	2541	5
Tiye P W	249 Cabbage Tree Lane	Nowra	NSW	2541	6
Thomason F G	139 The Links Rd	South Nowra	NSW	2541	5
Bennett M J	209 Worrigee Rd	Worrigee	NSW	2540	7
Pignataro S	82 Bennett Pl	Worrigee	NSW	2540	4
Barrow M A	12 Falls Rd	Falls Creek	NSW	2540	
Murray G W	"Rissmore" Murray's Rd	Conjola	NSW	2539	100
Murray E B (Bede)	"Rissmore" Murray's Rd	Conjola	NSW	2539	
Ogilvy M	82C Little Valley Way	Milton	NSW	2538	1
Smith T T	40 Pengana Cres	Mollymook	NSW	2539	2
Fisher R K	F1160A Princes Hwy	Termeil Creek	NSW	2539	1
Cassidy K J	PO Box 895	Batemans Bay	NSW	2536	4
Pearson C C	PO Box 547	Batemans Bay	NSW	2536	10
Connell B P	246 Beach Rd	Batehaven	NSW	2536	3
Afflick P D	PO Box 62	Moruya	NSW	2537	4
Backhouse G J	114 Donnelly Dr	Moruya	NSW	2537	12
Brown L	3A Mollee Rd	Moruya	NSW	2537	2
Bundy L	117 Donnelly Dr	Moruya	NSW	2537	15
Hill C M	5 Guthrie St	Moruya	NSW	2537	13
Jones B N	3308 Princes Hwy	Moruya	NSW	2537	2
Law J N	Camelot, Yarragee Rd	Moruya	NSW	2537	10
MacDonald M W	Lot 43 Donnelly Dr	Moruya	NSW	2537	7
Marzol J W	PO Box 801	Moruya	NSW	2537	15
Peiti R J	142 North Head Rd	Moruya	NSW	2537	7
Stephens S A	PO Box 106	Moruya	NSW	2537	6
Vella S	112 Donnelly Dr	Moruya	NSW	2537	5
Whipp M J	168 North Head Rd	Moruya	NSW	2537	
Pepper L J	48 Dunns Creek Rd	Woodlands	NSW	2537	15
Howes R J	148 Princes Hwy	Bodalla	NSW	2545	1
Mathie W A	256 Potato Point Rd	Bodalla	NSW	2545	
Wheatley R R	22 Auckland St	Bega	NSW	2550	3
Bobbin G J	Lot 143 Corridgeree Lane	Tarraganda	NSW	2550	5
Watson S	PO Box 7059	Tathra	NSW	2550	2
Hewson M & C	PO Box 7008	Tathra	NSW	2550	
Wynen B E	9 Cherry Lane	Wolumla	NSW	2550	7
Cole D B	1969 Sapphire Coast Rd	Kalaru	NSW	2550	2
Strickland C	Lot 93 Sapphire Coast Dr	Kalaru	NSW	2550	8
Joseph B & Jones P	PO Box 126	Bombala	NSW	2632	
Kimber R H	Lot1A Gunningrah Rd	Bombala	NSW	2632	1

NAME	ADDRESS	TOWN	STATE	P/CODE	HORSES
Owner Trainers					
Small P J	88A Gannet Rd	Nowra Hill	NSW	2540	
Backhouse R V	376 Dunns Creek Rd	Malua Bay	NSW	2536	1
Latta M G	4 Kerang St	Batemans Bay	NSW	2536	3
Gatty M J	1 Lyttle St	Broulee	NSW	2537	5
Gamble D J	120 Bingi Rd	Bergalia	NSW	2537	
Wood M B	PO Box 487	Moruya	NSW	2537	1
Hensler C	PO Box 375	Moruya	NSW	2537	2
Booker J	PO Box 53	Narooma	NSW	2546	2
Smith C G	Frogs Hollow Lane	Bega	NSW	2550	4
Stewart J B	3 Cloverdale Lane	Bega	NSW	2550	6
Horse Training					
Fitzroy Equestrian Centre	1171 Nowra Rd	Fitzroy Falls	NSW	2577	
Jim Collin Equine Training Services	3 Heard Ave	Shoalhaven Heads	NSW	2535	
Thomas Equestrian Services (Luke)	Slaughterhouse Rd	Milton	NSW	2538	
Heffernan B F	Donnelly Dr	Moruya	NSW	2537	
Jockeys					
Azzopardi J D	3/530-532 George Bass Dr	Malua Bay	NSW	2536	
Harness Racing					
Gary James Crossley		Berry	NSW	2535	
Terence James WinAm		Berry	NSW	2535	
Peter Robinson	620b Princes Hwy	Jaspers Brush	NSW	2535	10
Justin Kent Abbott	87 Jaspers Brush Rd	Jaspers Brush	NSW	2535	
Gregory John Minns	30 Golden Hill Ave	Shoalhaven Heads	NSW	2535	
Peter John Doody	71 Jasmine Dr	Bomaderry	NSW	2541	
Paul Allan Beresford	Stringybark Rd	Nowra	NSW	2541	
Catherine Ruth Carson		Nowra	NSW	2541	
Peter Jeffrey Haigh		Nowra	NSW	2541	
Robert Bruce Abrahams	29 Prosperity Rd	South Nowra	NSW	2541	
Phillip James Bowron	Central Ave	South Nowra	NSW	2541	
Peter William Carson		South Nowra	NSW	2541	
Gregory Robert Coney	105 Sophia Rd	Worrigee	NSW	2540	
John Christopher Miller	28 Nelson St	Bega	NSW	2550	
Horse Stud Breeders					
Valinor Park Arabians	Broughton VI	Berry	NSW	2535	
Lord's Ponies	91 B Coolangatta Rd	Berry	NSW	2535	
Blue Denim Pony Stud	5 Mullers Lane	Berry	NSW	2535	
Illawarra Equine Centre	23 Bridges Rd	Gerrigong	NSW	2534	
Illawarra Equine Centre	Lot 3 Elliott Lane	Meroo Meadow	NSW	2540	
Bellissimo Performance	71 Boxsells Lane	Meroo Meadow	NSW	2540	12
Bell View Park Stud P/L	112 Bells Lane	Meroo Meadow	NSW	2540	30
Turpentine Park	Bells Lane	Cambewarra	NSW	2540	
Nattahl Arabians	Budgong Fire Trail	Budgong	NSW	2577	
Kirabee Paint Horses	PO Box 235	Bomaderry	NSW	2541	

NAME	ADDRESS	TOWN	STATE	P/CODE	HORSES
Terara Park Equine Centre	174 Millbank Rd	Terara	NSW	2540	
M Apperley	174 Millbank Rd	Terara	NSW	2540	
Valhalla Horse Farm Holidays	Falls Rd	Falls Creek	NSW	2540	
Bill Hopkins	Pritchard Ave	Huskisson	NSW	2540	
Murray E B (Bede)	"Rissmore" Murray's Rd	Conjola	NSW	2539	100
Timbertops Stud/Ride School	Princes Hwy	Termeil	NSW	2539	
Longridge Equestrian Centre	462 Dunns Creek Rd	Malua Bay	NSW	2536	
Clarke E M & M B	Mungererie Stud	Moruya	NSW	2537	
Killarnie Clevelands	RMB 504 Araluen Rd	Moruya	NSW	2537	
Wadbilliga Stock Horse Stud	10785 Princes Hwy	Cobargo	NSW	2550	
Billabong Park Riding Centre	220 Princes Hwy	Bodalla	NSW	2545	
Stardust Miniatures	11 Candelo Rd	Bega	NSW	2550	
Irvin R D	Bonny View	Bemboka	NSW	2550	
Joseph B & Jones P	PO Box 126	Bombala	NSW	2632	

Artificial Breeding Service

Stenway Livestock/Breeding	16 McMahons Rd	Nowra North	NSW	2541	
Illawarra Equine Centre	Lot 3 Elliott Lane	Meroo Meadow	NSW	2540	
Horse Riding / Centres					
Kimberley Park Stud	46 Princes Hwy	Foxground	NSW	2534	
Fitzroy Equestrian Centre	1171 Nowra Rd	Fitzroy Falls	NSW	2577	
Man From Kangaroo Valley	24 Hillcrest View La	Kangaroo Valley	NSW	2577	38
Targa Equestrian	Emerald Drv	Meroo Meadow	NSW	2540	
Terara Park Equine Centre	174 Millbank Rd	Terara	NSW	2540	
Cedar Leigh Equest'n Centre	Terara Rd	Numbaa	NSW	2540	
Baronga Riding Academy	391 Yalwal Rd	Nowra	NSW	2541	
Bennetts Horse Stables	209 Worrigee Rd	Worrigee	NSW	2540	
Valhalla Horse Riding & Farm	Falls Rd	Falls Creek	NSW	2540	30
Milton Ulladulla Equestrian	1 Tallow Wood Dr	Milton	NSW	2538	4
Milbree Park Riding School		Milton	NSW	2538	
Timbertops Stud & Riding	Princes Hwy	Termeil	NSW	2539	30
Evans R & G Princes Hwy	Princes Hwy	Termeil	NSW	2539	
Longridge Equestrian Centre	462 Dunns Creek Rd	Malua Bay	NSW	2536	11+
Mirraboooka Equestrian Centre	Noggarulla Dr	Moruya	NSW	2537	
Billabong Park Riding Centre	220 Princes Hwy	Bodalla	NSW	2545	12
Wyndham Trail Rides	"Karuna"	Wyndham	NSW	2550	

Agistment

Boynton Park	119 Bong Bong Rd	Broughton Vale	NSW	2535	
Archer Park Stables	100 Hanigans Lane	Bolong	NSW	2540	
Piczo	Yalwal Rd	Nowra	NSW	2541	
Kygra-Lee Park Horse Camp	174 Millbank Rd	Terara	NSW	2540	
Terara Park Equine Centre	174 Millbank Rd	Terara	NSW	2540	
Valhalla Horse Riding & Farm	Falls Rd	Falls Creek	NSW	2540	
A & J Robertson	81 The Wool Rd	Old Erowal Bay	NSW	2540	

Services

Jim Collin Equine Training	3 Heard Ave	Shoalhaven Heads	NSW	2535	
Thomas Equestrian (Luke)	Slaughterhouse Rd	Milton	NSW	2538	
Tom Lyttle Equine Services	Mirraboooka Centre	Moruya	NSW	2537	

NAME	ADDRESS	TOWN	STATE	P/CODE	HORSES
Tourism					
Man From Kangaroo Valley	24 Hillcrest View La	Kangaroo Valley	NSW	2577	38
Kygra-Lee Park Horse Camps	174 Millbank Rd	Terara	NSW	2541	
Horse Ride Calymea	1012 Yalwal Rd	Barringella	NSW	2540	
Valhalla Horse Riding Farm	Falls Rd	Falls Creek	NSW	2540	30
The Oaks Ranch and Country	238 Old Mossy Point Rd	Mossy Point	NSW	2536	
Timbertops Riding School	Princes Hwy	Termeil	NSW	2539	30
Longridge Equestrian Centre	462 Dunns Creek Rd	Malua Bay	NSW	2536	11
Luhana Motel & Horse Stable	82 Princes Hwy	Moruya	NSW	2537	
Insurance					
Austbrokers Insurance Broker	Suite 4, 5- 7 East St	Nowra	NSW	2541	
Transport					
Terry Fahey		Berry	NSW	2535	
Gary Crossley	PO Box 420	Berry	NSW	2535	
Kirabee Paint Horses	PO Box 235	Bomaderry	NSW	2541	
South Coast Horse Transport	384 Albatross Rd	Nowra Hill	NSW	2540	
Garry Nelson Transport	218 Cabbage Tree Lane	Nowra Hill	NSW	2540	
Jones Horse Transport	3308 Princes Hwy	Moruya	NSW	2537	
Horse Racing Clubs					
Shoalhaven City Turf Club	Albatross Rd	Nowra	NSW	2541	
Nowra District Trotting Club	Albatross Rd	Nowra	NSW	2541	
Nowra Harness Racing Club	PO Box 136	Nowra	NSW	2541	
Moruya Jockey Club Ltd	Donnelly Drv	Moruya	NSW	2537	
Sapphire Coast Turf Club	Sapphire Coast Dr	Kalaru	NSW	2550	
Horse Floats					
EGR Trailers	Unit 2/ 186 Princes Hwy	South Nowra	NSW	2541	
Jennings McDonald & Co P/L	Norfolk Ave	South Nowra	NSW	2541	
Horse Drawn Carriages					
Clyde Manor Clydesdales	342 Agars Lane	Berry	NSW	2535	
Terara Carriages	344 Terara Rd	Terara	NSW	2540	
Vet Hospitals/Clinics - Services Equine					
Berry Veterinary Clinic	84 Queen St	Berry	NSW	2535	
Dr Geoffrey Manning	84 Queen St	Berry	NSW	2535	
Dr Anthony Bennett	84 Queen St	Berry	NSW	2535	
Alison Clark	84 Queen St	Berry	NSW	2535	
David Ball	84 Queen St	Berry	NSW	2535	
Illawarra Equine Centre	23 Bridges Rd	Gerrigong	NSW	2534	
Illawarra Equine Centre	Lot 3 Elliott Lane	Meroo Meadow	NSW	2540	
Dr David Searle	Lot 3 Elliott Lane	Meroo Meadow	NSW	2540	
Dr Chris Lawler	Lot 3 Elliott Lane	Meroo Meadow	NSW	2540	
Dr Gillian Rickard	Lot 3 Elliott Lane	Meroo Meadow	NSW	2540	
Dr Johann Schulze	Lot 3 Elliott Lane	Meroo Meadow	NSW	2540	
Dr Ramon Perez	Lot 3 Elliott Lane	Meroo Meadow	NSW	2540	
Bomaderry Veterinary Hospital	335 Princes Hwy	Bomaderry	NSW	2541	
Dr Gary Bryce	335 Princes Hwy	Bomaderry	NSW	2541	
Dr Neal Johnson	335 Princes Hwy	Bomaderry	NSW	2541	
Dr Ashley Wright-Hands	335 Princes Hwy	Bomaderry	NSW	2541	

NAME	ADDRESS	TOWN	STATE	P/CODE	HORSES
South Nowra Veterinary Hospital	55 Woncor Avenue	South Nowra	NSW	2541	
Vincentia Veterinary Surgery	Shop 1 Burton St	Vincentia	NSW	2540	
Dr Tony Kuipers	55 Woncor Avenue	South Nowra	NSW	2541	
Glynis Kuipers	55 Woncor Avenue	South Nowra	NSW	2541	
Chantal Whitten	55 Woncor Avenue	South Nowra	NSW	2541	
Rachael Bailey	55 Woncor Avenue	South Nowra	NSW	2541	
Eurocoast Veterinary Centre	3 Tallgums Way	Surf Beach	NSW	2536	
John N Law	3 Tallgums Way	Surf Beach	NSW	2536	
Adam Toyer	3 Tallgums Way	Surf Beach	NSW	2536	
Tara Cashman	3 Tallgums Way	Surf Beach	NSW	2536	
Moruya Veterinary Hospital	86-88 Queen St	Moruya	NSW	2537	
Peter & Mary Atkinson	86-88 Queen St	Moruya	NSW	2537	
Janelle Dunkley	86-88 Queen St	Moruya	NSW	2537	
Gary Eggins	86-88 Queen St	Moruya	NSW	2537	
Frances Busfield	86-88 Queen St	Moruya	NSW	2537	
Michael Nelson	86-88 Queen St	Moruya	NSW	2537	
Anabel Blake	86-88 Queen St	Moruya	NSW	2537	
Cobargo Veterinary Hospital	56 Princes Hwy	Cobargo	NSW	2550	
Helen Schaefer	56 Princes Hwy	Cobargo	NSW	2550	
Bega & Cobargo Veterinary Hospitals	9-11 Ridge St	North Bega	NSW	2550	
Jane Woolacott	9-11 Ridge St	North Bega	NSW	2550	
Peter Alexander	9-11 Ridge St	North Bega	NSW	2550	
Chris Knox	9-11 Ridge St	North Bega	NSW	2550	
Nikki-lea Esmond	9-11 Ridge St	North Bega	NSW	2550	
Eden and Pambula Vet Clinics	4A Bullara St	Pambula	NSW	2549	
Eden Veterinary Clinic	2 Irene Crs	Eden	NSW	2551	
Dr Leilani Nordin	4a Bullara St	Pambula	NSW	2549	
Dr Justin Daniel	4a Bullara St	Pambula	NSW	2549	
Dr Linden Daniel	4a Bullara St	Pambula	NSW	2549	
Dr Maeve Keenan					
Eurobodalla Animal Physiotherapy Services	1/11 Church St	Eurobodalla	NSW	2545	

Vet Hospitals/Clinics - Non Equine Specific

North Nowra

Veterinary Hospital	205 Illaroo Rd	Nowra North	NSW	2541	
Cathy Birch	205 Illaroo Rd	Nowra North	NSW	2541	
Dr Quentin Brown	205 Illaroo Rd	Nowra North	NSW	2541	
Dr Robyn Mackay	205 Illaroo Rd	Nowra North	NSW	2541	
Dr Kristy Gilbert	205 Illaroo Rd	Nowra North	NSW	2541	
Jervis Bay Veterinary Clinic	Lot 233 The Wool Rd	Old Erowal Bay	NSW	2540	
Ian Scott	Lot 1763 The Wool Rd	Old Erowal Bay	NSW	2540	
Shoalhaven Veterinary Clinic	109 Berry St	Nowra	NSW	2541	
Justin Clarke	109 Berry St	Nowra	NSW	2541	
Nowra Veterinary Hospital	103 Kinghorne St	Nowra	NSW	2541	
Andrew Havadjia	103 Kinghorne St	Nowra	NSW	2541	
Bay & Basin Animal Hospital	1 Grange Rd	Tomerong	NSW	2540	
Vets To You		Nowra	NSW	2541	
Culburra Veterinary Clinic	7 Weston St	Culburra Beach	NSW	2540	
John Wright	7 Weston St	Culburra Beach	NSW	2540	

NAME	ADDRESS	TOWN	STATE	P/CODE	HORSES
Callala Veterinary Consulting Room	22 Emmett St	Callala Bay	NSW	2540	
Sussex Inlet Veterinary Surgery	179 River Rd	Sussex Inlet	NSW	2540	
David Goodwin	179 River Rd	Sussex Inlet	NSW	2540	
Ulladulla Veterinary Hospital	249 Princes Hwy	Ulladulla	NSW	2539	
Milton Veterinary Clinic	166 Princes Hwy	Milton	NSW	2538	
Rob Wylie	166 Princes Hwy	Milton	NSW	2538	
Gary Parker	166 Princes Hwy	Milton	NSW	2538	
Andrew Ottley	166 Princes Hwy	Milton	NSW	2538	
Alison Hogan	166 Princes Hwy	Milton	NSW	2538	
Simone Daley	166 Princes Hwy	Milton	NSW	2538	
Milton Village Vet	139 Princes Hwy	Milton	NSW	2538	
Batemans Bay Veterinary Surgery	1 Peninsula Dr	Batemans Bay	NSW	2536	
Dr Roberts Paula	1 Peninsula Dr	Batemans Bay	NSW	2536	
Casey's Beach Veterinary Clinic	394 Beach Rd	Batehaven	NSW	2536	
Beth Miller	71 Coila Creek Rd	Coila	NSW	2537	
Beth Miller	394 Beach Rd	Batehaven	NSW	2536	
Batehaven Vet Clinic	210 Beach Rd	Batehaven	NSW	2536	
Vet-To-Pet Mobile Service	106 Wagonga St	Narooma	NSW	2546	
Narooma Veterinary Hospital	124 Wagonga Rd/ Princes Hwy	Narooma	NSW	2546	
Chris and Alison Spurgeon	124 Wagonga Rd/ Princes Hwy	Narooma	NSW	2546	
Bermagui Veterinary Clinic	1 Wapengo St	Bermagui	NSW	2546	
Carl Von Schreiber	1 Wapengo St	Bermagui	NSW	2546	
Imlay Veterinary Clinic	59 Merimbula Dr	Merimbula	NSW	2548	
G Collins	59 Merimbula Dr	Merimbula	NSW	2548	
S Ebeling	59 Merimbula Dr	Merimbula	NSW	2548	
Dentistry Equine					
South Nowra Veterinary Clinic	55 Woncor Avenue	South Nowra	NSW	2541	
Gavin Morton	PO Box 69	Milton	NSW	2538	
Moruya Veterinary Hospital	86-88 Queen St	Moruya	NSW	2537	
Sapphire Coast Equine Dental Practice		Candelo	NSW	2550	
Southern Tablelands Equine Dentistry	PO Box 340	Braidwood	NSW	2622	
Horse Specialists					
Samantha Farley					
- Herbalist /Naturopath	PO Box 414	Berry	NSW	2535	
Susan Wild - Natural Therapies	Stringybark Rd	Nowra Hill	NSW	2540	
Lara Rogers - Animal Chiropractor		Huskisson	NSW	2540	
Supplies					
Europa Saddlery Berry	Unit 4/78 Albert St	Berry	NSW	2535	
Berry Rural Co-Op Society Ltd	Old Creamery Lane	Berry	NSW	2535	

NAME	ADDRESS	TOWN	STATE	P/CODE	HORSES
Berry Lucerne Farms	498 Woodhill Mountain Rd	Woodhill	NSW	2535	
Stuart Saddles	37 River Rd	Shoalhaven Heads	NSW	2535	
Farmers Service Centre	Meroo Rd	Bomaderry	NSW	2541	
Discount Farm Supplies		Bomaderry	NSW	2541	
Ridley Agriproducts		Bomaderry	NSW	2541	
Alternate Pet Food	Unit 3 , 2 McIntyre Way	Bomaderry	NSW	2541	
Bomaderry Country Store	36 Bolong Rd	Bomaderry	NSW	2541	
Berry Street Seed & Produce	22 Berry St	Nowra	NSW	2541	
Nowra Pet Supplies	67 Graham St	Nowra	NSW	2541	
Agri-care International					
Stock Feeds		Nowra	NSW	2541	
Paul Bradshaw	112 Moss St	Nowra	NSW	2541	
Nowra Saddleworld	15 Nowra La	Nowra	NSW	2541	
Aquarium & Pet					
Warehouse & Produce	2/142 Princes Hwy	South Nowra	NSW	2541	
Bishops	21 Bellevue St	South Nowra	NSW	2541	
Jervis Bay Feeds	125 Old Princes H/wy	Falls Creek	NSW	2540	
Ulladulla Saddlery	1 Tallow Wood Drv	Milton	NSW	2538	
Easycare Downunder	142g Woodburn Rd	Morton	NSW	2538	
Budget Produce Ulladulla	Unit 10 Centre Crt, 44 Deering St	Ulladulla	NSW	2539	
Southern Rural Supplies	7-8 233 Princes Hwy	Ulladulla	NSW	2539	
Petstock Animal Supplies	Ulladulla Lifestyle Centre	Ulladulla	NSW	2539	
Ma Barker's Pet Supplies	4/19 Hughes St	Batemans Bay	NSW	2536	
Petstock Animal Supplies	13 Kylie Crt	Batemans Bay	NSW	2536	
Pet Australia National	PO Box 274	Moruya	NSW	2537	
Harrisons Horse & Rural	89 Queen St	Moruya	NSW	2537	
Cobargo Co-op					
Society Ltd	Princes Hwy	Cobargo	NSW	2550	
Glen Mia Supplies	Shop 1/45 Auckland St	Bega	NSW	2550	
Candelo Stock Feeds	Boundary Rd	Bega	NSW	2550	
Southern Farm Supplies	Auckland St	Bega	NSW	2550	
Horseland Bega	Unit 3 / 99 Bega St	Bega	NSW	2550	
Bega Agriculture Supplies					
Coast Country	13 Market St	Merimbula	NSW	2548	
Oaklands Barn &					
Garden Centre	3546 Princes H/wy	Pambula	NSW	2549	
Wyndham General Store	19 Monaro St	Wyndham	NSW	2550	
Ben Boyd Stock Feeds	13 Ben Boyd Dr	Eden	NSW	2551	
The Pet Pantry	35 Government Rd	Eden	NSW	2551	

NAME	EMAIL ADDRESS	HORSES
Clubs		
ACT & Southern NSW QHA-	gill@sonza.com.au	varies
Gillian Montgomery	gill@sonza.com.au	varies
Eurocoast Polocrosse Moruya	bcowdroy@bigpond.com	70+
Ben Cowdroy	bcowdroy@bigpond.com	70+
Milton Ulladulla Polocrosse	miltonpolocross@hotmail.com	40+
Leon Murray	miltonpolocross@hotmail.com	40+
Shoalhaven Dressage Club	sd cinc@shoal.net.au	130+
Gayle Loose	sd cinc@shoal.net.au	130+
Eurobodalla Dressage Club	hetty@aussiebroadband.com.au	61+
Hetty Munder	hetty@aussiebroadband.com.au	61+
Berry Riding Club	jasiy@bigpond.net.au	100+
Judy Sweeny	jasiy@bigpond.net.au	100+
Bombala THRC	hepburn@acti8.net.au	
Carla Hepburn	hepburn@acti8.net.au	
Cobargo THRC	havington@bigpond.com	
Trish hayes	havington@bigpond.com	
Nerriga THRC	amandaherringe@hotmail.com	
Amanada Herringe	amandaherringe@hotmail.com	
Nethercote THRC Pambula	skyrocket07@gmail.com	
Chris Billing	skyrocket07@gmail.com	
South Coast Assn HTRC Moruya	wambantwo@live.com	
Bronwyn Ludlow	wambantwo@live.com	
Wandera'ers THRC Moruya	ckelf@hotmail.com	
Jeannette Cook	ckelf@hotmail.com	
Endurance Zone 5	shelly1@shoal.net.au	
Shelly Ison	shelly1@shoal.net.au	
Shetland Pony Society		
Mirabooka Riding Club	karyn@starmer.net.au	
Karyn Starmer	karyn@starmer.net.au	
Shoalhaven All Breeds		
Milton Ulladulla Riding Club		
Bega Showjumping Club	stuart.kirstymcpaul@bigpond.com	
Kirsty McPaul	stuart.kirstymcpaul@bigpond.com	
Shoalhaven Showjumping Club		
Pony Club Zone 28		242
Pony Club Zone 22		416
Pony Club Zone 14		308
Equestrian Australia		
NCAS Accredited Coaches		
Non accredited		
Berry Riding Club	jasiy@bigpond.net.au	230
Judy Sweeney	jasiy@bigpond.net.au	230
Woodhill Mountain Pony Club	jasiy@bigpond.net.au	25
Berry Public School Inter-school	jasiy@bigpond.net.au	235
Judy Sweeney	jasiy@bigpond.net.au	235
Equestrian Championship		

- Economic development and jobs growth
- Community development
- Environmental sustainability

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