

**ABERDEEN CITY
COUNCIL**

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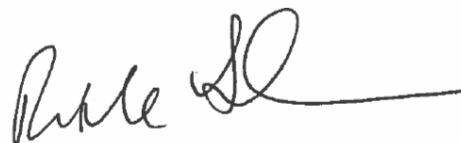
**MORAY
COUNCIL**

**ANGUS
COUNCIL**

NORTH EAST SCOTLAND AGRICULTURE ADVISORY GROUP

WEDNESDAY, 25 SEPTEMBER, 2019, at 10.00 A.M.

Your attendance is requested at a meeting of the **NORTH EAST SCOTLAND AGRICULTURE ADVISORY GROUP** which will be held in **COMMITTEE ROOM 5, WOODHILL HOUSE, ABERDEEN**, on **WEDNESDAY, 25 SEPTEMBER, 2019 at 10.00 A.M.**



18 September, 2019

Director of Business Services
Aberdeenshire Council
on behalf of North East
Scotland Agriculture Advisory Group

To: Aberdeenshire Council:
Councillors: W Howatson (Chair), S Duncan, J Hutchison, J Ingram, D Robertson,
I Taylor and J Whyte.

Aberdeen City Council:
Councillors: B Crockett, N MacGregor and A MacKenzie.

Moray Council:
Councillors: D Bremner and T Eagle.

Angus Council:
Councillors: K Braes, C Brown, A Macmillan Douglas and B Myles.

Contact Person:-	Jan McRobbie
	Tel: 01467 538371
E-mail:	jan.mcrobbie@aberdeenshire.gov.uk

BUSINESS

1. Welcome, Introductions and Declarations of Interest

2. Resolution - Public Sector Equality Duty:

Consider, and if so decided, adopt the following resolution: -

(1) to have due regard to the need to: -

- (a) eliminate discrimination, harassment and victimisation;
- (b) advance equality of opportunity between those who share a protected characteristic and persons who do not share it; and
- (c) foster good relations between those who share a protected characteristic and persons who do not share it.

(2) where an Equality Impact Assessment is provided, to consider its contents and take those into account when reaching a decision.

3. Minute of Meeting of 24 April, 2019 (Pages 4-8)

4. Matters Arising (Page 9)

5. Presentation: Lantra: a user's guide by Liz Barron-Majerik, Scotland Director, Lantra

6. Update: Technology-enabled Farming and the Rural Economy in Scotland by Steve Harrison, Project Manager, Scottish Enterprise

7. Presentation: Opportunity North East Progress Update by Peter Cook, Agriculture Food & Drink Director, Opportunity North East

8. Bulletin: Dimpleby Review of UK Food & Drink Sector (Pages 10-12)

9. Bulletin: EU: Mercosur Trade Agreement (Pages 13-14)

10. AOB

11. Date of next meeting:

- **Wednesday 27 November, 2019 at James Hutton Institute, Aberdeen**

PUBLIC SECTOR EQUALITY DUTY – GUIDANCE FOR MEMBERS

What is the duty?

In making decisions on the attached reports, Members are reminded of their legal duty under section 149 of the Equality Act 2010 to have due regard to the need to:-

- (i) eliminate discrimination, harassment and victimisation;
- (ii) advance equality of opportunity between those who share a protected characteristic and persons who do not share it; and
- (iii) foster good relations between those who share a protected characteristic and persons who do not share it.

The “protected characteristics” under the legislation are: age; disability; gender reassignment; pregnancy and maternity; race; religion or belief; sex; sexual orientation; and (in relation to point (i) above only) marriage and civil partnership.

How can Members discharge the duty?

To ‘have due regard’ means that in making decisions, Members must consciously consider the need to do the three things set out above. This requires a conscious approach and state of mind. The duty must influence the final decision.

However, it is not a duty to achieve a particular result (e.g. to eliminate unlawful racial discrimination or to promote good relations between persons of different racial groups). It is a duty to have due regard to the need to achieve these goals.

How much regard is ‘due’ will depend upon the circumstances and in particular on the relevance of the needs to the decision in question. The greater the relevance and potential impact that a decision may have on people with protected characteristics, the higher the regard required by the duty.

What does this mean for Committee/Full Council decisions?

Members are directed to the section in reports headed ‘Equalities, Staffing and Financial Implications’. This will indicate whether or not an Equality Impact Assessment (EIA) has been carried out as part of the development of the proposals and, if so, what the outcome of that assessment is.

An EIA will be appended to a report where it is likely that the action recommended in the report could have a differential impact (either positive or negative) upon people from different protected groups. The report author will have assessed whether or not an EIA is required. If one is not required, the report author will explain why that is.

Where an EIA is provided, Members should consider its contents and take those into account when reaching their decision. Members should also be satisfied that the assessment is sufficiently robust and that they have enough of an understanding of the issues to be able to discharge their legal duty satisfactorily.

For more detailed guidance please refer to the following link:- <https://www.equalityhumanrights.com/en/advice-and-guidance/equality-act-technical-guidance>

NORTH EAST SCOTLAND AGRICULTURE ADVISORY GROUP**COMMITTEE ROOM 5, WOODHILL HOUSE, ABERDEEN****WEDNESDAY, 24 APRIL, 2019**

Present: **Aberdeenshire Council** – Provost W Howatson (Chair), Councillors D Beagrie (substitute) Councillor J Hutchison, J Ingram, G Owen (substitute) and J Whyte
Aberdeen City Council – Councillor N MacGregor
Farm North East – E Gillanders
James Hutton Institute – Prof K Thomson and D Roberts
LANTRA – S Howden
NFUS - A Connon
SAC Consulting – D Ross
Scottish Enterprise – G Ford and S Harrison
Scottish Forestry – T Gordon-Roberts
Scottish Land and Estates – F Van Aardt
Scottish Pig Producers – A McGowan
SRUC – Professor C Argo and S Thomson
Visit Scotland - J Robinson

Apologies: **Aberdeenshire Council** – Councillors S Duncan, D Robertson and I Taylor
Angus Council – Councillors K Braes, C Brown and B Myles
Moray Council – Councillors D Bremner and T Eagle
Confor – J Farquhar
NFUS – D Winton
ANM Group Ltd – G Rogerson
Scottish Land & Estates – D Fyffe
Scottish Forestry – J Nott

Officers: D McDonald, Industry Support Executive ED & PS (Aberdeenshire Council)
J Davidson, Environmental Planner P&BS (Aberdeenshire Council)
E Wells, Sustainable Development Officer, ED & PS (Aberdeenshire Council)
A McLeod, Assistant Committee Officer (Aberdeenshire Council)

1. WELCOME, INTRODUCTIONS AND DECLARATIONS OF INTEREST

The Chair welcomed everyone present to the meeting. Members were asked if they had interests to declare. No declarations of interest were intimated.

2. PUBLIC SECTOR EQUALITY DUTY

In taking decisions on the undernoted items of business, the Partnership **agreed**, in terms of Section 149 of the Equality Act 2010:-

- (1) to have due regard to the need to:-
 - (a) eliminate discrimination, harassment and victimisation;
 - (b) advance equality and opportunity between those who share a protected characteristic and persons who do not share it, and

- (c) foster good relations between those who share a protected characteristic and persons who do not share it; and
- (2) to consider, where an equality impact assessment had been provided, its contents and to take those into consideration when reaching a decision.

3. MINUTE OF MEETING OF 5 DECEMBER, 2018

The Minute of Meeting of 5 December, 2018 was circulated and **approved** as a correct record.

4. MATTERS ARISING

It was noted that the matters arising were covered on the agenda.

5. PRESENTATION: PROVENANCE AND PROFIT BY ANDY MCGOWAN, CHIEF EXECUTIVE, SCOTTISH PIG PRODUCERS

The Chair introduced Andy McGowan, Chief Executive of Scottish Pig Producers who gave a presentation on the operations of the Scottish Pig Producers, which was established ten years ago in a collaborative approach by farmers following the closure of meat processors Lawsons of Dyce. The group is a marketing cooperative which currently sells approximately 500,000 pigs per year on behalf of the majority of pig units along the East Coast of Scotland. A sector strategy was launched at the Royal Highland Show in 2018. Its aim is to double of the value of the Scottish pig industry to £500m by 2030 by building the brand and developing collaborative and efficient supply chains. An Industry Leadership Group (ILG) had been formed to drive improvements in the supply chain, to use Research & Development (R&D) to build distinctiveness, to develop a carbon foot-printing methodology for the Scottish pig sector, to obtain 'fit for purpose' regulation and regulatory compliance, and ultimately to increase the demand for and value of Scottish Specially Selected pork. He explained that only one quarter of the pig carcass is currently eaten fresh, with the remainder being processed or semi-processed. This makes the labelling of the product as 'Scottish' quite challenging.

Plans were in hand to increase the slaughtering and processing capacity of the QPL plant at Brechin and to achieve further accreditation to allow for UK export certification. Animal welfare was an important factor with the health status of all pigs in Scotland known and tracked. Plans were also in place to address the medium-term skills gap and to map the skills for the future, in order to ensure the growth of the pig sector.

Mr McGowan advised that the number of breeding sows in China had recently reduced significantly due to a large outbreak of African Swine Fever and that pigmeat supply in what was the world's largest market had been significantly affected. Global pigmeat prices were likely to rise. It was very important therefore that strict biosecurity measures were observed in Scotland, especially as the disease had been found in Belgium in wild boar.

After a question and answer session, the Chair thanked Mr McGowan for a very detailed and informative presentation.

Action point 1: D McDonald to circulate presentation slides

6. PRESENTATION: THE JAMES HUTTON INSTITUTE AND ITS EVOLVING ROLE IN STIMULATING THE ECONOMY BY COLIN CAMPBELL, CHIEF EXECUTIVE, THE JAMES HUTTON INSTITUTE

The Chair introduced Professor Colin Campbell, Chief Executive of the James Hutton Institute (JHI) who was in attendance to address the meeting on the evolving role of the Institute in

stimulating the economy. He outlined the global and local challenges being faced, including the need for more food, water and energy to meet the demands of an increasing population.

Prof Campbell highlighted the many and varied activities of the JHI which included major crop initiatives at Invergowrie (the International Barley Hub, an industry led innovation Centre, and an Advanced Plant Growth Centre), and also at Craigiebuckler in Aberdeen, where a scoping study for new public engagement facilities was being undertaken.

He referred to the local context in Aberdeenshire, which was blessed with high quality prime agricultural land and which was the subject of ongoing research by JHI into efficient and sustainable production systems. He explained that the impacts of long term climate change were being considered in order to predict the future geographical distribution for barley cropping, and outlined work underway on innovative alternative methods for growing crops, including the use of Artificial Intelligence, robots and plant breeding science, which would lead to a revolution in crop growth.

Prof Campbell outlined future ideas being considered by JHI in relation to the UK Government Strength in Places Fund, including the development of farms as innovation hubs, Other projects included work on the provenance, authentication and safety of food and also water and land use.

The Chair thanked Prof Campbell for a fascinating presentation and it was suggested that the James Hutton Institute could host a future meeting of the group to showcase some of the work undertaken by the Institute

Action point 2: D McDonald to arrange a future meeting of the group to be held at the James Hutton Institute, to include a tour of the facilities.

7. PRESENTATION: BREXIT ISSUES IN SCOTTISH AGRICULTURE, BY STEVEN THOMSON, SENIOR AGRICULTURAL ECONOMIST, SRUC

The Chair introduced Steven Thomson, Senior Agricultural Economist at Scotland's Rural College (SRUC), who briefed members on Brexit issues in Scottish Agriculture. SRUC had conducted a survey of farmers in 2018 on Brexit-related opinions. Significant challenges had been predicted by respondents in many areas, including access to finance, access to seasonal and fulltime workers, access to imported inputs, and changes to farming regulations. It was thought likely that larger farms would potentially be at greater risk post-Brexit due to larger borrowings. Although the Scottish Government was undertaking contingency planning, there were many issues which still required clarification. Mr Thomson cited evidence showing that the agri-food sector was heavily reliant on a EU workforce. Unemployment levels in Europe were very low and were already reducing the numbers of workers available to come to the UK. If a visa system were adopted in the UK post-Brexit, it may lead to European workers being less willing to come to the UK, which would have a significant effect as most of the agricultural sector was reliant to some extent on a non-UK workforce.

Mr Thomson advised that the Scottish Government was bringing forward a Scottish Agricultural Bill, but there was still a great deal of uncertainty in terms of future funding support for agriculture. It was considered that the objectives set for any future support framework would be vital. On subsidies, there was some industry support a base support payment rate, supplemented by transformation payments (eg for farm business diversification and performance improvements) allied to environmental support and a disadvantage/peripherality payment.

Food and drink exports and imports had been studied by SRUC and post-Brexit trade costs seem likely to rise. The beef trade is currently dominated by imports from Ireland and the Netherlands while for the sheepmeat sector the majority of imports to the UK are from Australia

and New Zealand and exports go to France and Belgium. The UK Government had recently announced a tariff regime which would apply under a 'no deal' Brexit and which aimed to maintain low prices for consumers. As a 'third country' producers in the UK would face the imposition of high tariffs on beef and lamb exports into the EU. Even with a favourable currency exchange rate, UK exporters were likely to become uncompetitive in beef and sheep markets.

A separate research project by SRUC had found that farming was strongly linked to Scottish rural businesses in the wider rural economy, with 42% of businesses deriving sales income from the agricultural sector (as suppliers).

SRUC's key assessment of what farmers can do to mitigate potential Brexit-related impacts included analysing enterprise profitability and determining where they are exposed to Brexit changes, followed by detailed business planning to mitigate financial impacts.

Following a brief question and answer session, the Chair thanked Mr Thomson for a very insightful and well researched presentation.

Action point 3: D McDonald to circulate presentation slides

8. PRESENTATION: TECHNOLOGY ENABLED FARMING – CO-DEVELOPING A VISION FOR SCOTLAND AND ABERDEENSHIRE BY STEVE HARRISON, PROJECT MANAGER, SCOTTISH ENTERPRISE

The Chair welcomed Steve Harrison, Project Manager at Scottish Enterprise who briefed the meeting on technology related farming. He indicated that across the economy liquidity was less but the need to invest was high, and bringing these two together was complex, especially due to the current uncertainty in the industry. Scottish Enterprise was currently engaged in a number of areas, including looking at the potential economic opportunities for Scotland including goods vehicles used in the movement of food; future technologies eg Blockchain; machine learning. There was a need to understand what was happening, what was going well, how to learn from it and what the challenges were and to aim to provide a vision for the north-east.

Mr Harrison outlined details of plans which were in place for a consultative study to seek an understanding of technology use at a farm level and the use of digital enabling technologies. He also referred to other ongoing projects in the north-east, including agri projects, looking at investing in technology in farms.

It was suggested, and agreed, that further information be sought from Mr Harrison to form the basis of a briefing note to members with a view towards the creation of a NESAG sub-group to support this initiative

Action point 4: Derek McDonald to liaise with Steve Harrison to progress this matter.

9. BULLETIN: FARM BUSINESS INCOME REPORT 2017-18

There had been circulated a report dated 16 April, 2019 by the Director of Infrastructure Services, regarding a Scottish Government publication of its most recent estimate of Farm Business Income (FBI) in Scotland for 2017-18. It was noted that the Scottish farming sector continued to be heavily dependent upon subsidy payments and that farms engaging in diversified activities continued to perform better than non-diversified enterprises. The FBI report noted that over 60% of farms surveyed would be loss-making without CAP subsidy and that only 60% of farmers were currently earning enough to pay themselves the minimum agricultural wage.

It was **agreed** to note the information contained in the report.

10. AOB

There was no other business raised.

11. DATE OF FUTURE MEETINGS

It was **noted** that the schedule of meetings of the North East Scotland Agriculture Advisory Group for the remainder of 2019 was as follows:

- Wednesday 25th September, 2019 - Committee Room 5, Woodhill House, 10 am
- Wednesday 27th November, 2019 - Committee Room 1, Woodhill House, 10am

Draft

ACTION SHEET

NORTH EAST SCOTLAND AGRICULTURE ADVISORY GROUP – 24th APRIL, 2018

NO.	Agenda Item	ACTION	ACTION OWNER	COMPLETION DATE/ UPDATE
1.	Item 5: Provenance and Profit by Andy McGowan, Chief Exec, Scottish Pig Producers	Andy McGowan slides to be circulated to members	Derek McDonald	
2.	Item 6: JHI and its evolving role in stimulating the economy by Prof Colin Campbell, Chief Exec, JHI	Future meeting of the group to be held at the James Hutton Institute, to include a tour of the facilities.	Derek McDonald	
3.	Item 7: Brexit issues in Scottish agriculture by Steven Thomson, Senior Agricultural Economist, SRUC	Steven Thomson slides to be circulated to members	Derek McDonald	
4.	Item 8: Technology enabled farming by Steve Harrison, Project Manager, Scottish Enterprise	Derek McDonald to liaise with Steve Harrison to prepare briefing note and to progress this matter.	Derek McDonald	

NORTH EAST SCOTLAND AGRICULTURE ADVISORY GROUP BULLETIN – 25 SEPTEMBER 2019

DIMBLEBY REVIEW OF UK FOOD AND DRINK SECTOR

1 Recommendation

1.1 It is recommended that the Group notes this report

2 Discussion

2.1 UK Government has announced the first major review of the UK food system in its entirety for 75 years. The indicative terms of reference cover food, nutrition and the environment and the review will be led by Henry Dimbleby who was appointed lead non-executive board member of DEFRA in March 2018. Mr Dimbleby, son of David Dimbleby, is a writer, businessman and co-founder of a restaurant group and the Sustainable Restaurant Association.

2.2 The Dimbleby Review will assess the UK food system ‘from field to fork’ and will consider what may need to change to ensure that it:

- Delivers safe, healthy, affordable food, regardless of where people live or how much they earn;
- Is robust in the face of future shocks;
- Restores and enhances the natural environment for the next generation;
- Is built upon a resilient and sustainable agriculture sector;
- Is a thriving contributor to our urban and rural economies, delivering well paid jobs and supporting innovative producers and manufacturers;
- Does all of this in an efficient and cost-effective way.

It is expected that the Review’s recommendations will pave the way for a new National Food Strategy, potentially for publication in 2020.

2.3 Announcing the review, Environment Secretary (at the time) Michael Gove commented that the UK’s departure from the EU presented a ‘great opportunity for British farmers and food producers’ – but also a challenge in meeting the needs of an expanding population whilst also fulfilling climate change obligations. The review has been welcomed by NFU: ‘overdue....but pleased to see that the Government is taking food production seriously and is putting plans in place forsafe, traceable, affordable foodproduced to high standards of animal welfare and environmental protection and ... that British farmers should be the number one supplier of this. The Food and Drink Federation noted that food and drink is the UK’s largest manufacturing sector, is central to economic success and our cultural fabric and is therefore a strategic national asset which should be protected. However it is generally taken for granted by the public.

2.4 In 2017 Scotland Food and Drink published Ambition 2030, a sustainable growth strategy for agriculture, fishing, food and drink in which progress over the previous ten years was reviewed (industry turnover up 44% to £14Bn and

exports by 56%) and the factors driving success were analysed (collaboration, reputation and produce diversity). The title is drawn from the future envisioned for the sector in 2030, mostly notably growth in turnover value to £30Bn. Key challenges are outlined and include investment in people, research and development alongside market development and enhanced collaboration, profitability and sustainability credentials. Market and consumer trends are also considered across Scotland, the UK and beyond and three key pillars of growth are described: people and skills, the supply chain and innovation. <https://scotlandfoodanddrink.org/resources/publications/ambition-2030-industry-strategy-for-growth/>

In March 2016 NESAG published 'The Land Based Sector in NE Scotland – Facing the Future'. The main report is a highly detailed strategic analysis based on empirical data which extends beyond agriculture, food and drink to the wider land-based sector. A summary report was also produced and is accompanied by regional summaries (infographics) for Aberdeenshire, Angus and Moray. Whilst the report's conclusions and recommendations are NE Scotland-centric (and have helped inform the Regional Economic Strategy for NE Scotland), they nevertheless align broadly with the national growth trajectory mapped out in Ambition 2030. Food & drink industry analyses have also been carried out by Aberdeen and Grampian Chamber of Commerce, Opportunity North East and others.

- 2.5 There is therefore a wealth of evidence and analysis available in Scotland and the NE in particular, which could help inform the Dimbleby Review. It is essential that the voice of the sector in Scotland is heard as it seems likely that the Dimbleby Review will strongly influence the shape of structural fund support for food and drink in the UK post-Brexit. It is anticipated that the Review will issue a call for evidence later in the year, to which it is suggested NESAG responds, and a member of the Review team will be invited to attend a forthcoming meeting of the Group.

3 Scheme of Governance

NESAG is able to consider this item in terms of its remit to provide a NE Scotland focus to enable issues and concerns across the agricultural and related sectors to be addressed. This includes strengthening economic development links across the wider land-based sector and food industry, contributing to regional and local priorities, improving links between industry, the environment and biodiversity and contributing to policy development and consultations.

4 Implications and Risk

- 4.1 There are no equality impact implications arising from this report
- 4.2 There are no staffing and financial implications for the council arising from this report.
- 4.3 No risks arising from this report have been identified for the council at Corporate Level

4.4 No issues have been identified in relation to the Town Centre First Principle

Stephen Archer
Director, Infrastructure Services

Report prepared by Derek McDonald, industry Support Executive (Rural & Maritime)
18 September 2019



NORTH EAST SCOTLAND AGRICULTURE ADVISORY GROUP BULLETIN – 25 SEPTEMBER 2019

EU: MERCOSUR TRADE AGREEMENT

1 Recommendation

1.1 It is recommended that the Group notes this report

2 Discussion

- 2.1 The Mercosur trading block was established in 1991 and currently comprises Argentina, Brazil, Paraguay, Uruguay. Venezuela joined in July 2012 but its membership was suspended in 2017. Bolivia has been waiting since December 2012 for its membership to be formally ratified. Although bilateral Partnership and Cooperation agreements have existed for around 20 years between the EU and Argentina, Brazil, Paraguay and Uruguay the recently concluded bi-regional Association Agreement between Mercosur and the EU the parties has raised concern, particularly in the UK and Irish beef industry and in environmental circles.
- 2.2 EU: Mercosur negotiations were initiated in 2000 and stalled on several occasions. However progress since 2016 has been relatively swift and continuous, resulting in the agreement being concluded on 28 June 2019. The deal is the largest ever struck by the EU in tariff reduction terms, with some reports estimating a reduction in EU export duty to Mercosur of around €4bn per annum – for example for cars and car parts, chemicals, machinery, textiles and enhanced market access for wine and cheese. The EU also anticipates the creation of a substantially more receptive market for its exports. Mercosur generally sets high tariffs and trade barriers and EU companies are gearing up to exploit a huge competitive advantage over non-EU suppliers. The deal is also the biggest and most comprehensive agreement negotiated by Mercosur and it is estimated in some quarters that tariffs will be eliminated on over 90% of Mercosur exports to the EU. The agreement also covers public procurement contracts, protected geographic indicators of food (PGI) and service provision.
- 2.3 Agricultural produce was identified as a key component of the proposed deal when negotiations began around 20 years ago, and access on competitive terms to EU markets for beef, poultry, sugar, coffee, fruit, orange juice and ethanol has been eagerly anticipated by Mercosur producers. Beef farmers in the UK and Ireland have however expressed serious concerns on the implications for market stability for their produce within the EU and there are fears financial margins - already fragile - could deteriorate significantly, a view echoed by Copa Cogeca, a group representing EU farmers. Meanwhile environmentalists worldwide fear the deal could accelerate the conversion of rainforest to pasture for livestock.

- 2.4 With market prices already at a very low point, the timing of the deal could not have come at a worse time for the beef sector in Scotland. The most recent (September) analysis of the beef sector by Stuart Ashworth, Director of Economic Services at Quality Meat Scotland attributes current low returns to a slight increase in supply at a time when demand is falling. There have also been suggestions that meat prices are still being depressed as stocks unwind from stockpiling in advance of the UK's expected departure from the EU on 29 March. QMS also notes that low beef prices are an issue for European farmers as well as Scottish farmers and that continuing Brexit uncertainty is a destabilising factor. Clearly international market forces will continue to play a huge part in the fortunes of the Scottish meat sector regardless of Brexit. A more detailed assessment of the implications of the EU: Mercosur deal will be examined at a forthcoming meeting of NESAAAG.

3 Scheme of Governance

NESAAAG is able to consider this item in terms of its remit to provide a NE Scotland focus to enable issues and concerns across the agricultural and related sectors to be addressed. This includes strengthening economic development links across the wider land-based sector and food industry, contributing to regional and local priorities, improving links between industry, the environment and biodiversity and contributing to policy development and consultations.

4 Implications and Risk

- 4.1 There are no equality impact implications arising from this report
- 4.2 There are no staffing and financial implications for the council arising from this report.
- 4.3 No risks arising from this report have been identified for the council at Corporate Level
- 4.4 No issues have been identified in relation to the Town Centre First Principle

Stephen Archer
Director, Infrastructure Services

Report prepared by Derek McDonald, industry Support Executive (Rural & Maritime)
18 September 2019