



Regional  
Development  
*Australia*

O R A N A N S W

**INVEST ORANA**  
**JANUARY 2023**



# Building the region together

## Do you have a project that needs grant funding and are not quite sure how and where to start?

RDA Orana is proud to work with businesses, organisations and community groups to ensure that they can fully take advantage of all possible opportunities for growth and development.

We can help review the eligibility of the project based on the funding guidelines and match it with the best available funding stream. We walk businesses through the process to ensure that their application is competitive.



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### Get in touch

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# RDA ORANA

Regional Development Australia (Orana) is the region's primary driver for economic development charged with leveraging the Orana region's underlying strengths and opportunities to drive economic growth through investment, creating connections, growing industry, infrastructure, and workforce.

We have been the local voice of industry and business since 2009, supporting investment growth in the region. Led by business and community representatives, RDA Orana provides regional intelligence on critical regional development issues and opportunities to improve the Orana region for the future.

## PURPOSE

To support the development of the Orana region by facilitating industry collaboration, encouraging public and private investment and supporting cooperation between all stakeholders.

## VISION

A regional powerhouse recognised for production, value-adding, linkages and entrepreneurship.

## MISSION

Provision of regional intelligence to

1. Create connections and growth
2. Grow industry and infrastructure investment
3. Grow our workforce

## PRIORITIES

### 1. Workforce development

Businesses in the region have access to a workforce required to support growth.

### 2. Information

Business and Governments have access to economic information, credible research and insights about our region.

### 3. Leadership

Influence all levels of Government as a respected, apolitical and reliable advocate for the Orana region.



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# WELCOME

## WELCOME TO THE THIRD EDITION OF INVEST ORANA

In times of significant economic challenges, the Orana region is continuing to grow and attract major development and infrastructure. Investors are increasingly recognising the region's competitive business environment, diverse economy, remarkable talent pool, and geographic advantages as reasons to do business in the Orana. The outlook for the region remains optimistic with a significant project pipeline with unprecedented public investment that will unlock investment opportunities across the region. Over \$7 billion dollars' worth of project investment are planned to be poured into the region over the next five years.

We are maturing as a region and our communities are becoming major support beams of the regional economy. Our role as an agricultural, mining, manufacturing, resource and renewable energy hub provides enormous strengths and competitive advantages. The Orana region has great drive, vision, and potential, strengthened by its people, its diversity, and its can-do attitude.

RDA Orana recently launched the Inland NSW Growth Alliance Limited (INGA), an exciting opportunity established to support industry and business development across inland NSW, and for our region we've been focused on infrastructure, resources and energy, METS, and business development opportunities, particularly around manufacturing.

This initiative has supported the development of businesses and facilitated collaborations and closer relationships between business, other networks and research institutions across the region.

The COVID-19 pandemic has had a profound impact on our communities and economy, as it has all around the world. The region's recovery efforts have not only shown immense strength from the business community but also the agility, resilience, determination, and innovation of this region. As the region moves into recovery from drought, bushfire, and COVID 19, investors have an opportunity to realise significant economic value from driving sectors such as Energy and Resources, Food and Agribusiness, Health, Education, Manufacturing, and Mining.

Now more than ever is the time to invest in, and become part of our region, supporting our vision to become the most dynamic region in NSW.

The Invest Orana guide to major opportunities outlines some of the successful projects recently delivered, announced, and in varying stages of development within the region. If you wish to offer project details to be included in the next edition, please get in touch with our team at [invest@rdaorana.org.au](mailto:invest@rdaorana.org.au).

Brad Cam  
**Chair, RDA Orana**

# THE REGION



## A SNAPSHOT OF ORANA

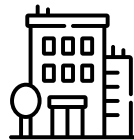
The Orana region stretches across the Central West and Western region of NSW. The Orana, meaning 'Welcome' in Wiradjuri, is the largest and most diverse region in the State, covering an area of 25% of NSW, and servicing a population of close to 123,000 people.

The region encompasses 12 Local Government Areas of:

- Bogan
- Bourke
- Brewarrina
- Cobar
- Coonamble
- Dubbo
- Gilgandra
- Mid-Western
- Mudgee
- Narromine
- Walgett
- Warren
- Warrumbungle



**\$7B**  
in investment



**\$180 - \$230**  
per square metre for  
office rent per annum



**\$19.1B** output



**13,502**  
businesses (June  
2021)



**100+**  
in projects



**62,033**  
people in the  
workforce



**123,987**  
people



# NEVER BEEN A BETTER TIME TO INVEST

## A growing population and workforce

The Orana region has a population of about 124,000 people, of which over 62,000 are in the workforce. The region has a proud reputation for a hard-working, reliable, and flexible workforce that's skilled across a diverse industrial bases. Central Orana's natural endowment as a centrally located region with a highly diverse and skilled workforce makes it an ideal place for investment.

## A diverse economy

The Orana economy has quite distinct industry bases with strong historical foundations in mining, manufacturing and agriculture continuing as major contributors. It features productive farmland, rich mineral deposits and a range of services and industries including transport, manufacturing, construction, accommodation, healthcare, education and tourism. Opportunities are also emerging in food production and packaging, aged care and related services, renewable energy and niche tourism.

## Connectivity

The Orana region is a well-connected and innovative region with growing opportunities across a range of sectors and across a vast and diverse geographical area. Major service and industry centers are well connected by road and rail to Sydney, Newcastle, Port Kembla and Canberra and their respective international gateways, along with the north-south access to Brisbane and Melbourne on the Newell Highway, and on to international trade routes. The region also has good connection to NBN.

## Access to markets

The Central West and Orana's freight connections extend to Sydney, Newcastle, Wollongong, Brisbane, Melbourne, Broken Hill, Adelaide and Perth, with the Main West Rail line meeting the Inland Rail line in Parkes. The convergence of these corridors at several locations, including Dubbo and Parkes, is a competitive advantage for the region. Airports in Dubbo, Mudgee, Nyngan and Cobar connect to domestic centers, with major freight hubs in Parkes and Dubbo. The ability to export produce through Canberra Airport, along with opportunities associated with the new Western Sydney Airport, is a game changer for agricultural exports from the region.

## An innovative region

The Orana region is a well-connected and innovative region with growing opportunities across a range of sectors including ag-tech, resources, and health. The region is embracing innovation as a major economic driver with a "can do" attitude that is fuelling sustained economic growth and a secure future. These factors, combined with the Orana's numerous other competitive advantages, have seen billions of dollars invested in recent years by a host of companies, including major national and international corporations.

## Significant infrastructure investments

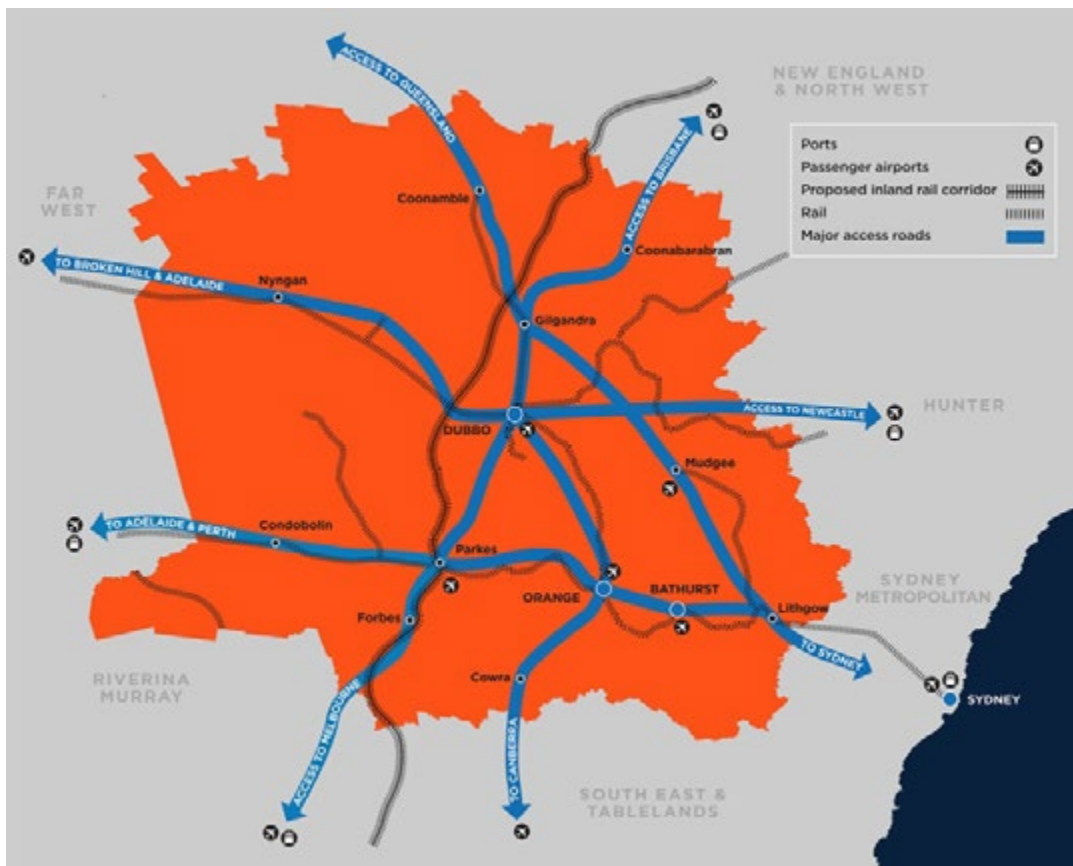
The \$9.3 billion Melbourne to Brisbane Inland Rail corridor will improve access to markets, reduce freight costs and boost the region's reputation as a freight hub with investment opportunities for facilities and intermodals. Dubbo will be home to the rail maintenance facility to service and maintain the new \$1.26 billion regional rail fleet.

The Government has committed to and commenced numerous infrastructure development projects in the region, including road upgrades for the Mitchell and Newell Highways. These projects will reduce congestion, deliver safer, more efficient, and reliable journeys for those traveling in, around and through Dubbo, and better connect communities in the region.

The Central West region was announced as the first Renewable Energy Zone as part of the 2019 NSW Electricity Strategy. The registration of interest process conducted last year sparked an overwhelming response from investors attracting 113 registrations, totaling 27GW and valued at \$38 billion. The Central West REZ will play a vital role in delivering affordable energy to help replace the state's existing power stations as they retire over the coming decades.

### Affordable country living

The Orana region offers diversity and opportunity ideal for family lifestyle with excellent schools and health facilities, coupled with a relaxed country environment. The region combines the attributes of larger centres with the familiarity and generosity of spirit typical of rural communities in western NSW.



# REGIONAL HIGHLIGHTS

## Workforce



**62,033**  
workforce



**46.99%**  
labour force  
participation  
rate



**4.1%**  
unemployment



**125%**  
increase job  
advertisements



**11.6%**  
youth  
unemployment

With sustained growth over the last two decades, the Orana region has continued on an upward trend in employment, with consistent increase in demand for workers. In fact, there has been an increase of 125.5% in job advertisements for the region from March 2021 according to the National Skills Commission Vacancy Index.

## LOCAL GOVERNMENT AREA WORKFORCE

Labour Force December 2021

- Bogan - 1,305
- Bourke - 1,218
- Brewarrina - 758
- Cobar - 2,365
- Coonamble - 1,860
- Dubbo Regional - 27,701
- Gilgandra - 2,086
- Mid-Western Regional - 13,497
- Narromine - 3,146
- Walgett - 2,542
- Warren - 1,328
- Warrumbungle - 4, 227

**TOTAL 62,033**

Source: National Skills Commission



## REGIONAL HIGHLIGHTS CONTINUED

The global pandemic caused widespread labour shortages, and demand for skilled staff is at its peak. The workforce shortage means skilled employees are in hot demand and the region needs to remain highly competitive if we are to fill the gaps so crucial to the prosperity of the nation.

There are endless opportunities for jobseekers, those looking for a country change or transferring their skills into a new career path.

In July 2021, the Commonwealth Government announced the expansion of the Local Jobs Program to 51 employment regions including Far West Orana and Central West. This will include dedicated Employment Facilitators, a Local Jobs and Skills Taskforce and the development of a Local Jobs Plan. The Local Jobs Program will support tailored approaches to accelerate reskilling, upskilling and employment.

## Migration

Regional migration experienced a significant challenge last year as a result of the Covid-19 pandemic that saw our international borders closed and travel restrictions imposed from state to state. Domestic and international border restrictions affected seasonal employers and workforces, resulting in fewer overseas seasonal workers available to meet the needs of the agricultural sector.

- Net regional migration - 66% rise
- Internal migration - 0.7% increase
- Total internal regional movement - 0.2% decrease
- 11% rise of people moving from capitals to regional areas

Since the March 2020 quarter, an increasing number of people have departed capital cities for regional areas. The pandemic-driven acceleration of net regional migration indicates that those already in regional areas are finding reasons to stay while city dwellers are finding compelling reasons to relocate rather than stay in the various capitals.

Skilled Migration continues to be one part of the workforce solution and we anticipate that the border openings will provide much-needed boosts to many employers in the region seeking labour. As restrictions ease, the region is expected to continue to welcome migrant workers to fill the existing skills shortage.

### Orana Designated Area Migration Agreement (DAMA) changes

The Government is providing employers in the Orana region with greater access to skilled workers by strengthening the Orana Designated Area Migration Agreement (DAMA), in order to meet labour-market challenges.



The Orana DAMA provides business owners in our region access to overseas workers, providing flexibility and responsiveness not available through the standard skilled migration programs.

*"The Government aims to address businesses' needs with the inclusion of a range of occupations including automotive trades, teachers, aged care and additional health professionals."*

Businesses in the Orana region now have access to overseas workers across 65 occupations.

Of particular importance to the region is the inclusion of ANZSCO Skill level 4 and 5 occupations, including clerks, aged care workers, mobile plant operators, security officers and waiters.

The inclusion of more flexible permanent residency pathways under the Orana DAMA will incentivise overseas workers to set down roots in the region and make long-term economic and social contributions, including through transferring skills to local workers.

On 3 April 2019, the Australian Government entered into a DAMA with the Regional Development Australia (RDA) Orana (the Designated Area Representative). RDA Orana administers the process for accessing the Orana DAMA which is open to businesses operating in the region.

Businesses interested in sponsoring migrant workers can contact RDA Orana.

## Western Cancer Center opened

The highly anticipated Western Cancer Centre in Dubbo was completed late last year, opening up for patients and bringing life-saving services much closer to home for people in regional and remote areas of Western NSW.

The Western Cancer Centre welcomed its first patients in September 2021, with a number of services moving into the facility at Dubbo Hospital since then.

The Australian Government provided \$25 million for the state-of-the-art facility, with the NSW Government contributing \$10 million.

The completion of this project marks a historic milestone for the entire region. This facility will allow cancer patients to stay closer to their loved ones during treatment, significantly reducing the need to travel to Sydney or Newcastle for treatment, and vastly improving quality of life.

*"This facility provides services that haven't been accessible in the region before, including medical oncology, radiation therapy and PET/CT diagnostic scans"*



# MAJOR INFRASTRUCTURE PROJECTS

## Central West Orana REZ

Since 2020, Transgrid has been working with the NSW Government to plan new transmission infrastructure for Australia's first coordinated Renewable Energy Zone (REZ) in the Central-West Orana region.

In January 2022, the NSW Government, acting through Energy Corporation NSW (EnergyCo NSW) took responsibility for the development of the new transmission infrastructure for the Central-West Orana REZ Transmission.

Following a highly-subscribed tender process for the Central-West Orana renewable energy zone (REZ) transmission network, the government has named three consortiums:

- ACE Energy, comprising Acciona, Cobra and Endeavour Energy;
- Network REZolution, comprising Pacific Partnerships, UGL, CPB Contractors and APA Group
- NewGen Networks, comprising Plenary Group, Elecnor, Essential Energy and SecureEnergy

The network operator will design, finance, build, operate and maintain the network infrastructure for the Central-West Orana REZ, with new grid connections to include energy hubs and new high-capacity transmission lines.

The revised study corridor for new transmission infrastructure will minimise impacts on prime agricultural land in the region and enable the delivery of greater capacity for the Central-West Orana REZ to meet future energy needs. The new route is expected to accommodate additional transmission lines, offering options to deliver nearly four times the amount of renewable power to the grid with the same infrastructure.

## Inland Rail

More towns and communities in the region will soon be reaping the benefits of Inland Rail, as the project continues to breathe new life into regional economies.

This billion dollar project will be a key driver of growth for regional communities, stimulating investment, supporting new jobs and opportunities for local businesses to grow and build capability.

*"New modelling shows Inland Rail could cut freight transport costs by up to \$213 million a year, resulting in huge savings for businesses and industries that use the line and further driving the growth of regional Australia."*

Businesses relying on road-based supply chains will benefit most from the switch, profiting from the average transport saving of \$80.77 per tonne (\$179 million per annum). Savings will only increase as Australia's freight task grows in the future.

Other projected savings for intermodal freight include an average:

- \$90 per tonne (44 per cent) reduction along the entire route from Melbourne and Brisbane;
- \$184 per tonne (47 per cent) reduction between Brisbane and Parkes, connecting to Perth;
- \$48 per tonne (22 per cent) reduction from Brisbane and connecting to Adelaide; and
- \$62 per tonne (31 per cent) reduction for regional intermodal freight to and from major metropolitan centres and ports.

According to the CSIRO's Inland Rail Supply Chain Mapping Project report, once fully operational, Inland Rail will take 200,000 trucks off the road each year, or 150 B-doubles for each train travelling between Melbourne and Brisbane.

The Australian Rail Track Corporation partnered with ACCIONA and CPB Contractors Joint Venture (ACACPB JV), to work on the Southern Civil Works Program. The companies have committed to employing local people, engaging with local businesses and suppliers and working with communities along the route to ensure the advantages of Inland Rail are felt throughout the Narromine to Narrabri section.

## Regional Rail – Mindyarra Maintenance Centre

The NSW Government is replacing the ageing NSW regional rail fleet of XPT, XPLOER and Endeavour trains, and constructing a purpose-built maintenance facility in Dubbo, named 'Mindyarra' that will support the new Regional Rail fleet and stimulate the regional economy.

In February 2019, NSW Government awarded a contract to Momentum Trains, an international consortium to deliver the Regional Rail Project. The Regional Rail project contract includes the design, build and maintenance of the new Regional Rail fleet, and also the design, build, maintenance and operation of the new purpose-built Mindyarra Maintenance Centre in Dubbo.

The new Main Western rail line was laid in February 2022 at the site to allow the new Regional Rail fleet to access the centre for service and maintenance.

Major construction of the centre is currently underway, with the maintenance centre expected to be completed in 2022.

## Building a Better Dubbo – transport infrastructure projects

Together, the Australian Government and the New South Wales Government are investing \$301.2 million in five Building a better Dubbo transport infrastructure projects.

As of December 2021, the Building a Better Dubbo program had proudly delivered four of the five road upgrades in Dubbo, saving travel time and enabling more efficient freight transport and time-saving benefits to motorists in and around Dubbo.

What has been completed:

- Newell Highway upgrade, West Dubbo
- Newell Highway Mitchell Highway intersection upgrade
- LH Ford Bridge strengthening
- Mitchell Highway (Cobra Street) and Fitzroy Street intersection upgrade

Early works program for the Newell Highway Upgrade, New Dubbo Bridge has commenced. Tenders were invited on 28 April 2022. This \$200 million project will improve freight efficiency on the Newell Highway, reduce traffic congestion and provide an additional route during flood events. It will assist in easing congestion in Dubbo when most needed.

## Mitchell Highway upgrade, Dubbo to Narromine

The NSW Government is investing \$32 million to construct overtaking lanes and safety upgrades on the Mitchell Highway between Dubbo and Narromine.

The project involves building three new overtaking lanes and safety improvement works. The overtaking lanes that will be constructed are located at:

- Lagoon Creek
- Mylangra
- Tantitha

Work has started on the Lagoon Creek overtaking on the Mitchell Highway, 17km west of Dubbo. Safety upgrades will also be delivered at the same time including flexible safety barriers, rumbles strips and wider centrelines.





## Advanced manufacturing precinct in Narromine

Engineering company Simmons Global will relocate operations from Western Australia to Narromine, thanks to a \$4.8m grant from the Regional Job Creation Fund.

This funding will help deliver an advanced manufacturing precinct that produces everything from unmanned aerial drones to solar UV monitors that tell teachers when students should play in the shade, as well as help upskill local indigenous and youth workers through apprenticeships.

Narromine has experienced record development and growth in recent years and the establishment of Simmons Global will help strengthen and diversify the economic base and give existing businesses confidence for a bright future.

*The advanced manufacturing precinct is expected to kick off in 2022 and start production on technology such as aerial drones and solar UV monitors.*

Other businesses across the Shire also benefited from the first round of the Regional Job Creation Fund that saw a good number of projects receiving up to 50% of their project costs in grant funding.

The \$140 million Regional Job Creation Fund was established to support existing businesses in regional NSW to grow and encourage interstate or overseas businesses to invest in regional NSW.



## EMERGING INDUSTRIES

### Energy and renewables

The state government's plan to deliver a 3GW renewable energy zone (REZ) in the Central-West has continued to receive support through the revised transmission corridor that maximizes options to unlock more renewable energy in the future.

The Central-West Orana REZ was the first of five designated clean energy zones detailed in the NSW Government's Electricity Infrastructure Roadmap.

As Australia's first REZ, the Central-West Orana REZ is pivotal to the NSW government's plan to inject at least 12GW of renewable energy and 2GW of energy storage into the grid before 2030 to fill the gap created by the retirement of the state's thermal-fuel generation fleet.

The Central West REZ is expected to bring up to \$5.2 billion in private investment to the Central-West Orana region by 2030, and support around 3,900 construction jobs and 500 ongoing jobs in the region.

*The Central-West Orana REZ is expected to be shovel-ready by the end of 2022 and produce enough clean energy to power 1.4 million homes when complete.*

As one of the faster developing REZs, there are many looking to the region as a leader and early adopter, including governments, renewable energy developers and other regional communities across Australia.

*"Stage 1 of the Central-West Orana REZ, which encompasses approximately 20,000 square kilometres centred in Dubbo, is planned to unlock at least 3GW of new network capacity by the mid-2020s, enough to power 1.4 million homes."*

Plans for transmission to support development of the New South Wales Central-West Orana Renewable Energy Zone are progressing as planned with Transgrid beginning community consultation on the proposed transmission corridor earlier in the year. The company has been meeting and working with landowners and local communities to

discuss constraints and opportunities within the study corridor, including carrying out environmental surveys to help with informing route identification.

- 180Km corridor
- Shovel ready end of 2023
- Construction commence Jan 2024 and completed July 2025
- \$5.2 billion investment unlocked by 2030
- 3900 peak construction jobs
- 500 ongoing jobs

Transgrid is planning new 500kV and 330 kV transmission lines, substation(s) and related infrastructure to support the development of the Central-West Orana REZ. Investment in the new infrastructure will allow renewable energy providers from the region to connect to the grid and enable more affordable, reliable and clean energy for New South Wales customers.

The government has further confirmed it will invest an extra \$84 million in the key bodies needed to accelerate the implementation of its Electricity Infrastructure Roadmap and provide \$47.5 million to accelerate the development of pumped hydro in the state. This funding is on top of the \$380 million announced in the 2021 Budget to support the delivery of the Roadmap.

### Value-added manufacturing

*"The onset of the COVID-19 pandemic revealed the importance of a local manufacturing supply chain and highlighted some of the region's unrealised industry capabilities."*

The Orana region is moving to higher value added manufacturing and food processing. These industries include organic and free-range production, grain milling, animal product and fiber processing, pet food manufacturing, packaging of raw fruits, vegetables and meats, and the processing of foods such as dairy products.

Local manufacturers are increasingly investing new and innovative technology or employing advanced business models that allow them to compete favorably both locally and globally.

With a collaborative research and development center at the core of the region, the Orana region is positioned to become a significant hub for advanced manufacturing.

Many manufacturing businesses are expanding in the region and investing in innovative technologies. All this investment will help attract top talent to the region, driving economic development and job creation.

## Food and agribusiness

The Orana region is moving to higher value-added manufacturing and food processing such as organic and free-range production, grain milling, animal product and fibre processing, pet food manufacturing, packing of raw fruits, vegetables, meats and seeds, and the processing of foods such as dairy products.

*The expansion of the agricultural supply chain including key transport infrastructure and facilities, supporting secondary processing facilities and transport and logistics industries has led to the growth and development of agribusiness in the region.*

The diversity and quality of agricultural commodities provide enormous potential for value-added opportunities. Processing facilities in the Central West rely partly on agricultural produce from the Orana and vice versa. The established processing and manufacturing industries in Dubbo, Blayney, Manildra and Bathurst encourage related industry development and attract investment. The synergies between the Central West and Orana region will maximise future innovation opportunities and increase productivity.

The region has access to international markets via Port of Newcastle, Port Botany, Sydney Airport and Canberra Airport. Products such as beef, lamb, goat, and dairy are already being exported to South East Asia.

Inland Rail, Western Sydney International Airport, improved road and rail links to Newcastle along with the proposed program of upgrades to the Great Western Highway will all open new domestic and international markets.

## Mining, Energy & Transport Services (METS)

The resources sector is the leading contributor to the region's economy, accounting for \$5.1 billion (25.9%) of the region's total economic output.

The Orana region hosts several commodities including coal, copper, silver, lead, zinc, gold, and critical minerals. There are several established mines in the region, with another handful being developed or going through feasibility studies. Notable mines include CSA Mine (Glencore) and Peak Gold and Hera (Aurelia), both in Cobar; Tritton Copper Operations (Aeris Resources); Northparkes (CMOC-Northparkes Mines); Tomingley Gold Operations (Alkane Resources Ltd); Cadia (Newcrest); Wilpinjong Mine (Peabody Energy); Moolarben Coal (Yancoal); Ulan Coal (Glencore Australia); and Springvale and Clarence Colliery (Centennial Coal).

The vast mining industry in the region is undergoing rapid transformation. As regulations change to stimulate investment, new mining-operating models are attracting private investment. Exploration for copper, gold, and essential minerals is gaining traction in the region. There is interest in zirconia resources in Dubbo, as well as a scandium project in Nyngan, which is now in the planning and evaluation stage.

The region has proven to be a valuable testing ground for new technologies and processes thanks to its established resources sector, and there is an appetite for innovation that looks set to grow as the region continues to see investment in its projects and resources, particularly around critical minerals. The CMOC Northparkes Mine, which runs a number of automation programmes, including driver-less loaders, is a leader in the region when it comes to automation.

## COVID-19

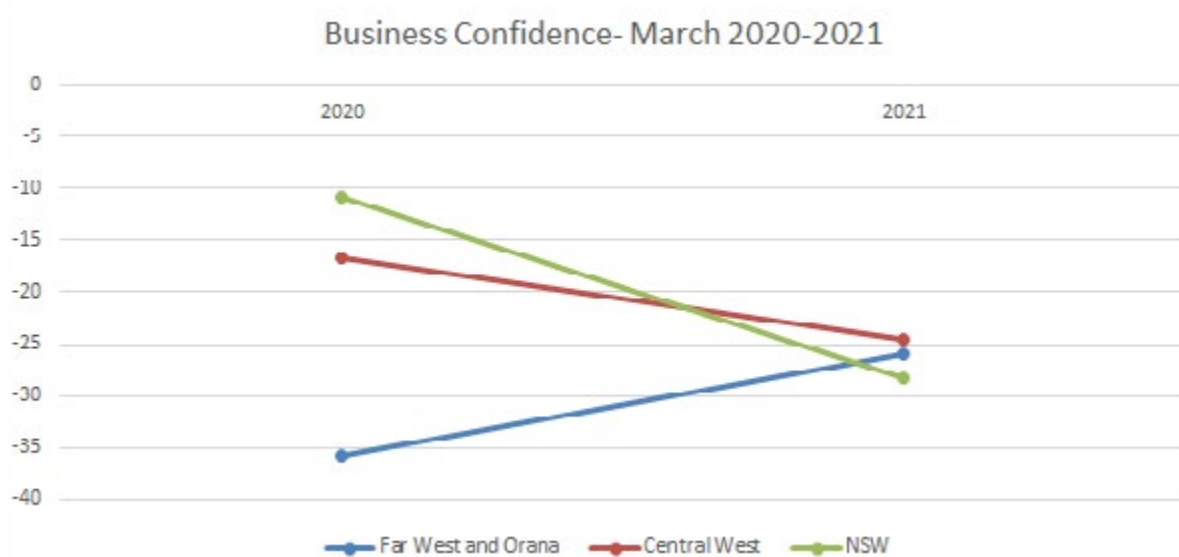
Business conditions have been challenging since the start of the pandemic in early 2020. The various lockdowns have caused major disruptions to economic activity. While businesses in the region are no longer operating in COVID crisis mode, trading conditions have been volatile and there are signs of a multispeed economy as different sectors and businesses are recovering at a different pace. Some have seen their operations back on track, while many others are still struggling.

In the midst of the pandemic and the host of measures and restrictions it requires, the region has continued to show resilience during these challenging economic times. A lot has been learnt, and there is an opportunity to harness the innovations and lessons learnt during the COVID-19 pandemic to ensure we rebuild the economy to be even more resilient and self-sufficient into the future.

The COVID-19 pandemic created short-term disruptions and provoked long-term changes in how the world lives and does business. The economic impact of COVID-19 continues to diverge across the region and country since the pandemic began. The primary impacts were particularly evident in:

- Business closures due to lockdowns and other containment measures
- Changing business operations due to work-from-home requirements
- Job losses as a result of business closures
- Restricted interstate and international travel impacting tourism
- International supply chain interruptions
- Falling consumer demand and business confidence

Individuals and businesses faced significant pressures in 2021-22 with restrictions imposed as a result of the growing pandemic. Business confidence dropped with some businesses being forced to close down due to financial pressures. The business exit rate in the region in March 2021 was 0.9%.



The COVID-19 pandemic has accelerated changes in consumption patterns which can create negative consequences for regional businesses. The switch to online purchasing is favouring high volume online outlets, pulling the rug out from underneath many regional businesses. Regional businesses can't compete well on high volume essentials, and are most competitive on high value products and most importantly, on services. But the collapse in spending has stalled local businesses everywhere, especially in regions.

*It is now more important than ever to push our dollar further and support the notion of "think local, buy local" to ensure support for our region.*

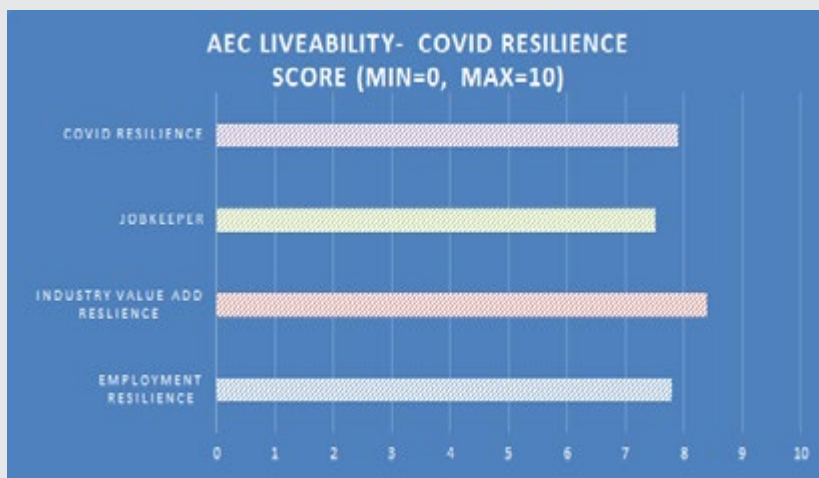
Despite the fact that a record percentage of Australians are unemployed or underemployed, consumer expenditure is increasing. How and where individuals and businesses choose to spend money will have a big impact on our recovery as a region.

Housing has remained a significant challenge for the region particularly in the last year. Housing pressures continued to increase with major centers like Dubbo and Mudgee recording very high price growth, with housing prices jumping by 47.3 percent between March 2020 and September 2021 in these towns.

- Average change in rent since March 2020: +17.3%
- Average change in property prices: +33.2%
- Median property prices: \$231,700

Covid-19 impacted some industries more than others, with Accommodation and Food Services and Retail Trade being the most impacted in the region. Tourism and accommodation industries are important job providers in the region, employing over 3000 people across the Orana region before the pandemic. The tourism industry was significantly affected by the pandemic with the Food and Accommodation sector taking the biggest hit between 2020-21.

COVID-19 has a short-term impact on tourism flow, and the region has already started to experience recovery. Tourism in the region is driven mainly by the domestic, rather than the international market. This means that as recovery timeframes for international tourism are expected to be longer.



AEC COVID Resilience Indicator: This indicator provides guidance on the extent to which COVID-19 impacted the region in terms of employment, businesses activities, and broader economic activity.

*Overall, the region has shown great resilience averaging 7.5 and above for each scoring index. The region showed very strong industry value-add resilience scoring 8.4. The Covid resilience score for the region averaged at 7.9.*

## ROAD TO RECOVERY

The Orana region has faced recent tough economic times following drought, bushfires, floods, and the COVID-19 pandemic. The Federal and State Governments have continued to support and roll out key incentives for individuals, small businesses, local governments and community groups.

The NSW economy is back on the road to recovery, with the government committing to:

- assist businesses to expand, establish, invest and create more jobs
- ensure communities get the services they need to recover, grow and thrive
- protect and improve the environment and local character of regions
- enable the continued response to recent natural disasters of storm, flood and COVID-19

- prepare for the future with drought and regional water strategies
- and improve road, rail and digital connections between the regions and the cities .

*"Now more than ever is the time to invest in the region following unprecedented NSW Government funding allocations that make regional NSW an attractive investment opportunity."*



# PROJECT PIPELINE

## PROJECT COMPLETIONS

The 2021–2022 financial year saw the completion of some major projects across the region. This demonstrates a thriving regional economy and the resilience of our industries despite the recent challenging economic times. These projects represent both public and private investments across different industries and sectors, demonstrating the diversity of our region's economy.

*\*Projects included in this report are those successfully delivered within the last year, with only major notable projects listed.*

PROJECT	LOCATION	PROPONENT	CONTRACTOR	INVESTMENT	COMPLETED	SECTOR
Western Cancer Centre	Dubbo	Western NSW Local Health District	Lipaman	\$35,000,000	September 2021	Healthcare and Social Services
Bogan Shire Medical Centre Extension	Bogan	Bogan Shire Council	Ktlyons Pty Ltd	\$466,958	May 2022	Healthcare
Lucas Bridge	Gilgandra	Gilgandra Shire Council	Saunders Civil Build	\$2,500,000	April 2021	Construction
Orana Living Cottages	Gilgandra	Orana, Living	Westbury Constructions	\$3,000,000	April 2021	Healthcare and Social Services
Newell Highway Roadworks	Dubbo	Roads and Maritime Services	Stabilised Pavements of Australia	\$2,832,000	August 2021	Transport
Boundary Road Extension	Dubbo	Dubbo Shire Council	Council's Infrastructure Delivery branch	\$4,700,000	April 2022	Transport
Dubbo Courthouse Extension	Dubbo	Department of Justice and Corrective Services	North Building With Trust	\$2,940,000	March 2021	Construction

## MAJOR PROJECTS

In the Orana region, there are over 40 major projects in the pipeline valued over \$8B. These projects are spread out across different industries and reflect the region's diverse economy.

- Over \$250M in public investment
- Over \$6.4B in private investment
- More than 4000 Jobs to be created

The highest sector of investment in the region is Renewable Energy with \$4.6B worth of investment in the pipeline. Dubbo Regional has the highest number of projects in the pipeline.

*\*The project details are based on publicly available data and information submitted to Cordell Connect as of the time of this publication.*

*\*\*Projects in this report include those in the early planning stages and those under construction at the time of this report.*

PROJECT	LOCATION	PROPONENT	INVESTMENT	OWNERSHIP	STAGE	SECTOR
<b>BOGAN SHIRE</b>						
<b>Nyngan Gilgai Scandium Project- Raw Water Supply</b> Raw water supply line to the plant site connected to the existing Cobar Water Board supply lines running adjacent to the Barrier Highway.	Nyngan	Scandium International Mining	\$1,000,000	Private	Development Approval	Mining
<b>Girilambone Joint Venture Copper Gold Project</b> A project within the Lachlan Fold Belt of the Cobar-Gilgunnia area. Investigations of anomalies along strike of the nearby Avoca Tank discovery.	Girilambone	Alchemy Resources Limited	\$2,000,000	Private	Early Planning	Mining
<b>BOURKE SHIRE</b>						
<b>Bourke Memorial Swimming Pool</b> Construction of a new learn to swim pool, surrounding concourses & drainage, new plant room & storage room & associated works at the Bourke War Memorial Swimming Pool site.	Bourke	Council	\$500,000	Public	Tendering	Sports and Recreation
<b>COBAR SHIRE</b>						
<b>New Cobar Complex Project</b> Amalgamation of underground mining at New Cobar, Great Cobar, Gladstone, Chesney and Jubilee deposits to create the New Cobar Complex Project	Cobar	Peak Gold Mines Pty Ltd	\$40,000,000	Private	Planning	Mining



PROJECT	LOCATION	PROPONENT	INVESTMENT	OWNERSHIP	STAGE	SECTOR
<b>South Cobar Copper Project</b> Comprises the Mallee Bull, Wirlong, Southern Nights, Wagga Tank and May Day deposits and associated development-focused activities. In process of drilling for Mineral Resource Estimate (MRE)	Cobar	Peel Mining	\$5,000,000	Private	Resource definition drilling	Mining
<b>Mallee Bull Project</b> 6.76 million tonnes at 1.8% copper, 31 g/t silver, 0.4 g/t gold, 0.6% lead and 0.6% zinc (a combined total of 2.6% copper equivalent) containing approximately 119,000 tonnes of copper, 6.6 million ounces silver, 83,000 ounces gold, 38,000t lead and 38,000t zinc (175,000t copper equivalent)	Cobar	Peel Mining	\$2,000,000	Private	Advanced exploration	Mining
<b>Bulla Park Copper/Gold Project</b> A project near Cobar where drill intersections to date indicate a substantial copper (silver) mineralised system hosted by Palaeozoic age sediments of the West Cobar Basin, demonstrating major previously unrecognised potential. A project covering an area of 157sq km, 45km north of Cobar, considered to be prospective for base metals and gold.	Cobar	West Cobar Metals	\$2,000,000	Private	Exploration, drilling, survey & assessment	Mining
<b>Endeavour Joint Venture Base Metal Project</b> A project including the Endeavour base metal mine, which is currently on care & maintenance, infrastructure and 1/2Mtpa processing plant, plus a highly prospective tenement package near Cobar	Cobar	Sandfire Resources CBH Resources	\$5,000,000	Private	Drilling program in progress	Mining
<b>Tinderly Gold/Base Metals Project</b> A project covering an area of 157sq km, 45km north of Cobar, considered to be prospective for base metals and gold.	Cobar	Silver City Minerals	\$2,000,000	Private	Project Assessment	Mining
<b>Cobar Storages and Pump System</b> Construction of a low lift & high lift pump station at Cobar storages site (low lift pump station), Cobar storages balance tanks site, Councils depot site (high lift pump station).	Cobar	Department of Finance and Services	\$1,000,000	Public	Tendering	Construction
<b>Cobar Water Reticulation</b> Pipelaying work for the Cobar reticulation upgrade works.	Cobar	Department of Finance and Services	\$1,000,000	Public	Tendering	Construction

PROJECT	LOCATION	PROPONENT	INVESTMENT	OWNERSHIP	STAGE	SECTOR
<b>Cobar Bio Hub</b> Utilising Invasive Native Scrub, (24 million tonnes in a 75 km radius of Cobar) an intense vegetation growth ruining many farmers livelihoods. 100,000t pa harvested, produce 8,000MW pa, 50 jobs to be created	Cobar	Renewed Carbon	\$100,000,000	Private	Development	Renewable Energy
<b>COONAMBLE SHIRE</b>						
<b>Warren Road Upgrades- Coonamble to Warren</b> Upgrade to Warren Road between Coonamble to Warren. The road is the most direct freight route between these two towns, but heavy vehicles are currently required to take a longer route due to the deteriorating condition of the road.	Coonamble and Warren	Coonamble Shire Council, Warren Shire Council	\$4,800,000	Public	Planning	Transport
<b>DUBBO REGIONAL</b>						
<b>Rawsonville Bridge replacement</b> Replace the Rawsonville Bridge over the Macquarie River on Rawsonville Bridge Road, west of Dubbo.	Dubbo	NSW Government Transport for NSW	\$12,500,000	Public	Concept Design	Transport
<b>Boothenda Road upgrade</b> Upgrades to the intersection that leads to the Dubbo Regional Livestock Markets.	Dubbo	Dubbo Regional Council	\$8,000,000	Public	Construction	Transport
<b>Mumbil Solar Farm</b> The site is located about 15 kilometres south of Wellington and is expected to support a solar farm of up to 150 Megawatts. The site is currently used for sheep grazing.	Mumbil	Epuron	\$210,000,000	Private	Planning	Renewable energy
<b>Wellington Solar Project – Battery Energy Storage System</b> 25,000kW energy storage project with a storage capacity of 100,000kWh. 1.2 million fixed and single-axis tracking solar panels; 300 megawatts, 155 inverter stations, 330 kilovolt overhead transmission line	Wellington	Lightsource	\$540,000,000	Private	Approved for development	Renewable Energy
<b>Burrendong Wind Farm</b> 72 wind turbines, output capacity of up to 446 megawatts (MW),	Wellington	Epuron	\$100,000,000	Private	Planning Assessment	Renewable Energy

PROJECT	LOCATION	PROPONENT	INVESTMENT	OWNERSHIP	STAGE	SECTOR
<b>Suntop solar farms</b> Five 1.14 gigawatt solar plants; 316 megawatt Gunning plant; 78 megawatt Mumbil; 165 megawatt Gunnedah, 286 megawatt Suntop and 196 megawatt Maryvale facilities.	Dubbo	Canadian Solar	\$262,000,000	Private	Construction	Renewable Energy
<b>Maryvale solar Farm</b> 450,000 single-axis tracking solar panels, 125 megawatt (MW), connect to Essential Energy's existing 132 kilovolt (kV) overhead transmission, create 150 construction jobs, 10 operational	Wellington	Photon Energy, Canadian Solar and Polop Investments	\$188,000,000	Private	Approved	Renewable Energy
<b>Uungula Wind Farm</b> 400MW, 97 wind turbines, 200,000 homes powered, 262 jobs	Wellington	CWP renewables	\$820,000,000	Private	Approved for development	Renewable Energy
<b>Newell Highway Upgrade – Dubbo Bridge</b> The construction of a new bridge over the Macquarie River in Dubbo, the construction of a new 2.3 kilometre link road between Thompson Street and Bourke Street, and associated intersection upgrades.	Dubbo	NSW Government Transport for NSW	\$220,200,000	Public	Planning	Transport
<b>GILGANDRA SHIRE</b>						
<b>The Gil Library Hub</b>	Gilgandra	Gilgandra Shire Council	\$2,959,544	Public	DA Approved	Education
<b>Gilgandra solar farm</b> 50MWac, 156,000 solar panels, on 150 hectares, produce 100,000 MWh, power 14,000 homes, 110 full time equivalent construction jobs and 2 full time equivalent operational jobs.	Eumungerie	Neoen Australia	\$63,000,000	Private	Development	Renewable Energy
<b>MID WESTERN REGIONAL</b>						
<b>Tallawang Solar Farm</b> 500MW solar farm, 1300 hectares, capacity of up to 1000 MWh, supply approximately 330,000 homes	Gulgong	RES	\$1.2B	Private	Assessment	Renewable Energy
<b>Crudine Ridge Wind Farm</b> 37 turbines: GE Energy 3.6-137 (power 3 600 kW, diameter 137 m),, 134 MW,392 GWHS annual output ,Supply 55,000 homes, 240 jobs	Crudine	CWP Renewables	\$20,600,000	Private	Civil Works Completed	Renewable Energy

PROJECT	LOCATION	PROPONENT	INVESTMENT	OWNERSHIP	STAGE	SECTOR
<b>Barneys Reef Wind Farm</b> 340MW, up to 65 wind turbines, over 13 free-hold properties, supply around 265,000 NSW homes.	Gulgong	RES	\$400,000,000	Private	Assessment	Renewable Energy
<b>Stubbo Solar Farm</b> 400MW, 1,750 hectares, power 150,000 NSW homes, 400 jobs	Stubbo	UPC/AC Renewables	\$418,000,000	Private	Consultation and Planning	Renewable Energy
<b>Suntop Stage 2 Solar Farm</b> Development of a 230 megawatt solar farm & associated infrastructure.	Suntop	Canadian Solar	\$250,000,000	Private	Planning	Renewable Energy
<b>Wollar Solar Farm</b> 290MW (ac), power approximately 104,926 households and reduce 515,564 tonnes of greenhouse emissions, create over 300 jobs	Wollar	Wollar Solar Development	\$450,000,000	Private	Construction	Renewable Energy
<b>Beryl Solar Farm</b> 206 hectares, 109 MW DC, 4,175 Piles 8,835 Exosun Trackers and 309,000 PV modules, 199,000 MWh of electricity per operating year, power 25,000 households, 150 jobs.	Gulgong	First Solar	\$140,000,000	Private	Development	Renewable Energy
<b>NARROMINE SHIRE</b>						
<b>Narromine West Solar Farm</b> Construction of a 5MW grid-connected solar PV installation. The solar farm will be connected to Essential Energy's network via a 22 kV distribution line running adjacent to the southern boundary of the site. The PV arrangement will consist of approximately 147 ground mounted single axis trackers.	Narromine		\$6,439,000	Private	Development Approval	Renewable Energy
<b>WARRUMBUNGL SHIRE</b>						
<b>Liverpool Range Wind Farm</b> 282 wind turbines and a capacity of 3.6 MW per wind turbine; produce 2,948 GWh of clean renewable electricity annually, sufficient for more than 400,000 homes.	Coolah	Tilt Renewables	\$1.5B	Private	Pre-construction	Renewable Energy
<b>Valley of the Winds</b> 800-megawatt wind farm, Up to 154 wind turbines, power 697,000 homes.	Coolah	UPC/AC Renewables	\$1B	Private	Technical Assessments	Renewable Energy

PROJECT	LOCATION	PROPONENT	INVESTMENT	OWNERSHIP	STAGE	SECTOR
<b>Cobbora Solar Farm</b> 700MW solar farm, 200MW/200MWh energy storage, 3300 hectares, 160,000 homes powered, 700 jobs created	Cobbora	Marble Energy	\$900,000	Private	Development	Renewable Energy
<b>Dunedoo Solar Farm</b> 55 MW AC (66 MW DC), 173,000 PV solar panels, supply 24,400 homes pa, support 260 jobs	Dunedoo	NGH Pty Ltd	\$76,000,000	Private	Development Application	Renewable Energy

## FUNDING ANNOUNCEMENTS

The Government has continued to acknowledge the importance of regional areas with more than \$100M worth of projects announced for funding within the last year. These projects are spread out across different industries and include public and private investment.

*Note: Only funding over \$500,000 was considered for this list*

PROJECT	OWNERSHIP	TOTAL INVESTMENT	AMOUNT FUNDED	PROGRAM	SECTOR
<b>Maverick Biomaterials Expansion</b> Create an additional 400 square metres of office space and 600 square metres of manufacturing facilities adjacent to its existing facilities in Dubbo.	Private	1,158,000	\$1,158,000	Regional Investment Attraction Fund.	Manufacturing
<b>Fletcher International Expansion</b> Increasing processing capacity to 11,000 head per day and creating more than 400 ongoing full-time jobs!	Private	\$14,000,000	\$4,500,000	Regional Job Creation Fund	Manufacturing
<b>Baradine Sawmill</b> The state's last remaining specialist white cypress mill to expand their operational capacity by acquiring facility at Baradine	Private	\$2,500,000	\$1,000,000	Regional Job Creation Fund	Agriculture and Forestry
<b>Bread and Brioche Project</b> Expansion to transform existing manufacturing facility and see significant innovative technology and equipment upgrades to sliced bread and brioche production plants.	Private	\$4,300,000	\$850,000	Regional Job Creation Fund	Manufacturing
<b>Plant expansion and upgrades</b> A new shed for storage and office space, along with the purchase of a fully automatic wraparound case packing machine to replace its current hand-packing system	Private	\$1,000,000	\$500,000	Regional Job Creation Fund	Manufacturing

PROJECT	OWNERSHIP	TOTAL INVESTMENT	AMOUNT FUNDED	PROGRAM	SECTOR
<b>Dubbo Drug Court</b> To expand the NSW Drug Court to Dubbo, on top of the recent \$3.6 million upgrade to the city's courthouse.	Public	\$27,900,000	\$27,900,000	Federal Funding	Construction
<b>Agecare investment</b> Significant infrastructure improvements to ensure aged care residents in Bourke, Narrabri and Walgett will be able to live in greater comfort.	Private	\$2,600,000	\$2,600,000	Aged Care Approvals Round (ACAR)	Healthcare and Social Services
<b>Brewarrina Aboriginal Fishtraps Lookout &amp; RiverWalk</b> Construction of a 2.4 kilometre path and a suspended lookout adjacent to the fish traps	Public	\$920,000	\$920,000	Federal Government's Economic Development Program.	Tourism
<b>Back O Bourke Exhibition Center Upgrade</b>	Public	\$974,215	\$974,215	Economic Development Program	Tourism
<b>Collarenebri Bore Baths</b> Construction of thermal baths and associated amenities	Public	\$920,124	\$920,124	Murray Darling Basin Economic Development Program.	Tourism
<b>Collarenebri Community Health Hub</b> A facility for integrated primary and allied health professionals, as well as medical training facilities, an Indigenous youth drop-in centre, study room and facilities for school and university students, an Elders' space and a gym	Private	\$924,000	\$924,000	Murray Darling Basin Economic Development Program	Healthcare
<b>Cobar Water Reticulation Upgrade – Stage 2</b> Improve water security and water quality within the Cobar township	Public	\$3,000,000	\$3,000,000	Resources for Regions program	Services
<b>Nyngan Railway Heritage Tourism Project</b> Renovations and improvements to items of interest to railway and heritage tourists including the Nyngan Museum, Railway Footbridge, viewing platform for Railway Turntable and Mid-State Shearing Shed Museum, Teamsters Rest and Flood Memorial areas.	Public	\$759,772	\$759,772	Resources for Regions Program	Tourism
<b>Bogan Shire Council Housing</b> The construction of two three-bedroom units in Nyngan for the use of doctors and other key professionals employed by the Bogan Shire Council.	Public	\$556,422	\$556,422	Resources for Regions Program	Housing
<b>Narromine Revitalisation and Activation Project</b> Enhance the town centres in Narromine, Trangie and Tomingley, with the aim to encourage more people to live and work in the region.	Public	\$600,000	\$600,000	Economic Development Program	Tourism

PROJECT	OWNERSHIP	TOTAL INVESTMENT	AMOUNT FUNDED	PROGRAM	SECTOR
<b>Tourism enhancement projects</b> Monkeygar Creek Macquarie Marshes Bird Viewing Project, Carter Oval Sports Lighting Project, Warren Showground Racecourse Improvement Program	Public	\$1,500,000	\$1,500,000	Murray Darling Basin Economic Development Program.	Tourism
<b>Connectivity</b> The project will build new Pivotal 4G and mmWave Fixed Wireless Access services to the north-west of Dubbo, providing coverage to the regional towns of Rawsonville, Dickygundi, Minore and Terramungamine.	Private and Public	\$508,900	\$436,300	Regional Connectivity Program	
<b>Rehabilitation of the Warren Town Levee</b> Funding for the remediation of part of the existing levee bank.	Public	\$5.3M	\$4.8M	National Flood Mitigation Infrastructure Program	

## MAJOR INFRASTRUCTURE ANNOUNCEMENTS

PROJECT	LOCATION	PROPONENT	AMOUNT FUNDED	FUNDING	TIMEFRAME
<b>Water infrastructure</b> The construction of three new pump stations at Nyngan, Hermidale and Cobar to improve water reliability	Cross	Bogan and Cobar Shire Council	\$46M	Federal & NSW Government	Medium term
<b>Upgrade of Jobs Gate Road</b> Jobs Gate Road seal extension	Brewarrina	Brewarrina Shire Council	\$5,000,000	Fixing Local Roads program	Short term
<b>Complete sealing of six roads in the shire</b> Coronga Peak Road, Toorale Road, Weelong Road, Weir Road, River Road and Parkdale Road sealing	Bourke	Bourke Shire Council	\$4,900,000	Fixing Local Roads program	Medium term
<b>Wilga Downs Road sealing</b> Sealing of Wilga Downs Road	Cobar	Cobar Shire Council	\$2,789,951	Fixing Local Roads program	Medium term
<b>Cobar Industrial Estate Road and Stormwater Upgrades</b> Upgrade the roads and stormwater infrastructure in the current industrial estate, which will impact the productivity of the area and usage of a number of businesses and their clientele.	Cobar	Cobar Shire Council	\$1,375,921	Resources for Regions program	Medium term
<b>Pangee Street resurfacing</b> Resurfacing Pangee Street	Bogan	Bogan Shire Council	\$974,783	Fixing Local Roads program	Medium term

PROJECT	LOCATION	PROPONENT	AMOUNT FUNDED	FUNDING	TIMEFRAME
<b>Old Mendooran Road sealing</b> Pavement construction and sealing to complete the last missing link of seal on this road.	Dubbo	Dubbo Shire Council	\$1,370,524	Fixing Local Roads program	Short term
<b>Lorne Road reconstruction and sealing</b> Reconstruction and sealing the damaged segment	Walgett	Walgett Shire Council	\$2,070,000	Fixing Local Roads program	Medium term
<b>Ballimore Road project Stage 2</b> Reconstruction and sealing of intersections with Windora and Wongajong Lanes, the replacement of safety barriers, line marking, installation of new signs and guide posts, and upgrades of the bridge at Finns Crossing	Dubbo	Dubbo Shire Council	\$1,000,000	Fixing Local Roads program	Medium term
<b>Narromine road upgrades</b> Doreen Lane rehabilitation; Raeburn Lane rehabilitation	Narromine	Narromine Shire Council	\$638,400	Fixing Local Roads Program	Short term
<b>Warren Road upgrade, Coonamble to Warren</b> Upgrade Warren Road between Coonamble to Warren.	Coonamble Warren	Coonamble Shire Council, Warren Shire Council	\$1,900,000	Roads of Strategic Importance	Medium term
<b>Roads upgrades and rehabilitation</b> Construction of a sealed driveway and carpark at the Coonamble Visitor Information Centre; Box Ridge Road reconstruction; Road rehabilitation at Euronne Gully; Replacement of the concrete causeway on Quabathoo; Stabilisation of the unsealed causeway on Sandy Camp Road	Coonamble	Coonamble Shire Council	\$723,922	Local Roads and Community Infrastructure (LRCI) program.	Short term
<b>Boardwalk project</b> A boardwalk will be constructed on the banks of the Macquarie River in Dubbo	Dubbo	Dubbo Regional Council	\$3,000,000	Public Spaces Legacy Fund	Short term



# OUR INDUSTRIES

Diversity is the underpinning driver of the region's economic strength. Bogan and Cobar shires are dominated by mining, Bourke and Brewarrina by agriculture, education and public administration, Coonamble, Gilgandra, Narromine, Walgett, Warren and Warrumbungle Shires are predominantly agricultural, Mid-Western LGA is known for coal mining, and Dubbo for health & community, finance & insurance and education.

High-level commercial, residential, cultural and industrial services are in Dubbo –Orana's only regional city. Other smaller towns and villages rely primarily on agribusiness and are also reliant on the services and facilities.

## TOP INDUSTRIES



### MINING



### AGRICULTURE, FORESTRY & FISHING



### MANUFACTURING



### CONSTRUCTION

## RESOURCES AND ENERGY

- Employment: 3,353 jobs
- Output: \$5.1B
- Regional Exports: \$4.9B
- Value Add: \$2.4cB

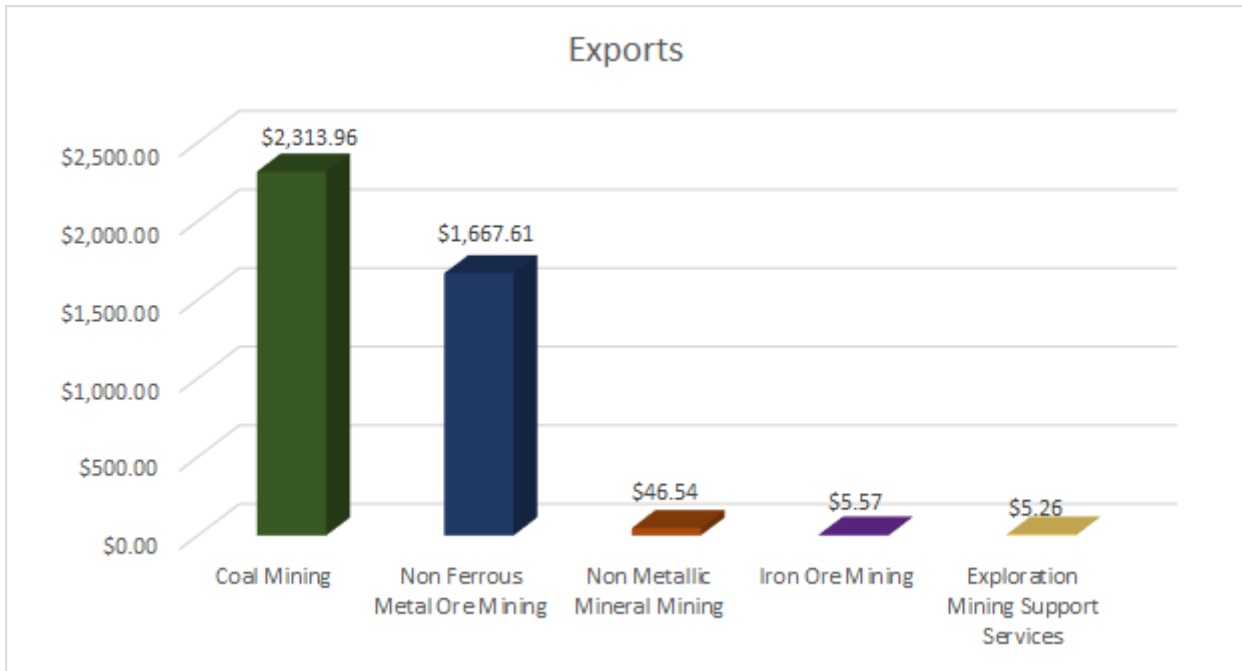
The mineral and energy resources sectors make a significant economic contribution, with new mining opportunities emerging across the region. Landmark solar, wind and bioenergy projects distinguish the region as a leader in renewable energy development.

The Orana region is home to world class mines and deposits, including both 'traditional' metals like gold and copper, and 'new' high-tech metals like scandium, cobalt and rare earth metals. The region's mining sector includes coal mining concentrated around Mudgee; gold, silver and copper mining; and emerging opportunities for rare earth mining in other parts of the region, including Dubbo.

*Renewable energy generation is expected to create a more sustainable energy future for the region.*

Growth in wind energy, solar energy and bioenergy generation will promote local jobs in smaller communities and development opportunities for associated industries. Wind generation opportunities are focused around the tablelands and slopes of the Central West, while the large open plains of the Orana provide the best access for solar energy generation.

There is significant mineral potential across the region for the resource and energy sector. Now more than ever, the Orana and Central West are the focal points for infrastructure, METS, energy and business development opportunities. The region is home to 33 operating mines and highly prospective opportunities including commodities associated with modern high-technology applications such as copper, silver, and gold, and strategic minerals, including scandium, platinum group elements, cobalt, lithium, titanium, and zirconium.



Competition for exploration investment is strong both within Australia and internationally. The Orana region is well positioned to attract this investment and supply the metals needed to underpin the economies and societies of the future.

More than 30 coal projects and mine extensions are proposed for development in NSW over the next decade, premised on world class utilisation of the estimated 11 billion tonnes of NSW recoverable coal reserves. A good number of these are in the Central West and Orana regions.

*There are exciting opportunities for the industry with the O2N Export Hub established to support industry and business development in the METS sector for the Orana and Central West regions.*

### Major Mining projects

PROJECT	COMPANY NAME	LOCATION
<b>Endeavor Mine</b> Largest zinc, lead and silver producer in the region, 720,000 tonnes per annum	CBH Resources Limited	Cobar
<b>Peak Gold Mines</b> A group of five underground mines producing copper and gold, \$390million investment	Aurelia Metals	Cobar
<b>Hera Project</b> Produce gold, lead, zinc and silver, \$155 million investment	Aurelia Metals	Cobar
<b>Tritton Copper Operations</b> Two underground mines, combined ore production of 1.8 million tonnes per annum	Aeris Resources	Nyngan

PROJECT	COMPANY NAME	LOCATION
<b>CSA Mine</b> Produce 1.1M tonnes per annum of copper ore, 185,000t of copper concentrate, 300 jobs	Glencore	Cobar
<b>Ulan Project</b> Produce 20 million tonnes of coal per annum of coal, 900 jobs	Glencore	Ulan
<b>Wilpingjong Mine</b> Extend life of mine by 7 years, 200 jobs, \$101million investment	Peabody	Mudgee
<b>Moolarben Coal Operations</b> 610M tonnes of high-quality thermal coal, 120 million investment	Yancoal	Mudgee
<b>Bowden's Silver Project</b> 3.4 million ounces of silver per annum, 6,900 tonnes of zinc and 5,100 tonnes of lead per annum, \$246.0 million, 350 jobs	Silver Mines	Lue
<b>Tomingley Gold and Copper Project Dubbo Project</b> 7.13 million tonnes of gold and copper resource estimate	Alkane Resources	Dubbo
<b>Nyngan Scandium Project</b> World's first scandium-only mine development project, 38,000 kg per year of scandium oxide.	Scandium International Mining Corp	Nyngan

## The Central West Orana REZ

The Central West - Orana region was chosen for the first pilot REZ because it benefits from relatively low build costs, a strong mix of energy resources, and significant existing investment and investor interest. It also has a strong transmission network and decreasing new power generation costs.

*The Central West – Orana's Renewable Energy Zone has set the stage for the future of renewable energy in the Orana region.*

The region has an abundance of solar and wind resources which is being harnessed by companies specialising in energy generation and distribution. Some of the largest projects in the region are in the renewable energy sector.

## Key players

- CWP Renewals
- RES
- Tilt Renewables
- Marble Energy
- NGH
- Canadian Solar
- Lightsource
- Neoen Australia
- Epuron
- Wollar Solar
- Photon Energy
- ACEN

## Major renewable energy projects under development

PROJECT	DESCRIPTION	LOCATION	JOBS	CONSTRUCTION COMMENCE	OPERATIONAL
<b>Liverpool Range Wind Farms</b> Tilt Renewables	223 turbines, power over 340,000 homes, inject \$3.9 million into the economy	Coolah	800	2021	2023
<b>Valley of the Winds</b> UPC/AC Renewables	800-megawatt wind farm, Up to 154 wind turbines , power 697,000 homes.	Coolah	400	2022	2024
<b>Cobbora Solar Farm</b> Marble Energy	700MW solar farm, 200MW/200MWh energy storage, 3300 hectares, 160,000 homes	Cobbora	700	2024	2025
<b>Dunedoo Solar Farm</b> NGH Pty Ltd	55 MW AC (66 MW DC), 173,000 PV solar panels, supply 24,400 homes pa	Dunedoo	260	2022	2023
<b>Birriwa Solar Farm</b> UPC/AC Renewables	600MW solar farm, battery energy storage system of up to 1,000MW, 240,000 homes powered	Birriwa	400	2023	2026
<b>Suntop solar farm Stage 2</b> Canadian Solar	395GWh of energy, 189MWdc, 700,000MWh pa, power 65,000 homes	Wellington	250	2022	2024
<b>Wellington Solar Project</b> Lightsource	Battery Energy Storage System- 25,000kW energy storage, 100,000kWh, 150,000 homes	Wellington	400	2022	2024
<b>Gilgandra Solar Farm</b> Neoen Australia	50MWac, 156,000 solar panels, on 150 hectares, produce 100,000 MWh, power 14,000 homes	Gilgandra	110	2021	2022
<b>Tallawang Solar Farm-RES</b>	500MW solar farm, 1300 hectares, capacity of up to 1000 MWh, supply approximately 330,000 homes	Gulgong	120	2023	2026
<b>Barneys Reef Wind Farm</b> RES	340MW, up to 65 wind turbines, over 13 free-hold properties, supply around 265,000 NSW homes.	Gulgong	70	2023	2026
<b>Stubbo Solar Farm</b> UPC/AC Renewables	400MW, 1,750 hectares, power 150,000 NSW homes	Stubbo	400	2022	2024
<b>Uungula Wind Farm</b> CWP Renewals	400MW, 97 wind turbines, 200,000 homes powered,	Wellington	262	2022	2024
<b>Crudine Ridge Wind Farm</b> CWP Renewals	37 turbines: GE Energy 3.6-137 (power 3 600 kW, diameter 137 m),, 134 MW,392 GWHS annual output ,Supply 55,000 homes	Mudgee	240	2019	2021
<b>Burrendong Wind Farm</b> Epuron	72 wind turbines, output capacity of up to 446 megawatts (MW),	Wellington	130	2022	2024
<b>Wollar Solar Farm</b> Wollar Solar Development	290MW (ac), power approximately 104,926 households and reduce 515,564 tonnes of greenhouse emissions,	Wollar	300	2021	2023
<b>Maryvale solar Farm</b> Photon Energy, Canadian Solar and Polpo Investments	450,000 single-axis tracking solar panels, 125 megawatt (MW), connect to Essential Energy's existing 132 kilovolt (kV) overhead transmission,	Wellington	150	2022	2024

PROJECT	DESCRIPTION	LOCATION	JOBS	CONSTRUCTION COMMENCE	OPERATIONAL
<b>Mumbil Solar Farm</b> Epuron	The site is located about 15 kilometres south of Wellington and is expected to support a solar farm of up to 150 Megawatts. The site is currently used for sheep grazing.	Mumbil	100	2022	2023
<b>Cobar Bio Hub</b> Renewed Carbon	Utilising Invasive Native Scrub, (24 million tonnes in a 75 km radius of Cobar, 100,000t pa harvested, produce 8,000MW pa	Cobar	50	2021	2022

## AGRICULTURE, FORESTRY AND FISHING

- Employment: **6,711 Jobs (13.5%)**
- Output: **\$2.3B (11.7%)**
- Exports: **\$1.7B**
- Value Add: **\$920.9M (9.7%)**

*Agricultural production in the Orana is diverse and includes irrigated cotton, lucerne, winter cereals, horticulture as well as extensive areas of dryland cropping, livestock grazing (including beef, sheep and wool), and timber production in the region's east.*

The region contains unique production areas with industries of limited geographical spread. These are clustered due to various factors including climate, topography, water needs and proximity to processors. The LGAs contributing the most in terms of total agricultural commodity value are Narromine (mostly wheat and cotton) and Coonamble (mostly mixed farming).

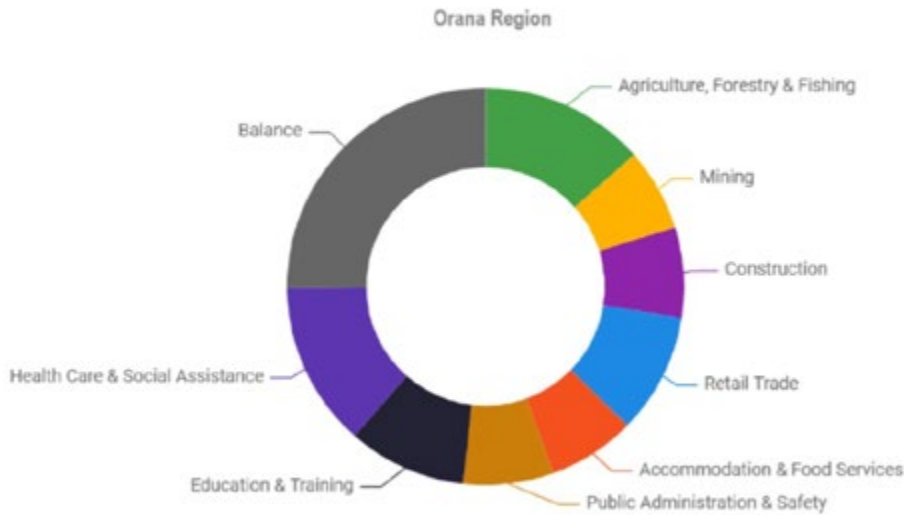
The Orana region has a strong agricultural history. The scenic tablelands support cool climate viticulture, forestry and grazing. The slopes and plains support diverse agribusiness enterprises, and broadscale and irrigated agriculture. These diverse agricultural industries provide employment for people living in areas such as Narromine and Coonamble, both directly in production and indirectly in supporting agribusiness.

The diversity and quality of agricultural commodities provide enormous potential for value-added opportunities. The region has a range of successful agribusinesses from multinationals to niche producers of artisanal food stemming across dryland cropping, irrigation, horticulture, viticulture and orchard growing. Diversification has helped to expand agricultural activities, businesses and industries, making agribusiness one of the most important economic sectors.

Agriculture and the value chain provide significant employment and exports from the region. The main regional agricultural commodities have shown sustained growth in terms of value of production.

## Orana Region

### Employment



Benchmarks: None | Industry sectors: All Selected

Despite the recent employment shifts, statistics reveal that agriculture still plays a significant role in the regional economy contributing an estimated 10.4% to the industry value and 13.4% of employment, making the industry the biggest employer in the region.

## CONSTRUCTION

- Employment: **3,668 Jobs**
- Output: **\$1.8B**
- Exports: **\$72.1M**
- Value Add: **\$585.2M**

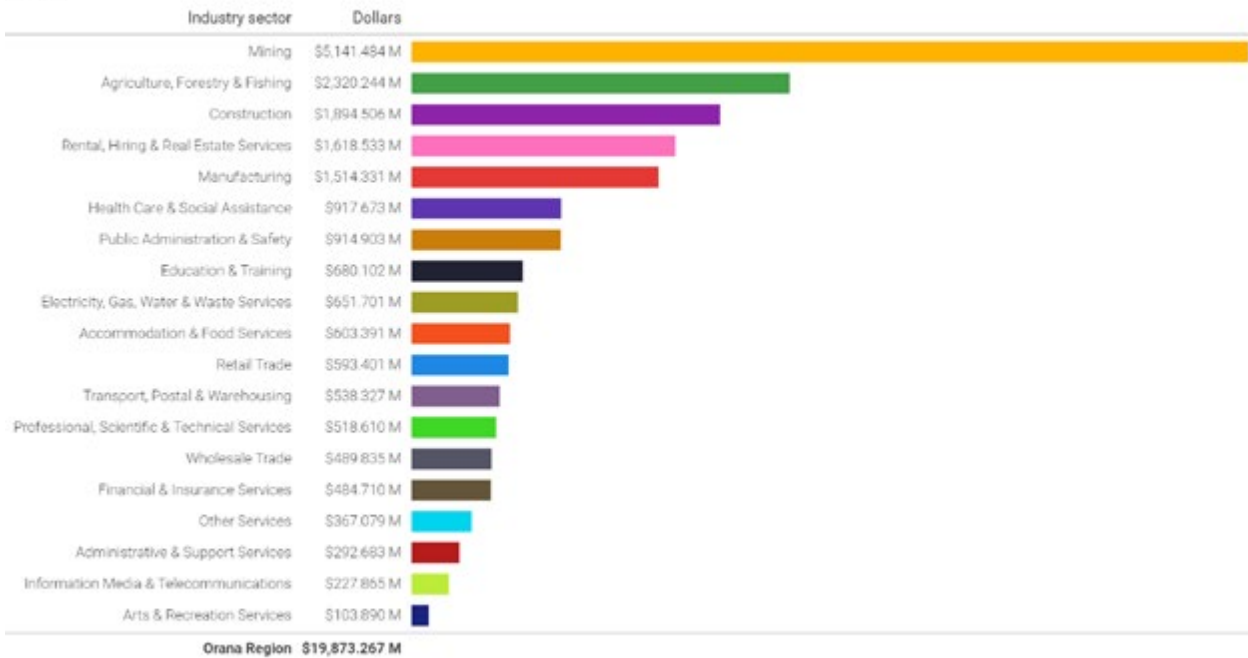
The construction industry has experienced significant growth and is the fastest moving industry in the Orana region. With the presence of new businesses, regional investment and population expansion, there is a strong demand for additional infrastructure and services in regional areas.

This has extended to renewable energy and housing construction to accommodate increasing needs in the Orana region.

Widespread public and private investment has led to extensive development along with additions, alterations, reconstruction, installation, maintenance and repair of buildings and other structures.

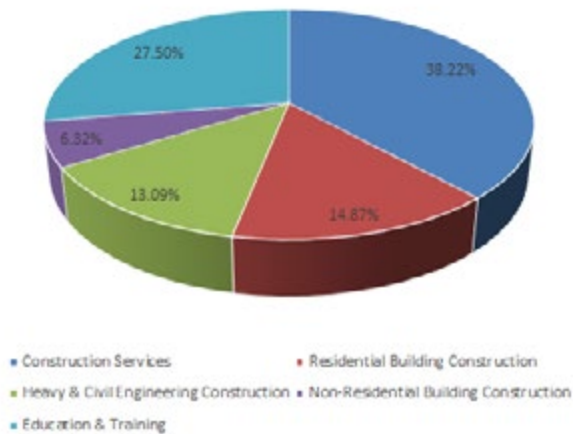
## Orana Region

### Output



Benchmarks: None | Industry sectors: All Selected

### Output sectors



As the third largest employing industry in Australia, construction has grown by 33% in the past 11 years. In the Orana, employment in the construction industry has grown at an annual rate of 15%, contributing to 7.4% of the workforce.

There are multiple factors that have contributed to the boom of the construction industry, with affordable land rates, significant opportunity and innovative projects all forming key elements in this productive shift.

Construction services occupy the biggest percentage of imports within the industry, and include architectural and engineering services, earthworks, surveying, stonework, project management and electrical work.

## Key players

- Maas Group
- Photon/Canadian Solar
- BLD Constructions
- David Payne Constructions
- Dubbo Terrazzo and Concrete Industries
- Jason Boxsell Constructions
- North Construction
- Mat Redfern Constructions
- Cynend Building and Construction

# MANUFACTURING

- Employment: **2,012 Jobs**
- Output: **\$1.376B**
- Exports: **\$559.465**
- Value Add: **\$265.523**

The region offers advanced manufacturing strengths and opportunities in food processing, beverage, energy, defence, industrial equipment, metal product manufacturing etc. Other promising advanced manufacturing opportunities exist in recycling and renewable energy.

*Food product manufacturing dominates the manufacturing industry in the Orana region and is fed by the growing agricultural industry.*

Manufacturing is a growing sector in the Orana, with the region's great diversity reflected by what is directly produced.

Identifying and supporting further value-added manufacturing and processing industries throughout the Orana region will encourage greater industry diversification and associated job opportunities; build investor confidence; maximise infrastructure and communication networks; and ensure the region's contribution to satisfying the global demand for goods and services ensure the region's contribution to satisfying the global demand for goods and services.

## Top sectors

- Meat and meat product manufacturing
- Other food product manufacturing
- Grain mill and cereal product manufacturing
- Structural metal product manufacturing
- Beverage product manufacturing

Most of the products from the primary industries are exported outside the region, but some are processed and manufactured within the region.

## Key players

- Fletchers International
- Ben Furney Flour Mill
- Sarah Jane Fine Foods
- Earlyrise Baking
- Bevco Pty Ltd
- Auscott Ltd
- NDF
- Maverick Biosciences
- Green Distillation Technologies
- Mining Camps Australia
- Garian Food Wholesalers
- Real Pet Food Company

The future of manufacturing and retail in the Orana region depend on ongoing investment, viability and innovation. Fresh enterprise ideas are surging ahead and new and existing companies have the advantage of affordable and plentiful opportunities for expansion into commercial business parks and industrial areas.

There is also opportunity for investment in value-added and advanced manufacturing through branding, packaging and processing, biotechnology and digital technology.



# HEALTHCARE AND SOCIAL ASSISTANCE

- Employment: **6,672 Jobs**
- Output: **\$913.204M**
- Exports: **\$39.160M**
- Value Add: **\$639.022M**

Health care and social assistance services are in increasing demand across regional Australia, including the Orana region. These services are important not only for the wellbeing and quality of life of people in regions, but they can also support the economic development of the region itself.

While traditionally the public sector provided the 'backbone' of health services in a region, the private sector is increasingly playing a role in both health care and social assistance, particularly in response to changing consumer expectations.

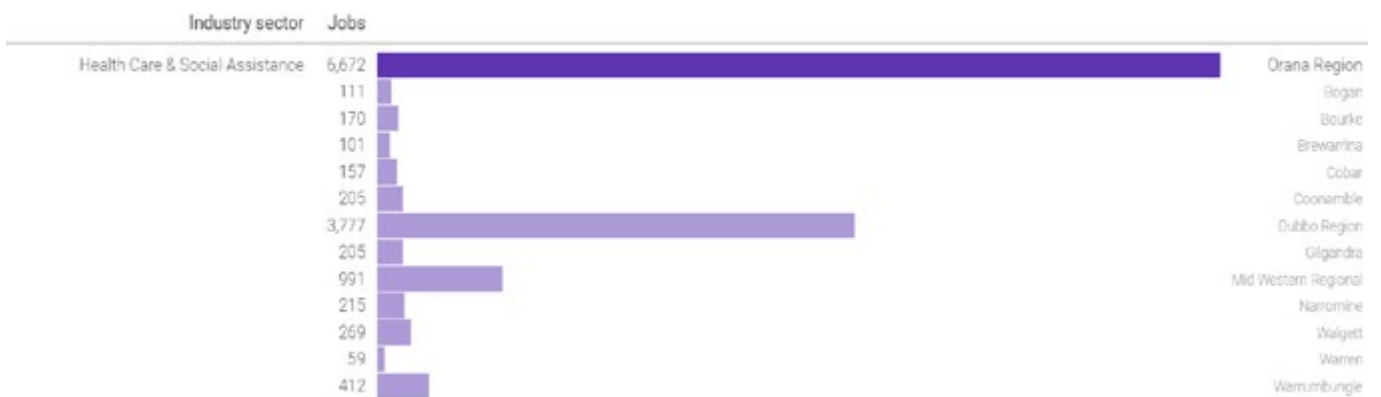
Significant public and private sector investment has been made into the healthcare and social assistance sector in the Orana region and there is a range of services available in emergency, chronic health care, aged care, mental health and specialist treatment. More than \$300 million has been spent on upgrades to the public hospitals in the major centres of Dubbo and Mudgee and in the smaller communities.

*The industry is the second largest employer in the region employing 6,672 people across the region, with over 50% of the workforce being in Dubbo.*

The region has experienced difficulties in attracting and retaining skilled professionals, such as general practitioners. Remote communities obtain services from Broken Hill, Cobar or Dubbo, with most primary health care services provided only on a visiting basis. The provision of training and educational support is a huge factor in continuing and extending the level of health services in the region. Institutions such as Charles Sturt University, the Western Institute of TAFE, and the University of Sydney's School of Rural Health all contribute to the future development and mentoring of health professionals in the region including doctors, dentists, surgeons, pharmacists and nursing professionals.

The health care and education sectors will deliver important services, particularly around existing health facilities in Dubbo and Mudgee. With an ageing population, demand for health services will increase in both cities and local centres, as will demand and opportunities for skilled workers to provide these services.

Opportunities exist in Nyngan, Bourke and Cobar to leverage investment in existing public health facilities to provide complementary health services that meet community need and support local employment.



## Major projects

Dubbo Base Hospital Development project:

The \$112 million Dubbo Hospital Redevelopment will provide new and revitalised facilities to meet the increasing demand for health services in and around the Dubbo region. Stages 1 and 2 are complete, and stages 3 and 4 of the redevelopment is underway. Once complete, the redevelopment will cement Dubbo Hospital's place as a major rural referral centre and acute care hospital for specialty services in Dubbo and surrounding areas.

- Emergency department and short stay unit
- New medical imaging unit
- New critical care floor comprising a coronary care and stroke unit, intensive care unit and cardiac catheter laboratory
- New medical imaging unit
- New ambulatory care unit
- Expansion of the oncology unit
- New entry and drop-off zone
- Upgrade of the women's and children's community health services
- Additional car parking

The Mudgee Hospital Redevelopment project: The new \$70.7 million Mudgee Hospital will provide a modern upgrade to the existing health service and more contemporary facilities and integrated models of health care.

The new building will house all of the existing hospital services including Community Health in the new building. The hospital will continue to be a health service hub for people living in the Mid-Western LGA.

- An Emergency Department
- An Inpatient Unit (IPU)
- Operating Theatres
- A Maternity Unit
- Outpatient services including:
  1. Community Health
  2. Physiotherapy
  3. Mental Health
  4. Occupational Therapy
  5. Oral Health (dental clinic)
  6. Renal Dialysis and Oncology



# EDUCATION AND TRAINING

- Employment: **4,811 Jobs**
- Output: **\$680.1M**
- Exports: **\$187.2M**
- Value Add: **\$497.5M**

As the economy and population profile of the region changes, so does the demand for skilled workers, particularly in the health, education, manufacturing, mining and renewable energy sectors.

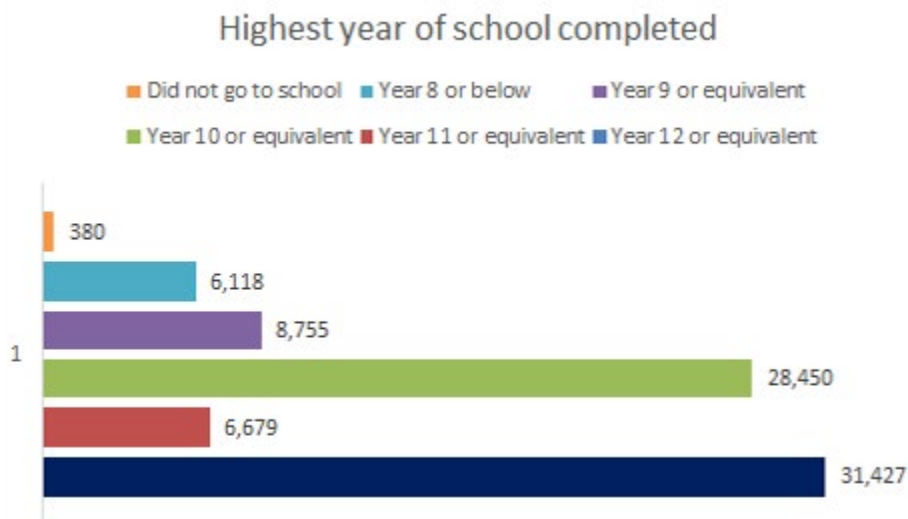
There are a variety of private and public education facilities and providers across the Orana region. These range from early childhood centres through to university campuses and vocational education as well as government and private institutions, giving people of all ages an opportunity for educational advancement.

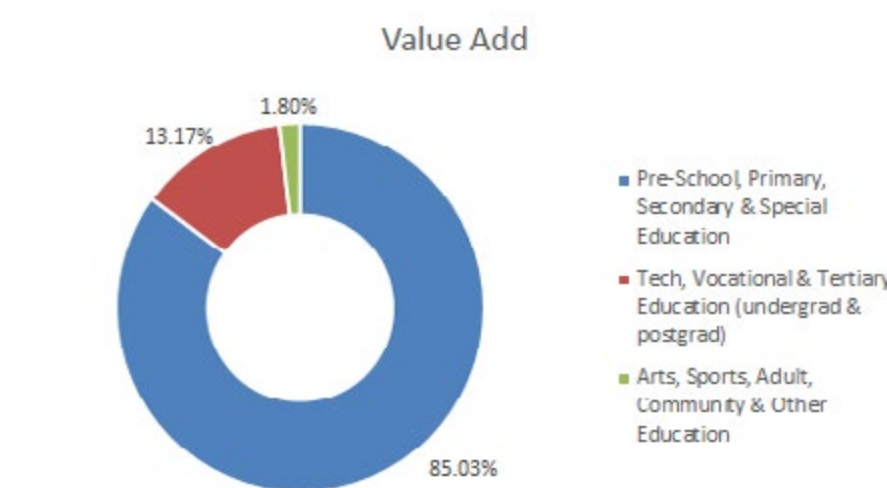
Expanding tertiary education services and online access to education will continue to increase access to services and sustain community wellbeing, particularly in smaller and isolated communities.

70.58% of the population in Orana have at least a year 10 qualification while 0.4% of the population have no school education.

The education system is a large employer in the region, with schools in every town and city across the Orana. Many of these are government-employed in the public-school system, along with privately-run institutions. The education system in NSW is regularly upgraded to keep improving the standard of learning for students.

- 20+ Pre-schools
- 60+ Primary Schools
- 20+ High Schools





Training in the Orana region is about educational advancement through vocational and practical learning pathways. There are also excellent study options for anyone who wishes to retrain or learn new skills and information. This comes in the form of face to face or online training, theoretical and practical learning or on the job cadetships and apprenticeships. Study can be taken at a secondary or tertiary level or in addition to knowledge gained within a specific industry.

*Dubbo Regional Council has partnered with Charles Sturt University, the Western NSW Local Health District and Department of Planning, Industry and Environment to develop a Health, Education and Wellbeing Precinct Master Plan to support health, education, agricultural research, training and recreation-related development in a central hub.*

## Major training providers

- TAFE NSW
- Charles Sturt University
- University of Sydney- School of Rural Health
- Western College of Adult Education
- University of the Third Age (U3A)



# TRANSPORT, POSTAL AND WAREHOUSING

- Employment: **1,694 Jobs**
- Output: **\$491.924M**
- Exports: **\$82.956M**
- Value Add: **\$212.068M**

*The Orana region's connections along major transport links support domestic and international supply chains and contribute to a diverse and productive regional economy.*

The Central West and Orana's freight connections extend to Sydney, Newcastle, Wollongong, Brisbane, Melbourne, Broken Hill, Adelaide and Perth, with the Main West Rail line meeting the Inland Rail line in Parkes. The convergence of these corridors at several locations, including Dubbo and Parkes, is a competitive advantage.

There are significant drivers of change emerging including increasing productivity in agriculture, an expanding mining sector and diversification of the manufacturing industry. The region is a major exporter of lamb, beef, wool, cotton, grain, raw minerals and metals, manufactured food and beverages and other value-added produce. The transport industry in this area is characterised by a freight and logistics network that is well supported by road and rail connectivity.

Upgrades to transport and freight networks will facilitate economic growth and diversification by unlocking new export opportunities, strengthening the region's cities and centre and enhancing productivity of the agricultural, mining and natural resources sectors.

The development of the Melbourne to Brisbane Inland Rail, alongside upgrades to the Newell and Golden Highways, has the potential to transform the Central West and Orana into one of the key freight and logistics destinations in Australia. In doing so, it will create more dynamic and resilient communities adapting to changing economic, social and environmental circumstances.

## ROAD

The Orana region has strong transport networks with access to major highways like the Golden Highway through Dubbo, Mitchell Highway (through Bogan, Bourke, Dubbo, Narromine and Warren), Barrier Highway (through Bogan and Cobar), Kamilaroi (through Bourke, Brewarrina, and Walgett), Castlereagh (through Brewarrina, Coonamble and Gilgandra), Newell Highway (through Dubbo, Gilgandra and Warrumbungle Shire), Oxley (through Gilgandra, Warren and Warrumbungle), Kidman Way through Cobar, the Great Inland Way through Coonamble, Katoomba, and the Great Western Highways through Mid-Western Regional

## AIR

The Orana region has access to air travel with Dubbo Regional Airport being the largest and busiest airport in the region, servicing most of the neighbouring towns in the region, including Narromine. It is one of the leading regional airports in Australia, located on the Mitchell Highway. The Airport offers direct services from Dubbo to Sydney, Melbourne, Brisbane, Newcastle and Broken Hill, serviced by Regional Express (REX), Fly Corporate, Fly Pelican and QantasLink. There are other airports in the region including Nyngan Airport, Bourke Airport, Cobar Airport and Mudgee Airport.

## RAIL

Transporting freight via rail connects the farms, mines and cities to domestic and international markets. The region has an efficient and accessible rail transport network that benefits both communities and industry. The Main Western Railway Line connects the inland to Sydney, running through Bathurst, Orange, Wellington, Narromine, Nyngan and Bourke. The Country Link rail coach runs from Broken Hill to Dubbo, linking with the XPT in Dubbo. NSW Train link Regional Coach service runs between Dubbo and Broken Hill via Nyngan and Cobar.

*Across NSW, freight volumes are expected to double by 2030 and triple by 2050. A large portion of this growth is expected in the Orana region, which will result in the need for a substantial upgrade and expansion of the existing transport networks.*

### Major project: Inland Rail

The 1,700km route will link Melbourne and Brisbane via regional Victoria, NSW and Queensland. The project commenced in 2018 and is expected to be completed in 2025.

- 1700 KM route
- \$10.7B investment
- 16,000 Jobs
- \$16B to economy

The Inland Rail is expected to return \$480M to the economies of Central and North West NSW, and will increase the volumes of grain, cotton, beef and other commodities being transported by rail by making it easier to move freight from farms, mines and ports to domestic and international markets. Within the Orana region, there are two sections of railway line being developed: Parkes to Narromine and Narromine to Narrabri.

### Key stakeholders

- Roads and Maritime Services
- Austrade
- Australian Rail Track Corporation
- Transport for NSW
- NSW Trainlink

## TOURISM, ACCOMMODATION AND FOOD SERVICES

- **Jobs:** 3106 (6.23%)
- 58% of the tourism jobs are based in Dubbo and 23.5% in Mid Western Regional
- **Output:** \$621.930M
- **Average Spend per trip:** \$165- Domestic, \$671 International

The Orana is a popular tourist destination for domestic and international visitors. The region has experienced an increase in the number of domestic tourists in the past year as result of the restricted travel enforced due to the Covid-19 pandemic. There has been an increase in local tourism as visitors from other parts of NSW and Interstate continue to visit regional attractions, subject to travel restrictions.

*Agritourism represents a diverse and unique tourism offering, including food and wine trails, farm stays, farmers markets and farm gate experiences*

The greatest number of visitors to the region came from other parts of NSW, with interstate visitors coming from Victoria and Queensland. Visits to the Orana region are made principally for holiday purposes while some came to see relatives or friends. On average, a domestic day visitor spends \$165 per trip, while a domestic overnight visitor spends \$173 per night and \$471 per trip.

### Visitor expenditure

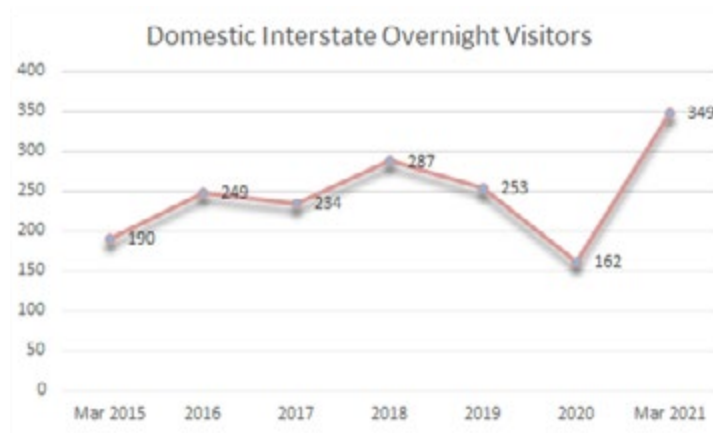
Visitor Profile	Domestic (Day)	Domestic (Overnight)	International
Average Stay (nights)	-	3	14
Average Spend per trip (\$)	\$165	\$471	\$671
Average Spend per night (\$)	-	\$173	\$44

Increased visitor numbers are boosting significant growth in tourism-related businesses and employment, including accommodation providers. This is driving the regional economy which in turn is adding to infrastructure and investment opportunities.

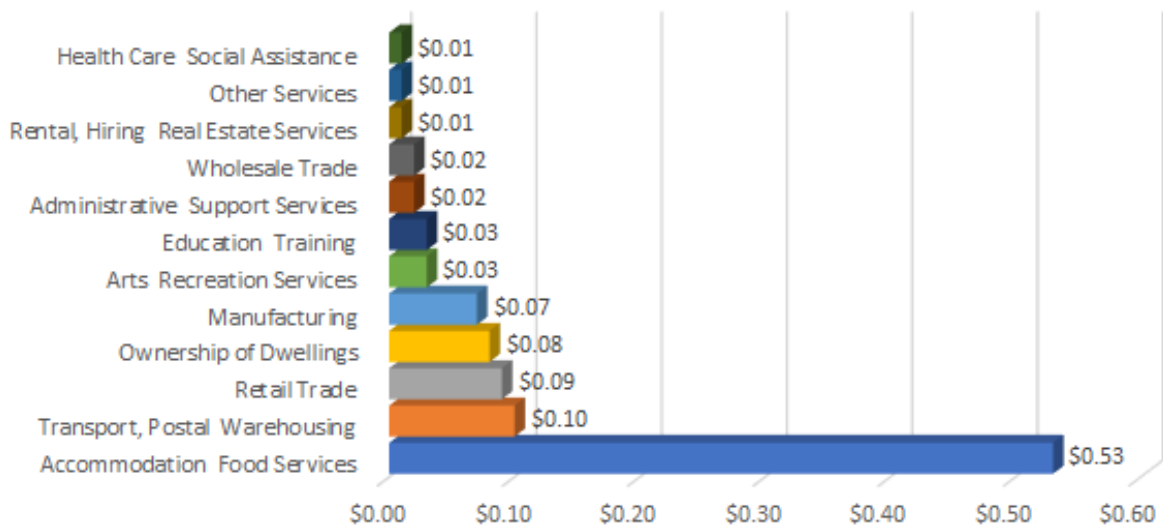
Increasing visitation and expenditure requires complementary products and experiences, including eco-accommodation, nature-based and cultural experiences, food and wine (including agritourism) experiences, adventure activities and event facilities. Investment from the NSW Government and councils can facilitate private sector investment and increase tourism numbers.

*Nationally, domestic and international tourism losses have totaled \$101.7 billion since the start of the pandemic. These losses comprised \$38.3 billion for domestic overnight travel; \$12.1 billion for domestic day trips and \$51.3 billion for international travel.*

The industry sector in Orana Region which captures the most value from visitor expenditure is Accommodation & Food Services. It is estimated that this sector captures \$0.532 for every dollar spent by visitors to the Orana Region.



### Visitor expenditure per dollar



In the LGAs, Dubbo has the highest percentage of tourism-based roles, with 1,535 or 58% of the total. Mid-Western has 752 jobs in tourism (23.5%) followed by Warrumbungle with 218 jobs or 6.8%.

Accommodation and Food Services is the largest tourism sub-sector in the Orana Region contributing \$138.823M in local expenditure, and 1,969 jobs supported by tourists expenditure

There are many different accommodation options across the Orana, including hotels, motels, B&Bs, private rooms, caravan parks, cabins, camping and farm stays. The advantage of accommodation providers in the Orana is that they are plentiful, diverse and give visitors the opportunity to explore the region for an affordable rate. The Orana region is fortunate to be home to such a large variety of affordable foods and convenient eateries.

### Major attractions

- Taronga Western Plains Zoo (Dubbo)
- Brewarrina Fish Traps (Brewarrina)
- Wellington Caves (Wellington)
- Dundullimal Homestead, Dubbo
- Macquarie Marshes (Bogan)
- The Museum Under the Bridge (Coonamble)
- Gulgong Pioneers Museum (Gulgong)
- The Big Bogan (Bogan)
- Bourke Historic Wharf (Bogan)
- Mudgee Wineries (Mudgee)
- Cobar Mines (Cobar)
- Cobb & Co Heritage Trail (Narromine)

# north

BUILDING WITH TRUST®



Dubbo Courthouse Extension

## NORTH, YOUR TRUSTED BUILDING PARTNER®

Founded in 1987, North Construction & Building is a regional commercial construction company with an award-winning reputation for excellence.

With offices in Orange, Dubbo, Mudgee, Tamworth, Newcastle and Tuggerah, we are well placed to deliver projects throughout regional NSW for both public and private-sector clients. We have a Specialist Projects Team that handle projects under \$3m and a Major Works Department overseeing projects up to \$50m allowing us to deliver both smaller and larger fitout, refurbishment, demolition/rebuild, or completely new construction projects.



St Matthews Catholic School Mudgee - Secondary Campus



Orange Airport Awning



Line of Lode Miners Memorial Broken Hill



# ECONOMIC SNAPSHOT

## THE ORANA ECONOMY



**\$7B**  
in investment



**123,978** 2021  
population



**4.1%**  
unemployment



**\$19.87B**  
regional output



**62,033**  
workforce



**\$399.32M**  
business approvals



**13,578**  
businesses (Oct 2021)



**\$10B**  
GRP



**\$8.6B**  
export

# REGION, STATE AND NATIONAL SNAPSHOT

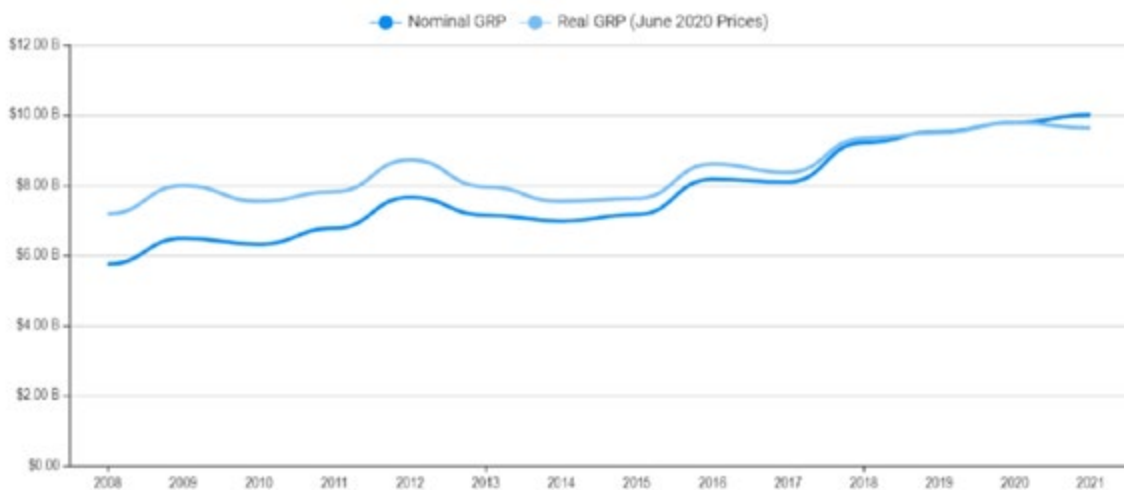
KEY STATISTICS	ORANA REGION	NSW	AUSTRALIA
Population (2020)	122,967	8.166M	25.69M
GRP/GDP per Capita (2020)	\$80,862	\$77,413	\$73,121
Unemployment (Dec 2021)	4.1%	4.5%	4.4%

## GROSS REGIONAL PRODUCT (GRP)

Orana Region's Gross Regional Product (GRP) is estimated at \$10.003 billion. Orana Region represents 1.6% of New South Wales's Gross State Product (GSP) of \$643.145 billion , and 0.5% of Australia's Gross Domestic Product (GDP) of \$2.067 trillion .

### Orana Region

Orana Region GRP



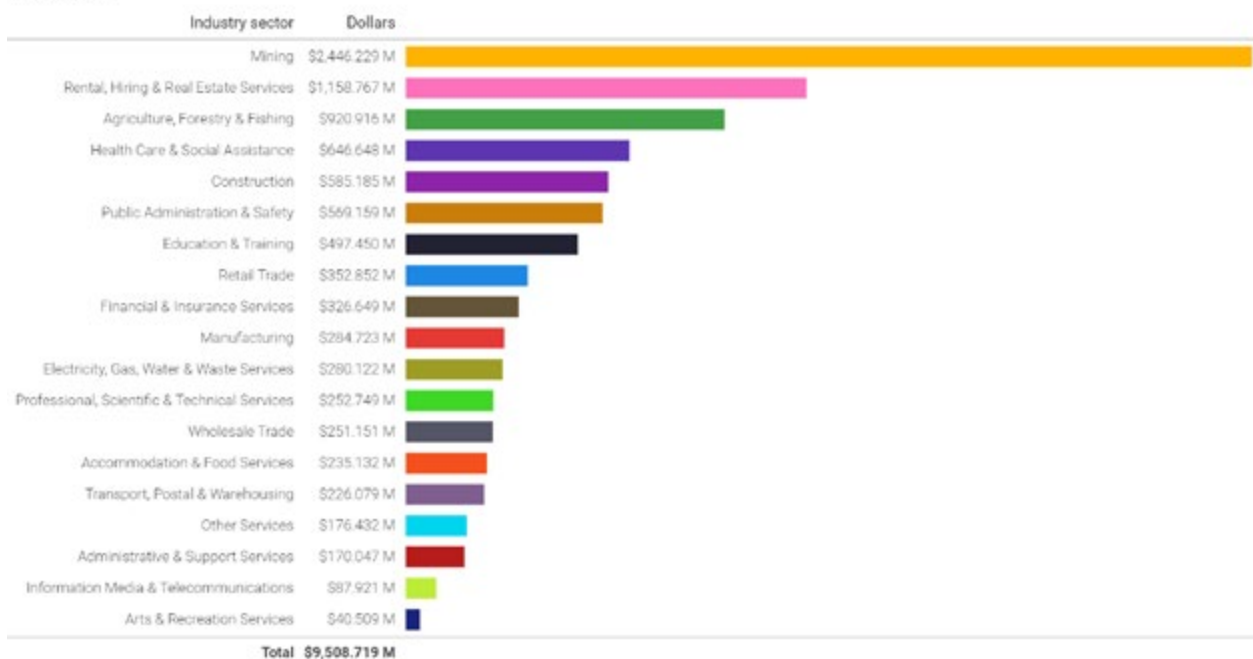
Options: All Selected

# VALUE ADDED GRP

The total value added by the Orana Region is estimated at \$9.509 billion. Orana Region represents 1.6% of the \$602.945 billion value added in New South Wales, and 0.5% of the \$1.937 trillion value added in Australia.

## Orana Region

Value Added



Benchmarks: None | Industry sectors: All Selected

Source: REMPLAN Economy

Diversity continues to be the underpinning factor for the region's economic strength. The largest industry is Mining, representing 25.7% of the economy followed by Rental, Hiring and Real Estate Services (12.2%) and Agriculture, Forestry and Fishing (9.7%).

*More than half of the region's GRP is shared across the four largest industries.*



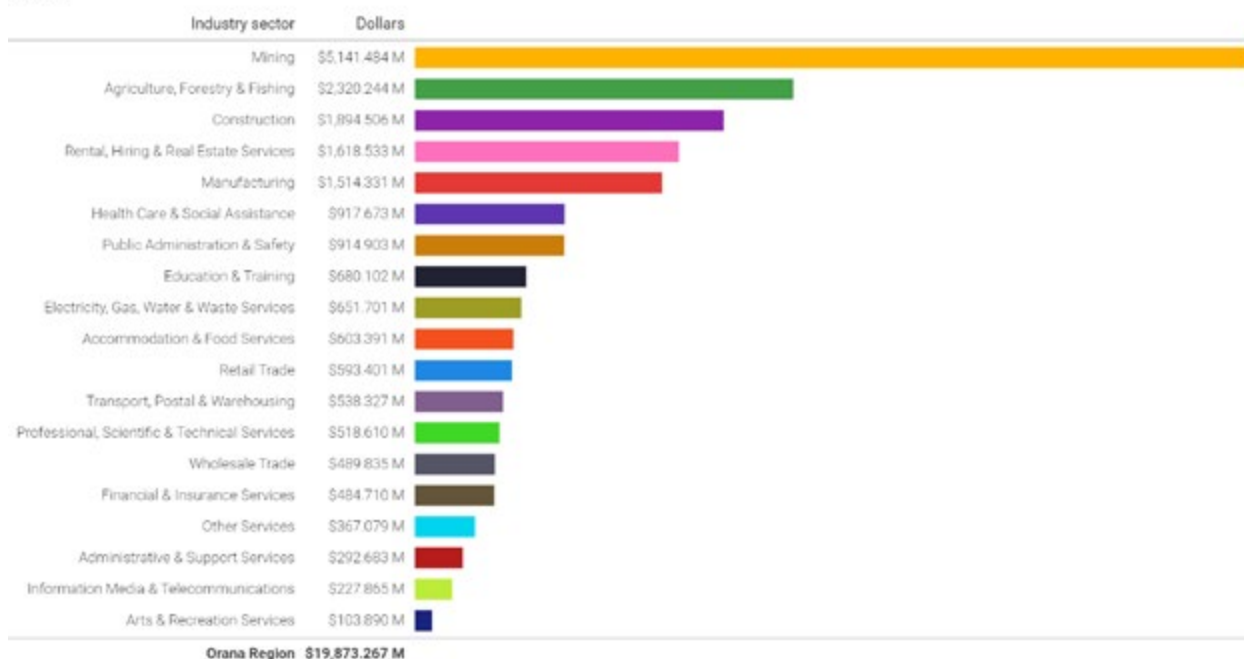
## OUTPUT

The Orana Region economy generates an estimated \$19.873 billion in output. Orana Region represents 1.5% of the \$1.291 trillion output generated in New South Wales, and 0.5% of the \$4.183 trillion output generated in Australia.

The largest contributor to annual economic output in Orana Region is Mining, which represents 25.9 percent of total output. The area in Orana Region generating the most output is Mudgee Region - West, and the largest industry here is Mining.

### Orana Region

#### Output

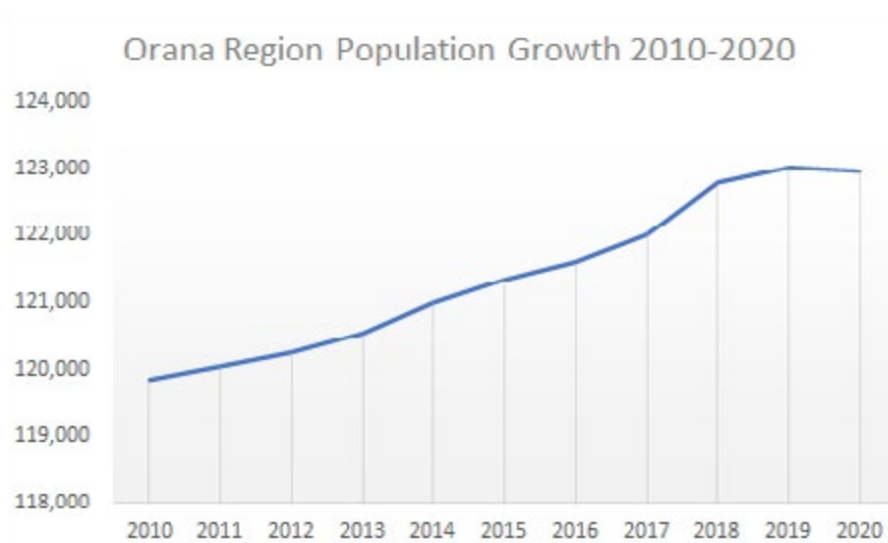


Benchmarks: None | Industry sectors: All Selected

# POPULATION

The Orana region has witnessed a slow but steady growth in population over the last decade. Between 2010 and 2020, the resident population of the region grew from 119,830 to 122,967.

*The annualised growth rate for the region is 0.28% compared to 1.38% for New South Wales.*



*The largest age cohort in the Orana region is 50-59 years.*

The most recent projections show that the Orana region is expected to reach a population of 126,641 by 2041, an increase of 3,674 people over 20 years. Much of the growth will be concentrated in larger towns like Dubbo, Mudgee and Cobar.

*The recent trends brought about by the COVID-19 pandemic show that the population predictions might change as more people are looking to move away from populated metropolitan areas and into regional areas.*

The infographic features three overlapping circles. The leftmost circle is light green and contains the text '2020 POPULATION 122,967'. The middle circle is dark green and contains a white icon of three stylized human figures with a house and an upward-pointing arrow above them. The rightmost circle is dark blue and contains the text '2041 POPULATION 126,641'.

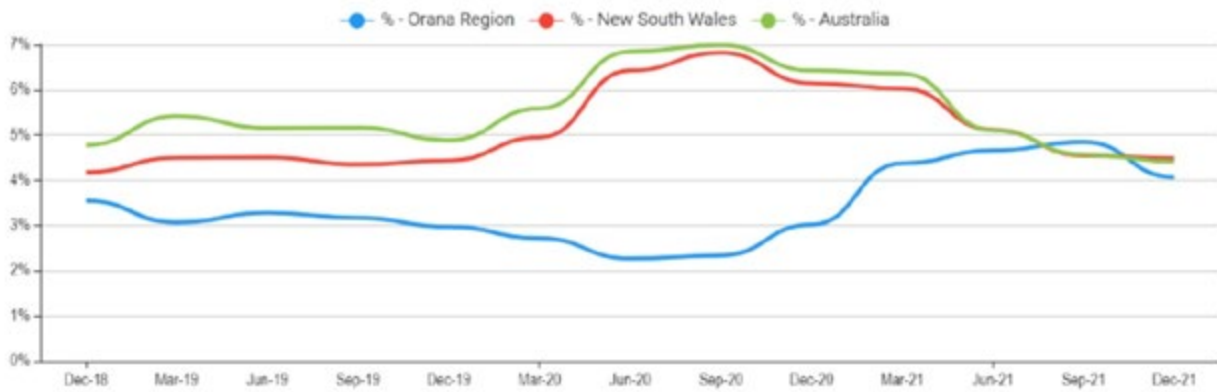
# EMPLOYMENT

The Orana Region economy supports an estimated 49,871 jobs, representing 1.5% of the 3,358,119 people working in New South Wales, and 0.5% of the 10,683,322 people working in Australia. In Orana Region, the locality of Dubbo - South contains the highest number of jobs.

The unemployment rate was on a steady decline in the region prior to the COVID-19 pandemic. This was attributed to the steady growth of industries that provide enough opportunities for the growing population.

## Orana Region

Unemployment By Quarter



Benchmarks: New South Wales, Australia

*The region has always had lower unemployment compared to the State average.*

The participation rate is the key to the local economy, indicating the number of people that are working and earning. The participation rate has decreased in the last year despite the increase in population and unemployment.

According to the 2016 ABS data, 34.52% of the population in the region are not in the labour force, while 33.16% work full time.

The largest employing industry in the region is Agriculture, Forestry and Fishing, employing 13.46% of the workforce, followed by Healthcare & Social Assistance with 13.38% and Retail Trade at 9.8%.



**13.46%**  
agriculture



**62,033**  
healthcare & social  
assistance

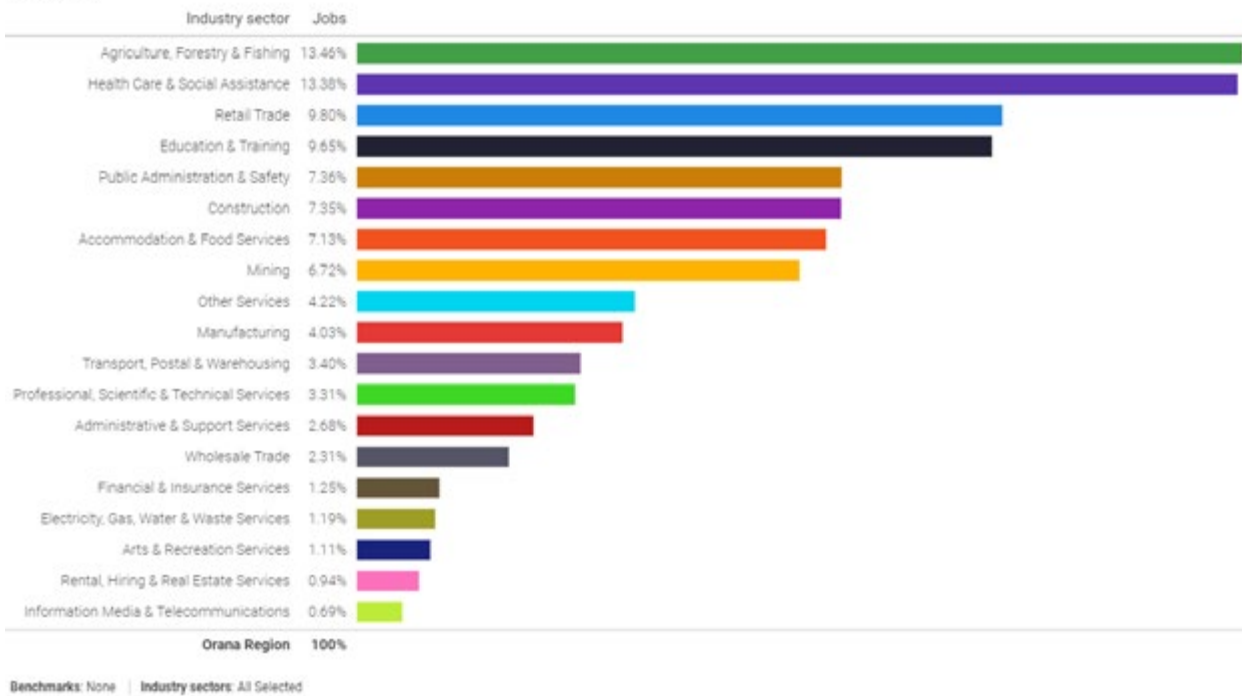


**62,033**  
retail trade

LABOUR FORCE STATUS	PERSONS	%
Not in the labour force	33,205	34.51%
Employed, worked full-time	31,904	33.16%
Employed, worked part-time	14,501	15.07%
Employed, away from work	2,967	3.08%
Unemployed, looking for full-time work	2,288	2.38%
Unemployed, looking for part-time work	1,203	1.25%
Not stated	9,748	10.13%
Overseas visitor	392	0.41%

### Orana Region

#### Employment



*Orana's labour market has rebounded strongly after the height of the pandemic – just about recouping the momentum that had existed prior to its onset.*

It is becoming increasingly apparent that our region, like many other regional areas, is running into supply constraints. Job vacancies continue to grow significantly

with the region recording 135% increase in job advertisements in the last quarter. In contrast, actual levels of employment have staggered with employment participation rates decreasing.

# IMPORT AND EXPORT MARKET

The value of intermediate goods and services imported into Orana Region by local industry sectors is estimated at \$5.446 billion. Orana Region represents 3.1% of the \$173.470 billion imported into New South Wales, and 1% of the \$564.113 billion imported into Australia.

Orana Region's Mining sector spends an estimated \$1.6 billion on regional imports, more than any other sector.

The value of regional exports generated by the Orana Region economy is estimated at \$8.592 billion. Orana Region represents 4.7% of the \$181.730 billion regional exports generated in New South Wales, and 1.5% of the \$566.109 billion regional exports generated in Australia.

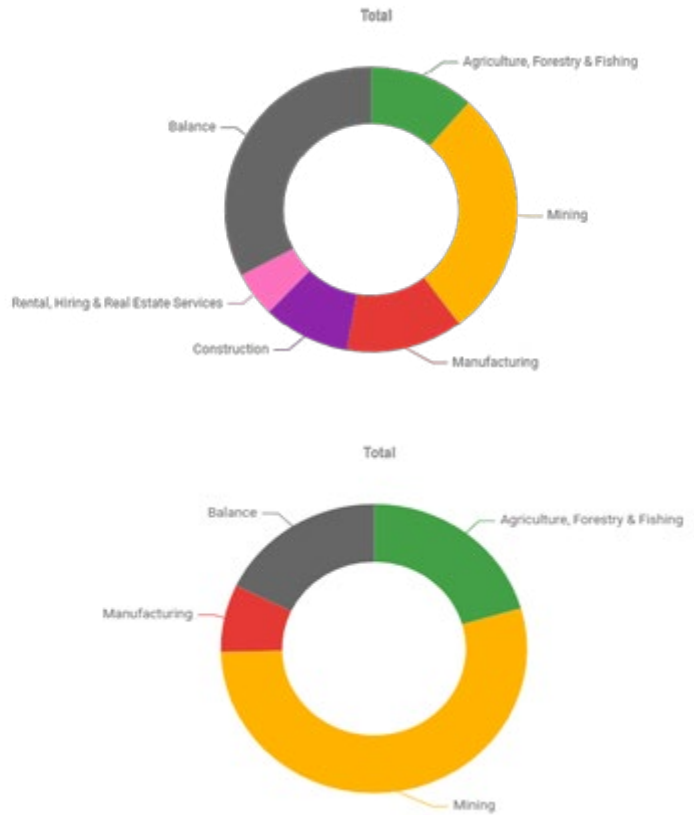
*Mining is Orana Region's largest exporter, generating regional exports estimated at \$4.9 billion.*

## Top exports

- Coal
- Non-ferrous metals
- Sheep, grains, beef and dairy cattle

## Top export countries

- Australia
- Indonesia
- Korea
- China
- Japan





# BUSINESS ENVIRONMENT

## BUILDING APPROVALS



**453**  
new houses



**\$191.2M**  
residential building  
approvals 2020 - 21

There was a significant increase in building approvals in 2020-21 with 453 new houses and 107 new other residential approvals. This was an increase from 219 new houses and 81 new other residential, in 2019-20, denoting a 84.7% increase in approvals across the region.



**107**  
new other  
residential



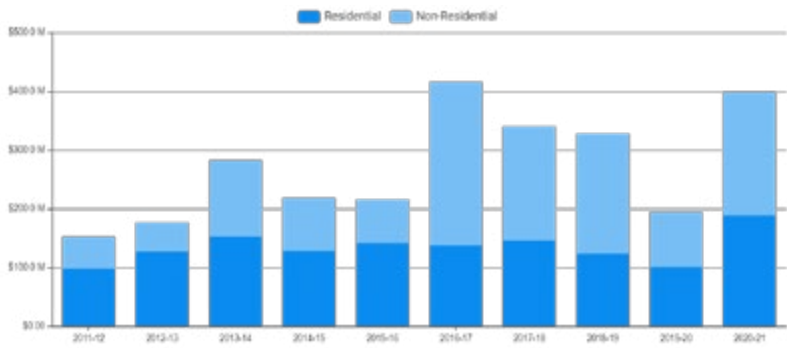
**\$208.1M**  
non-residential  
building approvals



### Building approvals by count



### Building approvals by value

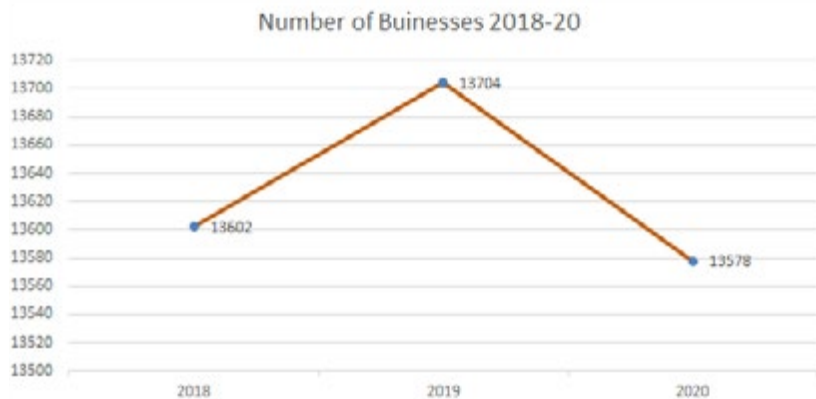


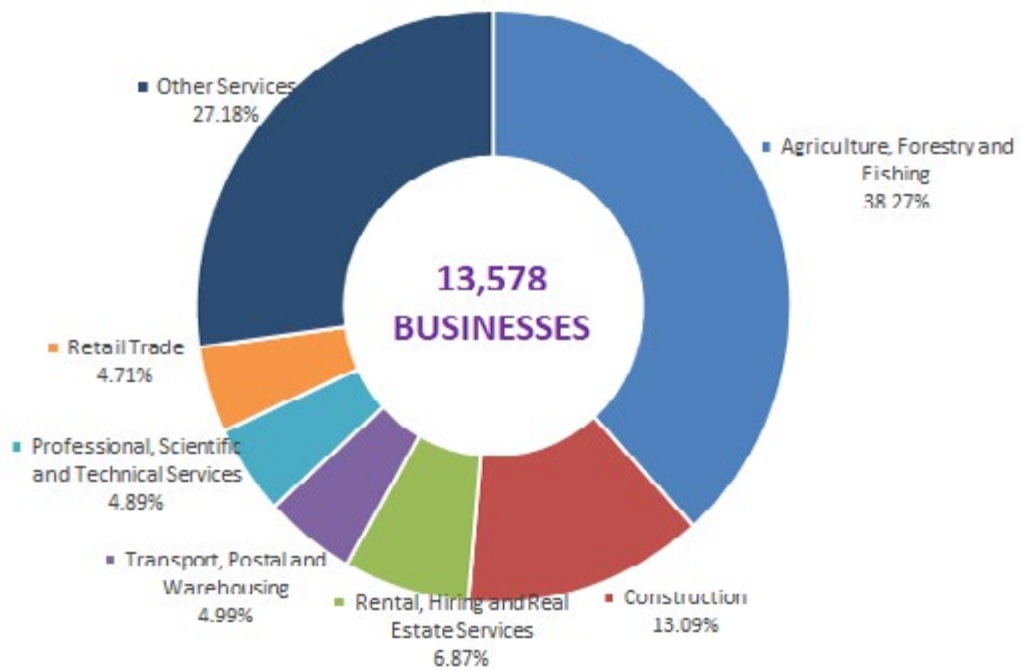
## BUSINESS COUNT

- Businesses (June 2021): **13,502**
- Non-employing: **8,278**
- 1-19 employees: **4,996**
- 20-199 employees: **217**
- 200+ employees: **11**

There was a significant increase in building approvals in 2020-21 with 453 new houses and 107 new other residential approvals. This was an increase from 219 new houses and 81 new other residential, in 2019-20, denoting a 84.7% increase in approvals across the region.

Businesses in the Orana region are spread out across the different industries with the leading industry as Agriculture, Forestry and Fishing with 5,280 businesses, followed by construction with 1,806 businesses.





As your regional solutions broker, Dubbo Regional Council's Strategic Partnerships and Investment Branch is committed to assisting the growth of your business in the Dubbo Region.

Our premium services include:



CONNECTION / FACILITATION



INVESTOR MATERIAL



WORKFORCE DEVELOPMENT



RESEARCH AND STATISTICS



GRANTS AND FUNDING



PRODUCT DEVELOPMENT



ECONOMIC MODELLING



DEVELOPMENT PROGRAMS



DESTINATION-BASED MARKETING



LAND AVAILABILITY



COMMUNICATION



BUSINESS PROMOTION

*View our Investment Guide*

For further information, statistics, economic modelling data and assistance with land availability, contact Dubbo Regional Council's Strategic Partnerships and Investment Branch.



02 6801 4000    council@dubbo.nsw.gov.au    dubbo.nsw.gov.au/contact

## BUSINESS CONFIDENCE

After a tough start to 2022 due to the Omicron wave of COVID and flooding, businesses are now faced with further uncertainties both global and domestic. The war in Ukraine has impacted global commodity markets, leading to further concerns about supply chain disruptions and commodity prices.

The combined impact of drought, bushfires and the ongoing COVID-19 pandemic has impacted business confidence across the region, like many other regions across the state and country. As of April 2022, Business NSW reported business confidence in the Far West and Orana as -44.4. Even though overall, business confidence

remains weak, there are signs of improvement. Despite the negative reading, the latest Business Confidence Index for current conditions rebounded from the previous quarter.

The greatest challenge currently facing the business community is rising costs. Inflationary pressures have intensified since 2021 due to both supply-side constraints and improved demand on the back of the economic recovery.

## WORKFORCE ATTRACTION

The Region is well positioned as a growing agricultural, manufacturing and mining centre, with flourishing mining and exploration projects both established and emerging.

Both skilled and semi-skilled labour rate highly as areas of need across the region. Over the last few years, the

region has seen vacancies increase for all skill levels, with the strongest rise recorded for technical and trade related jobs. A majority of the population in the region have a certificate level qualification.

LEVEL	PERSONS	%
Certificate Level	21,539	39.52%
Bachelor Degree Level	8,485	15.57%
Advanced Diploma and Diploma Level	6,382	11.71%
Postgraduate Degree Level	1,551	2.85%
Graduate Diploma and Graduate Certificate Level	1,109	2.03%
Inadequately described	604	1.11%
Level of education not stated	14,441	26.50%
Overseas visitor	392	0.72%
<b>Total</b>	<b>54,503</b>	<b>100.00%</b>

Future employment is reasonably positive in the region post Covid. Opportunities exist for young job seekers as businesses expect to be recruiting for a number of entry level positions.

There are numerous training opportunities in the region for skilled and unskilled workforce. Additionally, businesses are offering to train job seekers to provide them with the skills required for the job.

## BUSINESS NETWORKS



O2N was established to support industry and business development in the Orana and Central West regions of NSW. The aim of the network is to support the development of businesses across the region into growth and exports, improve sustainability and increase investment and connectivity for business.

### NSW Business Chambers

The regional offices of NSW Business Chamber enable businesses and local chambers to get support from someone who understands the area and can respond to individual needs in a dedicated way. NSW Business Chambers in the Orana region include:

- Dubbo Business Chamber
- Mudgee Business Chamber
- Wellington Business Chamber
- Cobar Business Chamber
- Gulgong Business Chamber
- Coonabarabran Business Chamber

### Orana Business Enterprise Centre

The Orana Business Enterprise Centre (BEC) has experienced business facilitators who can advise on business start-up, growth and development. BEC offers business information and advice, mentoring, networking events, regional programs, business development workshops, resources and training.

### Regional Cities New South Wales

Regional Cities New South Wales (RCNSW) is an alliance of 15 regional cities from across the state. The alliance aims to grow regional cities in New South Wales through increased investment that will build productive, livable and connected regions.

### Business Exchange Club

Business Exchange Club empowers entrepreneurs or professionals to connect with like minded people and grow their business.

## Women Out West (WOW) Network

For women seeking to increase their personal and business networks. Members consist of women from a wide range of social and professional backgrounds.

## Regional Development Australia (RDA)

Regional Development Australia (RDA) - Orana is part of a national initiative based on building partnerships and ensuring that all governments and stakeholders are responsive to local priorities and needs. It is a conduit between government and local communities, and a provider of information.

## Trade and Investment (NSW Government)

NSW Trade & Investment is the lead economic development agency in New South Wales, Australia responsible for driving sustainable economic growth across the state. Results driven, by collaborating with and supporting businesses, industries and communities to advance investment, trade, innovation, productivity and regional growth across all sectors.

## The Exchange

The Exchange is a social impact organisation and innovation hub located in Dubbo, offering 30 free co-working seats at Charles Sturt University (CSU) as well as community, resources, experts in residences and education at both the CSU Campus and The Clock Tower.



# REGIONAL ADVANTAGE

Our communities provide the perfect combination of relaxed country living coupled with exciting new opportunities and attractions. Set amongst some of Australia's most beautiful landscapes, the Orana region comprises quaint townships full of history and beauty. There is an impressive range of housing options, employment, access to health care, education services, retail and recreation facilities, events and attractions that make the region a perfect place to live. The region is conveniently located with access to road, air and rail transport connecting the region to larger cities.

## Climate

The Orana region extends across the central and north western parts of New South Wales – from the hilly slopes of the Warrumbungle Ranges in the east, to the flat plains of Cobar and Bourke in the west, and north to the Queensland border. The varied landscape of the region is reflected by the weather which ranges from a cooler climate in the eastern areas to hotter conditions on the western plains. The weather is temperate most of the time with a dry sunny climate and low to moderate rainfall.

## Employment

An estimated 52,464 people are employed in the Orana region; 1.49% of the total working population in NSW and 0.47% of the total Australian working population. The largest employing industry in the region are Agriculture followed by Healthcare & Social Assistance and Retail Trade. Dubbo and the Mid-Western Regional have the highest employment in the region.

## Education and training

The Orana region has a growing Education sector with numerous educational facilities available. From primary to tertiary and vocational training, the region plays host to public, private and independent schools, universities, TAFE campuses and trade training. Additionally, the region offers an excellent choice of pre-school, primary and high schools.

- Pre-schools-20+
- Primary Schools- 63
- High Schools- 20
- Training facilities- 10+

## Health and welfare

Health is a major industry in the Orana region which has benefited from government funding and private investment. It is inclusive of public services, medical centres and specialist facilities across the region and its growth is evidenced by the numbers of medical professionals choosing to relocate to the region.

Orana has Medical Centres spread across the region offering different services including pathology, podiatry, obstetrics, gynaecology, paediatric, dietetics, dentistry, health education, Allied health, psychiatry, psychology, cardiology, and counselling among others.

- Major Healthcare providers
- Western NSW Local Health District
- Macquarie Women's Health
- Nyngan Health Service
- Cobar District Hospital

The region also offers Disability and Aged Care Services. Orana is a great place to live and retire with various options for retirement and aged care living including independent living services, home care, residential aged care, and retirement living.

## Transport

The scope and availability of public transport varies across the Orana region. Most areas are accessible by coach services, including Dubbo, Wellington, Walgett, Mudgee, Warrumbungle, Bourke, Narromine, Cobar, Brewarrina, Nyngan, Gilgandra, Coonamble and Warren. Taxis are available in Dubbo, Wellington, Narromine, Gilgandra, Cobar, Bourke and Mudgee. Flights can be made from Cobar, Nyngan, Dubbo, Mudgee, Bourke, Gilgandra, Walgett and Narromine (Dubbo). These range from chartered to commercial services. Ride sharing services are also offered in Dubbo.

## Shopping

Anything you can buy in the cities, you can buy in the Orana region. Retail shopping is conveniently located across the Region. Larger centres such as Dubbo, Mudgee and Cobar feature major retail outlets including David Jones, Myer, Kmart, Target, Coles, Bunnings and Woolworths, catering to the shopper's every wish. Orana's retail sector continues to attract a large volume of investment.

## Housing

Housing Construction is booming in the Orana, with government funding and private investment buoying the region to upgrade existing facilities and build new developments. This is beneficial to the region for its ability to make the area more appealing, maintain employment and boost the economy. Land is available in most areas at an affordable rate for the purpose of residential, commercial and industrial usage.

The cost of living varies around the region with each town and city.

- Private dwellings: 114,613
- Non-private dwellings: 5890
- Building Approvals 2020-2021: 554
- Median Rent: \$275 PW
- Median Property Prices: \$231,700

Housing tends to be cheaper in smaller and more remote communities while the cost of living for food and fuel is higher in these localities. Housing types across the region range from units and apartment complexes, to large residential blocks and existing dwellings, along with commercial buildings, industrial land with service options available and rural farmland.

## Sporting life

Most towns in the Orana region have a common sporting precinct with a variety of sports on offer. The major sports in the region are football (soccer, touch, rugby league, Australian Rules and rugby union), netball, tennis, swimming, cycling, squash, basketball, athletics, lawn bowls, gliding, frisbee, darts and snooker, golf and hockey. Watersports are also enjoyed, with skiing, canoeing, kayaking, boating and recreational fishing. Motorsports are also popular including go-karting, speedway, drag racing and motocross. A number of towns in the region also host regular running events, including Dubbo, Wellington, Mudgee and Cobar.

## Arts, culture and events

The Orana region has a strong traditional heritage and emerging arts culture which is growing in stature and recognition. The arts community features a flourishing array of exhibitions, performances, workshops and creative gatherings in a range of mediums for artists, writers, musicians, actors and dancers and their audiences. There are galleries, museums, theatres and a conservatorium of music to share these experiences. Home to a range of festivals, fun runs, rodeos and race days, Orana offers every potential opportunity to immerse in familiar activities or a whole array of new pursuits. There are also events celebrating bush life, our literary history and rich cultural fabric.



## Dining, shopping and entertainment

Each local area has its own character and events often reflect that unique heritage. There is a range of different eateries to suit different tastes including cuisines from around the world, al fresco dining and eating experiences such as long lunches, café style and pub grub. The region is well-serviced by a variety of retail outlets which includes department stores, specialty shops and boutiques. Events held in the region include food and wine festivals and markets, music and dance and agricultural community events.

There are also outdoor music and cinema experiences including a drive-in west of Dubbo. Each town has regular picnic race meetings which generally have a good family atmosphere. A range of national parks, wineries and farm stays are waiting to be explored along with activities like pottery making, hot air ballooning, sculpture and art trails.

## The Great Outdoors

A number of major outdoor events are held regularly across the region, bringing large numbers of participants. These include athletics carnivals, football and basketball tournaments, harness and horse race meetings, rodeos and camp drafting, fishing competitions and equestrian events.

# Does your recruitment strategy include a housing plan?



Dubbo is a growth destination, and our housing market proves it.

Increased opportunity comes with increased competition. Ask any recruiting business, and they'll tell you that one of the hidden bottlenecks is housing.

Together, let's make housing part of your recruitment strategy, to ensure new talent has a place to call home. Make an appointment with our award-winning team today.



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# THE ORANA LIFESTYLE

## BOGAN SHIRE

Best known as 'home to the Big Bogan', the Shire offers the best of town and country. Bogan Shire is in the region's north west, and serviced by Nyngan which sits at the junction of the Mitchell and Barrier highways on the Bogan River.

Mining and agricultural production, including livestock grazing and large-scale cropping, are primary economic drivers. The farming community is very close-knit, and the townspeople enjoy comfortable country living alongside the beauty of the bush.

There are numerous outdoor recreational activities in the region that include water sports such as boating, skiing and canoeing, athletics, sports, dancing among other things. There is also a shared pathway alongside the Bogan River which is popular with cyclists, walkers and joggers.

- Population (ABS 2021): 2,481
- Land Area: 1,459,989.96 Ha
- Distance from Sydney: 572km
- Climate: 3-45oC
- Median rent: \$275 PW
- Median property prices: \$200,000
- Local businesses: 412
- Local jobs: 1,393
- Labour Force Participation Rate: 57.76%

### Top industries

- Agriculture
- Mining
- Healthcare

### Attractions

- An Iroquois 1022 helicopter in Vanges Park, Nyngan
- Nyngan and District Museum
- The Big Bogan
- The Macquarie Marshes
- Mid-State Shearing Shed



## BOURKE SHIRE

Bourke is popularly known as the 'Gateway to the Real Outback'. Traditionally a wool growing area, Bourke was once the biggest wool railhead in the world. Today, cotton has taken over as the major industry. Bourke also boasts a thriving horticultural sector which produces grapes, citrus, fruit plums, apricots and melons as well as a variety of vegetable crops.

Alternative native crops such as peanuts, jojoba and the unique Napunya honey are also produced in the area. A state of the art small livestock abattoir is on the market offering investment potential for the Bourke district. On-farm employment and service industries are mainstays in the area while professional jobs are available in the areas of social services, education, environment and agriculture.

- Population: 2,596
- Land Area: 4,159,950.72 Ha
- Distance from Sydney: 800km
- Climate: 4-40oC
- Median rent: \$280 PW
- Median property prices: \$118,750
- Local businesses (June 2021) : 299
- Local jobs: 1,036
- Labour Force Participation Rate: 53.17%

### Top industries

- Public Administration
- Healthcare
- Education

### Attractions

- Cruise on the Darling River aboard a paddle steamer
- Byrock Rock Holes
- Back o' Bourke Exhibition Centre
- Wharf precinct
- Poets' Corner
- Nancy Bird Air Terminal,
- Mt Oxley
- Gundabooka and Toorale National Parks

# BREWARRINA SHIRE

Situated on the banks of the Barwon River, and home to the Kamilaroi Highway, Brewarrina is steeped in history and has plenty of natural and man-made attractions. Brewarrina is strongly grounded to its indigenous heritage and was once one of the great inter-tribal meeting points for Aboriginal people in Eastern Australia. More than half of the population in the region identify as Aboriginal. Agriculture and wool production remain viable sectors today. These days, there is a friendly and relaxed lifestyle, access to national park land and recreation areas including good boating, fishing and camping spots.

- Population: 1,520
- Land Area: 1,916,347.98 Ha
- Distance from Sydney: 797 km
- Climate: 4-40oC
- Median rent: \$250 PW
- Median property prices: \$135,000
- Local businesses: 114
- Local jobs: 555
- Labour Force Participation Rate: 46.65%

## Top industries

- Agriculture
- Education
- Healthcare

## Attractions

- The National Heritage-listed Brewarrina Fish Traps
- The Old Barwon Bridge
- Culgoa National Park
- Narran Lakes,
- Cobb & Co trails
- Four Mile Skiing Reserve
- Aboriginal Cultural Centre
- Darling River Run
- Ochre Bed Pits
- State Heritage Aboriginal Mission



# COBAR SHIRE

Commonly referred to as 'The jewel of Outback', Cobar is bounded to the North by Bourke Shire, in the South by Carrathool Shire, the west by Central Darling Shire and the East by Bogan Shire. Cobar is friendly and welcoming and offers a range of cultural and recreational activities for residents. The Shire's prosperity is built around the thriving mining - copper, lead, silver, zinc, gold - and pastoral industries, which are strongly supported by a wide range of attractions and activities that make it a major tourist destination. There is a strong industrial network in Cobar including tradespeople, equipment hire and labour force.

- Population: 4,365
- Land Area: 4,557, 932.990 Ha
- Distance from Sydney: 750 km
- Climate: 5-40oC
- Median rent: \$260 PW
- Median property prices: \$195,000
- Labour Force Participation Rate: 59.04%

## Top industries

- Agriculture
- Healthcare
- Mining

## Attractions

- Cobar Miners Heritage Park
- Centenary of Federation Walking Track
- Fort Bourke Hill Lookout & New Cobar Cut Gold Mine
- Great Cobar Copper Mine
- Mt Grenfell Historic Site
- Stele Monument
- The Great Cobar Heritage Centre
- The Old Reservoir and Devil's Rock
- The Slag Dump



## COONAMBLE SHIRE

Coonamble is a determined and dynamic township on the banks of the Castlereagh River. The town of Coonamble, 160 km north of Dubbo, is the main service centre of Coonamble Shire, servicing villages such as Gulargambone and Quambone and is home to multipurpose health service that integrates a range of health services; rural support services; shops; as well as primary and high schools and a TAFE.

It lies at the heart of what is a productive agricultural region based on sustainable dryland livestock grazing and cropping industries. The Shire's prosperity is built around its diversified agricultural income and rural industries which includes two large beef cattle feedlots.

Coonamble Shire has a robust and resilient business sector comprising almost 700 small to medium enterprises. Self-employment is a good option for this area with affordable commercial premises, land availability and a supportive business community. New opportunities abound across a variety of business sectors for those with good ideas, sound skills, and a strong work ethic. Opportunities exist in aged care and the development of Coonamble's cultural and historic character.

- Population: 3,854
- Land Area: 991,605.360 Ha
- Distance from Sydney: 530 km
- Climate: 12-40oC
- Median rent: \$200 PW
- Median property price: \$103,740
- Labour Force Participation Rate: 50.06%

### Top industries

- Agriculture
- Education
- Healthcare

### Attractions

- Coonamble Nickname Hall of Fame
- Museum Under the Bridge
- Riverwalk
- Nakadoo Shed & Horse-Drawn Tours
- Outback Arts Gallery
- The smallest operational library in NSW and the Macquarie Marshes in Quambone





## DUBBO REGIONAL

Dubbo has long been known as the 'hub of the west' because of its geographical location as a service centre for the Orana region. The Shire offers diversity and opportunity, combining the attributes of a larger centre with the familiarity and generosity of spirit typical of rural communities in western NSW.

The Shire's economic strength lies heavily in the diversity of industries, including a thriving retail sector and more than 4,500 registered businesses. It is also well-positioned as a transport, agriculture and mining services centre.

Exploration projects are flourishing across the surrounding region and major works for significant rail infrastructure and maintenance facilities are underway. The LGA is also home to several large-scale renewable energy projects and is seeing greater integration and development of smart technology and supporting infrastructure.

- Population: 54,044
- Land Area: 753,452.510 Ha
- Distance from Sydney: 390 km
- Climate: 3-35oC
- Median rent: \$390 PW
- Median property prices: \$430,000
- Labour Force Participation Rate: 59.25%

### Top industries

- Retail
- Healthcare
- Education

### Attractions

- Taronga Western Plains Zoo
- Lake Burrendong
- Wellington Caves
- Dundullimal Homestead
- Old Dubbo Gaol
- Royal Flying Doctor Visitor Experience
- Dubbo Observatory
- Western Plains Cultural Centre
- Terramungamine Reserve



## GILGANDRA SHIRE

Located at the junction of the Newell, Oxley and Castlereagh Highways, Gilgandra is approximately halfway between Brisbane and Melbourne. Gilgandra is a friendly community with a great sense of civic pride. Residents enjoy a relaxed country lifestyle with the advantage of a nearby major regional centre.

Healthcare and social services have become large employers in the community and form an important part of the economy. Potential economic growth areas include aged care, renewable energy generation and enhancing Gilgandra's cultural and historic character.

- Population: 4,205
- Land Area: 483,150.570 Ha
- Distance from Sydney: 436 km
- Climate: 16-33oC
- Median rent: \$210 PW
- Median property prices: \$175,000
- Labour Force Participation Rate: 54.91%

### Top industries

- Agriculture
- Education
- Healthcare

### Attractions

- Rural Museum
- Coo-ee March Memorial
- Grandma's Dolls
- Gilgandra Native Flora Reserve
- Orana Cactusworld
- Southern Cross Windmills



## MID-WESTERN REGIONAL

The Mid-Western region offers a vibrant lifestyle and prosperous economy with real country community spirit. As a growth area, Mid-Western is popular with tourists and investors and offers lifestyle opportunities. It has a cosmopolitan vibe with the benefits of a friendly country community, making it the perfect location for tree changers tired of traffic jams and long commutes.

A key feature of the area is its diversity, with the major industries of agriculture, viticulture, tourism and mining and the emerging renewable sector. Construction, real estate, hospitality and retail are also strong employment areas.

Mudgee has some beautiful historic buildings, a vibrant café culture, market days and a thriving arts community. The surrounding area is home to a vast array of wineries nestled in the picturesque countryside. Tourism-related businesses are expected to expand, given the LGA's reputation as a food and wine destination and major events, including sports tourism. Further expansion of cultural facilities will enhance the overall visitor experience.

- Population: 25,563
- Land Area: 875,225.900 Ha
- Distance from Sydney: 270 km
- Climate: 2-34oC
- Median rent: \$430 PW
- Median property price: \$540,000
- Labour Force Participation Rate: 54.08%

### Top industries

- Retail
- Mining
- Healthcare

### Attractions

- Mudgee Honey Haven
- Henry Lawson's Heritage Trail and Memorial
- Windamere Dam
- Goulburn River National Park
- Kandos Museum
- Hill End Heritage Centre
- Frog Rock
- Ganguddy



# NARROMINE SHIRE

Narromine is an important rural service centre located on the Mitchell Highway and the Macquarie River at the eastern edge of the western plains of New South Wales. Narromine promotes itself as the 'Town of Champions' because of the large number of international sports stars who have grown up in the town.

Narromine offers a community that embraces a way of life that provides the perfect balance between work and lifestyle. Narromine Shire provides an attractive option for those seeking a better lifestyle, whether it is reduced travel time, a relaxed rural lifestyle or the ability to spend more time with their families.

Significant opportunities exist in freight and logistics, with Inland Rail planned to intersect with existing rail freight infrastructure at Narromine. Narromine is an aviation hub, with gliding and aviation related development around Narromine Aerodrome, including Skypark, a residential aviation precinct.

- Population: 5,785
- Land Area: 526,151.650 Ha
- Distance from Sydney: 450 km
- Climate: 7-37oC
- Median rent: \$330 PW
- Median property price: \$273,750
- Labour Force Participation Rate: 55.21%

## Top industries

- Agriculture
- Education
- Healthcare

## Attractions

- The Narromine Aerodrome
- Narromine's charming Iris Farm
- Trangie
- Gin Weir
- Goobang National Park
- Cobb & Co Heritage Trail



# WALGETT SHIRE

Walgett is the rural service centre for an enormous pastoral area which stretches to the state border. The town describes itself as the 'Gateway to the Opal Fields' as it is on the road to Lightning Ridge and the Grawin, Glengarry and Sheep yard Opal Fields. Agriculture is the primary industry in the region with a heavy reliance on dryland farming and grazing. The commercial service centre, including real estate, agricultural support, education and training, public administration, retail and health care also feature in the Walgett area, along with tourism and opal mining. Walgett Shire has all the ingredients for a great country lifestyle – the community is friendly and relaxed, there is minimal traffic and a range of recreational and sporting activities is on offer.

- Population: 6,112
- Land Area: 2,230,835.480 Ha
- Distance from Sydney: 648 km
- Climate: 3-40oC
- Median rent: \$200 PW
- Median property price: \$167,500
- Labour Force Participation Rate: 47.33%

## Top industries

- Agriculture
- Healthcare
- Education

## Attractions

- Artesian bore baths in Burren Junction, Lightning Ridge and Walgett
- Aboriginal art gallery
- John Murray art gallery
- Opal mines



## WARREN SHIRE

Warren is a safe and friendly rural community providing a range of services and amenities for its residents. Offering a comfortable, affordable and relaxed lifestyle, Warren provides the perfect base for family, business and social interests.

Warren Shire LGA is a rural area with land used primarily for agriculture, particularly sheep and cattle grazing; wheat, oats and cotton. Agriculture is also the largest employer, followed by health care and social assistance, retail, public administration, and education and training. The Ramsar-listed Macquarie Marshes, the most significant wetland complex in Australia, sit 110 km north of Warren.

The Warren region offers rewarding employment and investment opportunities and has a diverse business sector. Whether seeking employment or starting a business, the Warren Chamber of Commerce hosts 'Welcome to Warren' events for all new residents. This is an ideal way to meet other community members and learn more about what the region has to offer.

- Population: 2,708
- Land Area: 1,075.376.730 Ha
- Distance from Sydney: 525 km
- Climate: 5-40oC
- Median rent: \$200 PW
- Median property price: \$140,000
- Labour Force Participation Rate: 57.54%

### Top industries

- Agriculture
- Retail
- Public Administration

### Attractions

- Macquarie Park, Oxley Park, Victoria Park and Ebert Park
- Red River Gum Walk
- Tiger Bay Wetlands
- The Macquarie Marshes
- Fishing and Canoeing





## WARRUMBUNGLE SHIRE

Warrumbungle Shire is located on the central western slopes and plains of NSW. Situated mid-way between Brisbane and Melbourne, 3 hours from Newcastle, two hours from Tamworth in the north and Dubbo in the south; the town centre of Coonabarabran attracts overnight stays for long haul interstate travellers. Dunedoo is well located for people travelling along the Golden Highway.

The Shire was built on agricultural pursuits, with the main industries of wool growing, beef cattle production and cereal cropping. The performance of the agricultural sector impacts directly on the local economy, with Shire businesses experiencing significant highs and lows as a result of variations in agricultural production, demand, commodity prices and weather. In recent years the Shire has experienced significant drought, wildfires and a reduction in surface and ground water allocations for agricultural use resulting from the introduction of the Murray Darling Basin Plans.

Warrumbungle National Park west of Coonabarabran is a popular tourist destination and home to the internationally significant Siding Spring Observatory, which has international Dark Sky status. Warrumbungle Shire is home to three national parks, providing unique environments and experiences. The LGA is both the traditional land of Kamilaroi people and the Wiradjuri Nation. The area has strong Aboriginal heritage with many sacred sites. Good transport links and an abundance of natural resources provides the LGA with opportunities for economic growth.

- Population: 9,118
- Land Area: 1,237,212.010 Ha
- Distance from Sydney: 450 km
- Climate: 2-45oC
- Median rent: \$260 PW
- Median property price: \$275,000
- Labour Force Participation Rate: 46.99%

### Top industries

- Agriculture
- Healthcare
- Education

### Attractions

- Warrumbungle National Park
- Siding Spring Observatory
- Warrumbungle Dark Sky Park
- Pilliga Forest
- Coolah Tops National Park
- Pilliga Pottery



# Hello Energy. What's the Future?

Unlocking the potential of renewable energy through cutting-edge technology.



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INLAND NSW  
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# TAKING CHARGE IN THE SOLUTION FOR SUSTAINABLE INLAND GROWTH

Leading advocates for change across  
the inland region we are raising the  
profile of sustainable development.

An initiative by



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