Foreword

*South West: a region in profile* was prepared by the Department of Regional Development in conjunction with the South West Development Commission to provide a snapshot of the region’s economy.

The South West is the most popular tourist destination in regional Western Australia and features ancient caves, surf beaches and award-winning wines. Bauxite and coal mining and world class agriculture are also strong contributors to the region’s economy.

The Royalties for Regions program is an important State Government initiative that will allocate more than $1 billion for regional projects in 2014-15, including more than $343 million in the South West region. Since it began in 2008, Royalties for Regions has allocated $4.2 billion to more than 3,500 projects across regional Western Australia.

Through programs like Royalties for Regions, the State Government is increasingly investing in infrastructure and services to grow the state, including implementing major economic, social and community development projects that arise from the Regional Investment Blueprints.

This publication contains the latest information available on the economic development conditions of the South West region and is one of a series of nine regional economic summary documents.

I invite you to read *South West: a region in profile* and trust you will find it interesting and informative.

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Hon Terry Redman MLA
Minister for Regional Development
Regional Development Commissions

The State’s nine Regional Development Commissions were established by the Western Australian Parliament following the ratification of the *Regional Development Commissions Act 1993*.

The role of each commission is to:
- maximise job creation and improve career opportunities in the region
- develop and broaden the regional economy
- identify infrastructure services to promote economic and social development of the region
- provide information and advice to promote business development within the region
- seek to ensure that the standard of, and access to, government services in the regions is comparable to the Perth metropolitan area.

For the purposes of achieving that role a commission is expected to:
- promote the region
- facilitate coordination between relevant statutory bodies and State government agencies
- cooperate with representatives of industry and commerce, employer and employee organisations, education and training institutions and other sections of the community within the region
- identify the opportunities for investment in the region and encourage that investment
- identify the infrastructure needs of the region and encourage the provision of that infrastructure in the region
- cooperate with departments of the public service of the State and the Commonwealth and other agencies, instrumentalities and statutory bodies of the State and the Commonwealth in order to promote equitable delivery of services within the region
- cooperate with local governments in order to promote equitable delivery of services within the region.
Overview

Situated in the picturesque south-western corner of Australia and relatively close to Perth, the South West covers an area of nearly 24,000 square kilometres and is known for its natural beauty and typically Mediterranean climate. The South West is regional Western Australia’s most popular tourist destination and features some of the best natural wonders including famous surfing beaches. The towns of Augusta, Margaret River and Dunsborough are among the top destinations to experience award-winning wineries, restaurants, tall timber forests and ancient caves.

The region has 12 local government areas with 40 per cent of the population residing in the cities of Bunbury and Busselton. These key urban centres provide a diverse range of high quality medical, educational, communications, commercial and administrative services.

The South West benefits from strong economic growth, a skilled labour force with job diversity, business infrastructure and close proximity to expanding economies in south-east Asia. The production of alumina is a key driver of the mineral processing industry. Stable primary industry production diversifies the economic contribution of the region through its mining, agriculture, forestry and fishing industries.

Royalties for Regions has contributed to numerous projects that have enhanced the region’s economic, business and social development. The 2014–15 State Budget allocated $343 million for development of the region, including upgrading and constructing education and training facilities, as well as community and health infrastructure.

**Value of Industry Activities**

<table>
<thead>
<tr>
<th>Industry Activity</th>
<th>Value (in $ million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining and Mineral Processing (2012-13)</td>
<td>$1,908</td>
</tr>
<tr>
<td>Retail Turnover (2011-12)</td>
<td>$1,799</td>
</tr>
<tr>
<td>Tourism (2010-11-12)</td>
<td>$800</td>
</tr>
<tr>
<td>Agriculture (2011-12)</td>
<td>$616</td>
</tr>
<tr>
<td>Building Construction (2012-13)</td>
<td>$525</td>
</tr>
<tr>
<td>Timber (2012-13)</td>
<td>$71</td>
</tr>
<tr>
<td>Fishing and Aquaculture (2011-12)</td>
<td>$9</td>
</tr>
</tbody>
</table>

Source: Department of Regional Development.
Note: Industry activity is an estimation of the gross value of production of key regional industries.
Population

The South West is the most populated region outside Perth with an estimated resident population of 170,000 in 2013, representing nearly seven per cent of Western Australia’s population. The cities of Bunbury and Busselton are the regional hubs servicing the region. The growth along the coastal strip is assisted by road and rail infrastructure access and lifestyle preferences.

Over the decade to June 2013, the region’s population grew at the same rate as state growth of 2.5 per cent per year. The Shire of Capel experienced a 10-year average annual growth rate of 7.5 per cent.

According to the 2011 ABS census, more than 4,000 Aboriginal Australians live in the region. In 2012, the Western Australia Planning Commission forecasted the population of the South West would continue to steadily rise and reach 217,300 residents by 2023. This forecast represents the best estimate of future population size based on fertility, mortality and migration trends.
Western Australia experienced a rise in employment levels over the last decade driven by population and industry growth, and international demand for raw material exports. The South West recorded its highest level of employment at nearly 87,200 persons in 2011-12, and remained at this level in 2012-13. The unemployment rate reached a low of three per cent in 2006-07 and steadily increased to 5.5 per cent in 2012-13. Labour market conditions have moderated over the 12 months to 2012-13 with some softening of employment growth and an increase in regional and state unemployment rates.

The 2011 ABS census reported the construction industry as the greatest industry employer in the South West with 12.8 per cent of the workforce. Accompanied by high building approval numbers and increased business investment, this growth has flowed to complementary employment increases in health care, education and training. Strong levels of employment growth in the retail sector continue to support a vibrant tourism industry.

<table>
<thead>
<tr>
<th>Industry of Employment</th>
<th>2011</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>12.8%</td>
<td>11.8%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>11.6%</td>
<td>12.4%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>11.3%</td>
<td>11.8%</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>9.2%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Education and Training</td>
<td>7.5%</td>
<td>6.8%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>7.1%</td>
<td>7.1%</td>
</tr>
<tr>
<td>Agriculture, Forestry and Fishing</td>
<td>5.7%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Mining</td>
<td>5.0%</td>
<td>3.9%</td>
</tr>
<tr>
<td>Public Administration and Safety</td>
<td>4.7%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Real Estate, Administrative and Support Services</td>
<td>4.6%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>3.8%</td>
<td>3.4%</td>
</tr>
<tr>
<td>Other Services</td>
<td>3.8%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Transport, Postal and Warehousing</td>
<td>3.6%</td>
<td>3.5%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>2.3%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Inadequately described/not stated</td>
<td>2.1%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Electricity, Gas, Water and Waste Services</td>
<td>1.8%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Financial and Insurance Services</td>
<td>1.5%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Arts and Recreation Services</td>
<td>0.8%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Information Media and Telecommunications</td>
<td>0.7%</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

Tourism

The South West is recognised for its natural environment including pristine coastline, diverse landscape, abundant marine life and internationally acclaimed food and wine products. The Margaret River region is popular for world-class wineries, surfing and quality holiday accommodation, while the inland areas boast forests, rivers, lakes and a wide range of other recreational opportunities.

The region boasts the most visitors outside Perth, positively impacting on the South West’s economy including growth of international investment. According to Tourism Western Australia, the tourism industry in the South West attracted an average of 1.5 million overnight visitors annually over the period 2010 to 2012. In the same period, turnover was estimated at $800 million per annum.

Across the region there is a strong arts and culture sector, with small and large scale events of local, national and international interest. It is expected tourism will continue to develop as a major contributor to the region’s economy as visitors are increasingly attracted to the unique South West lifestyle.

Tourism Trends
Estimated Expenditure and Number of Visitors

Source: Tourism Western Australia and Department of Regional Development.
Note: figures based on 3-year rolling averages.

[Graph showing tourism trends]

Domestic Expenditure
International Expenditure
Total Visitors

Estimated Visitors (000)

Estimated Expenditure ($ m)

Year

2000/01/02 2001/02/03 2002/03/04 2003/04/05 2004/05/06 2005/06/07 2006/07/08 2007/08/09 2008/09/10 2009/10/11 2010/11/12
Retail turnover

The South West’s retail sector has experienced remarkable growth over the past 10 years, increasing 85 per cent from an estimated $974 million in 2001-02 to $1.8 billion in 2011-12, growing at an annual average rate of 6.3 per cent. The industry is a large employer and significant contributor to the regional economy.

Bunbury is the region’s commercial and administrative hub. Access to major road, rail and port facilities makes Bunbury the main distribution centre, servicing industry and community needs. Strong population growth in Greater Bunbury and Busselton is fuelling a vibrant retail sector. There are growing opportunities for businesses supplying goods and services to the mining, agricultural, forestry, fishing and tourism industries.

Mean taxable income

The mean taxable income for the South West region was estimated at $66,000 in 2010-11 and represents an annual average growth rate of 6.9 per cent over 10 years. The increase in income is driven by competition in the labour force arising from greater employment opportunities.

Activity in the resources sector has influenced wages in the mining, construction and wholesale trade industries. As an example, the Shire of Collie had an average income at more than $76,000 due to the mining and mineral processing industries.

<table>
<thead>
<tr>
<th>Area</th>
<th>Median Weekly Personal Income 2011</th>
<th>Mean Taxable Income 2010-11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Augusta-Margaret River (S)</td>
<td>$593</td>
<td>$58,121</td>
</tr>
<tr>
<td>Boyup Brook (S)</td>
<td>$495</td>
<td>$60,303</td>
</tr>
<tr>
<td>Bridgetown-Greenbushes (S)</td>
<td>$467</td>
<td>$61,328</td>
</tr>
<tr>
<td>Bunbury (C)</td>
<td>$582</td>
<td>$68,704</td>
</tr>
<tr>
<td>Busselton (C)</td>
<td>$555</td>
<td>$63,490</td>
</tr>
<tr>
<td>Capel (S)</td>
<td>$664</td>
<td>$66,401</td>
</tr>
<tr>
<td>Collie (S)</td>
<td>$558</td>
<td>$76,332</td>
</tr>
<tr>
<td>Dardanup (S)</td>
<td>$626</td>
<td>$68,439</td>
</tr>
<tr>
<td>Donnybrook-Balingup (S)</td>
<td>$496</td>
<td>$63,091</td>
</tr>
<tr>
<td>Harvey (S)</td>
<td>$603</td>
<td>$69,754</td>
</tr>
<tr>
<td>Manjimup (S)</td>
<td>$493</td>
<td>$55,700</td>
</tr>
<tr>
<td>Nannup (S)</td>
<td>$459</td>
<td>$54,519</td>
</tr>
<tr>
<td>Western Australia</td>
<td>$662</td>
<td>$73,591</td>
</tr>
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</table>

Agriculture production in the South West remained steady over the decade to 2011-12. In 2011-12, the value totalled $616 million accounting for eight per cent of the state’s total agriculture value.

More than half of production in 2011-12 was attributed to crop harvest at $368 million. The most significant horticultural commodities included grapes for wine production ($70 million), apples ($31 million) and avocados ($19 million). Margaret River is one of the best known wine regions in Australia. The superior growing conditions, coupled with Mediterranean style climate means good soil management and viticultural practices lead to consistently high quality fruit of intense flavour. Ranked among the world’s most famous wine regions, Margaret River produces 20 per cent of Australia’s premium wines and accounts for 75 per cent of the South West’s wine production.
The Geographe, Pemberton, Blackwood Valley and Manjimup wine regions also harvest premium quality wine grapes. Manjimup is recognised for a wide range of high value agricultural products including avocados, truffles and vegetables.

Livestock products account for a quarter of the South West’s agricultural value at $141 million. This is dominated by milk and other dairy products from farms around Dardanup and Harvey. The region is nestled on fertile, irrigated plains beneath the rolling foothills of the Darling Range. Wool is another locally produced livestock commodity.

In 2011-12 livestock disposals accounted for $106 million, comprising mainly of cattle, sheep and lambs. Harvey is also one of Western Australia’s largest producers of high quality beef for local, national and international markets. The steady rise in demand for safe, high-quality beef has served the sector well, particularly for the major export destinations of Japan, Korea, Indonesia and the United States.
Fishing and aquaculture

The commercial fishing industry has remained steady in recent years and was valued at $7.5 million in 2011-12. The fisheries operate sustainably in the region and are internationally recognised for research practices and best management, ensuring industry longevity. Commercial fleets operate out of Augusta, Bunbury, Busselton, Dunsborough, Walpole and Windy Harbour.

Fish and molluscs are the main contributors to the region’s catch. The South West comprised 30 per cent of the state’s mollusc catch at $4 million. Western rock lobsters are also a significant component of the catch.

The South West aquaculture industry was valued at $1.2 million in 2011-12 and is based around marron farming.

![Fishing Catch Estimated Value](chart.png)

Source: Department of Fisheries with further estimates by the Department of Regional Development.

<table>
<thead>
<tr>
<th>Year</th>
<th>Molluscs</th>
<th>Rock Lobsters</th>
<th>Crabs</th>
<th>Fish</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2001-02</td>
<td>20</td>
<td>10</td>
<td>5</td>
<td>5</td>
<td>30</td>
</tr>
<tr>
<td>2002-03</td>
<td>15</td>
<td>15</td>
<td>10</td>
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<td>2003-04</td>
<td>20</td>
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<td>15</td>
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<td>50</td>
</tr>
<tr>
<td>2004-05</td>
<td>15</td>
<td>15</td>
<td>10</td>
<td>10</td>
<td>40</td>
</tr>
<tr>
<td>2005-06</td>
<td>10</td>
<td>10</td>
<td>5</td>
<td>5</td>
<td>20</td>
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<tr>
<td>2006-07</td>
<td>5</td>
<td>5</td>
<td>3</td>
<td>3</td>
<td>13</td>
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<tr>
<td>2007-08</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2008-09</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2009-10</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2010-11</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>2011-12</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Aquaculture

<table>
<thead>
<tr>
<th></th>
<th>2008-9</th>
<th>2009-10</th>
<th>2010-11</th>
<th>2011-12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marron</td>
<td>1,219</td>
<td>1,232</td>
<td>1,206</td>
<td>1,227</td>
</tr>
<tr>
<td>Oysters</td>
<td>113</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>1,332</td>
<td>1,232</td>
<td>1,206</td>
<td>1,227</td>
</tr>
</tbody>
</table>

Source: Department of Fisheries with further estimates by the Department of Regional Development.
Timber

The South West native forests are some of the most spectacular in the world and include unique species such as jarrah, marri and karri. State-owned forestry production for the South West totalled one million tonnes in 2013 and was valued at $70 million. The Forest Products Commission engages in commercial forestry activities in State-owned native forests and plantations, delivering economic and social benefits to regional Western Australia.

Timber operations in South West forests provide environmentally sound raw materials used predominantly in local high value industries producing furniture and flooring products. This production is located throughout the South West, particularly around Manjimup, Pemberton, Nannup and Busselton.

[Value of Forestry Production graph]

Source: Forest Products Commission.
Western Australia’s resources industry grew significantly over the past decade due to unprecedented overseas demand, which resulted in mineral production and revenue increasing from $27.9 billion in 2002-03 to $101.8 billion in 2012-13.

In 2012-13, mineral production in the South West was valued at $1.9 billion. Alumina was the highest valued commodity, valued at $1.3 billion or 69 per cent of the regional total. Bauxite from the Darling Scarp in the Shire of Boddington provides the feedstock to the
Worsley Alumina refinery in the Shire of Collie via a 52 kilometre conveyor belt. The alumina in turn is transported by rail to the Port of Bunbury for export. The largest export markets for alumina are China (17 per cent), United Arab Emirates (17 per cent), South Africa (12 per cent) and Mozambique (10 per cent).

Coal accounted for 16 per cent of mining production of the region, valued at $311 million. The state’s two coal mines are located in the Shire of Collie. Almost 80 per cent of the coal mined in the region is used for electricity generation. Raw coal is exported through the Kwinana port, while a new export facility is proposed at Bunbury port.

The remaining 15 per cent of mining production includes clay, limestone, spodumene and heavy minerals sands.
Building approvals

Building approval activity provides an indication of future dwelling construction. Compared to the rest of the nation, Western Australia has remained robust over the decade to 2012-13 in construction value and approval numbers.

The total value of building approvals for the South West was estimated at $525 million in 2012-13, after fluctuating over the decade. In 2012-13 approximately 1,500 residential buildings were approved for construction at a value of $443 million. New building laws and a certified application process were introduced in 2012 and the approval process is now more efficient and consistent across the state.

In 2012-13 the value of non-residential construction was approximately $82 million. Large scale commercial building projects currently underway in the South West region include the $65 million Eaton town centre expansion, which is set to make Eaton a major retail centre and also provide an area that will become the focal point for the community. The $12 million Bunbury Regional Entertainment Centre redevelopment is completed and was opened by Premier Colin Barnett in July 2014.
Project investment

Project investment data is divided across three categories: under consideration, committed and under construction. Projects under consideration are being scoped for further development. Once the projects are approved they are committed, and under construction once building commences.

For the last decade, Western Australia was the fastest growing economy in Australia fuelled by investment contribution to the mining sector’s construction phase. For example the South West advanced the $3.5 billion expansion of Collie’s Worsley alumina refinery. Construction included modifications to pumping and pipework to enable an increase in production capacity. Additionally, the Bunbury waterfront development will revitalise the city and create an active cosmopolitan village for visitors, residents, businesses and the community.

The Western Australian economy is positioned to embrace a broader investment profile beyond mining for transitional growth into the future.

Source: Deloitte Access Economics Investment Monitor and Department of Regional Development.
Note: The graph represents investment value for calendar year.
Across the South West region, government, the non-for-profit sector and Aboriginal people are collaborating to foster and promote economic and social participation, achieve successful employment outcomes and improve living standards and quality of life.

The South West Development Commission and the State Government work closely with the region’s Noongar people to support sustainable economic and social development for their communities. Projects supported by this collaboration include the Woolkabunning Kiaka Inc commercial and cultural programs at the Roelands Village and the Ngalang Boodja Council Aboriginal Corporation for the Collie Noongar Community Centre. Royalties for Regions funding has also provided a boost to other Noongar projects in the South West, including the development of the Wardandi Memorial Park in Bunbury and a mobile health clinic that South West Aboriginal Medical Service uses to service the region.

There are services in the South West designed specifically for the broader Noongar community. The South West Aboriginal Medical Service, based at the South West Health Campus in Bunbury, provides holistic health services to the Aboriginal population. The Djidi Djidi Aboriginal School provides educational and cultural support to Noongar children. In addition, the Aboriginal Challenge Employment Services provides employment and training opportunities to Aboriginal clients and employers. Woolkabunning Kiaka Inc has developed a pre-employment RESPECT program that operates from the Roelands Village.

The Heads of Agreement signed in December 2009 by the Western Australian Government provides a structure to resolve and negotiate the native title claims for the Noongar people and recognises their traditional ownership. It also provides a settlement package for native title claims, which will further enhance sustainable development and participation by the region’s Aboriginal people.
Social and economic infrastructure

The South West is a thriving region with modern, first-class infrastructure. The region and its major towns are linked by well-maintained highways with transit time from Bunbury to Perth approximately two hours on the new Perth-Bunbury (Forrest) Highway. The Australind passenger rail service operates daily between Bunbury and Perth. Busselton is home to the region’s main airport catering for direct services to Perth, Albany and fly-in fly-out operations. Airstrips for light aircraft are located at Bunbury, Augusta, Margaret River, Manjimup, Collie and Boyup Brook.

The Bunbury port is one of the largest regional ports in Australia reaching a record of 15.3 million tonnes in 2012-13. Major commodities exported include alumina, mineral sands, woodchips, caustic soda and silica sand. Facilities to ship wheat from the Bunbury port were recently completed. The Bunbury port also hosts visiting cruise ships.

Regional telecommunication services include broadband internet to provide a comprehensive range of internet services. Mobile phone coverage and high speed internet access covers much of the region.

All towns in the South West have light industrial zones. The Preston Industrial Park contains about 3,000 hectares available for light and specialised industry. Industrial estates at Kemeronto and Shotts provide 2,100 and 235 hectares of land respectively for heavy industry. The region is home to major coal-fired power stations and the region has access to natural gas via the Dampier to Bunbury Natural Gas Pipeline. There is a good supply of water in the region for both agriculture and industry.

Bunbury’s South West Health Campus hosts the Bunbury Regional and St John of God hospitals with 24-hour emergency care and many support services. A cancer centre and coronary care unit are new facilities at the St John of God hospital site. Community health services include maternity support, child health clinics, school-based immunisation, dental care and intensive youth education programs.

The region is well-equipped with sporting facilities and offers great lifestyle opportunities in an environment that ranges from spectacular coastal locations to rural and forest settings.

The South West features a choice of government and non-government schools catering for pre-primary, primary and secondary students. Universities include Edith Cowan, Murdoch and Curtin in Bunbury and Margaret River. The South West Institute of Technology is based in Bunbury and offers a variety of courses at Bunbury, Busselton, Collie, Margaret River and Manjimup campuses.
Living in the South West

Living in the Regions 2013 was a large-scale social research project conducted by the Department of Regional Development. The purpose of the survey was to identify what attracts people to the regions, understand the barriers of living in the regions, measure the quality of life in regional Western Australia, and most importantly use that information to inform and direct regional development initiatives into the future. The survey received more than 10,000 responses.

Respondents were asked to rate attitudes and participation according to nine categories, with a score of 10 representing the most positive and a score of one the least positive. Results confirmed the South West has a lot to offer local residents. The most positively rated aspects of life in the South West were safety and lifestyle, general wellbeing and happiness.

Specifically:
- South West residents rated the happiest of all the regions with a high sense of community and connectedness
- the South West was viewed as a safe place to live and raise children, with a supportive community and clean environment
- the access to services such as health and education and training options, contributed to a large number of respondents intending to reside in the South West long-term.

Living in the Regions 2013 will assist government, the private sector and community partners to direct their efforts and investments on matters relevant to people living in regional Western Australia. A copy of Living in the Regions 2013 State Report is available for download at www.drd.wa.gov.au. In 2014, a Living in the Regions: South West Report detailing all data from the survey will be available.

Aspects of Regional Living

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Mean Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Happiness</td>
<td>8.54</td>
</tr>
<tr>
<td>Lifestyle</td>
<td>8.51</td>
</tr>
<tr>
<td>Safety</td>
<td>8.40</td>
</tr>
<tr>
<td>Health &amp; General Wellbeing</td>
<td>7.74</td>
</tr>
<tr>
<td>Sense of Community</td>
<td>7.63</td>
</tr>
<tr>
<td>Connectedness</td>
<td>7.33</td>
</tr>
<tr>
<td>Financial Situation</td>
<td>6.95</td>
</tr>
<tr>
<td>Employment Prospects</td>
<td>6.29</td>
</tr>
<tr>
<td>Education &amp; Training</td>
<td>6.26</td>
</tr>
</tbody>
</table>

Invest in the South West

Tourism
Home of the world-famous Margaret River wine region, the South West provides the ideal setting for luxury resorts and is becoming increasingly attractive to international resort developers. Current developments such as the Bunbury Waterfront and Augusta Boat Harbour will help to make the South West an international region of excellence by 2020.

There are a number of opportunities for investment in the tourism industry in the South West. These include:

- accommodation development, such as high-end spa resorts and boutique hotels, as well as short-stay and eco-style accommodation
- wine tourism, to capitalise on the region’s premium wine industry by investing in select wineries and wine tours
- corporate tourism including events and conference packages
- nature-based tourism, such as nature walks on the Bibbulman and the Cape-to-Cape walking trails, cycling on the Munda Biddi Trail, surfing and other outdoor activities.

Agriculture
A mild Mediterranean climate with good soils, no major pests, pollution or diseases makes the South West well equipped for agricultural development.

Investment opportunities in the agricultural industry include:

- introduction of new crop varieties such as avocados, asparagus and green tea
- wineries
- expansion of the Myalup and Manjimup food bowls
- aquaculture development including marron and abalone farming
- meat and dairy processing.

The Department of Agriculture and Food Western Australia (DAFWA) has developed an extensive information network called ‘Find your Farm’. This portal assists potential investors to find the right area, make business contacts and view agricultural statistics and information. You can access ‘Find your Farm’ via DAFWA’s website.

Mining and manufacturing
The South West is rich in minerals with current mining projects in bauxite (alumina) coal, zircon, rutile, ilmenite, spodumene (lithium) and tantalum.

Collie in the South West currently produces 100 per cent of Western Australia’s coal and about 73 per cent of the state’s coal-fired electricity. Worsley near Collie hosts one of the world’s largest, low-cost alumina producing hubs. There are a number of potential investment opportunities in the region’s resources sector. In addition, there is available land to establish heavy industry.
Industry opportunities include:
- manufacturing of exotic light metals such as titanium
- metal fabrication
- power generation
- coal mining
- chemical manufacturing
- downstream processing for mineral sands (zircon, rutile, ilmenite, lithium and tantalum).

**Renewable energy**
The South West offers excellent opportunities to develop renewable energy resources. There are new and innovative renewable energy technologies under development including solar, wave, geothermal, wind and bio-energy. There has been considerable interest in utilising forest by-products to generate electricity through biomass power plants. The renewal of the Forest Management Plan which expired in December 2013 may have a significant bearing on the availability of forest by-products.

A 40 megawatt biomass project near Manjimup using wood and other forest by-products as fuel has been approved by the Minister for Environment. This project could be a leader in biomass power generation.

**South West CO₂ geosequestration hub**
A major research project into the possible construction of a CO₂ geosequestration hub located in the northern part of the region may lead to opportunities for new industries to locate in the South West and utilise geosequestration technology to reduce CO₂ emissions.
Contact us

South West Development Commission

**BUNBURY OFFICE**
9th Floor, Bunbury Tower
61 Victoria Street
BUNBURY WA 6230
Telephone: (08) 9792 2000
Facsimile: (08) 9791 3223

**MANJIMUP OFFICE**
20a Giblett Street
MANJIMUP WA 6258
Telephone: (08) 9777 1555
Facsimile: (08) 9777 1414

**COLLIE OFFICE**
13 Forrest Street
COLLIE WA 6225
Telephone: (08) 9734 2322
Facsimile: (08) 9734 4142

All correspondence should be directed to:
Chief Executive Officer
South West Development Commission
61 Victoria Street
BUNBURY WA 6230
Email: swdc@swdc.wa.gov.au
Website: www.swdc.wa.gov.au

Department of Regional Development

Level 2, Gordon Stephenson House
140 William Street
PERTH WA 6000
PO Box 1143
WEST PERTH WA 6872
Telephone: (08) 6552 1800
Free call: 1800 049 155 (Country only)
Facsimile: (08) 6552 1850
Email: info@drd.wa.gov.au
Web: www.drd.wa.gov.au

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