

SOUTH WEST

REGIONAL FOCUS 2010

a snapshot of
SOUTH WEST
WESTERN AUSTRALIA

MARGARET RIVER COWPARADE
March - June 2010

CowParade is the largest and most successful public art event in the world. An estimated 648,000 people will visit the Margaret River region during CowParade, contributing about \$254 million to the region's economy.



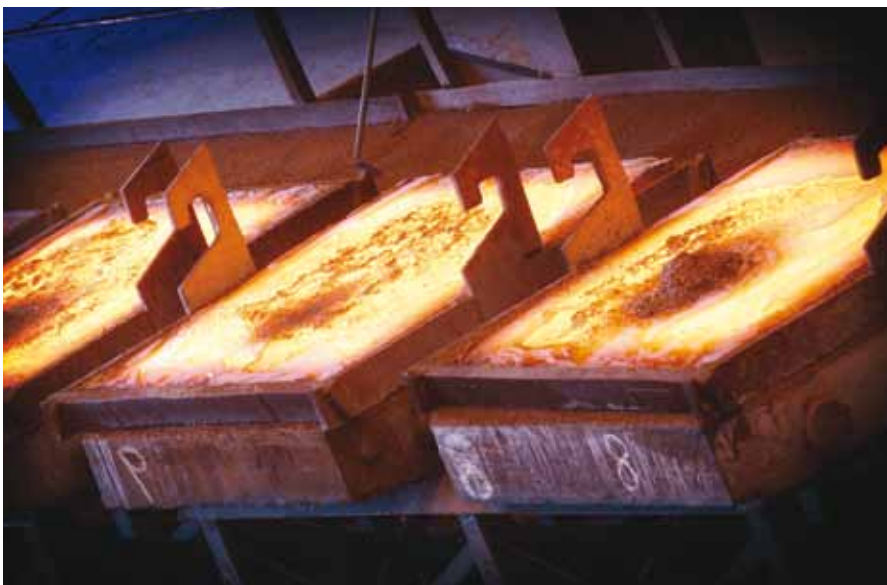
South West

at a glance

Growth

The South West of Western Australia is a fast growing region, with an increasing number of people choosing to call it home each year. Over the past five years the South West's average annual growth rate was 3.2 per cent, resulting in an extra 23,021 people living in the region.

Currently more than 157,000 people are residents of the South West. By 2027 it is anticipated about 216,000 people will reside in the region – and it's little wonder why. Lifestyle, employment opportunities and a



diverse economy make the South West a popular place to live.

Location

Situated in the picturesque south-west corner of Australia, the region is known for its extensive natural beauty and enviable climate. It covers an area of 23,970 square kilometres and has a typically Mediterranean climate with pleasant summer months and reliable winter rainfall. It is bordered by the Indian and Southern oceans, and the northern gateway to the region is only about an hour from Perth by road.



The Economy

The South West has a thriving economy which generated \$11.3 billion during 2008-09. The region derived most of its wealth from healthy mining and manufacturing sectors, which latest figures show produced \$2 billion and \$2.7 billion respectively. Much of the region's prosperity is based on its mining industry – in particular alumina and mineral sands. Residents work in a range of industries – with unemployment at a low three per cent. Forestry, agriculture, tourism, retail, construction and fishing are all sources of employment for South West people. Large investments are planned and underway in the areas of mining, tourism and infrastructure.

Attractions

The South West has a coastline featuring some of the best surfing beaches in the State, towering forests and established wine regions. The dynamic port city of Bunbury is the South West's regional hub. Surrounded by water on three sides, the City affords its residents unique opportunities for waterfront living and a cosmopolitan lifestyle. The region boasts superb restaurants and a thriving arts community with numerous galleries showcasing the works of talented artisans. Other attractions include national parks, beaches, wineries and eco-tourism sites that have credited the South West region as the most popular tourist destination outside Perth.



Growth indicators

Population growth

Shire	2008	2009	% change
Preston region			
Bunbury	32,928	33,979	3.2
Capel	11,967	12,687	6.0
Collie	9,175	9,332	1.7
Dardanup	12,199	12,709	4.2
Donnybrook-Balingup	5,212	5,360	2.8
Harvey	22,589	23,468	3.9
Vasse region			
Augusta-Margaret River	11,862	12,212	3.0
Busselton	29,261	30,514	4.3
Blackwood region			
Boyup Brook	1,598	1,624	1.6
Bridgetown-Greenbushes	4,351	4,466	2.6
Manjimup	10,022	10,162	1.4
Nannup	1,329	1,304	-1.9
TOTAL	152,493	157,817	3.5
TOTAL GREATER BUNBURY	63,370	66,117	4.3

The South West is expected to grow to about 216,000 people by 2027 according to population projections released by the Commonwealth Department of Health and Ageing.

Most of the projected growth is forecast to occur along the coastal strip, with the biggest population increase expected for the Shire of Busselton.

Greater Bunbury, which includes the City of Bunbury and the adjacent suburban areas in the shires of Capel, Dardanup and Harvey, grew at an average annual growth rate of 4.3 per cent for the period 2008-2009 and has a total population of 66,117.

Inland areas have generally remained stable in terms of population.

Indigenous people

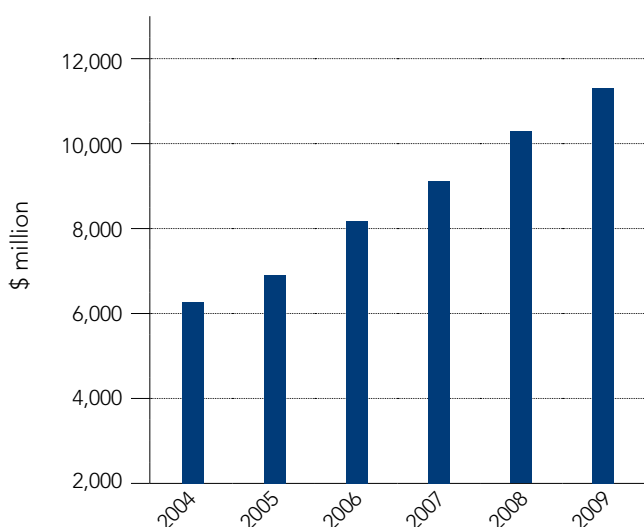
The Indigenous people of the South West are the Noongar people. The Noongar population is estimated at 2,770, representing 2.1 per cent of total population.

Almost 60 per cent of the Noongar population are less than 25 years of age. The Noongar unemployment rate is 14 per cent.

	Population by sub-region	% of population
Preston region	1,944	2.3
Vasse region	491	1.4
Blackwood region	335	2.1
TOTAL	2,770	2.1



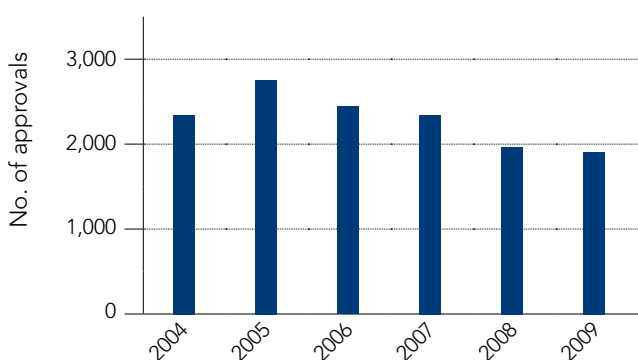
Gross regional product



The South West's gross regional product was estimated at \$11.3 billion for the financial year 2008-09. This represents an increase of 9.1 per cent on the previous year and an 80 per cent increase over the past five years.

The mining, construction and manufacturing industries are the main contributors to economic production in the region. The South West region accounts for 6.6 per cent of the Gross State Product in Western Australia.

Building approvals



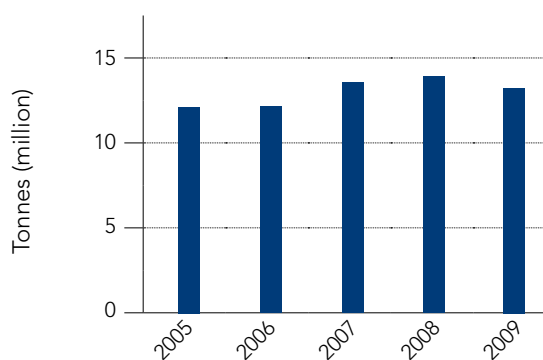
The total value of building approvals in the South West region was \$605.8 million in 2008-09, a decrease of 24.5 per cent from the previous financial year (\$802.8 million). Both residential and non-residential approvals fell in 2008-09, the larger decrease being felt by the non-residential sector due to the impact of the global economic downturn which has affected commercial development.

Employment

	No. Employed	% Unemployed
Preston region		
Bunbury	18,560	5.6
Capel	6,502	4.6
Collie	4,631	6.7
Dardanup	6,654	3.2
Donnybrook-Balingup	3,001	4.5
Harvey	12,416	4.0
Vasse region		
Augusta-Margaret River	6,957	3.5
Busselton	15,722	4.2
Blackwood region		
Boyup Brook	1,007	2.2
Bridgetown-Greenbushes	2,388	5.0
Manjimup	5,652	4.4
Nannup	735	4.5
TOTAL	84,225	4.5%

The South West region's rate of unemployment stands at 4.5 per cent as at December 2009 (up from 3.1 per cent at December 2008). This compares favourably to the Western Australian average of 4.9 per cent for the same period (December 2009).

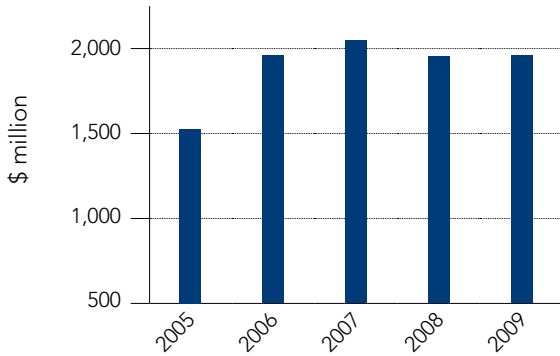
Bunbury Port trade



Trade data for the Bunbury Port shows total throughput of 13.3 million tonnes in 2008-09. The major commodity exported through the port is alumina. The outlook for growth in trade levels is positive. The Worsley Alumina expansion will increase the amount of alumina exported through the port and increase imports. The port will also handle product for proposed coal and urea projects.

Industry sectors

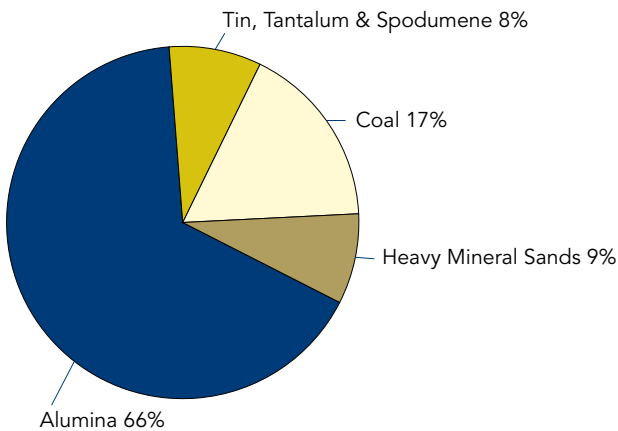
Mining



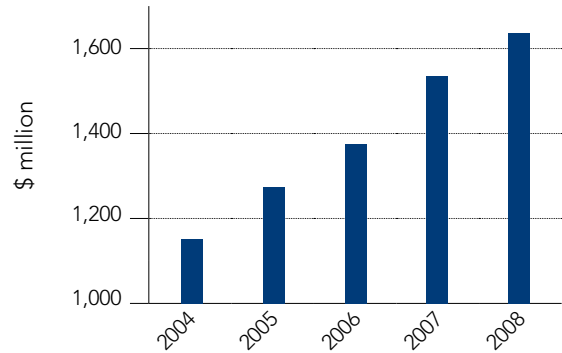
Mining continues to be a key economic driver for the South West region. Latest estimates show that mining and mineral processing was valued at \$1.96 billion for 2008-09, an increase of 2.0 per cent from the previous year.

Alumina production, valued at \$1.3 billion in 2008-09, was the largest commodity in terms of value.

The current expansion of the Worsley alumina refinery will see annual production increase from 3.5 million tonnes to 4.7 million tonnes.

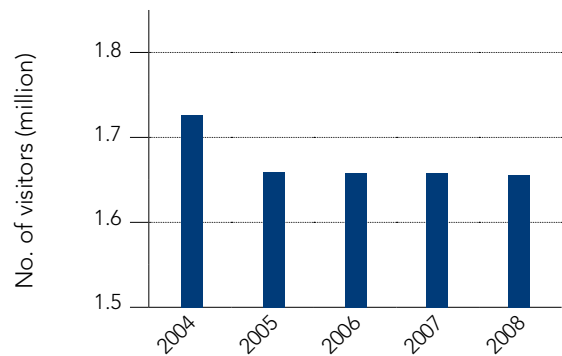


Retail



Retail turnover in the South West region was estimated at \$1.63 billion in 2007-08, an increase of 6.7 per cent over the previous year. This indicates that the South West retail sector is continuing the strong growth recorded over the last decade, driven mainly by population growth.

Tourism

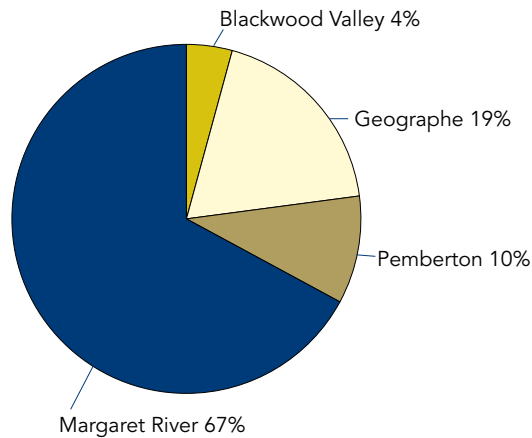


In 2008 the South West region received approximately 1.6 million tourists (overnight visitors) who directly contributed \$654 million into the South West economy. In terms of visitor numbers there has been a slight decrease from 2007. In 2008, 94 per cent were domestic visitors with the remaining 6 per cent being international visitors.

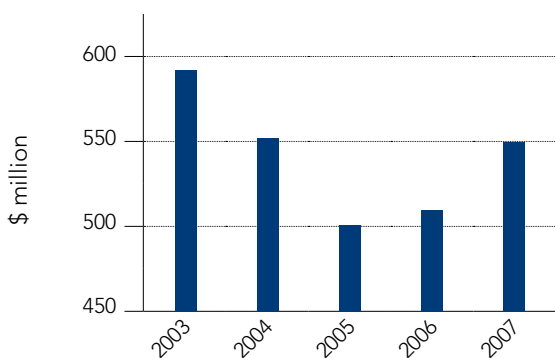
Viticulture

Viticulture production in the South West region had an estimated value of \$67.9 million in 2008 with 50,393 tonnes of grapes crushed. The production levels for 2008 are up 3.8 per cent from the previous year in terms of the tonnage of grapes crushed.

The Margaret River Wine Region is the major wine production region. There's been a growth in other premium brand wine regions though Margaret River remains the largest producer.



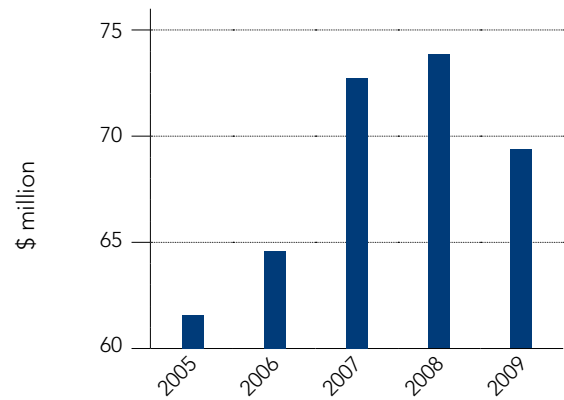
Agriculture



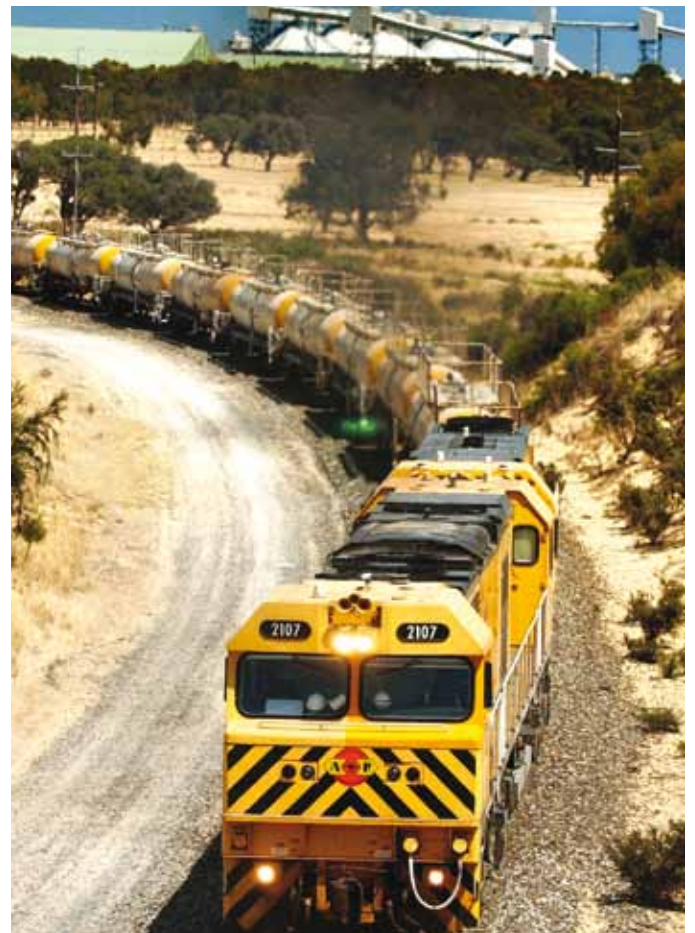
Total agricultural production in 2006-07 was \$550.2 million, an increase of 7.7 per cent from the previous year.

The major contributors to agricultural production in 2006-07 were cattle (\$105.4 million), milk (\$93.5 million), vegetables (\$77.3 million), fruit (\$58.9 million) and hay production (\$56.1 million).

Timber



Log production in the South West region was valued at \$69.3 million in 2008-09, a decrease of 6.3 per cent from the previous financial year. Hardwood production fell from 416,000 cubic metres in 2007-08 to 386,420 cubic metres in 2008-09. At the same time softwood production fell from 649,000 cubic metres in 2007-08 to 641,000 cubic metres in 2008-09.



MORE INFORMATION

Further information on the South West is available on our website. Visit www.swdc.wa.gov.au



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Data sources: Australian Bureau of Statistics, Department of Planning, Tourism Western Australia, Department of Regional Development and Lands, Forest Products Commission, Australian Department of Education, Employment and Workplace Relations, Australian Department of Health and Ageing, and the Department of Indigenous Affairs.
Note: Statistics are based on financial years with the exception of tourism data.

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