



SW

Regional Futures 2025-26



An Australian Government Initiative





In completing this work, RDA South West acknowledges the Noongar people of the South West, our regional partners and stakeholders, and the collective work of all who have contributed to making the South West a better place to live.

The European calendar has four seasons, while there are six Noongar seasons in Western Australia's South West. The seasons reflect the weather, plants and food sources.



RDA South West wishes to thank the young children from the Djidi Djidi Aboriginal School which contributed the six seasons artwork used throughout this document.

Front cover image: Bunbury CBD

Credit: Australia's South West and Frances Andrijich

Birak December and January

First summer and the traditional burning season as the days warm and rainfall is uncommon. Many of the birds have chicks which will fledge in Birak. Cool breezes come from the South West.

Bunuru February and March

Second summer. Hottest time of the year. Coastal living and fishing characterises the season. Fresh-water foods and seafood made up major parts of the diet during Bunuru. This is also a time of white flowering gums in full bloom.

Djeran April and May

The hot weather eases to Autumn and features cooler nights with dew in the mornings. As the season progresses it grows colder and red wildflowers bloom. Food sources include fish, frogs, turtles and root bulbs.

Makaru June and July

This is the coldest and wettest season. It is frequented by storms. Traditionally, people moved inland where the catchments have water and rivers run. Food sources change to kangaroos (yongar), emus (waitj) and possums (koomal).

Djilba August and September

Late winter and early spring days start to warm while nights are cold and clear. Flowers come to life as this transitional period sees rains and sunshine. Food sources remain grazing animals. Balgas (grass tree) flower stalks emerge.

Kambarang October and November

A transformational time of the year. Wildflowers and orchids bloom and Australian Christmas trees flower as the days get warmer. Food sources remain kangaroos, emus and possums. Snakes begin to wake up.

Foreword

It's hard not to get excited about the stunning South West with astonishing economic diversity, jaw-dropping landscapes and an abundance of opportunities ... but all that privilege is not to be taken for granted. We have to work at it.

We have to know where we need to go and why. Having everyone pull in the same direction is a fundamental requirement for business and life generally, but in developing Australia's regions it is absolutely critical.

Consider that about a fifth of the Australian population produces about two-thirds of the nation's export earnings, then the importance of the regions is plain to see. It is also clear that those regions which leave their development to chance, will lag behind, lack investment, miss opportunities and make mistakes that could cost jobs at best and long-term damage to the environment at worst.

Doing nothing is not an option, so what is the best path forward?

This piece of apolitical work marries the principles of regional development with opportunity. It identifies South West characteristics, trends shaping our future, priority settings and the principles of regional development to highlight a range of interventions and proposals that would make our region an internationally-recognised region of excellence.

Regional Australia is in the national psyche, but let us hang up the countryman's Akubra and debunk the myth that cutting edge means doing business in the city.

Instead, let us drive the narrative that progressive and innovative business can, and do, make their homes outside congested urban environs, employing skilled people who enjoy an enviable regional lifestyle.

It is incumbent on us to identify what's important to our region. We can pursue ambitious but realistic goals, choosing to disregard parochialism and opening our minds to prioritise game-changing opportunities that will have everyone working collectively for the greater benefit of the region.

Welcome to South West Regional Futures.

Scott Robinson, Chair
Regional Development Australia – South West



The Commonwealth's Regional Investment Framework

Investing in People

Listening to local voices and partnering with communities. Targeted investment in skills, education, training and local leadership capacity.

Investing in Places

Supporting adaptive, accessible, sustainable and liveable regions. Delivering infrastructure where and when it is needed.

Investing in Services

Enhancing connectivity, accessibility and equity of services. Investment including across communications, health, water, and transport.

Investing in Industries and Local Economies

Investment to help activate economic and industry growth. Supporting the conditions needed for regional industries to diversify and grow.

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Executive Summary

South West Regional Futures notes a high degree of alignment between key regional planning and regional development documents, backed by consensus among regional stakeholders.

This document blends existing industry strengths with new opportunities in the renewable space and advanced manufacturing. Neither can be separated from community and environment, one acknowledging the importance of liveability and the other underpinning what South West residents love most about their region.

It is clear that everything is connected. Sustainable energy and a healthy natural environment underline integrity in industry and the necessary green credentials required in a new era. The South West brand is one of clean, green productivity and liveability, leveraging tourism visitation product value, particularly in the food and wine sector.

Support infrastructure is an economic enabler. Roads, rail, development of the region's port and key airport are all important along with energy, water security in a drying climate and digital capability.

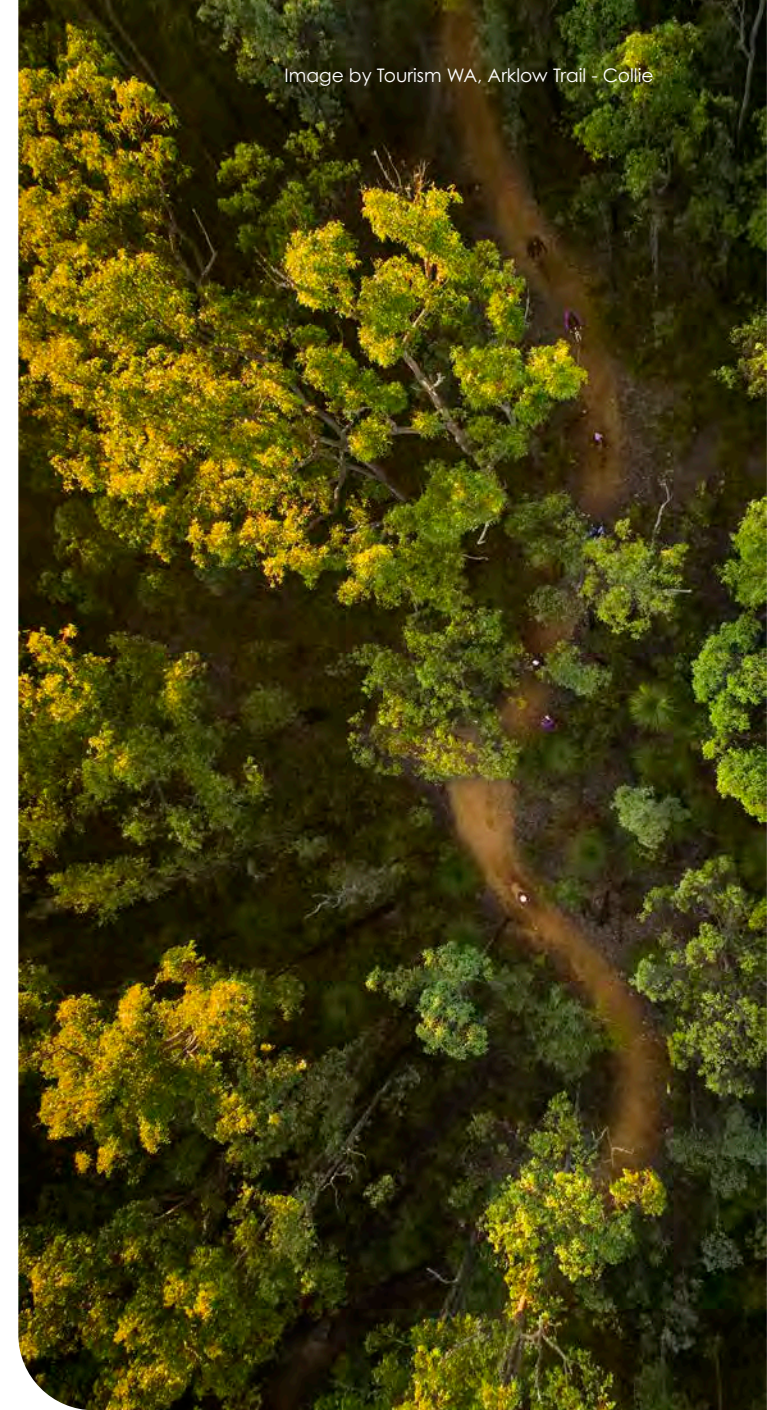
South West Regional Futures flags the looming need for energy security as the region transitions from coal-fired electricity generation to renewables. The need to pivot to a decarbonised economy is a given. That the community will unite and embrace the manner of change is not.

Understanding all the moving parts and options will be key to minimising division and moving forward in an informed way.

In addition to energy disruption, other enabling infrastructure will work through investment to support trade capacity and efficiencies through Bunbury Port. A longer term piece of the puzzle is the development of an intermodal terminal that connects South West roads, rail, maritime traffic and industry at Kemerton to Perth, the world's most isolated major city.

Another cornerstone is planning to develop an advanced manufacturing hub. That vision marries opportunity with land availability, resources, skills training and global trends. There is alignment with policy to decouple from an over reliance on overseas supply chains, to utilise green energy and enhance the region's market access through high quality transport networks including digital connectivity.

Mining and mine processing are the South West's most significant economic contributors. With the growth of the Greenbushes lithium mine, the highest grade and largest hard rock lithium deposit in





the world, and the multi-billion-dollar Albemarle processing plant, mining and minerals processing will become ever more important.

The South West is well placed to pursue opportunities in innovation and technology with Bunbury poised to underline its status as Western Australia's second city. The plantation and timber industry is highlighted as a fully functioning and collaborative cluster supplying export markets and creating products at a state and national scale. Opportunities abound in capturing carbon through a greater use of timber and expanding the plantation estate in suitable locations.

Tourism is of fundamental importance to the South West, as an employer and enhancing the regional brand at the international level. The Capes subregion is one of Australia's most tourism-dependent regions and a host of proposals can only heighten the South West's standing in the world while adding value locally through employment and changed perceptions, particularly in respect of Bunbury's waterfront. International cycling in Nannup, Busselton's performing arts and convention centre, Australia's first motorcycle trail hub in Manjimup, and first class mountain biking experiences at a number of regional locations all add to brand reputation.

In transforming the community, the South West Regional Waste Group looks to further boost the regional brand by moving towards circular economy principles and waste handling solutions that will add value across business, manufacturing, jobs and environment. Future plans at Stanley Road will elevate the region to sectoral leadership, establishing new standards in the waste industry and achieving State and Commonwealth policy goals.

Liveability remains a key regional advantage. From the 20-minute city to magnificent geo-landscapes, the South West can be a drawcard for long-term decentralisation across both the public and private sectors.

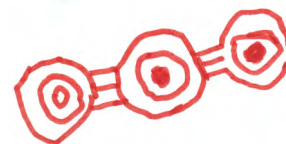
However, the region is not immune from national challenges. Accommodation shortages create hurdles for existing business and opportunities. There are housing shortages for critical mineral workers, those in tourism, agriculture and barriers for recruiting medical professionals.

Attention must be also drawn to water supply limitations, and furthermore, there needs to be greater endogenous growth in training and skilling, more investment in the ageing population – active ageing, social housing and aged health. There needs to be more innovative thinking, and first Australians must be brought on a shared journey towards enjoying better standards of living for all.

There is no lack of ideas and lists of projects to be funded, from rebuilding old sports pavilions and imagining trackless trams to re-routing roads and creating new berths at the port. While ambitions and innovative ideas are boundless, funding opportunities are not.

South West Regional Futures features a range of projects of differing scale, cost and impact. In particular, the document suggests a framework of consideration towards the back of the book, and highlights those projects that are genuinely transformative in their nature.

1 Introduction



The South West has been steered by a regional plan, in different guises, for more than a decade. Its achievement is demonstrated in successfully prioritising investment opportunities.

The power of a strategy that engages across its region and has its region's buy-in cannot be over-stated. While driven by Regional Development Australia, South West Regional Futures is the region's plan not RDA's plan.

It considers broad input and is influenced by other pieces of work such as that produced by the South West Development Commission and there is substantial input from the region's 12 local governments.

SW Regional Futures challenges readers to meet the years ahead with courage and confront both what will be exciting and what is likely to pose a threat.

Some of the ideas might seem provocative but they are based on genuine opportunity, comparative advantage and they have an eye on our rapidly changing world.

The first part of this work will note overall regional data and then we will move to future themes. This will provide a framework for discussion which will be enlivened by commentary on global megatrends, futurism and arguably a little speculation.

Regional Futures will explore several areas of opportunity and will dare to dream what might be.

Economic Infrastructure

- Roads
- Rail connectivity
- Port
- Airport
- Water
- Intermodal Hub
- Renewable Energy
- Fibre
- Telecommunications

- Advanced manufacturing
- Mining and METs
- Timber
- Agribusiness
- Tourism

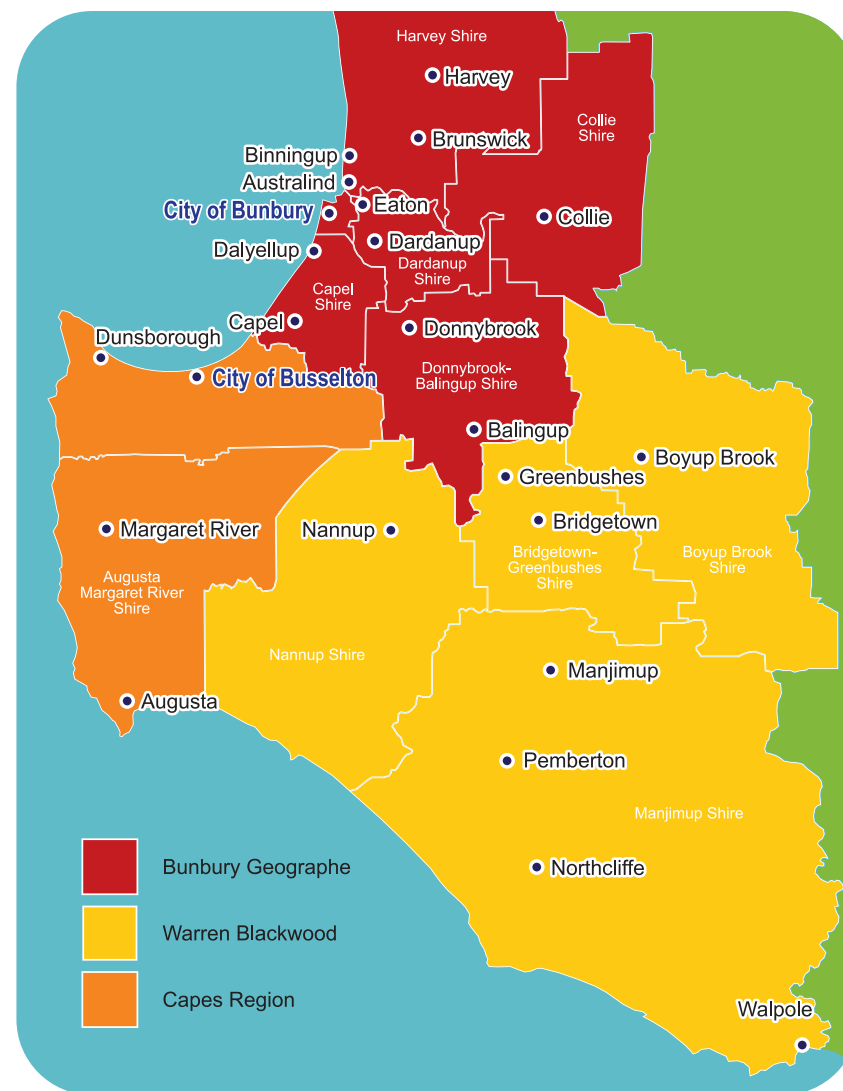
- Education and training
- Health and ageing population
- Housing and social equity
- Arts, sport and recreation
- Sustainable living and landcare

1.1 South West Locator

The South West is one of Western Australia's nine recognised regions located outside the Perth metropolitan area. Fronting the Indian and Southern Oceans, covering 24,000km² and including 12 local government areas, the South West is the most populous and economically diverse of WA's regions.



Image by Warren Blackwood Alliance of Councils, Beulah Wines



1.2 Purpose

This document provides an analysis of the factors shaping our world and consequent opportunities for the economic and social development of the region. It sets out key principles for guiding future investment and decisions. It incorporates the ideas and thinking of the public sector, local government, industry and community bodies. It is based on solid evidence and on consulting regional stakeholders, leading to a suite of investment proposals.

Regional Development Australia – South West (RDASW) has worked substantially with the region's local government bodies to provide the best possible advice to both Commonwealth and Western Australian Government on the region's strategic imperatives.

The framework for Regional Futures is based on investments that support a prosperous society where business creates jobs and the whole community is supported in the context of a healthy natural environment.

The framework is based on three pillars:

- Economic infrastructure
- Industry, business and investment
- Community and environment

It is intended to link the pillars, demonstrating that prosperity and sustainability should and must go hand-in-hand.

While the document may dare to dream, a key intent of Regional Futures is to present a robust rationale underpinning actions that are achievable over differing time horizons. The evidence-base is derived from a variety of statistical, academic and planning sources as well as:

- An understanding and recognition of the region, its economic history and values;
- Analysis of national and global megatrends that will shape the future in a significant and material way;
- Analysis of more than 50 Commonwealth, state and local level planning strategic documents; and
- Analysis of the region's key determinants of long-term regional growth within recognised regional development principles of human capital, sustainable communities, access to markets and comparative advantage all brought together through working in partnership.

These considerations lead to actions underscored by identified priority areas that are geared to generating jobs and prosperity in the region. It is important to note these actions do not represent funding commitments by Government but rather set out a broad direction for exploring action agendas.

Image by City of Bunbury, Casuarina Harbour



2 Context



2.1 Regional Qualities

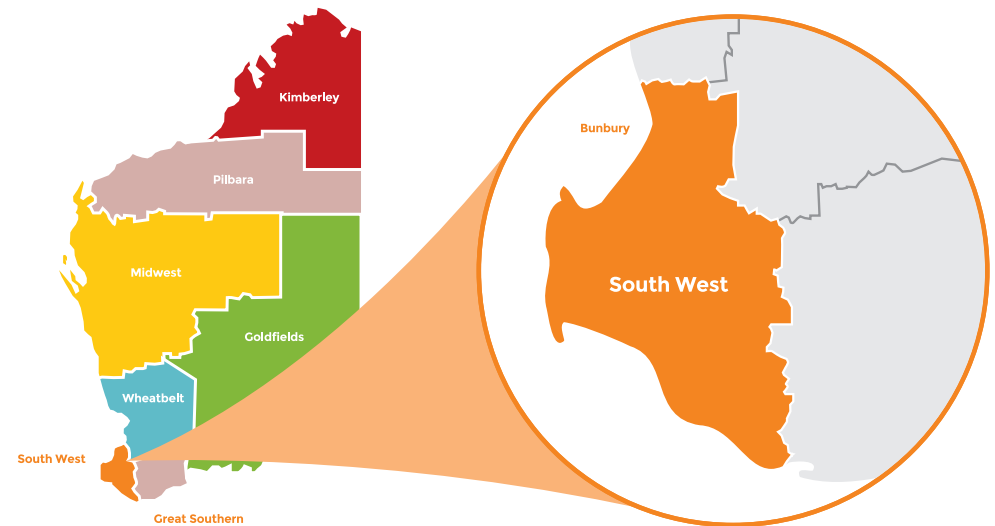
The South West region is approximately 24,000km² of which 16,000km² comprises of State forest, national parks, conservation parks, nature and timber reserves. About 6,000km² is occupied by agricultural and rural uses; with some 2,000km² used for industrial and urban development.

The Noongar people are the traditional owners and have widespread cultural and heritage links to places in the region. The future involvement of Noongar people in the economic and social fabric of the region is important in respect of social equity and closing the gap.

2.1.1 Bunbury Geographe

The urban and administrative focus of the Bunbury Geographe sub-region is Bunbury, Western Australia's largest regional centre. The urban area that is Greater Bunbury includes residential areas in the local governments of Bunbury, Harvey, Dardanup and Capel.

The sub-region features substantial mining resource processing operations, served by Bunbury Port and strategic industrial areas at Kemerton, Waterloo, Worsley and Shotts. The power stations around Collie are facing closure in the short to medium term as the Western Australian Government has committed to cleaner energy options. In the meantime, programs have been put in place to transition the workforce.



Greater Bunbury has a range of higher-order services and facilities, including the Bunbury campus of Edith Cowan University, South Regional TAFE and the South West Health Campus which includes Bunbury Regional Hospital and St John of God private hospital. Most specialist services within the South West are located in Bunbury.



2.1.2 The Capes

The Capes sub-region comprises the City of Busselton and Shire of Augusta-Margaret River. Its economic base includes tourism, creative industries, premium wine and food production and agriculture. The City owns the region's major airport which has grown from an operational FIFO base to secure interstate flights to Melbourne in 2022, expanded to Sydney in 2024. It has significant potential to expand interstate travel, with medium term ambitions to forge international connections into Asian markets.

The Margaret River region is a globally recognised brand which helps attract 86% of all overseas tourist visitation to the South West. Margaret River has a strong affiliation with its stunning natural assets while Busselton is the principal commercial and administrative centre for the sub-region. Busselton also features spectacular scenery and is a drawcard for visitors, particularly through events and its foreshore which is highlighted by the iconic 1.8km jetty.

2.1.3 Warren Blackwood

The Warren Blackwood sub-region has an economy based on agriculture, mining, timber and tourism. Manjimup is the sub-regional centre and includes the shires of Manjimup, Boyup Brook, Nannup and Bridgetown-Greenbushes. Manjimup Shire has more than 500 agriculture businesses that collectively generate \$541m in annual agricultural output (ABS 2024). It is WA's largest horticulture producer. Similarly, agriculture re-mains the dominant industry in Boyup Brook, accounting for 57.2% of all employment in the Shire.

The Warren-Blackwood has the largest number of individual small settlements of the South West, mainly a result of the historic development of small timber mill towns that emerged almost a century ago.

Access to native forest timber ceased in 2023, effectively end-ing the hardwood timber industry. However, the sub-region features significant softwood plantations.

Greenbushes is home to the world's premium lithium ore (spodumene) resource, producing 20% of global supplies. The operation continues to expand and feeds processing plants in Kwinana and in Kemerton, 17km from Bunbury Port. The Greenbushes Chemical Grade Plant 3 expects to process its first concentrate in the December 2025 quarter.



Image by Tourism WA, Frances Andrijich

Megatrends are large, transformative processes with global reach, broad scope with fundamental and dramatic impacts which could throw companies, individuals and societies into freefall. Megatrends are interlinked and involve a significant shift in environmental, societal and economic conditions.

The following points are drawn from a number of sources which generally interrelate, albeit with differing nomenclature. There is a mix of what is very clearly coming soon and 'weaker signals' of what is likely but less guaranteed. It is noted that the global pandemic continues to negatively influence trade and behaviours. So too has the war in Ukraine, conflict in the Middle East and Chinese activities in the South China Sea as geopolitical shifts add weight to the human dimension over trust, fairness, governance and environment.

2.2 Global Futurism and Megatrends

2.2.1 Urbanisation and energy

City dwelling has passed the 50% mark and it is predicted that 68% of the world's population will live in cities by 2050. This pressure alongside disruptive technologies will remap cities.

While cities are attractors, it is predicted that talent will leave behind megacities for smaller, more liveable cities. For the first time, 2020 saw more people leave Australia's two biggest cities for the regions, rather than regional people move to cities. The pandemic experience also saw increased interest in regional lifestyle and family liveability.

Urbanisation and a growing middle class in emerging economies will mean more people have disposable income. This will lead to increased consumerism and a greater demand for energy. The consequence will increase the push for energy efficiency and renewables in line with the State and Commonwealth policy drive to Net Zero.

The Australian Energy Market Operator (AEMO) reported WA's record energy demands in early 2024, echoing the prediction from CSIRO Megatrends (2022) that energy needs will continue to soar. Demand and calls for green energy will create greater employment as manufacturers look to remove emissions from their supply chains. Countries like Australia have a solar advantage.

2.2.2 People and society

Ageing populations will drive change in healthcare which will be more predictive and tailored. OECD nations will be impacted more than most and CSIRO (2022) predicts that Australians aged 65+ years will comprise 23% of the population as the ratio of working people to non-working goes from 4:1 to 2.7:1. This will force new thoughts on future-proofing infrastructure, planning, aged care and housing.

It is expected that of those aged 10-24 years, 90% will live in less developed nations by 2050 and the world population is predicted to be between nine and ten billion. Most scientists consider this a maximum upper limit given that the Earth's carrying capacity would be as low as two billion if all those people consumed at the same rate as the average American.

Society will have an increasing demand for personalisation and experiences as millennials become the largest demographic. For Australia, the impact of ageing will be on the future labour market, healthcare and the widening savings gap.

Economic inequality will become more extreme across most of the world. Refugee crises and human migration will add to the strain as the next waves of disruption promise to push these conflicts to a breaking point.

The future of work and human augmentation could produce a massive displacement of work and workers. Adding to the pressures are climate change, disease and excessive debt. These will collectively reframe the social contract between governments and citizens.

2.2.3 Education and skills

Education systems are planning significant transformation to align with the future of work. The future will be less about knowledge and more about a lifelong approach to developing critical thinking, problem-solving and communication skills, teamwork and leadership capabilities, and being technology-enabled.

Universities and the VET sector need to embrace change and work together. The need for reskilling will combine higher education and vocational; the key being right-time right-place education. Learning pathways will need to be easier to navigate and flexible, offering more choice and micro credentialing options.

Australia has a skills deficit along with most other countries and collectively, we need to increase work-integrated learning and particularly increase STEM-skilled graduate numbers.

Gig economy growth will leave low paid workers vulnerable and automation will impact on the unskilled who will suffer increasing economic displacement. So too will those with less access to technology. The role of education and skills training cannot be underestimated in the coming decade.

2.2.4 Climate sensitivity

The changing climate will become an ever more powerful driver as forests and farming is impacted by continued rainfall decline, storm events become more extreme, bushfires pose greater threats and habitat is threatened. National Tidal Centre data showed that the South West had the greatest sea level rises in Australia (+7.4mm/pa, 1990-2010) which will inevitably impact coastal infrastructure.

Regardless of what people believe is the cause, the planet is getting hotter – every year for 44 years now. Bushfires have seen issues become increasingly political and there will likely be conflict between those seeking restoration of ecosystems and those seeking technological solutions.

Innovation in food, water for food and consumer attitudes will drive change as the impact of population and climate change affects lives. This will likely form a part of the deglobalisation attitude and shift to localisation – farmers' markets, seasonal foods and so on.

The direct impact of climate change on Africa will have global implications for 'climate refugees' and the movement of people. Refugees in advanced nations will see jobs market tighten which would prompt decreasing tolerance towards immigrants particularly as some will lack the skills to find employment.

2.2.5 Depletion, extinction and resource security

In the face of declining farmland, it is estimated that the world will need to produce 35-56% more food for a growing population with increasing demands by 2050. The UN estimates the loss of 12 million hectares of productive farmland to desertification and degradation every year.

World fisheries may collapse within 30 years and in a little more than a decade, demand for water will increase 40%, and for energy 50%.

Rare earths and components for technologies will be running out. Research will need to be a priority to protect the quality of life and resources, particularly utilising waste. Australians produce 1.5kg of waste daily compared to the world average 0.7kg. End of life plastics will need to be targeted for recovery and to avoid landfill.

Extinction threats and environmental damage will reach a critical point demanding a response. It is believed that the pressure for positive change will escalate and cannot be ignored.

2.2.6 Technology and the workplace

Machine learning, AI and AR (artificial intelligence and augmented reality) will not only drive efficiency and productivity, but an increasing need for the efficient flow of data which will be more important at the edge of the internet since the traditional cloud model lacks real time responsiveness.

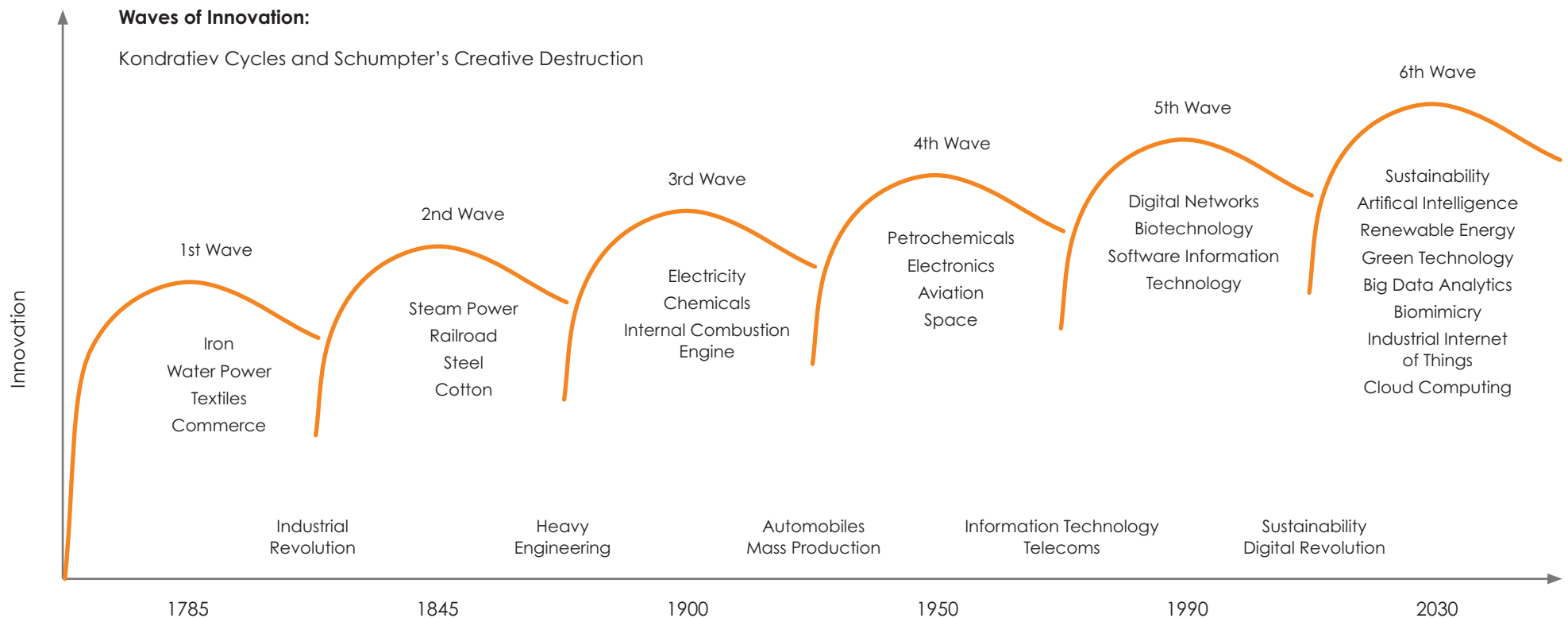
Technologies will boost efficiencies and productivity so companies that traditionally had a business edge through human efficiencies will lose that

advantage and will need to compete through quality and innovation.

Edge computing will begin to change everything and is necessary to implement change such as autonomous vehicles which will need to interact with each other and not just their physical environment. For Australians, 5G will shape as a solution to data sharing in a more localised way. The connectedness of products through the internet of things will pose

substantial cyber security threats while the ability to gather and analyse data in real time will not be a competitive advantage, it will be a necessity.

Blockchain will be vital in respect of product trust and preventing food fraud (substitution and adulteration). The aim is to guarantee quality and provenance in a competitive world challenged by misinformation. Blockchain will facilitate efficiencies and automation, for example, in purchasing.



2.2.7 Manufacturing shift

Business is shifting from products to services which are becoming increasingly important in a world where knowledge is a commodity.

Total exports of services rose 27.6% in 2023-24 to reach \$124bn (ABS). It was primarily driven by the tourism sector.

However, COVID-19 exposed business risks impacting on those dependent on multiple supply chains, and the experience has reset thinking on overseas manufacturing reliance.

Some relief will likely come through additive manufacturing. Improvements in technology and 3D printing will become the norm with onshore suppliers able to layer materials to create required items. The 'molecular economy' could be a very significant disruptor.

Nanotechnology will be a disruptor that challenges current manufacturing and while the 'next greatest thing' in technology can vary, the trend is towards ever more compact and mobile.

It is expected that the continued move to mechanisation will impact on labour and risk jobs. The positive aspect for Australia is that with labour costs removed there will be a more level playing field in respect of input costs and global competitiveness. Workers in emerging economies will be particularly vulnerable.

The World Bank predicts the leading risk to workers will be in China (77%) and India (67%). The consequence is political risk focuses on the young age demographic of those countries where unemployment could be as high as 34%.

Top 5 leading economies by GDP

- 1 United States
- 2 China
- 3 Germany
- 4 Japan
- 5 India

Top 5 export markets for Australia

- 1 China
- 2 Japan
- 3 South Korea
- 4 India
- 5 United States



2.2.8 Economic powerhouses

Economic shifts will continue to see influence shift from West to East, and North to South, as the world economy restructures towards the Asian century.

It is expected that within the next decade, the combined E7 countries (China, India, Brazil, Mexico, Russia, Indonesia and Turkey) will double the GDP of G7 nations (Canada, France, Germany, Italy, Japan, the United Kingdom and the United States).

Added to this, up to two-thirds of the world's middle class will live in the Asia Pacific within a decade. The impact on OECD economies may lead to protectionism, nationalism and deglobalisation.

Futurists note that Indonesia should not be overlooked in importance, especially to Australia as a key market. Indonesia is ranked 17th in the world in terms of GDP and its citizens are generally young, increasingly educated and with greater levels of disposable income.

The Asia-Pacific's cities will be seen as important markets. Some single city populations will grow to the size of modest countries and should be considered as target markets in their own right.

Developing commercial and friendly relationships based on trust and respect will be the key to political and economic stability.

Image by Tourism WA, Beedelup Falls



3 South West Overview

Regional Economic Snapshot

In 2024, the South West Region's Gross Regional Product exceeded \$19.6bn to set a new benchmark, accounting for 4.3% of WA's Gross State Product (ABS National Accounts). An average annual estimated GRP growth rate of 5.3% was achieved in the years 2016-2024, with negative growth reported in 2020.

The South West has a broad economic base with manufacturing, construction, mining, agriculture, tourism and timber processing key elements. There is a strong business and retail sector with an estimated 17,118 businesses in the South West. The main contributors to economic output in the region are Manufacturing (22.4%), Construction (14.5%) and Mining (15%).

Small and medium enterprises are the most significant employers with only 3% of all businesses employing more than 20 staff. Most production in the region is small scale and relies on premium markets to generate return on investment. Marketing premium quality is the principle characteristic of South West competitiveness.



Figure 1 – South West Gross Regional Product, nominal terms, 2016-2024

Source: ABS 2021 Census Place of Work Employment (Scaled), ABS 2022/2023 National Input Output Tables, and ABS June 2024 Gross State Product.

3.1 Framework for Analysis

With the regional data and megatrends highlighted, an opportunity exists to look at South West data and overall prospects, and then discuss through the lens of agreed regional development determinants as established by the Council of Australian Governments and accounting for both the Australian Government's regional priorities and the Western Australian Government's regional strategic vision as delivered through the South West Development Commission (SWDC).

3.1.1 Determinants of regional development

- Connectivity and infrastructure: Access to international, national and regional markets (including supply chain infrastructure and digital capacity).
- Regional employment and business: Comparative advantage and business competitiveness boosted by clustering, R&D and a strategic regional vision.
- Human capital and skills: Adaptable and educated workforces supported by further and higher education facilities.
- Sustainable (economically, environmentally and socially) communities and population: supporting liveability, natural resources, opportunities and jobs.
- Effective cross-sectoral and intergovernmental partnerships and integrated regional planning: collaborative approaches provided by regional leadership, shared goals and including the Aboriginal community.

3.1.2 Pillars of the Western Australian Government's regional strategic themes in the South West

- Attracting new investment and business activity.
- Facilitating a robust pipeline of infrastructure investment.
- Providing ongoing support for the revitalisation of Collie.
- Providing ongoing support towards Bunbury's urban development and expansion.

In relation to these themes, SWDC notes priority sectors where significant growth and diversification opportunities exist for the region:

- Energy (including renewables).
- Technology and advanced manufacturing.
- Mining and Mining Equipment, Technology and Services (METS).
- Primary Industries, including Agriculture, Forestry and Fishing.
- Tourism, events and creative industries.
- Trade and investment.

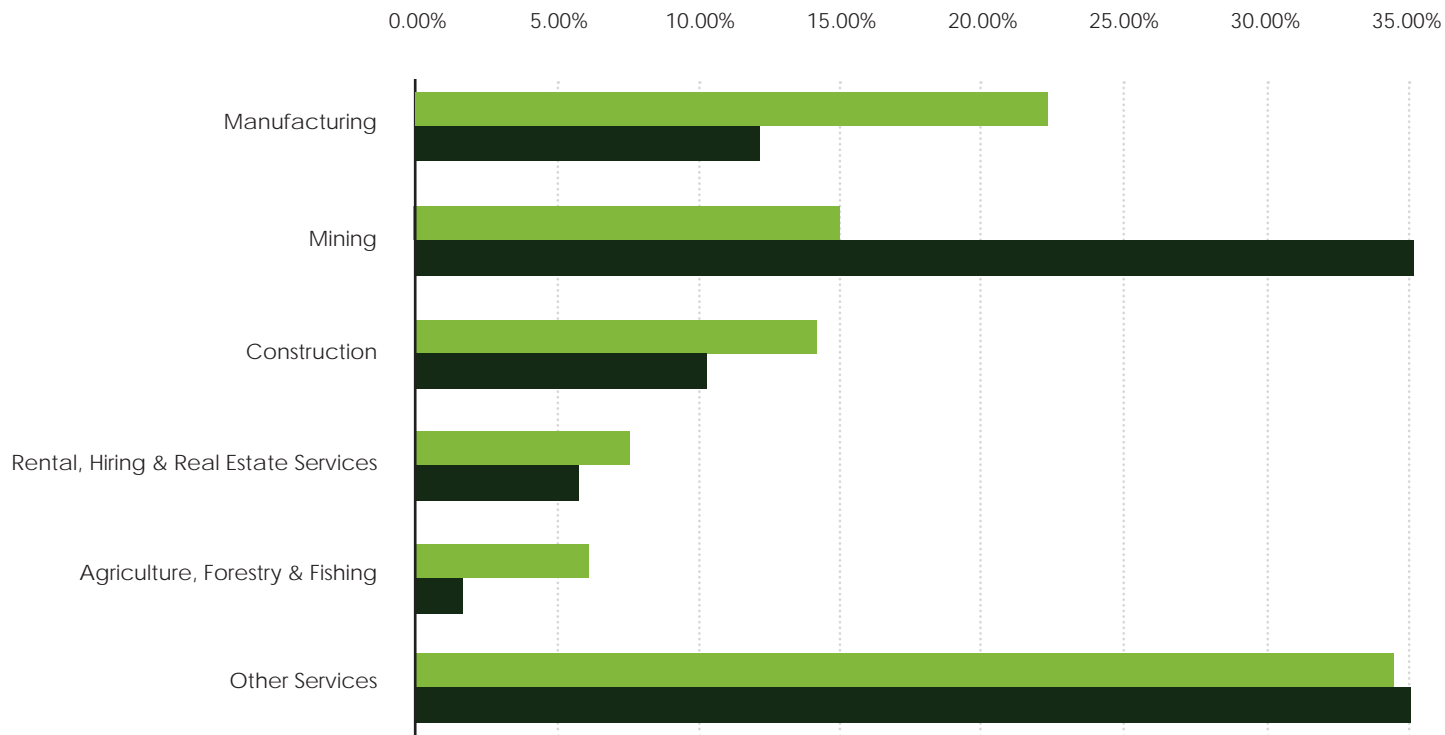


Figure 2 - Structure of the South West and Western Australian Economies, percentage share of output by sector REMPLAN 2024

Source: ABS 2021 Census Place of Work Employment (Scaled), ABS 2022/2023 National Input Output Tables, and ABS June 2024 Gross State Product

■ Sector's share of South West Economy %
■ Sector's share of WA Economy %

3.1.3 Regional SWOT

This forms a mix of domestic and bigger picture prospects and pressures

STRENGTHS

- Regional economic diversity
- Resources processing
- Transport infrastructure (road, rail, airport, maritime)
- Clean, green brand/reputation
- Softwood timber industry cluster
- Position in Asia and on the Indian Ocean
- Geo-landscapes and natural beauty
- Regional liveability and lifestyle attractors
- Proximity to the State capital
- Sustainable population
- South West Health-Education Precinct

WEAKNESSES

- Distance from major population centres
- Population demographic, particularly ageing in some areas
- Critical mass of people in the hinterland
- Number of seasonal/low paid jobs
- Water infrastructure for agriculture, industry and urban liveability
- Reliance on seasonal workforces
- Reliability of energy
- Constricted housing supplies and high rents
- Limitations on waste facilities
- Lack of fill materials for development

OPPORTUNITIES

- High tech manufacturing and digital technologies
- Public/private sector decentralisation
- Growth in agriculture and food demand
- Growing Bunbury as WA's second city (in every sense)
- Waste as a resource
- Renewable energy
- Proximity to SE Asian markets and Busselton-Margaret River Airport
- Alternative building and infrastructure construction practices
- Education to meet skills needs
- Climate studies and pilot projects
- Improved tourism product
- Increasing liveability

THREATS

- Housing and worker accommodation shortages
- Climate change and declining rainfall
- Water security, quality and quantity
- Slow pace of energy transition
- China trade relationship
- Poor appetite for long term investment (plantations)
- The cost of energy and commodity price volatility
- Ageing population
- Biosecurity and disease
- Investment in long-standing resources has flat-lined
- The cost of doing business in the South West
- Bushfire and coastal inundation

3.2 Region and Prospects

The region and its prospects will be discussed in reference to trends that point to the future and best practice economic development principles. Infrastructure Australia (2021) and the Regional Australia Institute's Regionalisation Ambition 2032 both acknowledge the increasing attraction of small cities and regional centres which is highlighting infrastructure gaps, barriers to regionalisation and enabling investment.

3.2.1 Connectivity and infrastructure (access to markets)

Distance is an economic hurdle than can only be surmounted by world class infrastructure – roads, rail, port, airports, intermodal hubs and data superhighways. It is important to acknowledge that the South West's regional centre is 185km from the world's most isolated capital city. Quality infrastructure is therefore a supply chain facilitator of market access and enabler of competitiveness.

It is important to note that with much of business being digitally based then communications are as essential as traditional transport infrastructure. The South West's relative global remoteness is mitigated by quality fibre connections and paves the way for attracting decentralised public and private workforces to a region featuring outstanding natural beauty and liveability.





Image by City of Bunbury

Roads

The South West has a quality road network that has benefited from upgrades to the Collie Highway and Wilman Wadandi Highway (WWH) works with associated duplication of the Bussell Highway. The WWH boosts links with the 1350ha Waterloo Industrial area, Kemerton and the Bunbury Port. The new outer ring road will service the timber precinct as well as facilitating the smooth flow of traffic to the Capes.

A future bottleneck is likely to be the Busselton Bypass which will require duplication though to Vasse. The bypass will service Yalyalup Industrial Park close to Busselton-Margaret River Airport, connecting to south of Vasse and Carbanup in 15-20 years. Before that, the Vasse-Dunsborough link will require enhancement and additional works are likely to be needed on the main Forrest-Bussell Highway corridor. Extra passing points will be necessary on the South Western Highway.

Rail

The main Perth-Bunbury line (Claisebrook-Picton) line has been close to capacity for some time, particularly from Brunswick to Picton where freight from Worsley and Collie join the line to Bunbury Port and contribute to 40 movements per day. There remain limitations on containers and constraints due to the lack of standard gauge tracks (21-tonne axle loads). Long term growth at Kemerton would also benefit from a rail spur to service investment.

Investigations into the re-establishment of the Greenbushes rail line have been ongoing but challenged by mineral price volatility.

Bunbury-Perth passenger services will be restored by the end of 2025 with two new three-car Australind train sets. These will enter service at the same time the Armadale line is reopened.

Bunbury Port

The port operates across the Inner and Outer Harbours, although management of the southern section of the latter has been handed to the WA Department of Transport. This will free up land for integration into the Bunbury Waterfront project over the coming decade.

The Inner Harbour features 400ha of quality and available development land with potential to accommodate overflows from Kwinana and Fremantle. Bunbury Port has continued to meet regional trade demand since it was founded in 1864 and adapts to market changes. Current trade continues to be 17-18mtpa. Organic growth is expected in the years ahead.

While the Westport Taskforce recommendations on container options focused on Perth, about 30,000 TEUs (Twenty-foot Equivalent Units) are now generated in the South West each year. Pressures on the Western Trade Coast has maintained interest in Bunbury as a roll on/off (ro-ro) port, and several studies continue to focus on the future trade scenarios on the West Coast.

Regionally, the port has a critical role in facilitating trade and servicing the resources sector which produces the bulk of the region's output wealth. With changing energy demands, the port is experiencing greater engagement with renewable energy projects and will continue to facilitate the future energy trade requirements for the region.



Image by Bunbury Port

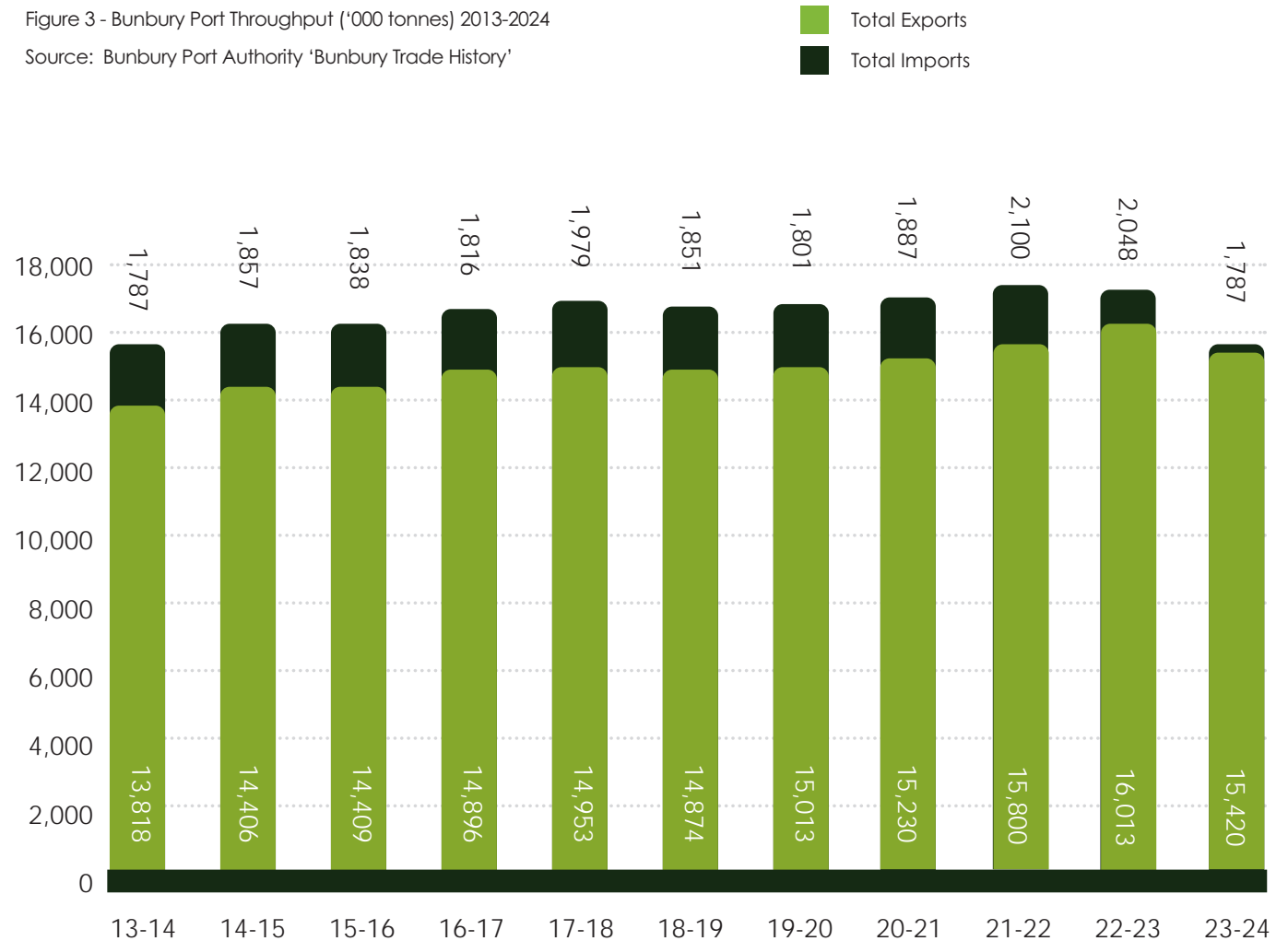


Strategies to support Energy and Water Infrastructure

- Encourage investment in renewable energy production and battery storage to decarbonise the future.
- Envision renewable energy as boosting the credentials for industry and the South West's clean/green reputation.
- Three-phase power provision for light industry precincts and water supplies at a pressure necessary for fighting fires.
- Progress the Myalup-Wellington water project to tackle salinity and trigger investment in piped irrigation.
- Encourage R+D and investment in water infrastructure and improve irrigation efficiency through consolidated schemes.
- Monitor the legislated introduction of water trading as a tool to drive efficiencies in a drying climate.
- Increased use of 'waste' water resources for reuse and/or aquifer recharge.
- Integrate sustainable water and power principles in any retrofit or new builds.

Figure 3 - Bunbury Port Throughput ('000 tonnes) 2013-2024

Source: Bunbury Port Authority 'Bunbury Trade History'



Airports

Busselton Margaret River Airport is the region's principal airport. Airside redevelopment work features a 2520m runway supporting Code 4E commercial aircraft (Boeing 737 and Airbus 320, 330) with the capacity for services to reach China. The airport's key passenger carrier is Jetstar which flies direct to Melbourne and Sydney.

BMRA aims to serve the region's tourism potential as a powerful economic driver on the back of up to 250,000 passengers projected to pass through the BMRA in 2026. Those numbers will exceed the capacity of existing landside infrastructure and underpin the rapidly growing pressures to develop a fit-for-purpose terminal.

The airport currently has 41 scheduled Fly in Fly out (FIFO) charter flights that service mine sites in the state's Mid and North West, 3 direct services per week to Melbourne and 3 direct services per week to Sydney. The introduction of a tri-weekly Busselton-Perth service will encourage both domestic and international visitation. In 2023-24, a total of 156,095 passengers passed through BMRA. This number is forecast to reach 190,000 in 2024-25 when all the figures are in.

Additionally, the airport serves ad hoc charters, tourism operators, emergency services (DFES, RFDS) and a growing general aviation community. With BMRA's close proximity to Perth, the regional facility is also an alternate airport for airlines when Perth Airport may not be available. Potential for the airport includes expanded destinations in Australia and overseas, serving passengers and freight. The airport benefits from extensive and nearby greenfield development opportunities which could serve freight as well as transport logistics, aircraft engineering and maintenance, and other industries.

Bunbury Airport has WA's highest number of light aircraft movements after Jandakot in Perth. Bunbury services private aviators and supports three flying schools as well as the region's rescue helicopter and seasonal water bombers. The site is home to more than 50 hangars and 100 aircraft. Expansion would require the realignment of the South Western Highway.

Manjimup Airfield caters for various aviation services such as the RFDS, emergency fire-fighting, private aircraft and has a small number of FIFO flights.

Image by City of Busselton, Busselton Margaret River Airport

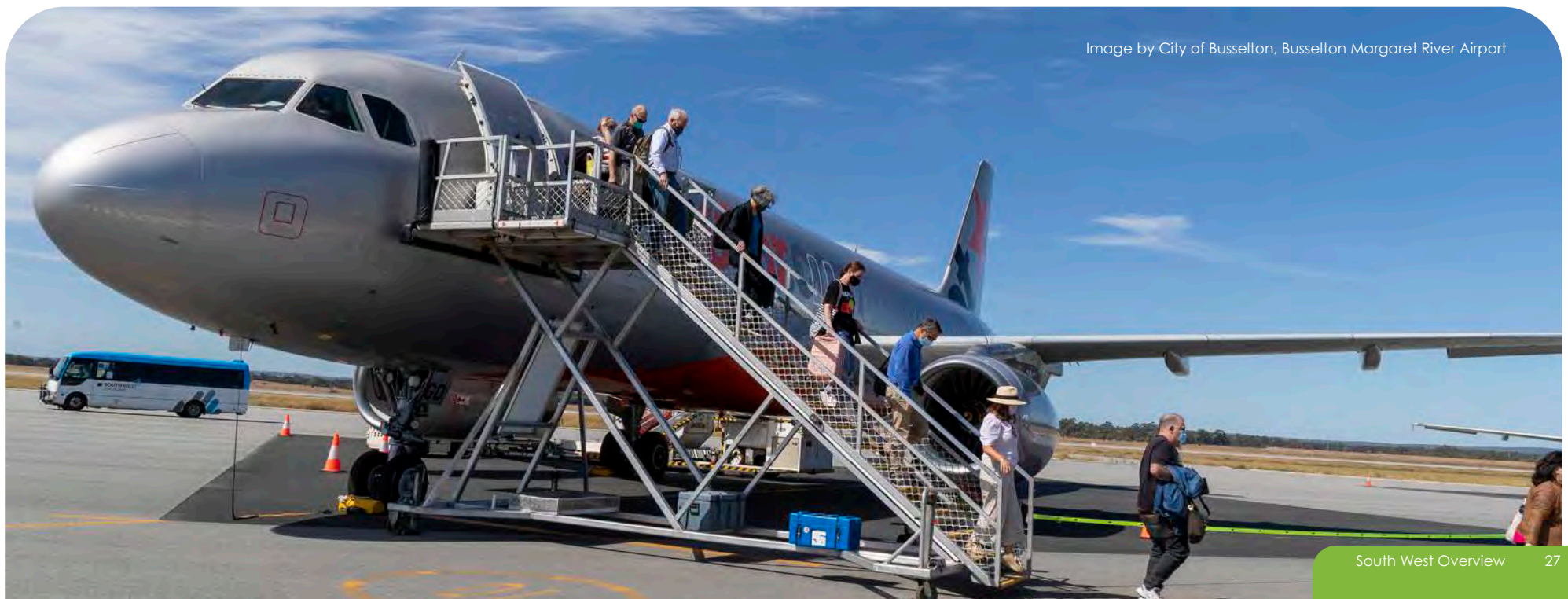




Image by Russell Ord Photography

Energy

The energy landscape is creating opportunities and unprecedented threats in equal measure. The Australian Energy Market Operator (AEMO) 2025 report concludes that 1,700 MW of ageing coal and gas power stations are expected to retire from 2027-32. There are plans to phase out coal by 2030, but renewable energy projects will not be developed fast enough to cover a predicted 932 MW shortfall in the next two years.

Coordinated by WA Treasury, the SWIS Demand Assessment estimates peak demand in the South West Interconnected System (SWIS) will more than triple by 2042. That means the South West could require up to 51GW of new energy generation and storage capacity to meet the needs of industry over the next 20 years. That will leave the South West with a serious energy demand deficit although 500MW of new grid-scale batteries are help balance supply and demand which is being challenged a lengthening demand period – and growth.

Batteries are also helping to stabilise the grid as Australians 'electrify' their homes.

With shortfall predicted, the reality is that if coal-fired power stations closures are firm, then there will need to be significant (and immediate) energy investment.

Collie is at the centre of the SWIS transmission network and has attracted multi-billion-dollar battery investments. These will help stabilise the grid and better

manage solar. Domestic penetration of rooftop solar in WA is the highest in the world and it is expected to blow out to 50% by 2030.

The 2025 Electrical Statement of Opportunities report notes: "In 2027-28, following the closure of more coal-fired generation, more capacity will need to be procured ... to avert energy shortfalls that are otherwise forecast to become more prevalent. While there is substantial continued interest in battery storage to help maintain reliable supply, investment in storage alone will not suffice. At least 110 MW of new generation sources such as gas, wind and solar generation will be required."

The South West economy is dominated by manufacturing. Albemarle, South32, Iluka Resources, Tronox and Simcoa all have huge energy demands. Resolving the energy challenge is the leading issue in the region. It is unlikely that sufficiently scaled wind infrastructure will be producing energy before 2033-34. It is therefore increasingly urgent that projects are fast-tracked as soon as possible, along with an extended transmission line network to take best advantage of low population and consistent, clean wind opportunities.

The region also needs to look to green hydrogen. The WA Renewable Hydrogen Roadmap supports remote communities and fuelling vehicles, particularly in return-to-base operations such as mining and waste services.



Image by Frances Andrijich, Wellington Dam

Water

Water security will be one of the region's greatest challenges. CSIRO found that the South West was 'one of the most water challenged' parts of the country. Rainfall has declined 15% since 1975 and continues to see a contraction along a NW-SE axis towards Cape Leeuwin.

Agriculture uses about 60% of all water in the region and 185GL Wellington Dam (the State's second largest surface water supply) is increasing in salinity. The dam's salinity levels of 1,000-1,500 mg/L (WA Government) have resulted from clearing in Collie River East Branch and are well above the 500 mg/L total dissolved salts acceptable for potable water. It is also considered too high for sustaining irrigation. Industry leaders believe that water is under-valued and so users can be wasteful, particularly in industry.

The prospects for water security are concerning without significant investment. It is preferred that interventions are pre-emptive rather than reactive.

Telecommunications

The South West is relatively well served by high speed communications, domestically at up to 100Mbps and in Business Fibre Zones at 1Gbps in Bunbury, Busselton, Margaret River and Collie. It is expected that technology advances, particularly with 5G Internet will boost a lot of areas, although fibre offers the greatest stability. The five key functional telecoms drivers include: superfast broadband, ultra-reliable low latency communication, massive machine-type communications, high reliability/availability and efficient energy usage. (PWC 2020)

NBN Co set a world record long range 5G transmission in 2021. That record 1Gbps signal over 7km from a fixed wireless tower is now held by e&UAE's 30.5Gbps set in 2025. Increases in fixed tower technologies will benefit South West due to a concentration of towers. That, Low Earth Orbit satellite progress and other advancements are critical to the region's proposals to create a Digital Innovation District/Advanced Manufacturing and Technology Hub.

Strategies to support Connectivity and Infrastructure

- Complete road and standard gauge rail links to the Port of Bunbury, delivering through the Bunbury Outer Ring Road and associated transport infrastructure.
- Boost supply chain improvement opportunities through an Inter-modal Terminal (IMT). Link industrial parks, the port and interoperable transport connections via the IMT and staging areas, including standard gauge rail.
- Upgrade the port to support projected trade expansion and to cater for additional traffic related to renewable energy projects.
- Plan for the longer term delivery of the Busselton Outer Bypass, investigating options of first putting in place a Dunsborough-Vasse Link.
- Create more passing places on busy single lane roads, particularly the South Western Highway.
- Prepare for the delivery of the Brunswick rail duplication.
- Deliver a study to determine preconditions for faster rail, benefits and opportunities.
- Expand Busselton Margaret River Regional Airport infrastructure to provide visitors with a premium experience and exporters with freight options.
- Consider bigger picture utilities infrastructure to support growth and environmental values.
- Continually drive communications upgrades to remain competitive and to support communities.
- Provide leading edge internet connections throughout the region's rural areas, particularly supporting farming communities

3.2.2 Regional employment and business (comparative advantage and business competitiveness)

Competitive advantage tends to come at the intersection of comparative advantage, good market access and opportunity. The South West's sub-regions feature aspects of different industry sectors although each has focus points based on inherent advantage – resources, agriculture and natural beauty.

Mining, Mineral Processing and Mining Equipment, Technology & Services Sector (METS)

The importance of the mining sector to Western Australia is widely acknowledged, but the mining/manufacturing value to the South West is less well recognised. Mining and manufacturing's value is a third of the total economy and that is growing.

The region is well placed for the future in alumina/bauxite processing, and particularly in lithium-rich spodumene production. The Talison Lithium plant in Greenbushes is in the middle of a 10-year transition. Five years ago output was at 650,000t and last year it was 1.35mt with quarterly sales exceeding \$2bn. By 2027 the forecast output is 2.2mt. With an anticipated mine life of more than 20 years, the Kemerton-based lithium processor, Albermarle is also expanding to meet worldwide demand.

In respect of titanium dioxide, compound annual growth rates of 5.3% are predicted

through to 2032. The region's mineral sands enterprises (Iluka and Tronox) contributed almost \$900m in sales (2022).

The sectoral picture for employment is muddled since the South West is home to a significant FIFO workforce and Alcoa's major alumina plant at Waaerup is located just inside the neighbouring Peel region but the bulk of the workforce hails from the South West with exports going through the Port of Bunbury. Mining in the South West employs more than 3,000 persons in-region, while almost that number travel outside the region for work.

Regional METS prospects are outstanding.

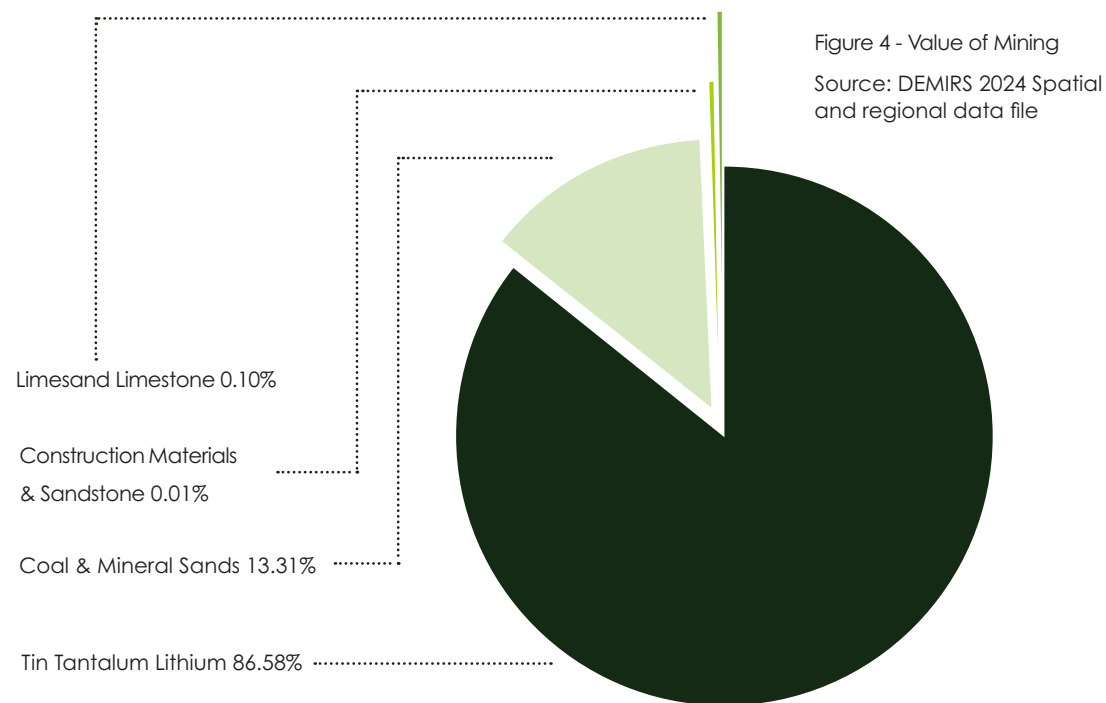
Note - Mineral and petroleum sales are necessarily allocated to a single Local Government Area (LGA) and Region, even though mining and processing operations may be located within multiple LGAs and Regions. Sales are allocated to LGAs and Regions based on where a mineral or petroleum product is originally extracted.

South West Region Value (by Commodity) 2023-24

Tin Tantalum Lithium	3,644,996,076
Coal & Mineral Sands	560,293,805
Limesand Limestone	4,097,570
Construction Materials & Sandstone	441,816
South West Total	4,209,829,267

South West Region Value (by LGA) 2023-24

Bridgetown-Greenbushes & Manjimup	3,645,023,698
Collie & Donnybrook-Balingup	463,015,376
Busselton & Augusta Margaret River	101,366,262
Harvey	423,931
South West Total	4,209,829,267



South West Region Mining Employment by LGA

Augusta-Margaret River	7	Bridgetown-Greenbushes	596
Bunbury	1,796	Busselton	69
Capel	378	Collie	2,687
Donnybrook-Balingup	1	Harvey	821
South West Total		6355	

Strategies to support mining competitiveness

- Improving transport efficiency through standard gauge rail and interoperable freight networks connected through an intermodal terminal linking in with the port of Bunbury and the Kemerton Strategic Industrial Area.
- Improving current reliability and capacity in the South West Interconnected System (SWIS) to service existing demand.
- The development of a reliable and cost-competitive green energy grid from 2030 with the capacity to service an increase in future commercial and industrial loads as forecast by the State Government's SWIS Demand Assessment.
- Major streamlining of existing environmental approvals processes that avoid Federal and State Government duplication while preserving existing levels of scrutiny that ensure industry maintains its robust environmental credentials.
- Access to accessible turnkey industry-ready land serviced by power and water.
- Expanded port capacity to facilitate efficient turnaround of imports and exports with storage facilities and laydown areas capable of accommodating both regular trade products and bulk renewable infrastructural imports.
- Government-led incentives to develop markets and innovative uses for by-products.
- Co-investment in downstream value-adding.
- Move towards knowledge clustering in advanced manufacturing, and direct industry input.
- Skills development and industry links to support the sector.



Agriculture

Agriculture, forestry and fishing is a large, fragmented industry that makes contributes \$2.76bn (6.3%) to economic output, with Manjimup the leading area and accounting for more than \$550m in annual output (ABS June 2024 Gross State Product).

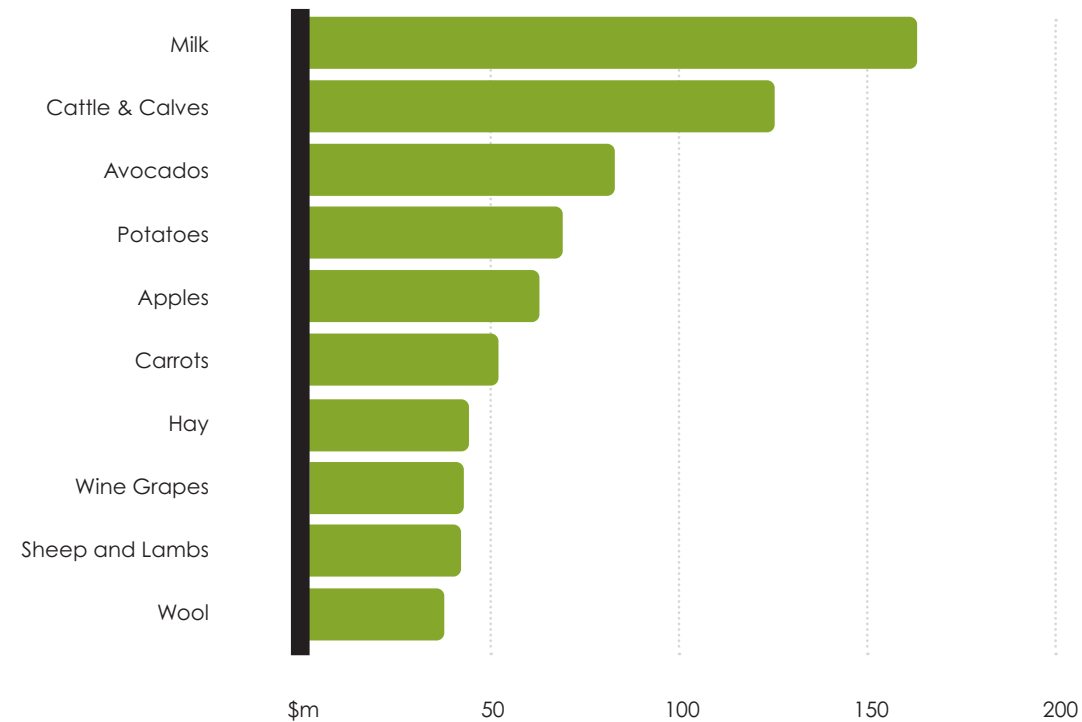
Farming takes up 7,100km² of land area in a region that has typically enjoyed reliable rainfall. However, this calendar year has been one of the lowest rainfall years in recent memory and producers in the region have struggled with livestock management and survival of plantation trees and vines. Re-examining water needs and how to meet them will be critical as efforts to support adaptation and dry season business management pivots from other areas of the state to the South West.

Being home to smaller farms and more intensive production methods than other primary production regions of the state, the South West faces challenges in the management of chemicals, fertilisers and effluent in areas that are closer to water sources and more urban environments. Scale also impacts on investment in mechanisation/technology upgrades which can reduce labour needs, an issue that has blighted the region especially at harvest time.

The future relocation of Boyanup Saleyards creates an opportunity for developing an agricultural precinct. This would be an enabler for collectively working at scale, value adding and manufacturing products to reduce waste. An agriculture precinct would also play to the region's strengths given that industry classifications with more than half the State's total contribution include: onions (100%), avocado (89%), potatoes (86%), apples (84%), dairy production (82%), carrots (53%), and wine grapes (65%).

Figure 5 - Value of agricultural production – South West 21-22

Source: ABS 2021-22 National Input Output Tables



Strategies to support the agriculture sector

- Implement immediate action on adaptation to water scarcity and quality, particularly for irrigation and re-engineering dams.
- Protect the highest quality land for agriculture.
- Introducing regenerative agriculture on marginal land and areas where soils are degraded.
- Support export opportunities in new markets, targeting growth areas and enhance the brand.
- Increase investment in food processing capacity within the region, with an emphasis on clusters and knowledge sharing.
- Facilitate access to investment capital to increase scale of production, value add and diversify.
- Support technological solutions, encouraging R+D and investment in water infrastructure and improve irrigation efficiency through consolidated schemes.
- Monitor water trading as a tool to drive efficiencies in a drying climate.
- Increase high capacity broadband to improve efficiencies in automation.
- Promote policy, identifying regulatory barriers and seeking solutions.
- Support and encourage new common user infrastructure such as saleyards and transport systems.
- Address dryland salinity through value plantations, particularly in the East Collie catchment.
- Find ways to reduce waste and utilise food that does not meet consumer expectations, eg blemished fruit.

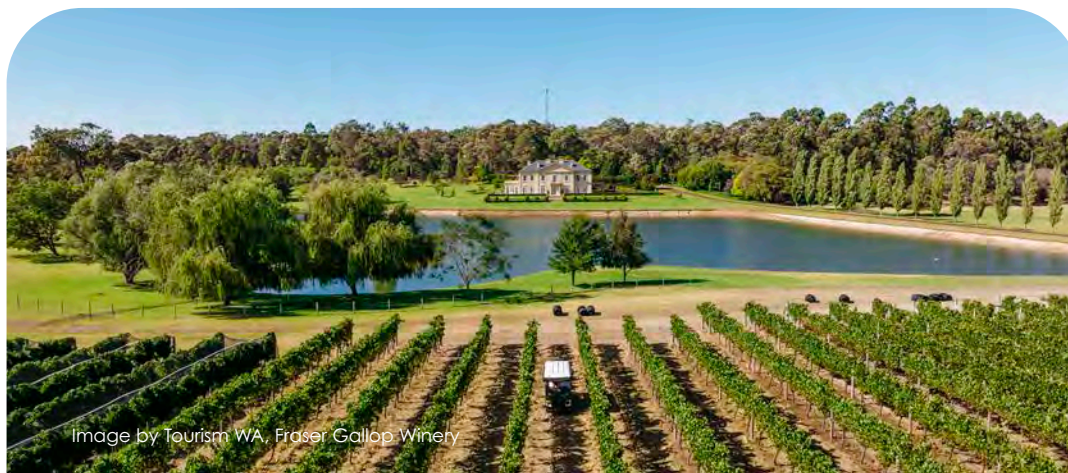


Image by Tourism WA, Fraser Gallop Winery



Viticulture

The value of wine grapes is just over \$50m and the value of the wine and spirits industry is collectively \$245m (2019). However, the value that the brand brings to Margaret River and the region as a whole is far greater.

Of the South West's five wine regions, Margaret River leads the way with 100 cellar doors and about 30,000t of grapes harvested contributing 2% of the national crush. Margaret River remains a standout for exports (1.6 million litres, \$24m, 2024-25) and leads the nation with 67% of wine sold in the top three price brackets.

The removal of Chinese tariffs saw the Australian export market bounce back and underlined in importance as other markets, particularly North America, have declined (Wine Australia, 2025). Weather conditions have been perfect for viticulture, leading to the 2025 vintage being hailed as exceptional for both red and white varieties and akin to the 2023 standout year.

The Geographe wine region continues to grow in reputation along with The Blackwood Valley, Manjimup and Pemberton regions.

Fisheries

Fisheries, particularly aquaculture, has increasingly realised its potential particularly in marron farming at Capel and abalone along the south coast. In respect of fishing, the recreational fishing industry has greater value than commercial operations, with almost 18,000 recreational fishers spending more than \$305m pa in the South West (Recfishwest 2021).

Timber

The timber industry is in the midst of unprecedented change and challenges. Two-thirds of the South West region is native forest but the vast majority of that resource has been set aside for conservation.

South West forestry was traditionally a mix of regrowth native hardwood, plantation hardwood and softwoods. However, commercial harvesting of native forest ended with implementation of the new Forestry Management Plan 2024-2033. This has left WA increasingly reliant on hardwood timber imports, but has created plantation opportunities for softwood (pine) and hardwood (bluegum).

Funded by the Australian Government to 2027-28, the South West Forestry Hub is one of 11 nationally and includes the South West and Great Southern regions. The priorities identified by the South West Timber Hub now focus on supporting growth in plantations and utilisation of forest thinning:

- Undertaking research projects aiming to expand the softwood plantation estate by at least 5,000ha annually, with a focus on integrating commercial trees on farmlands;
- Encouraging full utilisation of the available wood fibre; and
- Ensuring community understanding of the environmental, regional, social and economic benefits from managed forests and woodlands.

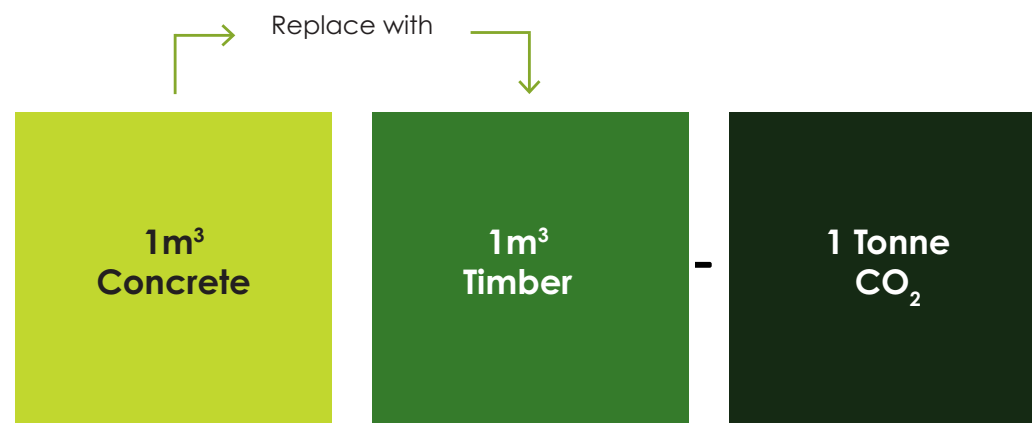
Forestry is being challenged by a drying climate. Geographically, the lower south western part of WA enjoys a natural rainfall advantage, although the 600mm precipitation line is retreating (westward). This is impacting on suitable land to establish more plantations.

The onflow from forestry is manufacturing. The Dardanup timber precinct captures Laminex, one of Australia's leading particle board manufacturers, and Wespine which produces the vast majority of the State's construction timbers. Koppers produces WA's power poles. There are other local interests in fibre processing including WAPRES which processes pine and bluegum for both export and domestic sales. Exports were approximately 870k mt (2023).

Timber sourced from sustainable forest management supports a local processing and manufacturing capability. Processing locally grown and harvested timber adds value and jobs while providing our community with the ultimate renewable

construction material. However, there is a shortfall of plantation softwood and a need for planting at least an additional 50,000ha to sustain existing processing capacity to meet the forecast industry demand in the years ahead. The State Government committed \$350m to plantation softwoods in 2021 but progress has been slow. Considerable opportunities exist for private sector investment in plantations.

New technologies are helping ensure that every fibre of resource is utilised and efficiencies can support opportunities in log peeling, veneer production, and Engineered Wood Products (EWP) including expanding LVL production or alternative cross laminate timber (CLT) manufacturing.



Credit: Planet Ark

Strategies to support the timber and forestry sector

- Expand the plantation estate to ensure a minimum 100,000ha.
- Continue to drive plantation options as a part of minesite rehabilitation.
- Explore opportunities for an Advanced Timber Manufacturing Hub.
- Encourage the adoption of Planet Ark's Wood First policy among Local Government bodies in line with WA Government wood procurement policy.
- Investigate opportunities for developing engineered wood products (laminates, plys, cross-laminate timbers, veneers and more) in the South West.
- Encourage investment in expanding the plantation estate.
- Ensure 'wood first' is embedded in government procurement policies.
- Support and encourage growth of the Dardanup cluster.
- Manage forests in a drying climate, eco-thinning and utilising fibre.
- Support biomass waste as an energy option, maximising the use of fibre and producing bio-char for regenerative agriculture.
- Encourage Aboriginal engagement in forestry, bushfire mitigation and employment in caring for country.
- Investigate the prospects of a demonstration project of 10-20 timber-built homes.
- Support advanced manufacturing of homes, including modular construction methodologies to produce affordable housing.
- Explore how blockchain technologies can provide consumer confidence in sustainable forest-ry practices and supplies.



Image by City of Busselton, Boranup Forest

Tourism

The tendency to measure the impact of tourism in financial terms never hits the mark since its benefits and true value stretch way beyond dollars and cents. Tourism creates vibrancy, echoes lifestyle and speaks to brand messages that reach beyond food and accommodation services (FAS).

While a number of regional communities value tourism, the key industry sector lies in the Capes where tourism jobs (2024) dominate: Busselton 15.2% and Margaret River 17.6%. The sector contributes through FAS but also in retail, services and even manufacturing. ABS metrics note that the FAS category provides 6.1% of all South West jobs. However, the total of tourism jobs for the region is 8.6% compared to tourism employment across Western Australia generally at 5.3%. The economic value of the sector (2024) was estimated at more than \$1.7bn with more than half of that in the Capes sub-region: Busselton \$666m and Margaret River \$325m.

The region clearly benefits from its natural beauty, amazing landscapes and proximity to the Perth intra-state

market. Quality events are also strong triggers for regional visitation which is supported by trails, food and beverage, cultural enrichment and visitors seeking positive/wellness experiences.

There are significant opportunities for Aboriginal cultural tourism, building on existing attractions, while new trails, improvements to the existing trails and world class cycling tracks add to the region's emotional drivers.

Prospects for an increasingly strong sector abound, but the strength of the sector in local employment is also its vulnerability. Given that the South West is noted as the seventh most tourism dependent region in Australia across different measures (Tourism Research Australia), building resilience through capacity and capability building to manage cyclical changes and shocks is essential. The sharing economy has also affected businesses, with Airbnb having an impact on professional accommodation services.

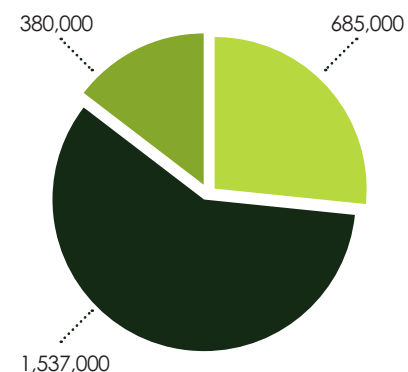
Accommodation and hospitality are traditionally less well paid than other sectors. This can be a challenge when those workers find themselves living in a tourism hotspots where living expenses are typically higher than average. The added complication is the current shortage of affordable housing.

Figure 6 - Domestic Nights in Australia's South West Sub-Regions

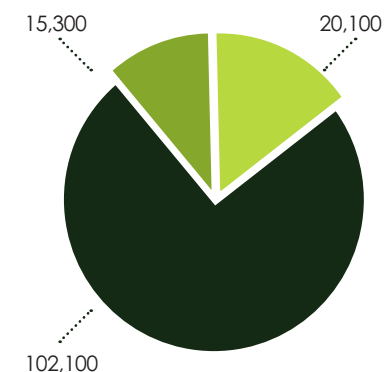
Source: Tourism Research Australia - International and National Visitor Surveys

- Southern Forests & Blackwood River Valley
- Margaret River Region
- Bunbury Geopraphe

Domestic Visitation YE Dec 24



International Visitation YE Dec 24



Activities, attractions & events		Bunbury-Geographe	Margaret River Region	Southern Forests & Valleys
Culture & Heritage	Nature/biodiversity	S	S	S
	Arts & creativity	E	S	D
	Aboriginal culture	D	E	D
	History & heritage	D	E	E
	Adventure	S	S	E
	Wine, food & produce	E	S	E
	Events & festivals	S	S	S

S Signature product, well established and represented

E Emerging product is established and growing

D Development opportunity

Source: Australia's South West Tourism Destination Marketing Plan

Domestic Nights in Australia's South West Sub-Regions YE 2021-YE 2023

	% Change 23-24	3 year CAGR* 23-24
Bunbury Geographe	-6.0%	2.8%
Margaret River Region	-2.3%	-0.2%
Southern Forests & Blackwood River Valley	-5.2%	-3.7%

*CAGR = compound annual growth rate

Source: Tourism Research Australia - International and National Visitor Surveys

Strategies to support the tourism sector

- Construct a fit-for-purpose Busselton Margaret River Airport terminal and fit-out to a standard that gives visitors a quality experience with provision to accommodate international tourists at a later date.
- Encourage high quality and eco-certified accommodation developments.
- Invest in first class attractions that add value to the region as a whole.
- Sub-regions should focus on place-based advantages, aligning with the region's Tourism Destination Marketing Plan. For example, experience and product development in adventure tourism and trails, wellness, arts culture and heritage, and agritourism.
- Attract and grow demand in higher yield markets and values-based travellers to identified niches including trails, food and wine, wellness and road trips.
- Build capacity within existing Aboriginal Cultural Tourism experiences ensuring the South West Aboriginal communities are part of the decision making.
- Position the region to demonstrate outstanding environmental credentials.
- Focus on place-based supply side initiatives including sustainability, aviation, niche product development, and leveraging trails investment.
- Co-ordinate and build on events, including business events, that capitalise on the regional airport and conferencing assets.
- Create a suite of high-level events that leverage the region's quality sports infrastructure assets.
- Capitalise on geo-landscapes and the region's unique geology.
- Ensure quality telecommunications connectivity to enhance visitor experiences.
- Leverage and support the ASW regional brand and assets to strengthen strategic marketing across the region.
- Build greater industry capacity and capability to support sustainability of tourism across the region.
- Improve signage (directional signage, placemaking, tourism and dual naming/Aboriginal art) to assist visitors and operators.
- Consider accessibility and implement projects to support all visitors.

Strategies to support creative industries

- Investigate the creation of a Creative Incubator in Busselton, including provision for start-ups, shared spaces, mentoring, business skills training, established business and underpin with a leading edge anchor tenant.
- Provide support and investment in local creatives and pre-cinct development to provide places to connect, network and collaborate.
- Support the continued improvement of high capacity broadband and fibre zones to support the sector, enhancing digital infrastructure to facilitate creative output and maximise potential by facilitating 'creation anywhere'.
- Foster a collaborative ecosystem, learning from successful models in other regions which promote inclusivity, partnerships as a driver of innovation and business growth.
- Embed creative arts in the education system to nurture future talent, ensuring the longevity and vibrancy of the sector.
- Work towards placing the South West in a leadership position through actions and events.
- Embrace a vision that extends beyond traditional employment streams to integrate creative thinking into all industries, so the region is set apart from others and attracts further investment.
- Generate a film-friendly reputation via a supply of capable operators.
- Support 'buy local' strategies to help incubate the sector through local purchasing of digital media and related content.
- Support an Aboriginal art gallery and the expansion of other galleries to grow the recognition of a chain of arts and cultural attractions linking sub-regions.
- Demonstrate that the South West is a creative region through unique, place-based community infrastructure.



Image by City of Bunbury

Creative sector

Economic growth, prosperity and liveability is underpinned by growth in the creative sector with creative roles being integral to many sectors, not just traditional arts and culture.

The South West region has a substantial and growing creative economy, with some hotspot areas such as Bunbury, Busselton and Margaret River showing employment levels comparable to Perth.

While diverse, creatives lie in these categories:

- Core arts and Cultural industries (e.g. core arts such as literature, music, performing art and visual arts and cultural industries such as film, museums, galleries, photographic studios and libraries)
- Creative industries (e.g. sound recording, television and radio, video and computer games, heritage, publishing and print media)
- Wider creative jobs in other industries (e.g. architecture, marketing, advertising, design)

Many creative jobs contribute to the economy but are not located specifically within a creative business. Overall there are 1,467 jobs in the creative sector, but also 1,394 creative jobs that are located in “non-creative” industries. Some examples include computer system and app design across all industries, architectural services in construction, marketing and advertising in almost any business.

Underpinning these ecosystems is the local Capes reputation for quality nationally-recognised events

and festivals such as CinéfestOZ which has helped fuel growth of the screen industry over the past decade. The Bun-Geo subregion encourage creatives to connect through events such as Bunbury Fringe, the Creative Tech Village hub in Bunbury and also a number of maker spaces being supported by local governments.

Retail

A shift in consumer behaviour has seen retail move from the most significant employer in the region to the third, accounting for 10.7% of all employment. It remains a majority employer in the Shire of Dardanup at 14.7%, and a major contributor to jobs in the tourism region of Augusta/Margaret River, and Busselton at 11.9% and 12.7%.

Changes in consumer behaviour has seen some change and has shaped CBDs in recent years. However, Local Governments have responded and there has been significant investment in Busselton and Eaton.

Nevertheless, online options, cost of living pressures, reduced disposable income and increased commercial rents combine to squeeze retailers.

It has also been recognised that shoppers are likely to demand a more enjoyable experience and greater diversity, so a number of smaller and unique outlets are more appealing than national chains.

Strategies across the retail space

- Begin processes to re-vision CBDs to provide drawcard experiences, especially supporting place-based approaches to community connections and small business in the retail space.
- Examine multi-levels in CBDs, utilising spaces above shopfronts to activate spaces by boosting resident populations and changing the lifestyle dynamic.
- Encourage casual/pop-up use of empty retail and office premises.
- Use street art and street furniture to enrich and enliven CBDs, creating unique spaces that reflect the local cultural narrative and attract people.
- Change the feel of shopping areas. Activate walking precincts through traffic calming or re-routing through traffic, particularly in tourism towns.
- Encourage appealing shopfronts, rooftop bars and clusters of impact.
- Green urban CBDs to make them welcoming and reduce summer heat.

3.2.3 Human capital, particularly education and skills

Human capital is a significant contributor to regional development through skills, training, regional resilience and having a capable workforce. This section examines the human capacity of the South West and opportunities to strengthen the region's capability as an input to business competitiveness and overall quality of regional life.

The knowledge and skills of workers available in the labour supply is a key determinant for both business and economic growth. Those with higher education and training earn higher wages and contribute more to the economy through spillover spending (Radcliffe 2020).

The region features Western Australia's largest non-metro TAFE with six campuses in the region, while Edith Cowan University (ECU) South West, Bunbury is the largest regional campus in WA. ECU has more than

30,000 undergraduate and postgraduate students, including international students from 100 countries.

ECU South West features recognised research partnerships, study hubs and learning centres throughout the region, offering a comprehensive range of courses in arts, commerce, science, environmental health, health science, nursing, midwifery, social work and teacher education.

ECU South West also delivers the WA Creative Tech Innovation Hub – WA Creative Tech Village in Bunbury and is establishing the South West University Department of Rural Health. This will offer medical, nursing and midwifery and allied health students practicum placements throughout the region to boost rural primary care workforce, improve health outcomes and give students a taste of rural-regional work.

In addition to the courses offered by South Regional TAFE, there are numerous Registered Training Organisations

supporting the public sector and meeting the needs in the area of apprenticeships and traineeships.

Data from the last decade shows increasing levels of educational achievement, although the South West still lags behind Greater Perth: 4.2% studying toward a bachelor or higher degree versus 1.6% in the South West (2021). The disparity may be due to the cost of education for regional students having to fund accommodation in the city, and the greater mobility of highly educated people.

The number of people undertaking tertiary training is increasing and more of the workforce now holds postschool qualifications with growth recorded in both VET and higher education qualifications.

With increasing technical knowledge required in roles that were once unskilled, it is vital that levels of higher educational continue to progress.

	University or other Tertiary Institution	%	Technical or Further Educational Institution	%	Population
Western Australia	112,067	4.2%	59,902	2.2%	2,676,904
South West	2,813	1.6%	3,799	2.1%	180,443
Warren Blackwood	135	0.8%	268	1.5%	17,615
The Capes	903	1.6%	1,127	2.0%	56,655
Bunbury Geographe	1,775	1.7%	2,396	2.3%	106,173

Figure 7 - Proportion of population 15 years and over attending university or technical education

Source: ABS 2021, Census Community Profiles

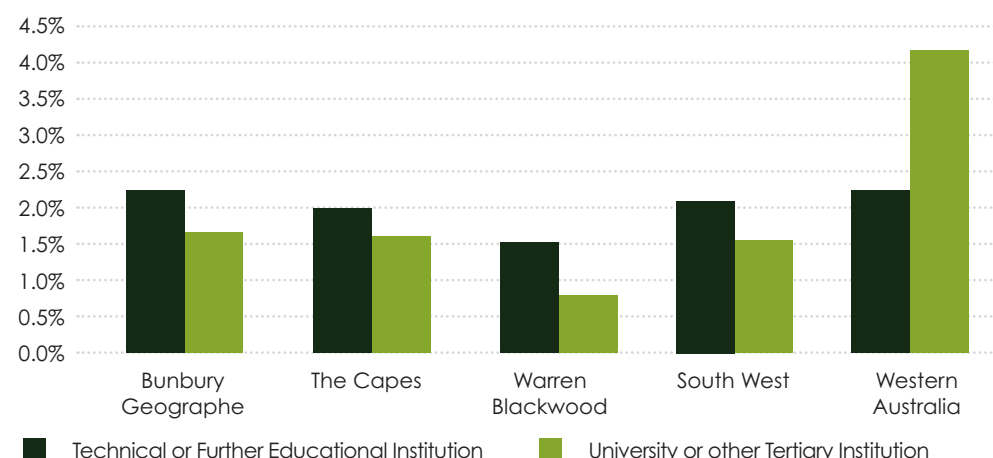


Figure 8 - Labour market outcomes by highest level of educational attainment, 2020 (%) - Australia

Source: Australian Jobs Report 2020

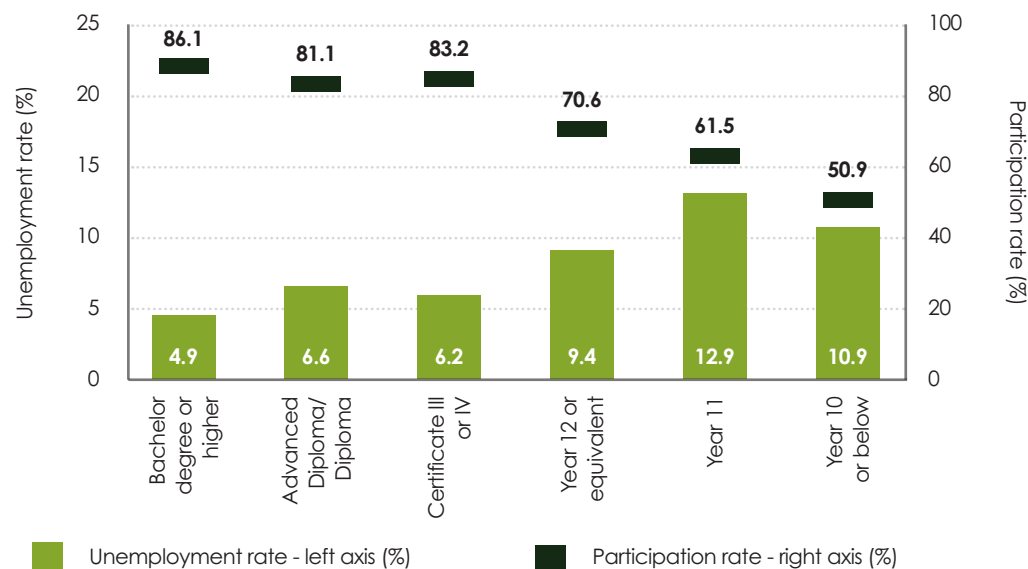
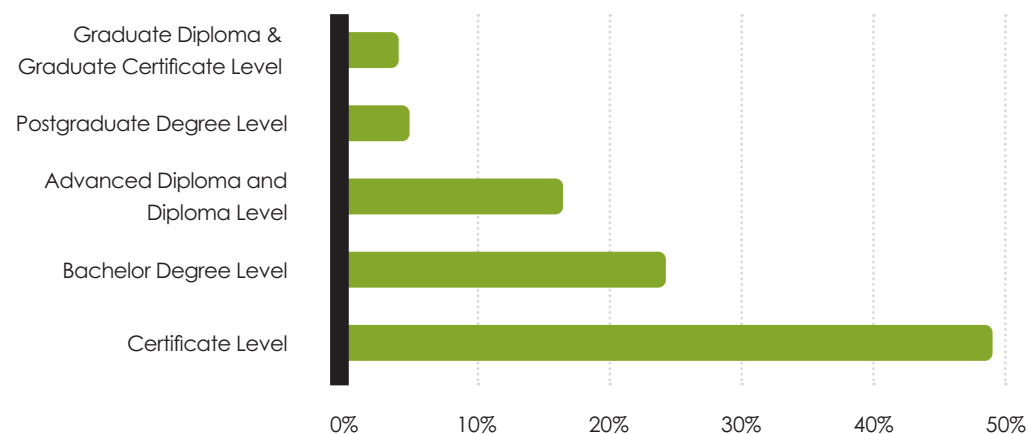


Figure 9 - Highest completed non-school qualification - South West

Source: ABS 2021 Census of Population and Housing



Strategies to support education and skills

- Link ECU's reputation in cyber security, integrating that, IT generally and TAFE training with the development of an advanced manufacturing hub.
- Create customised courses that build digital capacity on existing study, particularly for trades and meeting the needs of Industry 4.0.
- Certified training to meet care needs and employment opportunities resulting from demographic change and the ageing population.
- Blend online learning and attendance as a response to future educational demand and delivery.
- Introduce additional learning support/centres in key areas of regional growth reflecting regional student participation levels.
- Drive co-operation between industry and academia/training organisations to deliver premium training and research outcomes.
- Identify and exploit points of difference in education and training such as industry placements, internships, inter-state or overseas study exchanges for broader experiences and contra arrangements to expose students from overseas/interstate to the South West.
- Explore new ways of packaged learning as an alternative to the traditional three-year degree.
- Investigate options to share childcare services on the South West Campus to support retraining and upskilling.
- Project-based targeted training and skills development to help close the gap and provide work for Aboriginal people.
- Connect industry needs directly with tailored training.
- Adopt procurement policies to support training and Aboriginal economic engagement.



3.2.4 Sustainable (economically, environmentally and socially) communities and population

People

A sustainable population is a prerequisite for regional development, although predicating economic growth on a continually expanding population is environmentally reckless. The South West has not yet had the conversation on an ideal population size, but there remains capacity for growth and a need to plan for a regional population of 300,000 by 2050.

Population forecasting by WA Tomorrow was revised down as a result of very low migration numbers, a Covid impact that will resonate for some years. For the South West the impact is a greater number of aged persons, less aged to 14 years, and the dependency ratio will rise to 38% by 2063 (Intergenerational Report), a trend consistent with other developed nations. The regional population (201,659 in 2024) has grown steadily and at a faster rate than most of regional WA. The coastal strip remains popular with the Bunbury-Busselton axis being home to more than half of the whole region's population and accounting for about 55% of the region's workforce. The urban footprint that makes up Greater Bunbury accounts for almost 80,000 people.

All Local Government areas have grown since 2015 but experience different drivers: net overseas migration; net internal migration; and/or natural increase. The fastest growing local government is the Shire of Augusta-Margaret River followed by the Shires of Bridgetown and Boyup Brook. All areas have gained through net internal migration.

The City of Bunbury is constrained by its boundary and is impacted by the social trend to have less persons per household. The Regional Australia Institute predicts that Greater Bunbury will grow to 172,700 by 2056 and Busselton will grow to 68,500.

Inland communities, from Collie through to Manjimup, are generally more constant and reflect the nature of communities based on primary industry. These communities also feature a higher median age group.



Figure 11 - Jobs in Sub Regional South West by Industry

Source: Data based on: ABS 2024 Census of Population and Housing (Scaled)

Work in Bunbury Geographe (2024 Release 2)

Industry Sector	Jobs	%
Health Care & Social Assistance	7460	15.3%
Construction	5687	11.6%
Retail Trade	4952	10.1%
Manufacturing	4946	10.1%
Education & Training	4558	9.3%
Total of workforce		56.4%

Work in The Capes (2024 Release 2)

Industry Sector	Jobs	%
Accommodation & Food Services	3391	14.3%
Health Care & Social Assistance	3068	12.9%
Retail Trade	2965	12.5%
Construction	2564	10.8%
Education & Training	2154	9.1%
Total of workforce		59.6%

Work in Warren Blackwood (2024 Release 2)

Industry Sector	Jobs	%
Agriculture, Forestry & Fishing	1,873	24.0%
Health Care & Social Assistance	808	10.4%
Retail Trade	678	8.7%
Education & Training	633	8.1%
Accommodation & Food Services	595	7.6%
Total of workforce		58.8%

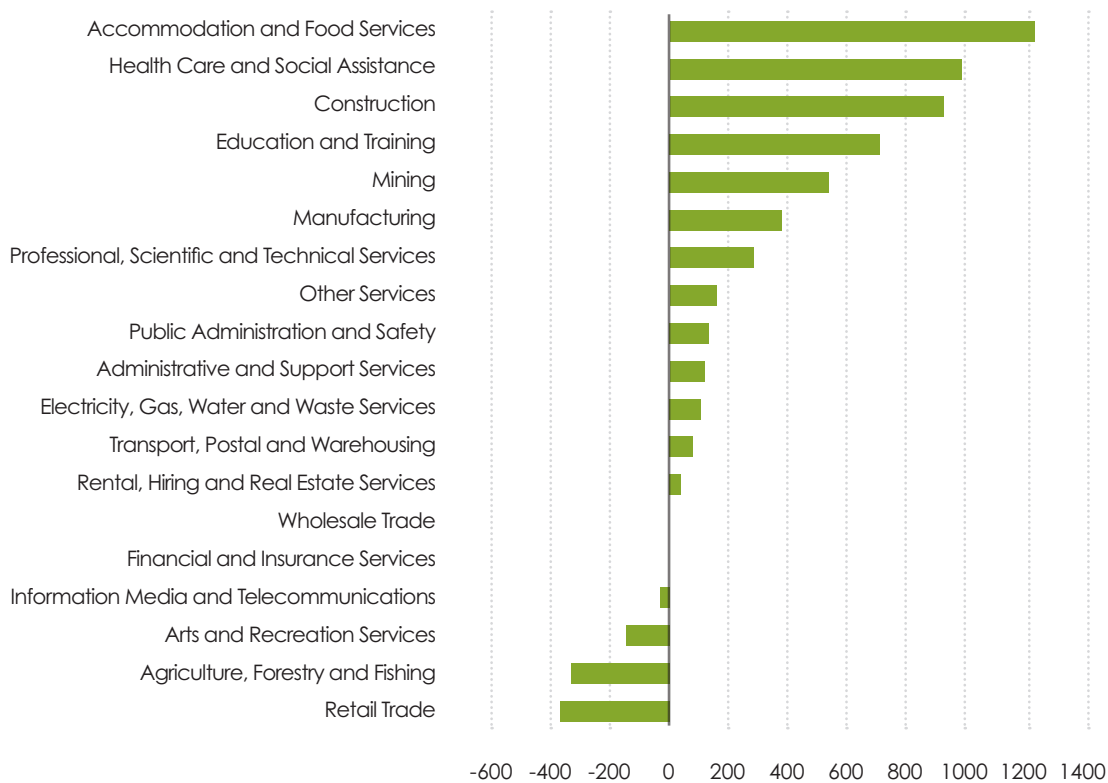


Figure 10 - Projected employment growth by industry, South West Region, five years to 2024

Source: Department of Jobs and Small Business 2019 Employment Projections, five years to May 2024



Figure 12 - Regional population, 2023-24 – South West

Source: Estimated resident population and components, Local Government Areas Western Australia 2023-24

	As of June 30		Movement 2023-24		Natural increase	Net Migration	
	2023	2024				Domestic	Overseas
	No.	No.	No.	%	No.	No.	No.
Augusta-Margaret River	18,633	19,410	777	4.2	77	355	345
Boyup Brook	1,948	1,959	11	0.6	3	2	6
Bridgetown-Greenbushes	5,671	5,797	126	2.2	1	106	19
Bunbury	34,788	35,174	386	1.1	-6	33	359
Busselton	43,984	45,003	1,019	2.3	43	700	276
Capel	19,341	19,701	360	1.9	110	127	123
Collie	9,298	9,408	110	1.2	18	55	37
Dardanup	15,690	15,930	240	1.5	59	105	76
Donnybrook-Ballingup	6,440	6,584	144	2.2	21	84	39
Harvey	30,802	31,495	693	2.2	188	292	213
Manjimup	9,442	9,523	81	0.9	8	18	55
Nannup	1,632	1,675	43	2.6	-1	33	11
South West	197,669	201,659	3,990	2.0			
Western Australia				2.8			

Demographic implications indicate a need to consider active ageing and provide more aged accommodation. Consequently, there will be training and professional opportunities in healthcare. Older residents may be less mobile and require public transport as well as putting more demand on medical services.

Figure 13 - Age Structure of the South West region relative to Western Australia - 2016, 2021, 2036

Source: ABS Census 2016 and 2021 and WAPC (Western Australia Tomorrow) 2016 to 2036

	2016 Census		2021 Census		2036 Estimate	
	SW	WA	SW	WA	SW	WA
0-4 years	6.3%	6.5%	5.4%	6.1%	4.8%	5.4%
5 to 14	14.0%	12.7%	13.5%	12.9%	10.7%	11.0%
15 to 19	6.2%	6.1%	5.8%	5.8%	10.2%	12.5%
20 to 24	4.6%	6.5%	4.2%	6.0%	9.9%	13.7%
25 to 34	1.3%	15.3%	10.6%	14.0%	10.5%	14.1%
35 to 44	13.1%	13.9%	12.8%	14.3%	11.7%	13.6%
45 to 54	14.1%	13.5%	13.5%	13.1%	13.3%	13.4%
55 to 64	3.4%	11.4%	13.7%	11.8%	12.3%	10.6%
65 to 74	10.3%	8.1%	12.2%	9.3%	12.7%	9.4%
75 to 84	5.0%	4.2%	6.1%	4.9%	9.7%	6.9%
85 and over	1.8%	1.7%	2.1%	1.9%	4.1%	3.2%



Image by Tourism WA, Busselton Jetty



Aboriginal people make up 2.7% (nearly 5,000 people) of the regional population. Noongar people are the Traditional Custodians of land stretching from Geraldton to Esperance, and there is evidence of some of the longest connections to the land and waters among all Indigenous people.

The South West connects the traditional boundaries of Wadandi, Pibulmen, Kanenag, Pindjarup and Minang dialect groups represented by Wagyl Kaip (Boyup Brook, Bridgetown, Walpole) to the East, Gnaala Karla Booja (Bunbury, Capel, Donnybrook, Balingup, Harvey, Collier and Mandurah) to the north, and Karri Karrak (South West Boojarah: Busselton, Dunsborough, Margaret River, Pemberton and Nannup) Native Title groups. It is important to note that the region's Noongar people have an exceptionally deep and enduring connection to booja (country) both physically and spiritually.

The South West Native Title Settlement is the largest Native Title settlement in Australian history and comprises six Indigenous Land Use Agreements (ILUAs) registered in 2021.

ILUAs are pushing forward and creating unprecedented opportunities for the region's Aboriginal people, with huge efforts being made to boost economic engagement through Ranger programs, commercial procurement, education/training and government projects. Other significant opportunities are in culture, knowledge and art.

Figure 14 - Change in the Region's Population 2016 to 2024 by LGA

Source: ABS Estimated Residential Population, ABS 2021 Census Population & Housing

	Resident Population 2024	Change 2016-2024		Av Annual Growth rate 2016-24
		%	No.	%
Augusta-Margaret River (Shire)	19,410	36	5,153	3.9
Boyup Brook (Shire)	1,959	15	257	1.8
Bridgetown-Greenbushes (Shire)	5,797	24	1,136	2.8
Bunbury (City)	35,174	10	3,254	1.2
Bussetton (City)	45,003	23	8,315	2.6
Capel (Shire)	19,701	15	2,580	1.8
Collie (Shire)	9,408	7	610	0.8
Dardanup (Shire)	15,930	14	1,902	1.6
Donnybrook - Balingup (Shire)	6,584	12	713	1.4
Harvey (Shire)	31,495	19	4,946	2.2
Manjimup (Shire)	9,523	3	270	0.4
Nannup (Shire)	1,675	26	346	2.9
Total	201,659			



Image by Tourism WA,
Connection to Country, Koomal Dreaming



Sports

Regional communities are bound by sports and high rates of participation, particularly organised sport. Local competition fuels community identity, inclusiveness and a sense of belonging.

The United Nations Office on Drugs and Crime promotes sports and related activities to prevent crime and to effectively build resilience of at-risk youth. Strengthening the life skills of youth is a key objective of the UN's 2030 Agenda for Sustainable Development which encourages social inclusion and links across race, gender and age.

While socially important, sports and recreational industries are generally under-rated as economic drivers for smaller industry sectors, community cohesion and tourism. They contribute to economic diversity and generate opportunity.

Sport West (2023) found the social return on investment in organised sport delivers an estimated gross benefit of \$10.3bn per year in Western Australia. For every dollar of economic and social investment into sport, more than \$7 of economic and social benefit are fostered.

As greater value is put on personal time and interests, discretionary spending boosts sectors from recreational fishing to racing and pacing. The South West racing and pacing industry supports thoroughbred racing in Bunbury and Collie, and trotting clubs in Bridgetown, Bunbury, Busselton and Collie. Bunbury Turf Club is the region's premier facility. Bunbury enjoyed an almost \$30m upgrade which has enabled year-round training and racing in what is the leading regional facility in Western Australia. The redevelopment also saw the creation of 150 state-of-the-art horse stalls with remodelled access, and some new buildings.

As a result of the redevelopment, it is estimated that the uplift in total direct expenditure generated by training activities at Bunbury racecourse will amount to \$30.8mpa by 2028-29.

Offering unsung value to the recreational sector are community sports facilities as regional and intra-regional attractors for events that drive visitation. So too are motorsport facilities such as Manjimup Cosy Creek, Bunbury Speedway and Collie Motorplex, the latter features a 2.6km track, the longest in WA. Given its out-of-town location and proximity to overnight accommodation, Collie Motorplex has genuine potential to rival the State's premier circuit over the long term.

Upgrades to Hands Oval has seen professional AFL brought to Bunbury. The West Coast Eagles played twice in 2025 while Fremantle will play in 2026. The Australian Women's National Soccer Team, the Matildas will play Panama in Bunbury in 2025.

While traditional structured sport remains popular, outdoor recreational activities have seen growth. Activities make a huge contribution to the health and wellbeing of individuals and communities in the South West. Every day, the region's unique

outdoor lifestyle is enjoyed — whether walking, riding, exploring, exercising, paddling or engaging in a range of outdoor adventures activities.

The South West has a growing network of tracks and trails from the walk and cycle iconic tracks and trails (Bibbulmun 1,000km, Munda Biddi 1,072km and Cape to Cape 125km) to bridle trails, kayaking and various other speciality routes from the arts to food and wine. In addition, the WA Government has committed to the completion of the Wadandi Track to form a continuous 109km route from Busselton Jetty to Flinders Bay in Augusta.

Everyday participation bridges differences in race, faith, gender and age which leads to greater social cohesion. Tracks and trails enhance liveability, provide access to nature, they educate and positively brand the South West.



ABS Census of Population and Housing

Socio-Economic Indexes for Australia (SEIFA), 2021

	SEIFA
South West	991
Augusta-Margaret River	1,031
Boyup Brook	995
Bridgetown-Greenbushes	1000
Bunbury	944
Busselton	1,019
Capel	1,016
Collie	908
Dardanup	1,006
Donnybrook-Balingup	987
Harvey	998
Manjimup	959
Nannup	978



Community

Compared with the State as a whole, people in the South West are more likely to be married, own their own home, live in lower density areas and have lower levels of mortgage debt.

However, the region scores below the average based on the Socio-Economic Indexes For Areas (SEIFA) which measures relative disadvantage – employment, income levels, educational achievement and internet access. SEIFA scores have flaws but do provide a general picture, noting where interventions would be useful.

Weekly household incomes are most commonly in the \$2,000-\$3,499 range, with more than a quarter of all households falling in these statistical brackets. The figures may trend slightly higher since Census data relates to the area where the person was resident at the time ie. the region's FIFO workforce would be recorded in other area data.

Arts and cultural activities

The economic contribution of the arts is well recognised in the South West. The region features Australia's largest film prize through CinéfestOZ, Western Australia's premier country music event at Boyup Brook and a multitude of food-related events which contribute to the regional brand through promoting excellence in agricultural production.

Events drivers include Southern Forests produce, regional wines and Cabin Fever Festival among many others that include premium drinks and food as key components of mixed packages. The Capes region features Margaret River Open Studios which attracts thousands of visitors each year to experience art in many forms. There are also regional music events from the Bridgetown Blues and Boyup Brook Country Music Festival, to Busselton's Jazz by the Bay and capacity for travelling shows at the region's entertainment centres.

The region has a wealth of other cultural connections – field days, cars and medieval carnivals – that add to the richness of the community as well as the economy in providing impactful visitation triggers.

Strategies to support sustainable communities

- Promote Bunbury as Western Australia's second city to attract more investment to the region.
- Improve public transport connections, particularly supporting youth and older people.
- Work to create more inclusive communities and close the gap across education, health, housing and jobs.
- Greater acknowledgement of Traditional Custodians through wider use of signage and art to boost regional identity.
- Boost Aboriginal recognition, engaging to grow the appreciation of distinctly South West tourism offerings and common use of the Noongar six seasons.
- Make the South West, Western Australia's regional sports capital for state-wide competitions and visitation triggers.
- Continue to develop facilities supporting state level country sports – hockey, professional basketball, state cricket, soccer carnivals and other sports.
- Utilise premier sports infrastructure for training pathways to develop talented youth.
- Maintain community sports facilities to enhance regional liveability, connectedness, lifestyle, youth engagement and active ageing.
- Invest in the region's sports facilities, engaging activities with community, youth, active ageing and health.
- Complete the development of Hands Oval to host AFLW, WAFL and AFL pre-season games and hold a long-term view to host a WAFL team.
- Consolidate interest in tracks/trails with a focus on managing and raising the standard of existing assets.
- Acknowledge the importance of volunteerism as a social glue.



Environment

The South West Natural Resource Management region incorporates 26 LGAs and is at the heart of the South West Botanical Province, one of only 36 biodiversity hotspots in the world, highlighting its rich diversity of flora and fauna. The NRM region also features four wetland systems of international significance recognised under the Ramsar Convention. The coastal environment is one of the South West's greatest assets in cultural, community, economic and environmental value. The Southern Forests are also of great value, noting that two-thirds of the entire region is made up of State forest, National Parks and regional parks.

The region enjoys a Mediterranean climate with hot dry summers and wet winters. The region is facing climate pressures, particularly declining rainfall and sea level rises. CSIRO's most comprehensive assessment of water yield found that the South West was one of the most water-challenged regions in Australia, noting a 15% decline in rainfall since 1975. With modelling suggesting a declining surface water yields of 24% in the next decade (CSIRO) then water issues must be considered a regional priority.

Further, the Bureau of Meteorology reports that WA temperatures have increase by 1.52°C (BoM 2024) since records began in 1910 and the Climate Commission found that local sea level rises have been the highest in Australia at 7.4mm/pa since the early 1990s, a combination of isostatic and eustatic influences. In 2010 the WA Planning Commission specified that SLR should be taken as +0.9m by 2100 while a Department of Transport's state-wide assessment highlights the South West as extremely vulnerable: Bunbury and Busselton were recently listed among the top three WA locations at "extreme" susceptibility to coastal inundation. The latest data ranges exceed 1m and does not account for storm surge.

The South West is Australia's canary in the cage, pointing to opportunities for academic research and pilot interventions in climate adaptation strategies in everything from home design and energy to bushfire and extreme weather events.

It is an increasing challenge to manage risks posed to the South West which is under pressure given that its landscapes are a drawcard that in turn requires management to save it from those who seek to experience its natural beauty.

Strategies to improve environmental outcomes

- Protect and enhance surface and groundwater resources, including wetland and waterway health.
- Increase the use of 'waste' water resources for reuse and/or aquifer recharge.
- Include aspects of green canopy and water sensitive urban design in CBD redevelopments and upgrades.
- Support carbon farming and Planet Ark's Wood Encouragement Policy to lock up carbon.
- Encourage access to forest environments to promote a greater understanding and appreciation of the region.
- Encourage weed and pest management on both public and private land.
- Protect and create habitat for the region's threatened native species.
- Future plan with coastal retreat in mind and develop local strategies for increased storm events and sea level rises.
- Consider fire risk, fuel load and thinning for healthier forests.
- Identify and mitigate against coastal erosion and inundation risks.
- Engage Traditional Custodians in environmental roles, caring for the land, forests and protecting it for future generations.
- Acknowledge farmers as key land managers, encouraging regenerative practices and undertaking actions to conserve soils. Encourage consumers to consider carbon kilometres, buy local and work with seasonally available food.
- Support the circular economy, utilising waste as a resource for reuse and repurposing.
- Change thinking to first consider repair and upgrade rather than replacement.
- Always consider the impact of population growth and sprawl on the region's environment.
- Work with communities so everyone understands that healthy environments are everyone's business.



3.2.5 Collaboration

Forming the final part of the determinants of regional development are effective cross-sectoral and intergovernmental partnerships – and integrated regional planning. While collaborative approaches can ebb and flow, the South West's planning and business environments have traditionally featured strong levels of partnership.

Working together for the purpose of prioritising government investment in the region raises awareness of critical issues and creates a focus for all sides of government. The collective can present a funding rationale based on good evidence and co-operation within sectors is also a powerful tool with clusters gaining their own momentum, concentrating knowledge which aids overall business competitiveness. The South West features a strong and united timber sector, dairy industry, health and education alliances, creative sector and business unity through the region's Chambers of Commerce and Industry.

In conclusion, regional development success is not a single champion charging out ahead of the others on a trusty steed. The battle for improving the region is fought on multiple fronts by an army which operates from the same plan. The power is in the region's interest – not individual interest.

This document aims to sit as a long-term vision for the South West. It works unreservedly with, and supports, the South West Development Commission's 2024-27 three-year action agenda, subregional planning strategies and other pieces of work. This in itself is a valuable collaboration with multiple stakeholders involved.

Strategies to support partnerships

- Invest and engage in true collaboration to ensure shared and committed ownership of solutions.
- Create specific roundtable groups to support action agendas such as the Advanced Manufacturing and Technology Hub project.
- Local Governments align in sub-regional and regional planning to prioritise those proposals that have genuine regional reach.
- Work with Aboriginal people to help close the gap and hold informal stakeholder group meetings to share information.
- Implement a whole-of-region waste strategy for critical mass and shared benefits.
- Standardise Local Government building requirements and create cross LGA teams to share resources.
- Build relationships with traditional owners for input on projects and possible employment outcomes.
- Work at all levels, prioritising regionally and delivering locally.
- Encourage clusters and information sharing to exploit synergies for mutual gain.

Image by Tourism Australia and Jarrod Seng, Wellington Dam Collie



4 Transformative Opportunities

4.1 An explanation

The overall regional vision will benefit from strategic investment in proposals that will fundamentally change the region, flowing beyond the original investment to support jobs, industry, community and regional liveability.

It is important that transformational projects are grounded in reality and what's achievable, but do allow some space so the South West can dare to dream. The highlighted areas will:

- Attract private as well as public investment
- Echo the pillars of regional development analysis
- Have regional reach
- Benefit the State and national economies
- Provide sustainable jobs
- Work with the environment
- Change the way the South West is perceived
- Enhance existing regional advantages
- Look to the future
- Offer an enviable quality of life

4.2 Selecting priority proposals

Priority proposals are highlighted where they align with Commonwealth regional priority areas, determinants of regional development and have propulsive linkages. Propulsive sectors are those that drive and support other sectors within an economy.

The Regional Australia Institute also identified particular prospects for Western Australia. Consistent foci for the South West refer to advanced manufacturing, food processing, tourism and the creative sector. The South West's headline gamechangers include: economic infrastructure, advanced manufacturing, decarbonisation (renewable energy and transformational technologies), timber, tourism and investment in communities.



Propulsive linkages

Economic development has a number of support theories generally covered by propulsive linkages which are forwards and backwards.

Some industries create more economic eco-systems than others and may also be labelled as clusters or growth poles in economic development theory.

For example:

Advanced manufacturing requires workforce supported by the education and training sector, but plants also require material inputs and energy while completed products require storage and distribution.

Linkages are augmented by options that produce cheap energy for competitiveness and lever off a regional brand / reputation if that energy is renewably produced.

4.3 Regional development matrix

	Determinants of regional development (COAG)	Regional Investment Framework (Australian Government)	Infrastructure WA objectives	SWDC regional development framework	Content summary: Category inclusions
1	Access to international, national and regional markets	Investing in Places – delivering infrastructure for accessible regions	Embrace technology, data and digital connectivity		Digital, transport links, and freight and supply chain infrastructure
2	Comparative advantage and business competitiveness	Investing in Industries and Local Economies – ensuring economies are positioned for growth	Maximise regional strengths to unlock strategic opportunities for Western Australia	Economic development, diversification and innovation	Businesses, industry, local R&D, innovation and a regional vision Supporting a strong, resilient and diversified economy
3	Human capital, particularly education and skills	Investing in People – targeting skills, education, training and leadership capacity	Enhance infrastructure delivery and develop skills for the future		Skilled and adaptable workforces, regional universities and training, and schooling
4	Sustainable (populations, environment and economically)	Investing in Services – health, communications, water and transport	Maximise wellbeing, liveability and cultural strategic opportunities	Regional livability	Services, facilities and liveability, and support for population growth and change
5			Enable environmental sustainability and resilience, and address climate change	Climate resilience and low carbon transition	Build future resilience, ensure sustainable foundations and provide economic opportunities and jobs
6	Partnerships and collaboration		Enhance cross-government coordination and planning	Organisational excellence	Investing in regional leadership, capable local government and the Indigenous community
7			Support access to social services and improve Aboriginal wellbeing	Aboriginal empowerment and prosperity	Recognition, business skills and local procurement
8			Get the most from our infrastructure and improve maintenance		

4.4 Gamechangers – how it all comes together

Infrastructure for the economy
Manufacturing Future Made In Australia

Technology pathways
Tourism and lifestyle; Community and liveability

Project	Alignment with regional development matrix								Transformative project highlights				
	1	2	3	4	5	6	7	8	Infra	Manu	Tech	Tour	Comm
Renewable energy	✓	✓	✓	✓	✓				✓	✓	✓		
AMTECH		✓	✓		✓		✓			✓	✓		
Intermodal Terminal with interoperable links	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			
Bunbury Port	✓	✓		✓	✓				✓	✓			
BMRA Passenger Terminal	✓	✓	✓	✓	✓	✓		✓	✓			✓	✓
Rail upgrades	✓	✓							✓	✓			
Critical minerals		✓			✓					✓	✓		
Water security	✓				✓				✓	✓			✓
Bunbury Waterfront	✓	✓		✓	✓	✓			✓			✓	
BMRA Commercial	✓	✓		✓	✓	✓			✓	✓			
Collie industries		✓	✓		✓				✓	✓	✓		
Creative sector		✓	✓	✓	✓	✓	✓				✓		
Housing	✓				✓				✓	✓	✓		✓
Plantations and timber manufacturing	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓		
Wanju new suburb development				✓	✓				✓	✓			
Agribusiness precinct	✓	✓			✓				✓	✓			
Tracks and trails		✓	✓	✓	✓	✓	✓	✓				✓	✓
Regional centres	✓				✓								
Waste	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Human capital, education and skills		✓	✓	✓	✓	✓							

Image by City of Bunbury



4.4.1 Transformative economic infrastructure

Bunbury Port

Adopted in 2023, Bunbury Port Masterplan provides an overview in a 30-year time horizon, being responsive to emerging markets and delivers on the port's key role to facilitate trade. A renewed Bunbury Port Optimisation Plan (BPOP) provides an overview of the requirements needed to meet future growth in the region and the necessary infrastructure requirements. This plan is currently under review by State Government.

Bunbury Port is a critical component of the transport supply chain and it is well placed for a future that looks towards more Indian Ocean markets. New demands will necessitate adaptation for supply chain efficiencies and evolving needs. That puts an onus on operations to safeguard port landholdings for port-related trade in the decades ahead.

Currently operating across two sites – an Inner and Outer Harbour – realisation of the existing outer harbour for an extended period may be required. Capacity exists to create additional berths within the port footprint, move to more land-backed facilities, widen the channel to accommodate larger vessels and create an operations centre with autonomous control capability to maximise efficiency and minimise demurrage costs.

Economic gains to be enjoyed by investment in the port cannot be under-estimated and reach beyond the region to Perth. It is well recognised the expanse of land over 400ha is well placed to assist with the West Coast trade demands.

Intermodal Terminal

The construction of an Intermodal Terminal (IMT) will be critical economic infrastructure serving Bunbury Port, advanced manufacturing and the efficient transfer of freight.

The subject of an Infrastructure WA submission, the location of the IMT has been identified as Waterloo (DoT 2019, DPLH 2020), a strategic optimal location linking Bunbury Port, Picton, Preston and Kemerton Strategic Industrial Area. The 1,350ha Waterloo site also intersects the Bunbury Outer Ring Road, due to be completed by 2026, and existing rail infrastructure.

Rail

Additional rail corridor capacity will facilitate efficiency, reduced road usage and will improve both industry and social outcomes.

The 18km Brunswick section requires duplication and grade separation as the line reaches operational capacity, while a Kemerton spur would provide rail as a transport choice for tenants of the Strategic Industrial Area.

A proposed Greenbushes line reinstatement is looking unlikely which advances a view that the South Western Highway requires investment to cater for road freight volumes.

All upgrades would need to be considered in relation to efficiently linking in with the future creation of a South West intermodal terminal.

Transforming Bunbury's Waterfront

The Transforming Bunbury's waterfront (TBW) project will see Bunbury reimagined as a city connected to Geographe Bay.

Work has been ongoing and has seen early stages delivered from the Dolphin Discovery Centre and the Koombana foreshore, through to the Jetty Baths. The Jetty Road causeway upgrade has been completed.

Stage 3 of the project has progressed with the refurbishment of the boat ramp and upgrades for trailer parking at Casuarina Boat Harbour. The 460m Northern Breakwater structure, which is being constructed with 400,000 tonnes of rock, is critical to creating a safe, year-round facility for 300 future boat pens in the harbour. The breakwater works are expected to reach full height by the end of 2025.

Meanwhile, design and development of the broader marine precinct (including future boat lifting, servicing and stacking) is under way. Dredging has been completed and land reclamation for future marine facilities, landscaping and dune protection is progressing along with measures.

Ultimately, TBW will see recreational and commercial boat pens created in the sheltered Casuarina Boat Harbour, sparking private investment in marine services as well as anticipated tourism investments. The overall investment has been \$112m to date and will change the face of Western Australia's second city, changing perceptions as works transition from dominantly industrial to a marine precinct and tourism drawcard.

4.4.2 Transforming manufacturing

BMRA Commercial

Air freight and general aviation servicing opportunities at Busselton Margaret River Airport (BMRA) are available across a flat 15ha industry-zoned development area.

Growth in passenger flights with underbelly freight capability will generate opportunities, particularly in future years as key international routes open to markets demanding premium perishable products.

However, the uniquely spacious greenfield development site and Code 4C and 4E aircraft accessibility offer opportunities that are unavailable in other airports. BMRA has the space for passenger and commercial aircraft hangars with associated servicing.



Agribusiness Precinct

The need for a relocated new, fit-for-purpose saleyards to replace the Boyanup yards is well established. Demand persists, with stakeholders indicating the efficiency of selling stock from the South West catchment through Capel rather than through facilities in the Wheatbelt or Great Southern. Maintaining sale yards close to their current location is crucial for aggregating cattle herds, supporting feedlots, aiding small producers in competitive sales, and serving as a transit point for a variety of destinations.

Establishing a new location also opens up other opportunities as appropriate buffers, biosecurity, animal welfare, access to the RAV 4 network, water availability and other systems can be put in place.

Stakeholders have indicated a variety of large businesses across several different agricultural industries that could potentially act as an anchor, including an abattoir, horticulture processing facility, and grains processing. Indeed, a modern fit-for-purpose agribusiness precinct would offer opportunities in value adding, would be technologically advanced and would promote the circular economy.

It is notable that the existing saleyards within Boyanup townsite creates land use conflicts with neighbours including odour, noise, dust and effluent disposal, as well as constraining development of fully serviced land. Relocating the yards opens the door to residential development.

Water security

Harvey Water's market-led proposal phase of the 'Collie to Coast' has progressed. The project offers to deliver a water infrastructure undertaking designed to improve water availability and quality for the benefit of agriculture and industrial water users in the South West, particularly supporting agricultural expansion in a proposed 500ha horticulture zone – Myalup Primary Industries Reserve.

Originally funded in partnership with the Australian and WA Government, a business case was developed to deliver a reduction in water salinity sourced from the 185GL capacity Wellington Dam, and to reduce water loss in the distribution network. The potential of Wellington Dam asset is constrained by salinity levels that exceed potable water two-fold.

The Collie to Coast work considers long-term forecasting and includes stakeholder engagement to maximise inputs and benefits. The preliminary business case was completed in 2024 but details are not yet public. Options considered include: project scale; the existing Binningup desalination plant; construction of a new 20GL capacity Wellington Dam desalination plant; upgrade and extension of water networks; establishment of managed aquifer recharge; and, better utilisation of existing storages in a drying climate.

Reducing salinity remains a South West priority issue and boosts regional water security.



Manufacturing opportunities

Manufacturing is undergoing a dynamic transformation globally and plays a vital role in Australia's economy.

Manufacturers are diversifying their focus across different stages of the manufacturing process, ranging from research and development, and ethical resource acquisition to responsible processing of waste materials.

Government policy supports the benefits of expanding regional production opportunities by decoupling the over-reliance on imports, alleviating dependency on global supply chains in materials, medical technologies and other goods. Advanced manufacturing is linked with competitive advantage and requires affordable energy, with an emphasis on promoting renewable energy as having leading credentials.

AMTECH

An Advanced Manufacturing and Technology Hub (AMTECH) in the region will enable the adoption of new technologies, processes and practices to attract increased private sector investment and encourage high-skilled, high-value job creation for the long-term growth and prosperity of the regional economy.

New technologies produce specialised and valuable inputs linked to downstream processing, improved efficiencies in the innovation process to target and supply growing Australian export markets and support the nation's energy transition.

Skilled and knowledgeable workforces will be a prerequisite, building strength and underpinning investment attraction.

AMTECH development begins

In early 2025 the WA State Government announced plans to develop AMTECH in Picton and establish facilities to support the local manufacture of major energy infrastructure. The State's Made in WA plan details its commitment to installing a Western Power Manufacturing Facility as the anchor tenant for AMTECH and enable local industry to leverage opportunities.

This is an important first step in the development of WA's first dedicated advanced manufacturing, technology and renewables zone which will unlock local supply chain opportunities and create jobs as the energy transition takes pace.

It also signals WA Government commitment to the energy transition pipeline. This encouraging development will underpin future investment in partnerships and facilities designed to increase industry collaboration, skills development and R&D innovation.

AMTECH will elevate the region's manufacturing potential by clustering private enterprise, education and skills training, and research to drive high-value industry transformation and workforce development.

At both a State and Commonwealth level there is increased investment in manufacturing innovation to support new and emerging markets. The South West is poised to benefit and play a major role in a 'Future Made in Australia' building on the region's existing strengths and comparative advantages.



Image by Uncommon Creative, Dwyer Engineering

Location

The South West has long been hailed as an industry hub and export gateway, boosted by Bunbury Port which features one of the largest landholdings of any port in Australia.

Together with a sophisticated port, rail and road network within reach of key mining operations, current and emerging manufacturers, innovators and educators, the South West has a real opportunity for advancement. Major growth opportunities exist at the region's Strategic Industrial Areas at Kemerton and Collie, as it transitions from a traditional coal-based economy to embracing an innovative, opportunity-rich business environment supported by the State Government.

The convenience of available industrial land within close proximity to the port and access to key road links to Perth suggests the cost of growth in the Bunbury Geopraphe will be more inviting than competing areas.

Furthermore, the development of the Bunbury Geopraphe Sub-regional Planning Strategy, South West Supply Chain Strategy and finalised alignment of the Bunbury Outer Ring Road has aided the identification of quality sites all within 10km of Bunbury Port.

Consequently, AMTECH has the potential to link and complement other future development in the South West, such as an intermodal terminal and port expansion.

Critical minerals

Critical minerals are essential components in modern technologies, particularly in generating clean energy. The Department of Industry, Science and Resources lists 33 critical minerals: Nine are produced in the South West. They are alumina, graphite, lithium, silicon, tantalum, titanium (ilmenite and rutile) and zircon.

The Australian Government's critical minerals strategy emphasises sovereign capability, supply chains and renewable energy development as key issues with \$566m made available from 2024-25 for Geoscience to map critical mineral and rare earth deposits across the continent.

These actions and investing in a "Future Made in Australia" highlight the importance of the South West in advanced manufacturing, port expansion and a renewable energy future. The South West is



Image by Simcoa

approaching a watershed period in which it value adds its potential or exports materials for another region to benefit.

Collie industries

Backed by the WA Government, Collie is transitioning away from coal-fired generation to new industries and jobs. Work is progressing to refresh the commitment through to 2030.

Australia's first low emissions steel mill and WA's first steel recycling mill is one step closer with Green Steel of WA closing on its final investment decision. The project has undertaken front-end engineering design and construction is anticipated to begin in late 2025 and complete in 2027.

Magnium Australia's state-of-the-art pilot plant is now operational in Collie's Light Industrial Area, marking a major milestone in the development of sustainable magnesium production. Magnium's facility represents a significant step forward in establishing a domestic supply of this critical defence and automotive metal.

International Graphite has now commissioned and is operating its pilot project as it continues to move towards commercial scale processing. The company has commenced a Battery Anode Material Facility Feasibility Study, demonstrating industry interest in developing projects at Coolangatta Industrial Estate. The facility will produce graphite products for battery materials and a variety of industrial uses.

In support of attracting new job-creating industries, the State Government has allocated \$134m to activate Collie's Coolangatta Industrial Estate.

Tesla's battery re-manufacturing facility is also powering ahead with construction due for

completion in October 2025. The facility will service, repair, and renew Tesla's battery products, including industry scale Megapacks.

It is expected that Synergy and Neoen projects will bring battery energy storage capacity to more than 1GW (4+GWh) by the end of 2025, with proposals to double that in the future.

Other projects include Renergi's waste-to-fuel pyrolysis plant at the commissioning stage, Cannaponics' medicinal cannabis project moving towards certification and Quantum Filtration Medium's water treatment systems.

Timber and forestry

The timber and forestry industry is under-rated as an economic contributor to the region and points towards a more sustainable future; growing, harvesting and then growing more trees to store carbon.

Innovations range from replacing plastic packaging to building more energy efficient and affordable housing. Planet Ark is promoting a Wood Encouragement Policy, a call to lock up carbon and think of timber first as a building material.

A timber future also raises new opportunities in education and training, developing expertise in construction, architecture, design, technology and manufacturing.

An integrated processing facility would add value to the sector by utilising whole logs to maximum value and reducing costs through efficiency in processing by exploiting synergies

within the industry cluster. A full merchandising yard would also support an Advanced Timber Manufacturing Hub.

Plantations and investment

The timber industry is a leading prospect for private sector investment. Creating the preconditions for investment in plantations at one end of the industry and high-end manufacturing at the other would set the sector on a solid course given the UN's prediction that demand for timber products will treble by 2050.

Blue sky thinking establishes a path that leads to the development of a CLT or LVL plant and is underpinned by expansion of the Dardanup Timber Precinct to include an industry-leading processing yard serving a variety of related customers.

Wanju and housing solutions

A shortage of fill materials and challenging soil types on land at the future suburb of Wanju will require lightweight construction techniques. Since the customary approach of brick and concrete on raised pads will not be an option, the opportunity for quick-build alternatives comes to the fore.

Timber construction on raised frames is the future in a suburb already being promoted as one where environmental values will dominate. That opportunity points to affordable and energy efficient homes erected in half the typical build time.



The Djarlma Plan for the Western Australian forestry industry is inspired by the Noongar concept of Djarlma, which reflects the interconnected relationship of people with forests and woodlands.

The Djarlma Plan is underpinned by four, interdependent strategic priorities that aim to integrate traditional with scientific knowledge:

- 1) Healthy forests and woodlands
- 2) Wood product and ecosystem values
- 3) Community benefits
- 4) Industry for the future



4.4.3 Transformational technologies

Renewable energy

The Australia Energy Market Operator (AEMO) has recognised that WA's energy generation has gone from 10% based on renewables a decade ago, to about a third generated by renewables today.

As fossil fuels are phased out, renewable energy technologies will need to come to the fore alongside battery storage capacity – and this will all need to be achieved at pace to ensure sufficient power availability for the region's homes and industries.

The region sits in the core of the South West Interconnected System (SWIS), the world's most isolated electricity grid. The SWIS is a network of transmission lines, and at the heart of that is Collie where coal-fired power stations have serviced the bulk of the state's baseload energy needs for more than a century. Given that the SWIS distribution network features an existing 7,800km of transmission lines and 93,000km of distribution lines, it follows that renewable energy generation must plug into this valued infrastructure.

The Australian Government has identified an area in Geographe Bay to explore the possibility of offshore

wind power generation and while there has been significant interest from potential proponents, it is too early to predict what may happen.

Land-based wind turbines present an opportunity for lower installation costs and cheaper maintenance. Sometimes unpopular with communities from a visual perspective, windfarms in New South Wales can now be developed in plantations, with transmission line corridors aligning with firebreaks and general infrastructure offering foresters a passive income between harvests.

Domestic rooftop solar has become so widespread (36% penetration) that it now contributes more than 2.5GW of energy to the grid. Driven by rising energy prices, half of all WA homes are expected to have solar by 2030.

Green hydrogen

The WA Government updated its Renewable Hydrogen Strategy in 2021 with a vision for export opportunities. However, the sector and commercial-scale technology is still emerging. Transport, particularly heavy vehicles and waste collection trucks, are expected to be the initial beneficiaries where the freight task is on a return-to-base model.

Gas reliance

The WA domestic gas market is projected to be in deficit between 2024 and 2029, with potential supply from committed and expected projects up to 11% below forecast demand. Options available to alleviate some of this shortfall include: utilisation of gas in storage; and, the potential redirection of uncontracted liquefied natural gas (LNG). From 2030 onwards, further gas supplies are forecast to be required to meet increasing demand. It may be necessary for all Perth basin supplies to be committed for domestic use in the years ahead.

Battery storage

Batteries are a critical feature of grid-scale energy storage. They store and release energy as required and provide stability to the grid, managing the ebbs and peaks of power generation and demand.

The first battery to be up and running is being built by French company, Neoen and delivered by Tesla. Work on the 219MW grid-scale battery will be completed by the end of 2024. State-owned utility, Synergy is building a 500MW /2,000 MWh capacity battery that is expected to be operational in 2027. That battery will be the largest in Western Australia and one of the largest in the world.

Synergy has now awarded a contract to Southern Cross Electrical Engineering Ltd for work on its Collie project. The contractor will install and commission about 640 battery container units, 160 inverters and 220km of high-voltage cabling, as well as managing a laydown facility at the Port of Bunbury.

In addition, Neoen will build a second battery (300MW) before the end of 2025 and Alinta Energy is building a 100MW battery at its existing Wagerup Power Station. Alinta has also lodged a proposal with the state government to build a second, 300MW battery at Wagerup.

These batteries will have a combined 4,640MWh capacity and will be constructed in Collie to take advantage of the SWIS.

Further ambitions could see Neoen creating even greater capacity at Collie, having obtained development approval to build a battery with up to 1 gigawatt of capacity.

WA Creative Technology Innovation Hub – WA Creative Tech Village

The region has the opportunity to leverage the South West's competitive advantages in the creative industries sector and explore further innovation and technology development through the State-funded WA Creative Technology Innovation Hub (WACTIH) which trades as the Creative Tech Village (CTV).

Headquartered in Bunbury {B}LAB, the CTV operates across the state as a distributed connector network, building local, national and international industry partnerships to deliver stakeholder-driven programs and explore cutting-edge creative technology development.

A first for WA, the hub is focused on supporting the region's 1,500 people working in design, music, advertising, film, and media, as well as emerging technologies including gaming, digital software development and immersive tech and LLMs.

Founded in 2023, WACTIH's first international initiative is the Creative Tech Exchange, an agreement with Indonesia's Singhasari SEZ. The Creative Tech Exchange is also working to develop partnerships with creative, tech and innovation collaborators from Singapore and beyond.

Closer to home, CTV partners with major events such as Emergence Creative, GoSH Hackathon and developed programs such as Bandwidth as a mentoring program, and a Pathways program, Biddiwah, for future emerging creatives and techs.

As the creative industries grow, we might ponder Green AI and the opportunity to be building renewable-powered data centres to export.

Proven talent, raw talent in the mix

To further progress the creative sector, there are opportunities in the Busselton Business Fibre Zone to create a creative industries centre at scale and on a fully commercial footing based on a model comprising shared resources, tenants with established businesses and the inclusion of an incubator component to transition start up innovators into commercial operations.

Common-user facilities – particularly where tech and equipment is capital intensive – makes a great deal of sense in raising the commercial bar, industry capability and the facilitation of growth in the industry.

The space itself should be built with large areas for usage as a photographic or video studio, sound stage or green screen/ motion capture and recording/ editing facilities for tenants and visiting productions. Co-working spaces add to the commercial arm of the project and generate other prospects.

It is expected that some existing studios and offices would be attracted to a dedicated space. This would underpin greater industry collaboration while tenant rents provide an income stream to maintain the facility and its equipment. Established creatives could additionally be integrated into the incubator program, mentoring and providing advice.

With a targeted Busselton location, the proposed facility could generate genuine critical mass by integrating with nearby convention centre activities, gallery, CinéfestOZ program and events.



4.4.4 Transforming tourism

BMRA Terminal

Noted as a leading priority by all South West councils, Busselton Margaret River Airport requires a fit-for-purpose terminal building that reflects the region's quality tourism brand and serves as an appropriate, high level introduction/farewell as expected from visitors to the Capes region.

With airside infrastructure in place, BMRA now accommodates direct RPT (Regular Passenger Transport) Jetstar flights to Melbourne and Sydney, connections to Perth and 36 closed charter flights for the resources sector. The airport serviced a forecast 190,000 passengers in 2024-25.

There is an identified and urgent need to upgrade the terminal to a scale that allows all passengers to disembark smoothly and departing passengers to be processed through baggage and security for outbound flights. Facilities will be required to provide capacity for a fast turnaround and create opportunities for private sector engagement in operations, such as car rentals, food/drinks and retail.

Along with the City of Busselton, SWDC is leading a working group and expert study exploring multiple options for a terminal proposal that would address current capacity issues. It is expected that a path forward will be determined soon.

Looking ahead to 2030 and beyond, BMRA's future will include international capability and the prospect of delivering underbelly freight into Asian markets.

As well as being just 7km from Busselton CBD, the airport is also blessed with greenfield site opportunities.



Cape to Cape Track

The Cape to Cape Track is one of Australia's premier and most iconic hikes, running along the Leeuwin-Naturaliste Ridge between the lighthouses of Cape Naturaliste and Cape Leeuwin.

It is estimated that the Track attracts around 20,000 walkers each year, who engage in guided and independent short, day, and multi-day walks. However, a significant portion of the track and its associated day-use sites are in poor condition. Although recent upgrades have been made to a limited number of sections, there is a substantial opportunity to increase the number of interstate and international visitors by upgrading the entire track to meet international standards.

UCI Gravel Championships 2026

Australia has been awarded the 2026 UCI World Gravel Championships which will be held in Nannup and put the global spotlight on the South West.

The Western Australian event will not only be the first UCI World Championships outside Europe, but will also bring world-class cycling to the South West. This constitutes an exceptional opportunity for Nannup and the whole region to establish its credentials as an international destination.

Accommodation services will be spread across the region, although investment will be required in communications, water/sewerage infrastructure and power.

Trails

The South West is Western Australia's premier trails destination, delivering options from high quality mountain bike projects to a bridle trail and world class walks that include the renowned 1,000km Bibbulmun Track, 1,072km Munda Biddi Trail and breathtaking Cape to Cape Track.

Investment is supporting the extension of the walking/cycling Wadandi Track to 110km. Named after the traditional custodians of the land, the Wadandi Track traverses bushland, farms, vineyards and the magnificent Leeuwin-Naturaliste area.

In contrast, Manjimup is developing Australia's first trailbike hub which will provide unique access to State Forests. The hub is expected to attract more than 33,600 visitors yearly and builds on Manjimup's reputation as a dirt bike racing destination.

4.4.5 Transforming the community

Economic development activities must go beyond wealth generation and ultimately improve the wellbeing of communities by serving this dual purpose.

Regional centres and hierarchies

Settlement hierarchies underpin economic development, with the trend towards urban living on the coast, especially relevant to regional centres.

Weak regional centres lead to weak regions. Economic activity and liveability flow in waves from regional centres so it is important that the Bunbury-Busselton population axis stays strong and Manjimup anchors the Warren-Blackwood sub-region.

A drive to have Bunbury recognised as Western Australia's second city is important in administration, education, healthcare, business and accompanying investment.

Transforming Bunbury's Waterfront will change perceptions while the development of Hands Oval is already doing that in hosting AFL games. Advanced manufacturing, port investment and digital progress will lay the foundations of a path to the future. Combine this with R+D, skills training and industries requiring an educated workforce, and your key centres secure the region.

Bicentennial Square

Development of Bunbury's Waterfront highlights the impact of revitalisation on first impressions and serves to provide opportunities in jobs and community leisure. Bicentennial Square has all the hallmarks of potential to better connect Bunbury to Leschenault Inlet and deliver transformative outcomes.

The currently underutilised public space can position itself as a connector to the water and become a vibrant precinct and community asset with strategic options to rejuvenate the CBD.

Human capital, education and skills

Unprecedented change and a housing shortage serve to elevate the importance of endogenous skills development and training in the region.

While collaborative activities already take place among SW Health and Education Campus bodies (Bunbury Regional Hospital and St John of God Hospital, ECU South West, South Regional TAFE, Manea Senior College and the Rural Clinical School), they operate separately which triggers an opportunity to create a fully co-operative working space and closer ties for all the precinct partners.

A proposed Precinct Hub would be co-designed to physically connect the partners, support collaboration and ease current infrastructure constraints as well as delivering a multi-disciplinary and interprofessional approach to regional health and education.



Image by City of Bunbury, Koolambidi Woola - Youth Precinct

Closing the gap

The South West Native Title Settlement has begun to fundamentally change Aboriginal engagement and create unprecedented opportunities for South West Noongar people. Notwithstanding formalised approaches, it is important that the potential for Aboriginal advancement is fulfilled through acknowledgement of history and an understanding that, for traditional owners, booja is a complete ecosystem that includes family, society and relationships with the land, plants and animals.

Opportunities for recognition abound in signage, art, procurement and tourism. Shared learning and mutual respect will be a key to a shared future in which no one is left behind.

In Bunbury, the Gnaala Karla Booja Aboriginal Corporation has a vision for a centre at Mangrove Cove where new premises can blend the 21st century with traditional culture and share arts with the community and visitors alike.

Liveability

Growing our regional cities is popular theme, and sustainable populations are a key pillar, but there are risks that need to be carefully addressed. The '20-minute city' with easy commute times, accessibility and parking will be challenged by unmanaged population growth. However, those issues will present their own opportunities for surrounding smaller towns and for infrastructure and services that retain high levels of liveability.

There will need to be open and mature discussion on sprawl versus multi-storey buildings, and the necessary development of support infrastructure to cater for more people. For example, there will be requirements for expanded sports facilities, and thoughts will need to turn to the built environment in respect of catering for an ageing population. Amid all change, the value of the natural environment must always be taken into account.

Waste

Waste precincts have the potential to meet State and Federal policy expectations by rapidly heading towards zero waste to landfill while using 'waste' as a resource and boosting innovation, jobs and the economy. Developing composting facilities will cut landfill significantly and create other opportunities, while other activities can move towards a circular economy in which landfill is an atypical approach to available waste materials.

Investment in materials recovery will produce a stream of sorted materials for recycling uses and product for an innovation hub, which is strong potential development for the site. There have been great strides in utilising mine tailings as roadbase and that is just the start as the region takes its first steps on the journey towards a circular economy.

Image by Tourism WA, Shelter Brewing Busselton





5 Positioning the South West

Economic Infrastructure 1		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Intermodal Transport Hub Deliver an open access IMT to maximise transport efficiencies	Create an IMT to facilitate dynamic transport management Plan for freight efficiencies, combining road, rail and port systems at the Waterloo site identified by the WA Department of Transport	Work towards site planning at Waterloo/Picton, accounting for existing transport networks, industrial land availability and future need	Deliver an open access inter modal transport hub to meet the regional freight task for decades ahead	The South West is served by an efficient inter-operable hub, boosting competitiveness in industry and supporting investment decisions
Bunbury Port Enabling the development of trade through shipping, connecting the South West to world markets	Fulfilling the potential of Bunbury Port Plan for the best use of significant landholdings and exploit the proximity to Perth by developing berths and rationalising landholdings Grow the port to meet South West and State export/import needs for bulk cargoes, energy transition requirements, niche container cargoes, breakbulk and roll-on roll-off cargo including refrigerated and food grade cargo Acknowledge regional ports importance in regional development via sustainability, collaboration and active participation in innovation systems	Determine best use of outer harbour facilities and consolidation of suitable cargoes	Consolidate facilities for efficiency	The region is well served by its port in a co-ordinated delivery of maritime services, working with other ports to provide solutions to both the South West and Perth
		Plan to widen the channel to maximise efficiencies and accommodate vessels to 265m	Widen the channel	
		Plan for a port-based operations centre with autonomous control capability	Deliver an operations centre and relocate port operations to the central port site	
		Plan for energy transition projects including further laydown storage needs	Develop port landholdings to support new trade opportunities for the region	
		Commence planning for new berth facilities to handle growing trade requirements inclusive of energy transition and onshore processing requirements	Begin the development of berths to support multi-user options including RO-RO, energy transition and organic growth	

Economic Infrastructure 2		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Rail Ensure rail systems keep apace with the needs of the region	Connect the South West Continually improve the South West rail network and connections to Perth to maximise freight competitiveness and community passenger patronage	Implement actions to improve the speed of Bunbury-Perth passenger services	Complete duplication of South West Main Railway Line – Brunswick to Bunbury Port – which would trigger remodelling the Coalfields Hwy/South Western Hwy intersection Construct standard gauge rail from Bunbury IMT to Perth Link Kemerton to Bunbury Port	The region's rail connections are fast and efficient, featuring standard gauge rail and grade separation
		Determine the future of the potential reinstatement of the Greenbushes line and provide some certainty for impacted communities		
Roads Construct free-flowing major roads to benefit industry and minimise freight traffic on local roads	Freight efficiency Maximise efficiencies through connections on key routes and grade separations to ensure the uninterrupted flow of traffic and boost business competitiveness	Improve safety at access points on Forrest and Bussell Highways		The South West has efficient freight, tourism and community networks meeting the needs of a go-ahead region
		Lighting at brake inspection bay on Coalfields Highway		
		Continually improve local roads with an emphasis on delivering sealed roads for Scott River agriculture producers		
		Continually improve South Western Hwy with upgrades and additional passing lanes from Donnybrook to Walpole		
		Upgrade Graphite Road linking Manjimup and Nannup	Upgrade the Brockman Hwy between Nannup and Bridgetown	
		Upgrade roads to Improve efficiencies and safety around the lithium mine in Greenbushes	Dual single lane sections on the Busselton Bypass to Vasse	
		Upgrade both Donnybrook-Boyup Brook Road and Boyup Brook-Cranbrook Road to support agriculture and proposed developments	Investigate putting in place the Vasse Dunsborough Link ahead of the Busselton Outer Bypass	

Economic Infrastructure 3		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Aviation The South West provides a suite of services including passenger, flight training, commercial, recreational and emergency services	Busselton Margaret River Airport BMRA becomes a recognised regional airport at the national level with links to other Australian cities and Asia, continually attracting quality upgrades to service the region	Begin constructing a quality fit-for-purpose passenger terminal with a view to expansion and meeting the expectations of visitors to the South West region Develop and construct freight and logistics warehousing facilities at BMRA	Upgrade to cater for international passengers Introduce quarantine capacity for international freight	The South West is connected via key air routes in Australia and Asia BMRA has a reputation for collaborative work with the mining sector, providing quality FIFO options
	Bunbury Airport The airport provides high capacity general services for recreational aviation, emergency management and flight training	Investigate offsets for future expansion	Construct a cross-runway to provide an alternate runway for training and in the event of strong winds	
	Manjimup Airport Airport is capable of supporting 50-seat aircraft for fly-in fly-out and emergency service provision	Widen existing runway seal to 30m	Build additional terminal space and refuelling facilities	The South West provides a suite of flight training, recreational and quality emergency services including for RFDS, air ambulance and bushfire fighting aircraft
	Boyup Brook Airport Airport can accommodate emergency night flights and glider demand	Extend the runway and add lighting to accommodate RFDS night flights and recreational use for gliders		
	Emergency services Ensure all regional airports have the capacity to support access for the Royal Flying Doctor Service The region's airports should also plan for, and be able to host, water bombers	Emergency access must be made available to all the region's airports		

Economic Infrastructure 4		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Water security Ensure the South West has long term water security for agriculture, industry and domestic purposes	Desalinating Wellington Dam Improve water availability and quality, desalinating the Wellington Dam water resource to support industry and downstream agriculture, targeting irrigation district growers and freeing up capacity for agricultural reserves around Myalup	Develop a business case for improving the dam, converting open irrigation channels to a piped network and improving water security	Consider integration of recycled water, use water balance to underwrite agriculture and industry	The region has access to fit-for-purpose industrial water supplies to meet growth in manufacturing and agriculture Salinity reduction in agricultural water supplies and long-term catchment rehabilitation is advanced
	Southern Forests Ensure water security in the agricultural food production areas across Bridgetown-Manjimup-Pemberton	Encourage shared infrastructure as growers manage their own water security	Implement evidence-based research and monitoring in a drying climate	The Manjimup growing district has better protection against climate change and drought
	Waste water recovery resource Treat and utilise waste water, and other non-potable sources, for use in public open space, recreational space and for industry	Construct a pipeline from Bunbury waste water treatment site to Bunbury for distribution within Dalyellup and Bunbury	Connect all large scale recreational and public open space areas to fit-for-purpose non-potable water	Set the benchmark for reusing waste water, minimising waste in a drying climate
		Extend wastewater reuse to all parts of the South West particularly looking at Collie and Busselton townsites, and new urban development areas in Margaret River	Future residential developments should include grey water systems	Potable water supplies are safeguarded and fit-for-purpose water is used for public irrigation
	Wastewater management/sewerage Existing septic sewer systems in urban areas are replaced by sewer systems	Complete sewerage infill provision in Bunbury, Busselton and Leschenault to mitigate against eutrophication	Complete sewerage infill provision in Augusta, Bunbury, Busselton, Balingup, Bridgetown, Leschenault, Manjimup, Northcliffe, Collie, Donnybrook, Capel, Harvey, Margaret River, Gracetown, Nannup, Witchcliffe and Walpole to mitigate against eutrophication	All South West towns have quality sewerage systems as a standard feature
		Begin installing reticulated sewerage in Boyup Brook		

Economic Infrastructure 5		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Water security Ensure the South West has long term water security for agriculture, industry and domestic purposes	Managing groundwater resources Investigate and provide appropriate level of protection/optimisation of existing resources	Digest the recent sea water intrusion report and identify new actions as well as additional coastal areas that may need to be monitored as the climate dries and water usage increases	Ensure an adequate network of sea water intrusion monitoring bores has been established	Monitor and flexibly manage groundwater extraction to optimise aquifer management, protect current users and ensure the resource remains available for future generations
	Water servicing Ensure expansion of Greater Bunbury and Busselton is undertaken in a coordinated and sustainable manner, including upgrades to services in Capel and Boyanup	Undertake a rigorous assessment of water servicing options for Wanju including wastewater, scheme water and fit for purpose water for irrigation of urban landscapes	Ensure water servicing infrastructure including arterial drainage is constructed in a timely manner to service urban expansion and industry throughout the region	Maximise opportunities to optimise water servicing to ensure the vision of a liveable, green and vibrant urban community is realised
Sustainable energy Ensure there is access to sustainable, affordable energy supplies to support a growing region	Energy security The region is able to expand its economic and population base through the provision of adequate energy supplies and reliable distribution networks, making the best possible use of renewable energy options and opportunities to decarbonise energy	Begin the green hydrogen journey with generation and refuelling at the Shire of Dardanup Depot in Waterloo	Underground power, particularly in the highest risk bushfire areas	The South West has secure and sustainable energy supplies for a population of 300,000 New industry is developing on the basis of access to reasonably priced green energy with a mix of technologies providing opportunity
		Continue to develop battery storage opportunities linked with the SWIS	Expand to make best use of the South West Interconnected System (SWIS) network	
		Explore and construct a mix of renewable energy options – solar, wind and hydrogen – where feasible	Provide upgraded power supplies to Kemerton Strategic Industrial Area and the Scott River area to facilitate industry and agriculture investment	
		Encourage solar and the electrification of local government assets at all levels, including EV charging and street lighting		

Economic Infrastructure 6		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Advanced manufacturing and digital hub Look to future trends and position the South West	Bunbury-Geographe cluster Identify key sites for advanced manufacturing and engineering services	Undertake a study to investigate suitable sites with available industry-zoned land and put in place infrastructure to attract investment	Transition to a highly skilled workforce and environment where business is increasingly connected with academia	The South West has transitioned to a knowledge economy and is recognised for innovation and quality Continued investment is justified as the South West gains reputation for downstream processing and enjoys world class supply chains The South West is a leader in waste minimisation and is fully engaged in the circular economy
	Value-add downstream processing and circular economy Expanding the manufacturing sector is a key to value adding resources and facilitating growth including engagement with a waste innovation hub to benefit from R+D synergies	Offer information on available industrial land with a focus on transport links and co-location synergies	Transition to green energy use to boost business credentials and support the South West brand	
		Explore opportunities in critical minerals and the recovery of minerals		
High capacity bandwidth and digital connections Ensure the region is capable of communicating and transferring data at the forefront of world standards	High capacity bandwidth The region is able to expand its economic base and social amenity through high capacity broadband delivering 500+ Mbps for domestic use, 2-10Gbps for business use, with fixed, wireless and satellite networks throughout the region	Upgrade all copper services to more reliable high speed optic fibre (FTTP) Move fixed wireless communities to high speed FW and LEO sat options Free wi-fi access is available to support tourism in town and city centres throughout the region	Lever off progressing the digital agenda to engage with edge computing and establish a data centre in the South West	The South West is a region of excellence in digital technology The South West is a recognised technology region capable of meeting the needs of cutting-edge industry, the creative sector as well as education and social connectivity The critical mass of telecommunications demand is sufficient to drive investment in new and emerging technologies as access is enabled and consumers have choice
	Mobile coverage Mobile phone access is available throughout the entire region to support economic growth, improved social amenity and emergency calls Mitigate against bushfire risk and natural disasters by pursuing whole-of-region coverage	Back up batteries increase wireless and telecoms tower coverage during bushfires All blackspots are covered		

Industry, Business & Investment 1		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Export opportunities An industry and business sector with the skills, knowledge and capacity to engage with Asia	Business support Skill local business and industry in Asian and Indian business culture, language, finance and export procedures	Support trade opportunities through engagement with Government and trade bodies		The South West has a fully engaged, well developed international market presence with the reputation of being a good place to do business
		Establish an online South West opportunities prospectus demonstrating regional capability		
Land for industry Ensure adequate land supply, water and energy is available to create business opportunities, economic diversity and generates employment across industry sectors	Industry land bank Sufficient land is set aside for a range of industry needs to 2050	Complete structure planning for Kemerton, Shotts and Preston industrial land areas being mindful of significant water constraints Ensure major towns have a supply of light industrial lots to support small business	Provide a rail link to the Kemerton Industrial Park and improve the East-West link Marriott Road Realise the potential of the Waterloo industrial estate, its transport connectivity and proximity to Picton State Government to look at incentivisation strategies to encourage industrial attraction and development	The South West has sufficient land for industry set aside to meet future demand and eliminate land use conflicts
	Shovel readiness Industrial land is prepared for immediate investment in respect of planning, water and power	Approval processes are undertaken by Government to remove investment barriers from SIAs at Kemerton and Shotts		
	Light industrial areas Set aside, and ensure fit-for-purpose locales are provided, particularly in respect to necessary services in smaller regional towns Upfront infrastructure support required to develop new fit-for-purpose areas	Provide utilities including three-phase power and water with adequate pressure for fire-fighting in Boyup Brook, Bridgetown, Donnybrook, Manjimup, Pemberton, Nannup		

Industry, Business & Investment 2		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Creative industries Ensure the creative sector has the best opportunity to expand and thrive	Grow the creative cluster Support the sector's reputation and opportunity in a fully inclusive environment that bridges sub-sectors of the industry and crosses cultures Drive skills development across the board to underpin the industry and grow critical mass in the South West Support jobs growth in an industry that has a very light footprint	Promote awareness of the value of the creative sector and support through local procurement and events including CinéfestOZ and the Emergence Festival	Develop national and international links through the Creative Tech Village	The South West has significantly grown its film, digital media, music and related creative capacity and is recognised as a major international contributor earning export income leading to new opportunities for education and training
		Look to develop a commercially-based Creative Hub centred in Busselton, and link in opportunities to nurture talent through an incubator model	Continually update the centre with cutting edge shared facilities to support the sector	
		Underpin part-time management costs to grow the South West Creative Corner with the neighbouring Great Southern region and develop the region as a hotspot for talent		
	Boost Aboriginal economic development Encourage opportunities to support the Aboriginal community through the acknowledgement of arts and culture	Grow the recognition of Aboriginal art in the region and continually move towards commercialisation opportunities	Ongoing long-term efforts to embrace a uniquely South West form of art	Aboriginal art in the region is widely recognised as distinctive and belonging to the South West
			Include culture and arts opportunities as an attractor and commercial venture via a Gnaala Karla Booja Aboriginal Corporation centre in Mangrove Cove	
	Build the creative brand Enhance the entire region's creative reputation	Encourage all Local Governments to create streetscapes, places and feature public art in a way that collectively boosts the region's creative brand		The region has a reputation as a destination to enjoy art and culture

Industry, Business & Investment 3		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Agriculture Ensure the South West maintains its reputation for quality products, produced in a reputable environment	Food reputation Ensure the region is well positioned to meet growing domestic and overseas demand for high quality food products Regional tourists experience quality foods in South West restaurants and at special food events such as Truffle Kerfuffle to create demand in premium markets Growth Support regional growth through value adding, soil improvement, reducing regulatory barriers, introducing common user infrastructure and making more efficient use of water resources in a drying climate	Protect the best agricultural land for food production	Find ways to reduce waste and utilise food that does not meet consumer expectations eg blemished fruit Develop an Agribusiness Precinct on an unconstrained site to replace the ageing Boyanup Saleyards – the new facility should include food manufacturing opportunities and export for high value produce Encourage R&D and investment in water infrastructure and improve irrigation efficiency through consolidated schemes Implement closed loop horticulture systems, recycling nutrients and organic matter material back to the soil	South West product value has increased as it takes advantage of high-value niche markets domestically and overseas Regional consumers value regional production and all restaurants and cafes proudly prepare local product Nuisance weeds have been eradicated Soils have improved
		Support technological solutions to blockchain, enhancing regional brand reputation		
		Introduce regenerative agriculture on marginal land and areas where soils are degraded		
		Conduct inbound food and wine buyer events to support growth		
		Develop traditional/native foods and spices as a point of difference and Aboriginal business opportunity		
		Investigate potential for food manufacturing links as a part of the advanced manufacturing drive		
		Introduce regenerative agriculture in marginal farming areas		
		Host the WA Small Wineries Show at a major venue		

Industry, Business & Investment 4		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Forestry and timber processing Ensure the sustainability of forests through replanting and public understanding of locking up carbon	Expand the estate Growing the plantation estate is critical to give confidence of future supplies and underpin investment in the sector Drive to zero waste Employ the latest technologies in harvesting and engineered products to underpin the sustainability of the industry Ensure community understanding Promote environmental, regional, social and economic benefits from managed forests and woodlands, while ensuring bushfire risks are not exacerbated	Identify suitable landholdings for plantation timber and salinity reduction benefits with immediate investment through the Forest Products Commission	Mainstream building companies offer timber homes as a standard Attract investment in industrial scale mainstream kit homes Continued plantation expansion guarantees supplies and tackles salinity issues Introduce Forestry Management Plans that work over longer timeframes to give confidence to investors	The South West has an international reputation for producing sustainably sourced and quality timber and wood products The region is known for building innovation in renewable timber The South West has more plantation acreage than in 2020 and will continue to expand the estate in a way that supports communities More homes are built of timber in the pursuit of savings and sustainability: grow-build-plant-repeat
		All South West LGAs adopt the Timber First policy		
		Construction of a common log landing and manufacturing precinct for timber manufacturing based on shared economies of scale		
		Investigate carbon offset systems to stimulate investment interest and to promote tree planting		
		Encourage farmers to plant trees on parts of their landholdings to grow the overall plantation estate		
		Explore opportunities for an Advanced Timber Manufacturing Hub, boosting investment prospects		

Industry, Business & Investment 5		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Tourism Develop tourism infrastructure in core South West experiences of wine and food, art and culture, events and landscapes	World leader Increase economic contribution through higher value visitation from interstate and overseas markets by providing first class attractions, experiences, food and accommodation	Specifically support local governments that attract national and international level events eg Nannup hosting World Championship cycling	Support infrastructure requirements of the Margaret River region to deliver as a premium destination for tourism	The South West's international visitation rate matches intra and interstate rates leading to new investment in accommodation, things to do and jobs growth
	Aboriginal tourism opportunity Boost Noongar cultural experiences and involvement for contributions in other suitable projects throughout the region	Engage traditional owners and ILUA Regional Councils in projects with a view to generating Aboriginal employment opportunities that support culture	Create a completed mountain bike and trails network catering for all needs from walking, cycling, bridle trails, motorcycle and others	Traditional owners are celebrated throughout the region and Western Australia for their connection to country, art and culture
	Events Increase the number of high value events to attract wider interstate and international visitation, act as attractors and contribute to addressing seasonality and regional dispersion	Investigate opportunities to hold business events and capitalise on Busselton Margaret River Airport Capitalise on sports assets to host major events and country carnivals Support local government to grow events as attractors	Complete development of Collie Motorplex to at least a standard to hold nationally televised competitions Maintain Bunbury Speedway to a standard that secures national and state level events Support and develop Manjimup to become Western Australia's premier trailbike racing and experience hub	All restaurants support local food produce, beers and wines The South West features a range of appropriate accommodation choices that support infrastructure investment
	Accommodation expectation Provide modern hotels, stays and resorts to meet the needs of visitors	Encourage more investment in five-star and eco hotel accommodation as well as upgrading existing assets		
	Creative combination Street art, sculptures and townscapes demonstrating a sense of place add to the regional brand in business and leisure	Each South West townsite begins to develop and reflect their own unique sense of place Support the Nannup Geopark proposal		

Community & Environment 1		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Sustaining environmental qualities Acting to mitigate and adapt to climate change and sustain the environmental qualities which are intrinsic to the character of the South West	Maintaining environmental values Ensure the region maintains its environmental and economic values, maintaining sustainable credentials while growing in a drying climate and with rising sea levels Include Net Zero and carbon emission reduction in all activities and projects	Support the region's NRM bodies which work strategically to ensure the region's landscapes, flora, fauna, waterways and coastline are protected for current and future generations	Retrofit existing stormwater management systems with water sensitive urban design and continue to improve nutrient management to reduce threats to fish and water quality	Population and industry growth has occurred without materially compromising South West environmental values and lifestyle leaving a positive legacy for the future
		Support the Peron-Naturaliste Partnership (PNP) to identify and mitigate sea level rise between Rockingham and Naturaliste	Undertake a long-term study of groundwater salinity to investigate the impacts of continued agricultural use of the Western side of the Forrest Hwy in the Shire of Harvey	
		Continue to address nutrient inflows into the Leschenault Estuary, Hardy Inlet-estuary and Geographe Waterways and repair habitat	Develop a funding mechanism to ensure measures to mitigate against sea level rise can be achieved	
		The whole SWALGA Zone collaborates on a united goal to decarbonise the South West		
		Support the post mining transition of land back to nature or appropriate community use		
Regional waste Minimise kerbside waste and ensure that practices and processes head towards a target of zero landfill consistent with State and Australian Government policy agendas	Sub Regional Resource Recovery Facility Develop the Diamond RRF within the proposed Eco Industrial Park, based on mobile systems, proven as a rural waste management solution Capacity Investigate and test mobile solutions for surrounding councils and industry, with a 'hub' for processing agricultural, forestry, commercial and domestic waste streams	Boost the region's composting capacity to divert landfill	Monitor innovations and replicate successes	The South West is nationally recognised as a leader in waste diversion, reuse and management Compost materials are widely used to improve agricultural land in a drying climate The use of waste materials in civil works is commonplace and all materials are utilised
		Replace basic raw materials with recovered alternative materials	Strive to develop local demand for quality recovered materials, and produce the products required	
		Utilise waste resources in civil works	Expand recovery to all forms of plastics with sub-regional collection points	
		Investigate pyrolysis for non-usable waste as a source of biochar, carbon black and energy generation	Continue to research and introduce novel, proven processing systems	

Community & Environment 2		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
South West streetscapes Create an image of the region's settlements that showcases culture and environmental values, benefitting the community and reducing heat islands	Creative culture The region's towns should reflect their sense of place in public art, heritage, atmosphere and offerings to attract population and stimulate business	Each settlement to undertake a review exploring their points of difference and showcase South West art		The South West is a desired lifestyle location with each area featuring its own character
	Urban canopy Urban greening concepts set the region and Western Australia apart	Extend urban greening concepts to all built areas		Urban streets are greener and boost available habitat as well as human lifestyle
Regional capital: Greater Bunbury Strengthen the role of Bunbury as Western Australia's second city supporting regional commerce, trade, arts, culture, education and human services	Bunbury Position Bunbury as a well-connected and consolidated city of choice through access to high quality services, housing, economic opportunity, education and high quality amenity in both recreational and public open spaces	Complete Bunbury Waterfront Development including expanded marina facilities in Casuarina Harbour and Koombana Bay	Create new mixed-use development opportunities at Casuarina Harbour following decommissioning of Outer Harbour infrastructure	Greater Bunbury is Western Australia's second city known for its vibrancy, growth and commercial investment Bunbury is a viable residential and investment alternative to Perth Bunbury is recognised nationally as a maritime trade and commercial centre
		Expand the Bunbury Regional Art Gallery to provide a regional exhibition and art education centre		
		Bunbury is home to a decentralised government agency		
Regional city: Busselton Develop the City of Busselton as a major Western Australian regional city	Busselton Establish Busselton as the regions' major lifestyle city based on tourism, wine and food, creative industries, events and high-value professional services	Complete Busselton foreshore development incorporating high quality accommodation development	Develop responsible approaches to managing coastal retreat or protection in respect of sea level rises	Busselton is a nationally recognised city for high- value industries in the creative sector, professional services and tourism and is an international gateway for business and tourism visitation to the region
		Ensure Busselton features Wi-Fi access in major tourism nodes		
		Monitor sea level rises to plan for the future		

Community & Environment 3		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Education A region of excellence requires the capacity to deliver high quality services from kindy to higher education	Growing to meet need Ensure kindergarten/primary and high schools are capable and have capacity to meet forecast population growth Continued learning Improve engagement of young people in the opportunity to access higher education and achieve high retention rates Adaptation Education and training are innovative in service delivery and work in collaboration with industry partners to adapt to changing needs Further education Increase the number of school leavers engaged in further training – TAFE and recognised certificates	Integrate vocational education with industry need and input, paying particular attention to opportunities for endogenous workforce growth on the South West Health and Education Precinct led by ECU South West Introduce additional learning support/centres in key areas of regional growth reflecting regional student participation levels Follow through on ECU's commitment to be a university of the future, creating points of difference and being responsive to change	Integrate and develop online learning support/centres in each of the region's major towns to deliver synchronous quality courses in an online mode Physically expand higher education close to centres of population and industry Expand student accommodation facilities in Bunbury to support local initiatives and domestic and international student enrolment at ECU and to support SR TAFE Deliver a range of courses and modalities aligned to regional need and demand	Young people choose to remain in the South West for their education or return to the region following graduation elsewhere The region has a vibrant well developed international student cohort A broad range of educational opportunities exist for people to participate in education at any stage of life The South West is established and recognised as an education region and Bunbury is recognised as an education city
	Higher education options Continue to expand degree options for regional students, supporting first year study in the South West with the possibility of completing degrees in Perth	Focus on international student opportunities Strengthen proven links with Africa and explore other Indian Ocean countries		

Community & Environment 4		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Health Ensure hospital, GP and Primary Health care services have the capacity to meet demand from a South West population of 300,000	Primary health care Ensure the region has access to primary health care professionals, quality emergency care and a suite of programs that address health issues for a growing population Healthy minds Ensure the needs of people with mental illness are addressed as far as possible within the region Aged care Expansion of aged care services (to age in place) and accommodation options to address demographic change Aboriginal health Ensure that South West services support efforts to close the gap in Aboriginal health outcomes Expectations Traditional health service delivery becomes more patient-focused Health professionals The region should move towards growing its own workforce rather than rely on recruiting from other areas	Improve focus on the management of chronic disease (diabetes, asthma, mental health, and arthritis for example) and the associated lifestyle risk factors for these conditions (obesity, alcohol use, smoking, inadequate exercise and poor diet)	Population growth is demanding greater investment in oncology services to ensure need is met in the region Step change management accounts for support infrastructure needs such as parking, catering and necessary supplies Work towards meeting demand needs for additional chemotherapy, dialysis, theatres and beds Ongoing Integrated health services are provided to support adolescent health	High incidences of health morbidity have been addressed and awareness of the impact of personal decisions on individual health has increased The South West is a preferred regional destination for health professionals The South West is a model of integration and collaboration between the public and private healthcare systems
		Complete the \$451m refurbishment of Bunbury Regional Hospital by the end of 2029		
		Begin construction of the SW Aboriginal Medical Service's new centre		
		Monitor and develop the EMPPATH (Essential Medications for Palliative Patients Accessing Treatment at Home) pilot in the South West		
		Support redevelopment of the Margaret River Hospital Campus to meet the needs of the resident population and tourism influx		
		Support the increase of locally-trained workers, integrating training by educators and health providers		

Community & Environment 5		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Community connectivity Ensure the bulk of the population has access to public transport	EV Network Support the development of an EV charging network Trackless tram Investigate the introduction of a ground-breaking trackless tram featuring renewable power	Grow 'greenfleets' across all levels of government		The key population corridor is connected by an efficient zero emissions transport service
		Plan for a service within Greater Bunbury	Extend South to Busselton and Vasse Introduce technologies to automate the service	
Active ageing Developing infrastructure which supports accessibility, ageing in place, Aboriginal engagement and advanced health care, including mental health	Ageing in place Enable people to age in place and transition to appropriate high and permanent care as required Moving forward Ensure continued community engagement through age-appropriate sports delivery and social/interest groups	Build supported seniors accommodation to meet forecast demand Ensure high care services are expanded both in high care accommodation and services to the home Build culturally specific Aboriginal high and permanent care facilities for Aboriginal seniors		The region's higher proportion of older people enjoy appropriate public infrastructure and have access to quality services delivered by a strong non-government sector
Housing Real estate stocks need to support growth across a mix of housing options at a range of settlement scales	Affordability and choice Ensure there is a mix of affordable housing options providing choice in terms of block size and city or hamlet scale living Lighter footprint Encourage lightweight construction methods to reduce the demand for sandfill Social housing Address homelessness issues and spread public housing within suburbs and throughout the region	Unlock land and ensure appropriate land supply and regional choice to manage pricing and regional living expectations	Detailed planning for the new suburb of Wanju to come on line – setting timelines and a schedule of necessary infrastructure roll-out	Affordability is no longer a major housing social issue in the South West All regional communities are self-sufficient with a range of housing options that enable people to remain in their local communities
		Expand the trades workforce through local training, and through migration, to meet construction demand	Incorporate affordable housing targets in new development proposals	
		Develop integrated accommodation for at-risk young people with service provision aimed at returning them to mainstream education and work		

Community & Environment 6		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Sport and recreation Ensure the region has adequate well planned sports and recreational spaces across the region	Enhance liveability Ensure adequate land area is developed to provide an expansion of team-based sports facilities mindful of demographic and gender need Raise the game Position the South West to have premium facilities which enable the region to host State-wide country events, support population growth and attract workers Trails reputation Support the development of key trail infrastructure that adds to the South West brand and reputation	Upgrade Eaton Recreation Centre as the region's FIBA accredited basketball venue and home to the State Netball League's SW side	Redevelop the South West Sports Centre to increase capacity, integrating new models of service delivery and private sector integration to boost financial sustainability Redevelop the ageing Hockey Stadium infrastructure in Bunbury Build a new recreation centre to cater for growth in the City of Busselton Redevelop and extend the Bovell Park Sporting Complex to a regional facility Redevelop and upgrade the Leschenault Leisure and Recreation Precinct Complete the trailbike and ATV trail in Manjimup Plan and deliver a state level equestrian facility at Capel Regional Equestrian Park Investigate the provision of suitable shooting sports facilities in the South West	A strategic spread of recreational space exists to support both population growth and the requirements of specific population demographics
		Investigate the provision of indoor netball courts in the South West		
		Redevelop Hay Park regional facilities (including athletics stadium and regional BMX track) at Bunbury		
		Develop the Greenbushes Sports Precinct to support community and need resulting from Talison growth		
		Develop land in Dalyellup to cater for oval-based sports demand and relocate clubs at the South West Equestrian Centre to Capel Regional Equestrian Park		
		Repair and upgrade the Cape to Cape Track, and, develop the Wadandi Track		
		Redevelop and upgrade Manjimup's Rea Park and Collier Sporting Precinct		
		Upgrade Boyup Brook recreation facilities		
		Upgrade Bunbury motorsports precinct at the Speedway, Kart Club and Motorcycle Club		

Community & Environment 7		Actions		
Focus	Proposition	1 - 5 years	5 - 20 years	Outcomes 2050
Community wellbeing Ensure the community is well served through leadership, volunteerism, collaboration and the safety of residents	Capitalise on opportunities in art Progress an Aboriginal art facility in Gnaala Karla Booja to boost business, tourism and cultural opportunities	Build the arts and creative culture of the region through events and Aboriginal recognition	Build an iconic cultural and community centre at Mangrove Cove in Bunbury to celebrate Aboriginal art and culture	The South West has a deep understanding of connections, engagement and growth in a value framework that respects the environment and demographic diversity Arts and music are identified tools for engagement, recognition and regional pride across the South West The South West has a diverse and capable not-for-profit sector
	Shared vision Facilitate a regional consensus on a shared vision and objectives through education and communication to build capacity	Exploit opportunities to educate and enhance leadership skills and understanding of regional development as a determinant of the region's future growth	The region features a developed system utilising the experience and skills of retirees	
	Volunteerism Ensure volunteerism remains a vital ingredient of South West community life	Promote the value of volunteerism as a contributor to regional liveability and human connection		
	Emergencies covered Ensure the region has the capacity to deal with natural events including storm, fire and flood	Encourage collaboration in planning for catastrophic events and support emergency organisations Plan for multiple centres to support communities and shared accommodation resources that can be transported to areas of need		



APPENDIX

6.1 Sources

Sections 1-2

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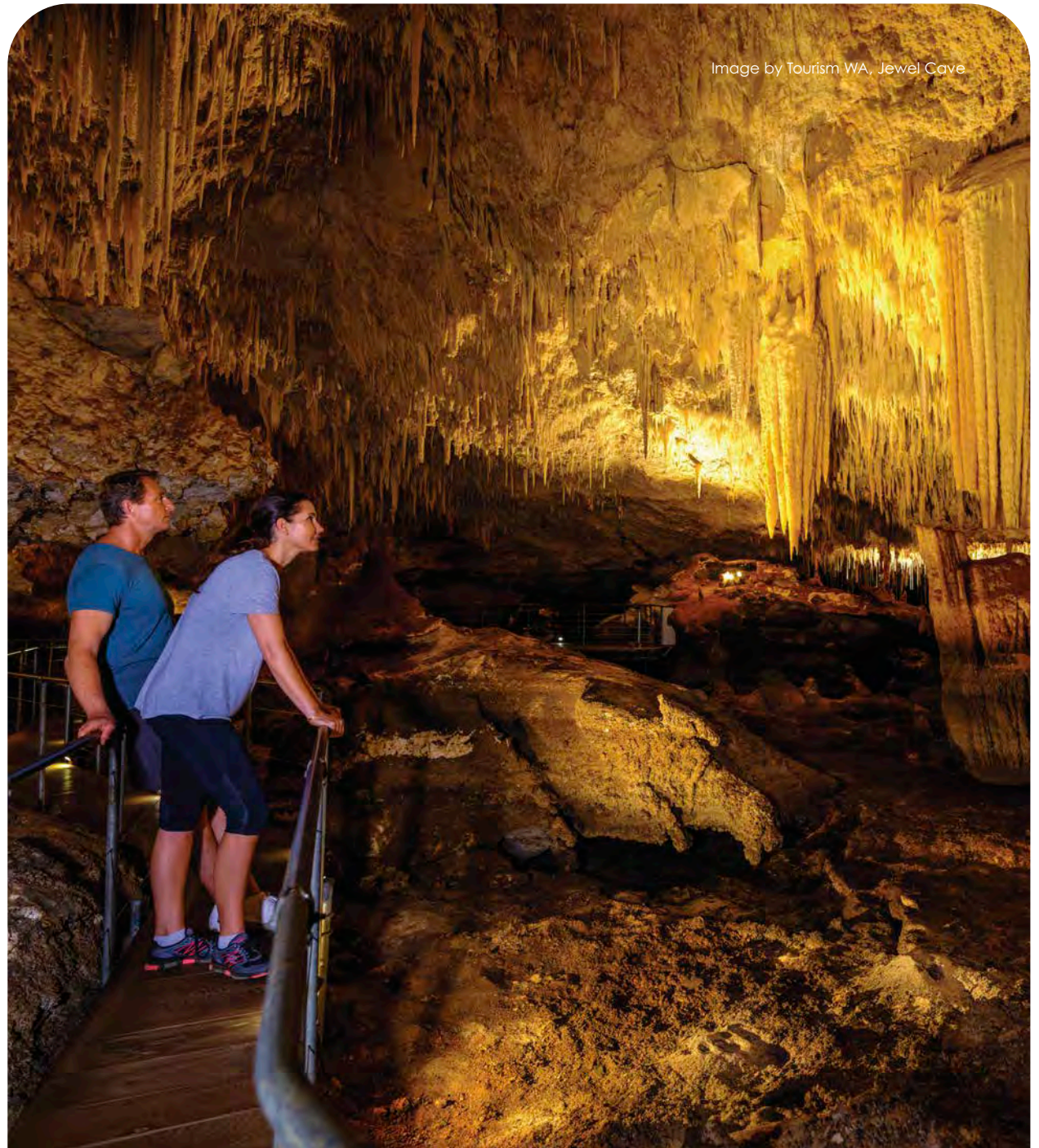


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6.2 Consults and contributors

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Bunbury-Geographe Economic Alliance

Bunbury Harvey Regional Council

Bunbury Turf Club

Busselton Jetty

Busselton Margaret River Airport

Chamber of Minerals & Energy (South West)

Creative Corner

City of Bunbury

City of Busselton

Dept of Local Government, Sport and Cultural Industries

Dept of Primary Industries & Regional Development

Dept of Water and Environmental Regulation

Department of Transport

Development WA

Diamond Resources

ECU South West (Bunbury Campus)

Federation of Forest Industries WA

Gnaala Karla Booja Aboriginal Corporation

Harvey Water

Karri Karrak Aboriginal Corporation

Main Roads WA

Margaret River Busselton Tourism Association

Member for Forrest

NBN Co

Port of Bunbury, Southern Ports

Shire of Augusta-Margaret River

Shire of Boyup Brook

Shire of Bridgetown-Greenbushes

Shire of Capel

Shire of Collie

Shire of Dardanup

Shire of Donnybrook-Balingup

Shire of Harvey

Shire of Manjimup

Shire of Nannup

South West Catchments Council

South West Timber Hub

Southern Forests Food Council

South West Development Commission

St John of God Hospital

Telstra

WA Creative Tech Village

Warren Blackwood Alliance of Councils

Water Corporation

Western Power

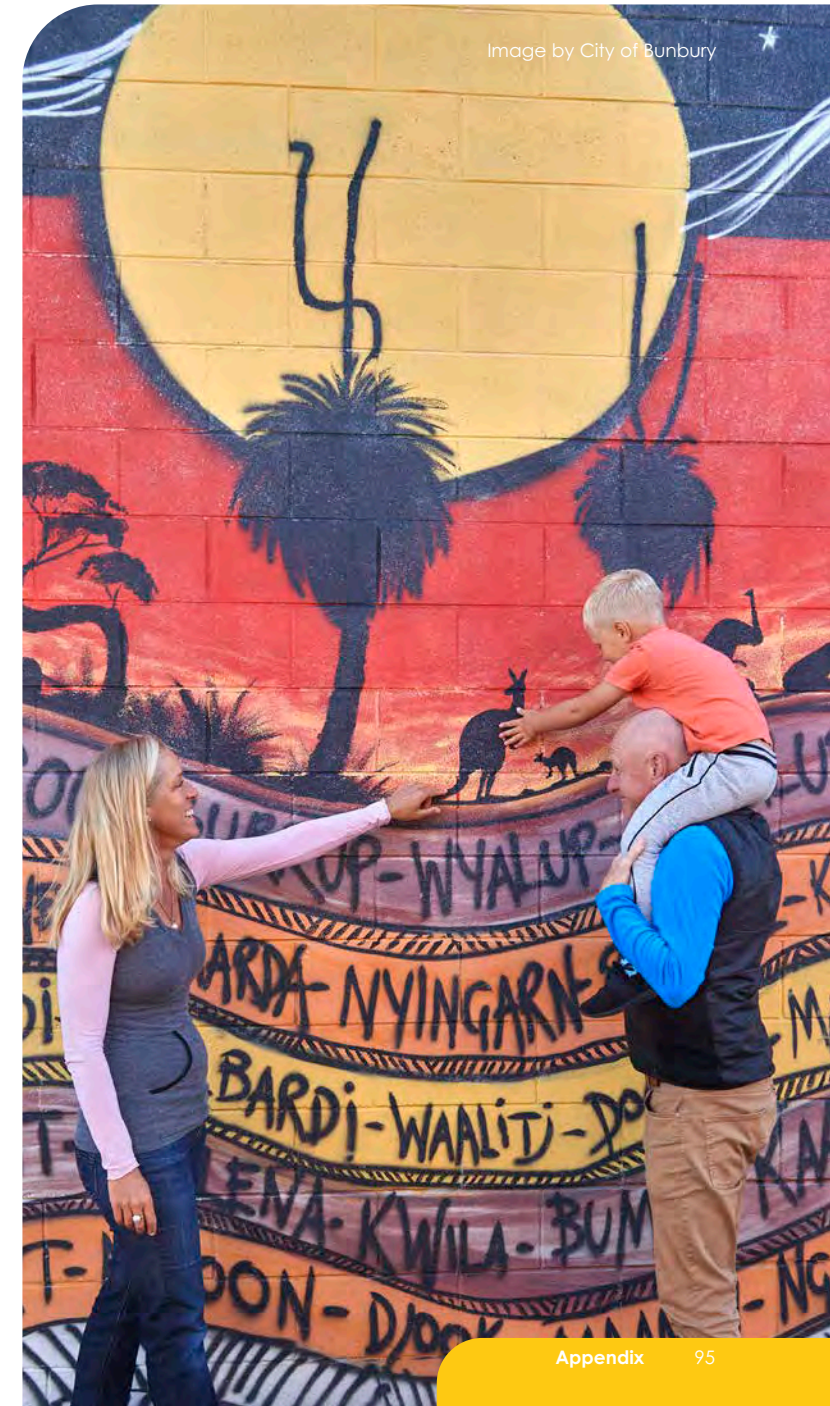


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