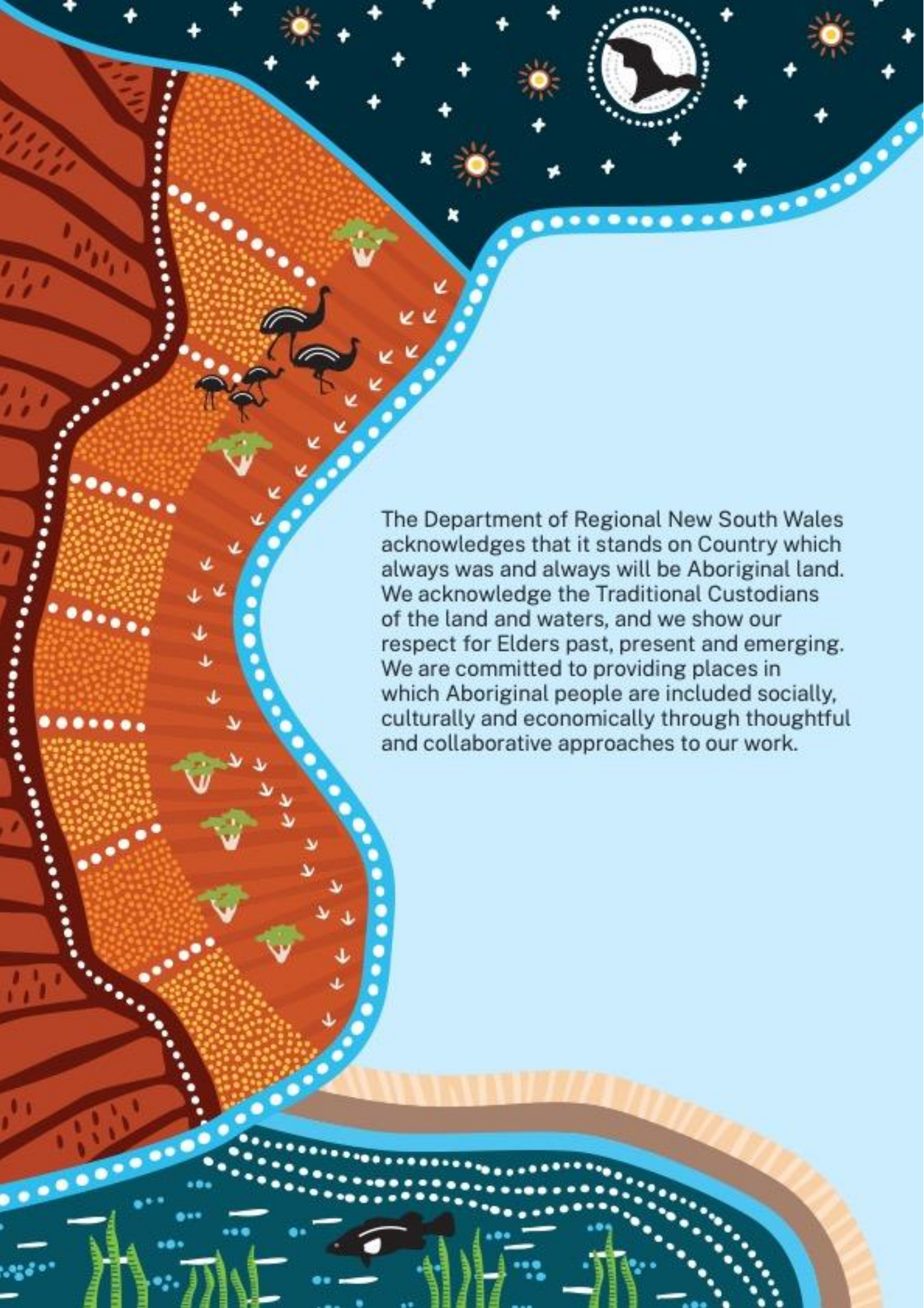


Western Riverina Regional Economic Development Strategy – 2023 Update





The Department of Regional New South Wales acknowledges that it stands on Country which always was and always will be Aboriginal land. We acknowledge the Traditional Custodians of the land and waters, and we show our respect for Elders past, present and emerging. We are committed to providing places in which Aboriginal people are included socially, culturally and economically through thoughtful and collaborative approaches to our work.

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On Country – Artwork by Mumbulla Creative

"On Country" captures the many different countries located within the Department of Regional NSW footprint. Only part of the image is shown on the Acknowledgement of Country page. The regions included in this partial image are detailed below.

The Far West region of NSW is represented by red earth plains, mallee scrubs and an abundant emu population. Freshwater countries are referenced by the expansive network of rivers stretching through the regions. The Riverina Murray region is represented by the roots of a river redgum on the banks of a river, and a large Murray Cod can be seen in the river. The night sky features as it plays an important navigational and story-telling role in traditional life.

Cover image: The Lookout Hermits Cave, Griffith LGA. Photo credit: Visit Griffith.

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1. Executive summary

Changes in the Western Riverina region since 2018

In 2018, the NSW Government developed Regional Economic Development Strategies (REDS) for 38 Functional Economic Regions (FERs) across regional NSW. Since publication, regional NSW has endured shocks including bushfires, floods, COVID-19 and the mouse plague, and significant new economic opportunities have emerged. The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW.

The Western Riverina has seen significant investment delivered since 2018, with additional projects in the planning or delivery stages



~\$2 billion worth of private investment in **solar projects**.



Investment into the **upgrade of Griffith CBD** to the sum of ~\$15 million.



Commitment to invest **\$250 million** to deliver the new **Griffith Base Hospital**.



\$50 million into the **Western Riverina Intermodal Freight Terminal**.

The region has seen unemployment reduce since 2018, but is facing challenges associated with low housing availability and increasing job vacancies



Population numbers have **remained steady** since 2018.



Housing **vacancy rates** sit below **1%**, with median **house prices** having **risen by an average of 70%** since 2018.



The proportion of the population **over 55 years old** has increased by **1%** since 2018.



Unemployment has **reduced substantially** across the region since 2018, with **job vacancies** climbing to a record **2,472** in August 2022.

The region's key industries have remained resilient, with the agriculture sector continuing to be a key driver of economic growth



Electricity and water supply (incl. renewables)

+ 3.1 % Year on Year (YoY) growth from 2011-2020

\$ 144 million Gross Value Added (GVA) in 2020

382 jobs supported in 2021



Health and education

+ 4.3 % YoY growth from 2011-2020

\$ 390 million GVA in 2020

4,405 jobs supported in 2021



Manufacturing

+ 0 % YoY growth from 2011-2020

\$ 526 million GVA in 2020

3,827 jobs supported in 2021



Agriculture

+ 6 % YoY growth from 2011-2020

\$ 344 million GVA in 2020

3,926 jobs supported in 2021

Key themes from local consultation

Stakeholders from the Western Riverina have highlighted enabling growth through service and infrastructure provision and enhancing regional resilience as being key priorities for the region.

Housing market challenges



Stakeholders highlighted a key challenge in the provision of infrastructure to enable housing development, thereby limiting the region's ability to successfully deliver outcomes and roll out other programs.

Enabling future growth



Stakeholders highlighted that support is needed to deliver enabling infrastructure to support future growth, and to improve scenario modelling undertaken within planning processes to provide a better basis for supporting service planning and investment.

Building resilience in agriculture



Recent shocks caused by drought and natural disasters have highlighted the need to focus on building resilience in the agriculture sector.

Western Riverina REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p>Develop and grow the agricultural and manufacturing ‘Engines of Growth’.</p>	<ul style="list-style-type: none"> • Support value-add and increased production efficiency in the agricultural industry, including through enabling adoption of agtech and expanding formal business networks. • Support councils to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure. • Enable flexible land use and coordinated planning to release industrial lands and alleviate development constraints on manufacturing. • Undertake strategic land use planning to identify and address the impact of land use conflict on agricultural producers, including conflicts relating to renewable energy projects and the visitor economy.
<p>Invest in skills and the supply of key utilities critical to ‘Engines of Growth’.</p>	<ul style="list-style-type: none"> • Engage with businesses and education providers to ensure that education and training programs are in place to develop an appropriately skilled local workforce in agriculture, manufacturing, healthcare, retail trade, construction, and energy distribution.
<p>Grow the Western Riverina population and labour pool.</p>	<ul style="list-style-type: none"> • Undertake scenario planning which accounts for the impacts of major projects and the growing population and deliver on future regional housing supply needs across relevant growth trajectories. • Enable partnerships with Murrumbidgee Local Health District (LHD) to support the delivery of new health worker accommodation in the region.

2. About the 2023 REDS Update

In 2018, the NSW Government and local councils developed a series of REDS for 38 Functional Economic Regions (FERs) across regional NSW. FERs are made up of one or more Local Government Areas (LGAs) that work together to create smaller economies with strong economic links.

Supporting the *20-Year Economic Vision for Regional NSW*, the REDS set out a place-based vision and framework for economic development for each FER. The REDS identify each FER's endowments, industry specialisations and key vulnerabilities and opportunities, and outline economic development strategies and actions to leverage these strengths.

Since 2018, regional NSW has endured many challenges including drought, bushfires, floods, COVID-19 and the mouse plague. At the same time a range of broader state-wide trends and actions continue to change the economic landscape across regional NSW, including digital transformation, increased remote working and the shift towards net zero. These challenges and trends have altered the landscape of economic development in many regions and created new opportunities for growth.

The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW. The objectives of the update are to:

1. **Highlight progress:** reflect on significant initiatives and investments that have supported progress against the key strategies and actions in the 2018 REDS.
2. **Capture major changes:** identify and assess the impacts of major changes to regional economies since 2018, including the effect of recent 'shocks' such as bushfires, droughts, floods, mouse plagues and the COVID-19 pandemic.
3. **Identify strategic opportunities:** identify key strategic opportunities and vulnerabilities for engine and emerging industries, as well as any changes to local endowments.
4. **Set the foundation for the future:** review, affirm and/or adjust the 2018 strategies, including consideration of new strategies to meet emerging priorities, to ensure they remain relevant.
5. **Identify key enablers to guide future action:** develop a non-exhaustive list of priority enabling actions that will support the 2023 REDS Update strategies.



Figure 1: Hillston suspension bridge, Carrathool LGA. Photo credit: Carrathool Shire Council.



Figure 2: The Bolt Exhibition Kelly Armour, Murrumbidgee LGA. Photo credit: Murrumbidgee Council.

3. About the Western Riverina region

The Western Riverina FER is comprised of the Carrathool Shire, Griffith City, Leeton Shire, Murrumbidgee Shire and Narrandera Shire Local Government Areas (LGAs). The region is 570 km west of Sydney and 435 km north of Melbourne. Griffith is the main regional city, with a number of important other smaller centres including Coleambally, Darlington Point, Hillston, Jerilderie, Leeton, Narrandera and Yanco.

Total area covered (km ²)	32,738
Population (2021)	50,829
Carrathool	2,871
Griffith	27,182
Leeton	11,481
Murrumbidgee	3,564
Narrandera	5,731
Size of the economy (2020)	\$3.511 billion
Total employment (2021)	23,752

Source: Australian Bureau of Statistics (ABS) (2021) Estimated Resident Population, REMPLAN (2020), ABS Census (2021).






Figure 3: Map of the Western Riverina Functional Economic Region.

4. The 2018 Western Riverina REDS

In the 2018 Western Riverina REDS, the region was actively pursuing growth of its key industry specialisations, particularly utilities, healthcare and education, agriculture and manufacturing.





Endowments recognised in the document spanned natural, social and infrastructure assets, many of which were central to the strategy’s approach to enabling economic development for the region. These endowments and specialisations are highlighted below.

2018 Western Riverina strategies

	Develop and grow the agricultural and manufacturing ‘Engines of Growth’.
	Invest in skills and the supply of key utilities critical to ‘Engines of Growth’.
	Grow the Western Riverina population and labour pool.

2018 Western Riverina specialisations

The primary industry specialisations below were identified as comparative advantages for the Western Riverina region in the 2018 REDS, based on employment concentrations in industry sectors.

	Utilities
	Healthcare and education
	Agriculture
	Manufacturing

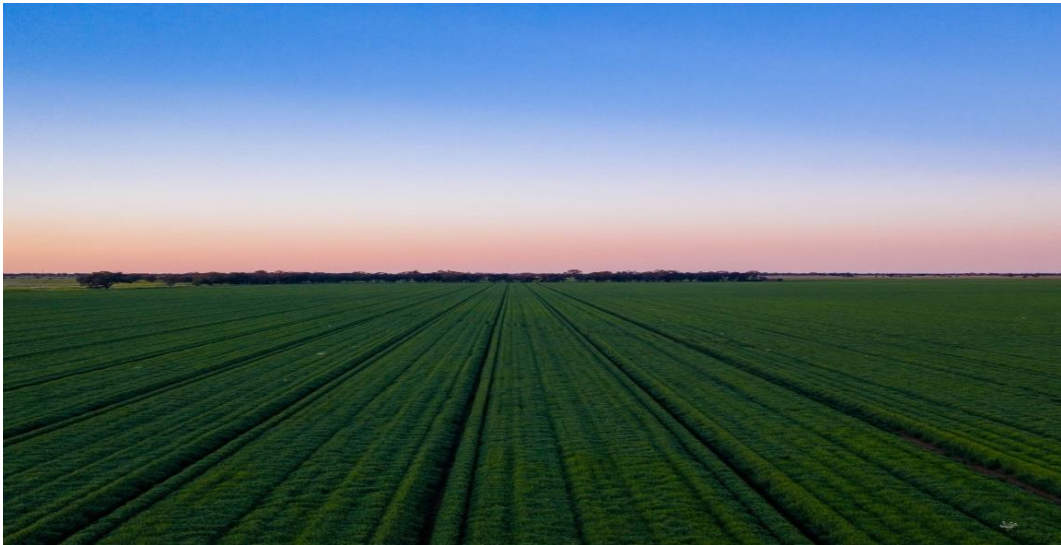





































Figure 4: An irrigated wheat crop in Murrumbidgee. Photo credit: Murrumbidgee Council.

2018 Western Riverina endowments

The Western Riverina is home to a wealth of physical, institutional, built, and human endowments. These endowments play a key role in enabling success and growth across its 2018 industry specialisations of agriculture, manufacturing, energy and water supply and population-serving sectors.

Endowment	Relevant 2018 specialisation
Arable land	  
Access to water and irrigation systems	  
Proximity to major metropolitan markets	   
Extensive road and rail freight arterial infrastructure	 
Increasing supply and value chain integration in agriculture and manufacturing	 
Sophisticated water infrastructure	  
Private capital equipment	
Operational and entrepreneurial capability	 
Emerging population-serving employment clusters	  
Water security	 
Balance of lifestyle, social and economic opportunities	 
Collaboration between private investors and operators	   
Collaboration between the councils of the region	   

5. The big picture: Shocks and trends impacting the Western Riverina region since 2018



Figure 5: Lake Jerilderie, Murrumbidgee LGA. Photo credit: Murrumbidgee Council.

Significant events impacting major industries

A sustained period of drought, followed by a mouse plague and major flooding resulted in significant environmental and economic implications for the region. The COVID-19 pandemic further challenged the region, with local businesses suffering, particularly those in the hospitality sector impacted by movement and operating restrictions. During the period 2018 to 2022, the region had 3 disaster declarations and received \$8.09 million in disaster recovery grants funding.^[1] Despite these challenges, key industries in the region such as agriculture have continued to prosper.

Drought

Similar to many parts of NSW, the Western Riverina endured a period of severe drought during 2018 and 2019 (see Figure 6).

Narrandera and Carrathool LGAs were particularly impacted because of their key specialisations in agricultural production. The Murrumbidgee LGA was also significantly impacted by reduced water allocations and availability during the drought, which significantly impacted on irrigated production in the region.^[2]

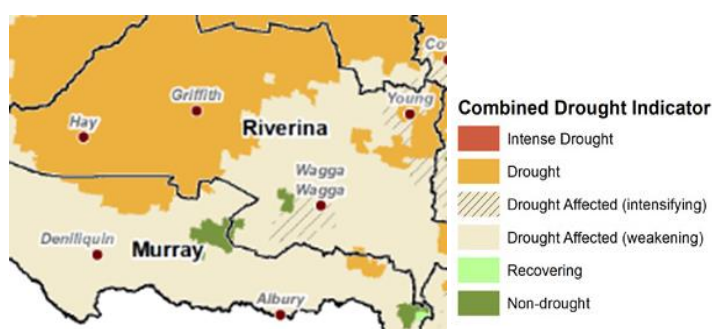


Figure 6: Combined Drought Indicator, 12 months to 31 December 2019 (Department of Primary Industries (DPI), 2022).

COVID-19

The COVID-19 pandemic had a noticeable impact on local businesses in the region. In 2022, 42% of businesses reported that COVID-19 negatively affected their business.^[3] The impact of the pandemic on employment was reflected by a sustained increase in income support recipients observed since March 2020, with JobSeeker recipients rising by 51% while Health Care Card recipients rose by 25% to June 2020.^[4]

Many parts of the FER were also impacted by the impacts of border closures. An example of the impact was in Jerilderie, situated 40 minutes from the NSW / Victorian border. Border closures impacted businesses with staff living across the border and economic activity in the region was reduced due to the reduction in traffic along the Newell Highway.^[5]

Griffith has continued to grow following the COVID-19 pandemic, but the community has experienced a shortage of nurses, doctors, skilled tradespeople and teachers as well as other skilled labour, reflecting a broader trend seen in many parts of regional NSW.

Mouse plague

In 2021, a mouse plague across regional NSW impacted local communities and farmers, including parts of the Western Riverina region. Mice did significant damage to a range of crops, ruined stored grain, and destroyed farm and household equipment and infrastructure.^[6] In response to the outbreak, the NSW Government announced a package to assist farmers, households and small businesses to combat the mouse plague. In the Western Riverina region, a total of \$1.71 million was paid to 3,233 recipients as part of the mouse control rebate program.^[7]

Floods


Similar to many parts of NSW, the Western Riverina experienced impacts from flooding in 2021 and 2022. In January 2022, Narrandera suffered a major urban flash flooding event from severe storms, with one event resulting in the inundation of several businesses in Narrandera's main street and East Street. Rectification of the problem will require significant investment and upgrades to urban drainage, with costs estimated to be around \$5.9 million, with funding through a mix of grants and council funds.^[8]




Griffith also experienced major flash flooding with the Griffith State Emergency Service (SES) unit receiving over 80 calls for assistance from community members. In January 2022, Griffith Regional Airport Terminal was affected to such an extent that it was forced to temporarily shut, with the roads around the Golf Course and Dalton Park rendered inaccessible.^[9]

There was also severe weather and multiple flood events right across the Western Riverina region in the second half of 2022. All LGAs were disaster declared after these weather events, with key impacts including major roads being cut off across the region,^[10] low lying areas of towns evacuated, agricultural properties inundated by water for months causing major damage to crops and production,^[11] and extended closures of major national parks in the region.^[12]

Macroeconomic trends shaping the region's future

Macro trends related to climate and migration have played a significant role in the development of the Western Riverina region since 2018 and are likely to continue to have a strong influence on its future. The region's specialisation in agriculture, utilities and energy means it can have a central role in driving the shift Towards Net Zero. The region also faces opportunities and challenges brought by the impacts of successive natural disasters and the COVID-19 pandemic.

Trend		Opportunities and risks
 Digital transformation	The recent COVID-19 pandemic has accelerated the development of the digital economy in Australia, with increased uptake of remote working arrangements as well as online services such as education and telehealth. ^[13] As industries diversify and innovate, the	Investment into agtech can increase productivity and efficiency in the agriculture sector.

Trend		Opportunities and risks
	<p>need for reliable and efficient infrastructure to support business growth and to secure and retain a skilled workforce will be crucial.</p> <p>In the Western Riverina, the limited scale of existing agtech infrastructure may constrain the region's capacity to fully engage with this digital economy and take advantage of the opportunities it offers to the sector.</p>	<p>Opportunities exist to significantly improve telecommunications connectivity and continue to invest in infrastructure projects that can support the local economy and support innovation.</p>
 <p>Changing migration patterns</p>	<p>Many parts of regional NSW have experienced above average rates of population growth in recent years, partly driven by COVID-19 related migration. This is evident in the population shift in 2020-21, with regional NSW gaining an additional 26,800 residents while Sydney declined by 5,200.^[14]</p> <p>The Western Riverina FER has experienced flat population growth since 2018, however it is expected to grow over the next decade.^[15]</p>	<p>Population growth can increase local economic activity and attract new businesses and industries to the region.</p> <p>Population surges place pressure on existing infrastructure, especially housing and care economy services.</p>
 <p>Towards net zero</p>	<p>Renewable energy is a growing source of investment in the Western Riverina, with the presence of a REZ and proximity to proposed and existing transmission infrastructure. New solar energy projects are emerging in the Griffith, Murrumbidgee, and Narrandera LGAs in particular. A focus will need to be ensuring the benefits of these investments are shared equitably across communities, and across the life-cycle of new facilities.</p>	<p>Opportunity to use solar farms to support and sustain renewable energy practices.</p> <p>Solar farms can cause land use conflict with agricultural land, which is a key specialisation in the Western Riverina.</p>
 <p>Rising uncertainty</p>	<p>The region has seen a succession of extreme climate events since 2018, including drought and floods. Climatic events have had significant and ongoing impacts on local infrastructure and industries. El Nina combined with other macroeconomic pressures, such as rising costs are impacting on agriculture and agricultural processing, as well as their supply chains.</p> <p>There is a need to enhance climate resilience in the region to limit disruption to supply chains, with the Western Riverina being one of the largest exporting regions. The need to build community and industry resilience, alongside that of physical infrastructure will be crucial to helping to secure the region's future.</p>	<p>Climatic events increase the risk of damage to key infrastructure and industry assets.</p> <p>Risks of supply chain unreliability particularly in agriculture and manufacturing.</p>

6. Responding to change: Initiatives and investments since 2018

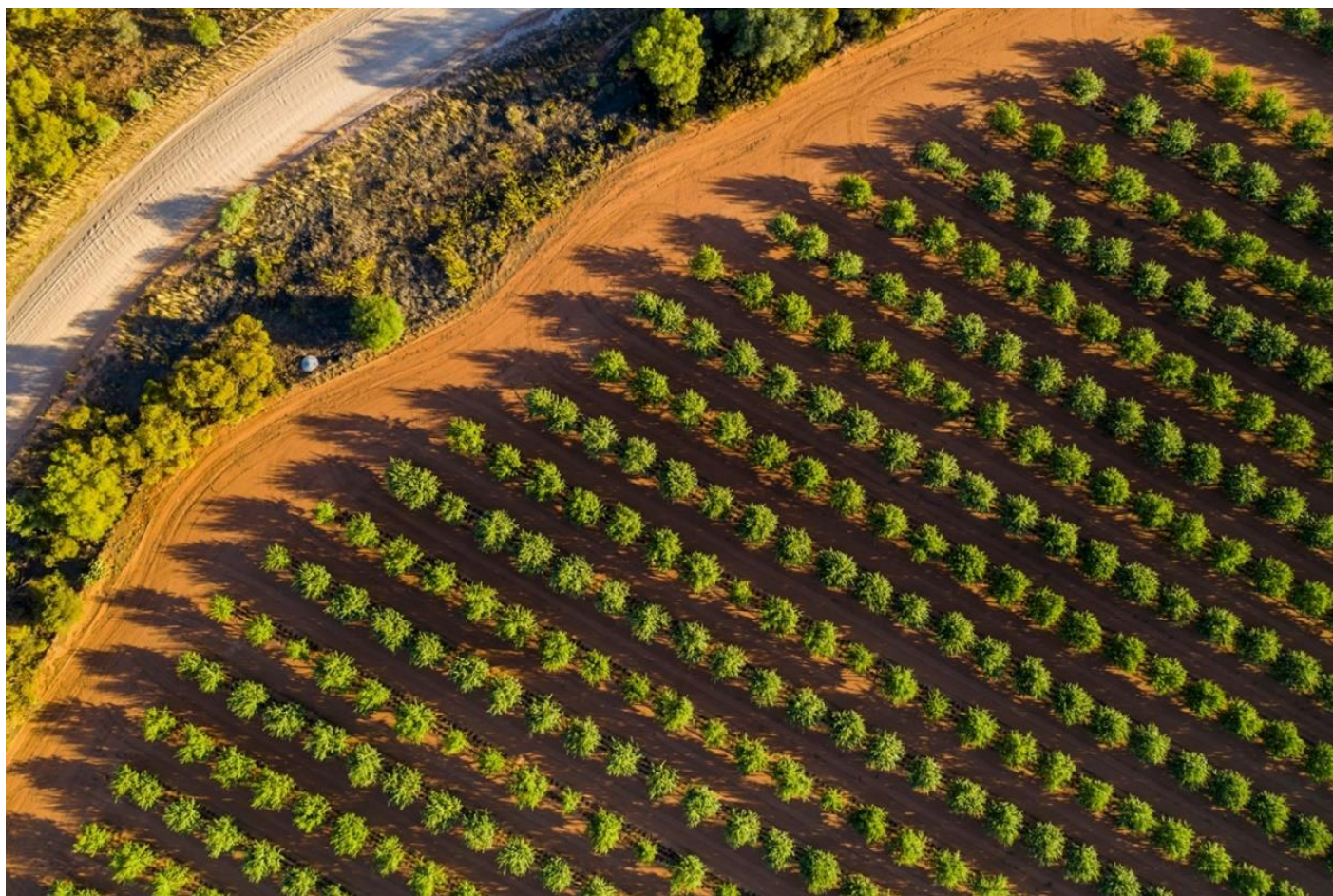


Figure 7: Aerial shot of a farm in Griffith LGA. Photo credit: Matt Beaver.

Since 2018, local councils, the NSW Government and other key organisations have delivered new and updated key strategic documents and plans that help guide economic and community development in the region. These documents support the development of local enabling actions that contribute towards progress against key REDS priorities and strategies.

Strategies and plans	Relevant 2018 strategies
The Riverina Murray Region Plan 2041 sets out a 20-year land use planning vision for the broader region to support economic growth in key sectors such as agribusiness, manufacturing and renewable energy. The Regional Plan is supported by councils' Local Strategic Planning Statements , which set out land use priorities for each local government area, and Community Strategic Plans , which set out each council's key objectives.	  
Several councils have developed economic development strategies. The Griffith Economic Development Strategy seeks to ensure Griffith is an ideal place to live, work and invest. The Leeton Economic, Tourism and Events Strategic Plan identifies projects that will support continued economic growth, employment and innovation. The Murrumbidgee Economic Development Strategy guides economic development in the Murrumbidgee LGA, while the Business Recovery Strategy – Narrandera Energised guides Narrandera's recovery from the COVID-19 pandemic in conjunction with council's Economic Development Strategy 2017-2020 .	  










Strategies and plans	Relevant 2018 strategies
The Riverina and Murray Joint Organisation Freight Priorities Report May 2022 identifies transport corridors that facilitate the efficient and effective movement of freight, outlines the development of integrated freight transport solutions, removes identified transport constraints and supports the growth and development of logistics solutions.	 
The Riverina and Murray Joint Organisation Energy Strategy builds on the work of individual councils and identifies actions that could be taken by councils to reduce both their energy costs and emissions.	
The Griffith Hospital Health Precinct Masterplan provides development controls to support diverse housing options for medical staff based on their needs including the provision of suitable sites for short stay accommodation, housing share options, new generation boarding houses and unit development.	
The Murrumbidgee Land Use Plan 2022 provides a clear direction to achieving Murrumbidgee's medium to long-term urban and rural growth needs.	
The Riverina Murray Destination Management Plan has been prepared to create a collaborative framework to guide the work of local, regional and state tourism stakeholders to grow, develop and promote the region's visitor economy.	
The Murrumbidgee Regional Water Strategy guides how the NSW Government can best address the water-related challenges to support a liveable and prosperous region.	  



Figure 8: Western Riverina Connect. Photo credit: Leeton Shire Council.

Significant investments since 2018

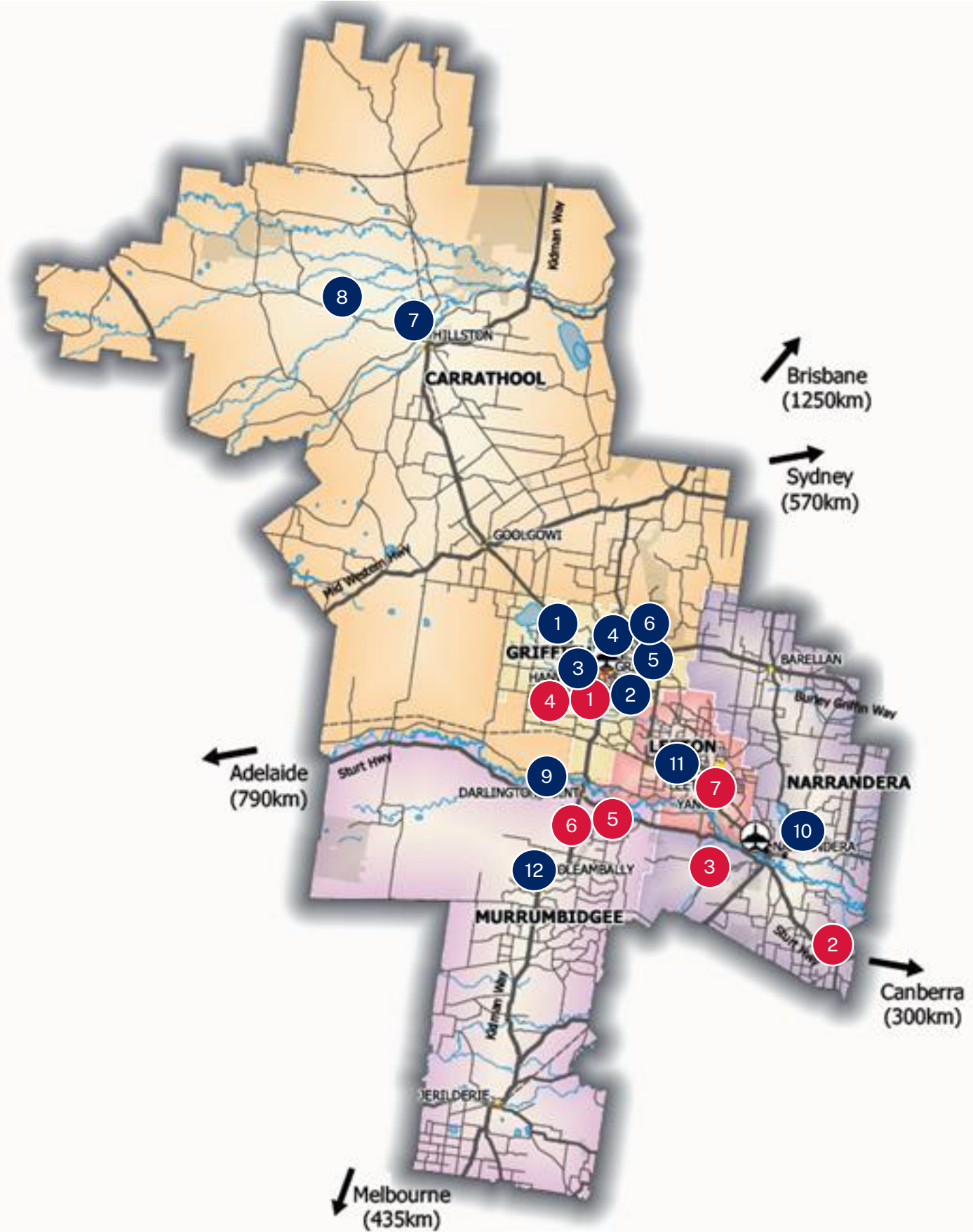


Figure 9: Significant investment in the Western Riverina FER since 2018, as detailed on pages 18 and 19.

As shown in Figure 8, since 2018 the region has seen significant local, state and federal funding, as well as private investment. These investments are at varying stages of progress, with some delivered, some underway, and some investments still in the planning stage. Public investments have focused on developing infrastructure which supports increased amenity for the local community, alongside major health and transport related investments. Grant funding has played a key role in delivery of many of these projects.

Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 The Whitton Malt House	Not available	
2 Avonlie Solar Farm	\$250 million	
3 Yarrabee Solar Project	\$1 billion	
4 Griffith Solar Farm	\$47 million	
5 Darlington Point Solar Farm	\$450 million	
6 Coleambally Solar Farm	\$200 million	
7 SunRice's Leeton plant upgrade	\$4.5 million	

Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Griffith Regional Sports Precinct	\$33 million	
2 Griffith Base Hospital Redevelopment	\$250 million	
3 Griffith CBD Upgrade Strategy	\$15 million	
4 Western Riverina Intermodal Freight Terminal	\$42.5 million	
5 Griffith's Southern Industrial Link Road	Not available	
6 Griffin Green affordable housing project	\$12 million	

7	Hillston weather radar*	\$25 million	
8	Jackson's bridge upgrade	\$2.17 million	
9	Darlington Point housing subdivision	\$2.9 million	
10	Playground on the Murrumbidgee	\$8 million	
11	Roxy Theatre Leeton redevelopment	\$8 million	
12	Coleambally Sporting Precinct redevelopment	\$2.6 million	

*Part of a broader state-wide commitment to deliver three Doppler radars in regional NSW.

Regional grants programs

The region has received \$65.38 million in grant funding since 2018. Key programs in the region have included the Stronger Country Communities Fund, with \$30.45 million committed to a range of projects including new sports facilities and town centre upgrade works.

Grant category	Approved funding
Community	\$54.57 million
Economic	\$2.71 million
Disaster recovery	\$8.09 million

Note: Total grant funding outlined above only includes programs managed by the Department of Regional NSW, accurate as at January 2023.

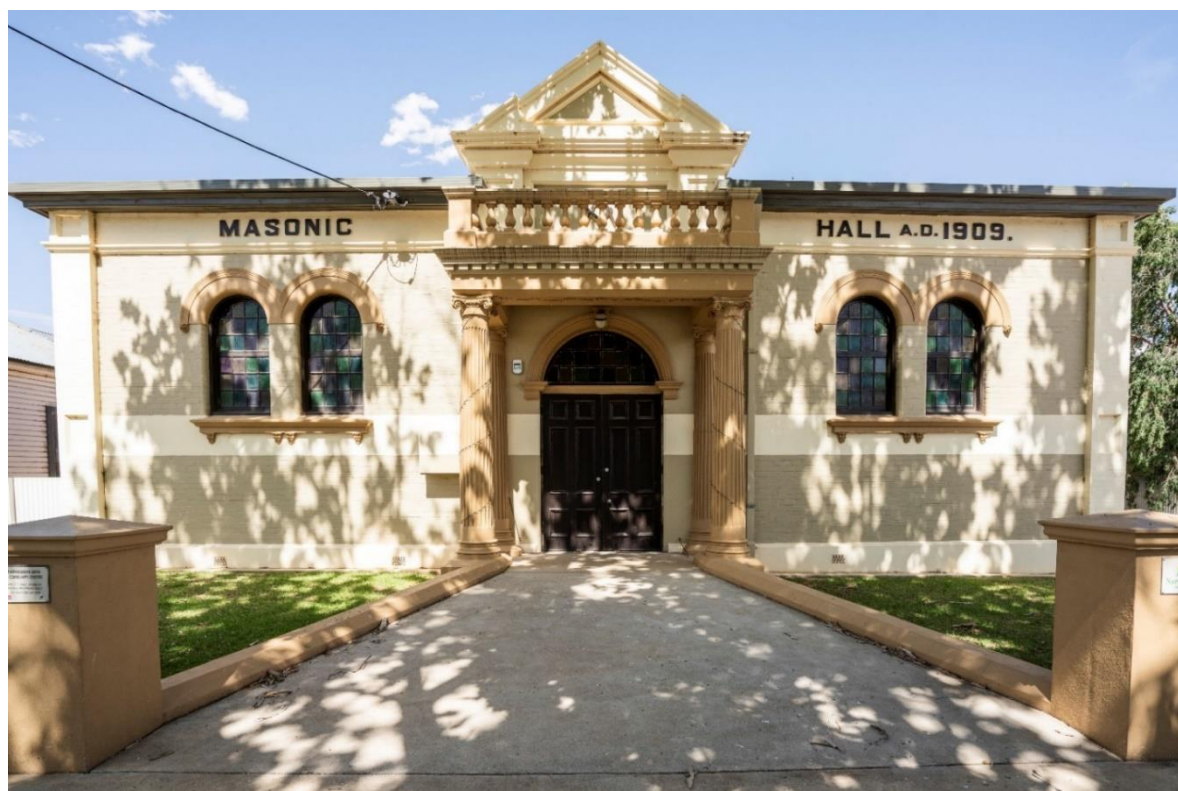


Figure 10: Narrandera Arts and Community Centre. Photo credit: Narrandera Tourism.

7. Western Riverina 2023 economic snapshot

The Western Riverina experienced a declining rate of population growth since 2018, and a focus is needed on attracting people in their prime working ages

The region has seen a declining population growth rate since 2018. The demographic profile of the region suggests people in the prime working age are leaving the region for work, so this may suggest a need to focus on robust education and training programs to provide visible pathways for young people into the workforce.

Population growth

The region saw flat overall population growth between 2018 and 2021. Over this period, yearly population growth rates of 0.39% and 0.22% were experienced in 2018 and 2019 respectively, but this was countered by population decline in later years.

The region is expected to experience positive growth over the coming decades, with NSW population projections predicting that growth across the region will be slightly less than the NSW-wide annual increase of 0.95% between 2021 and 2041.

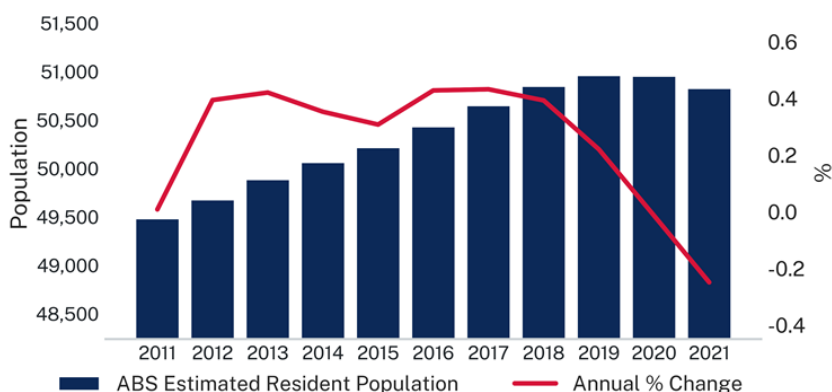


Figure 11: Western Riverina FER population growth, 2011-2021 (ABS ERP, July 2022)

Demographic profile

Western Riverina has a median age of 38, which is contrary to a common trend in other regions which are experiencing structural ageing in the population. This is driven by 27% of the Western Riverina population being in the age range of 0-19, compared to 24% state-wide (see Figure 11).

However, this trend is reversed in the prime working age group (25-49 years), suggesting that younger people move elsewhere for work opportunities. This highlights the need for clearer pathways between secondary and tertiary education and local employment and career opportunities. A focus on actions to promote this outcome will help ensure the region can take advantage of its demographic comparative advantage and convert it into long term positive outcomes for the community and the economy.

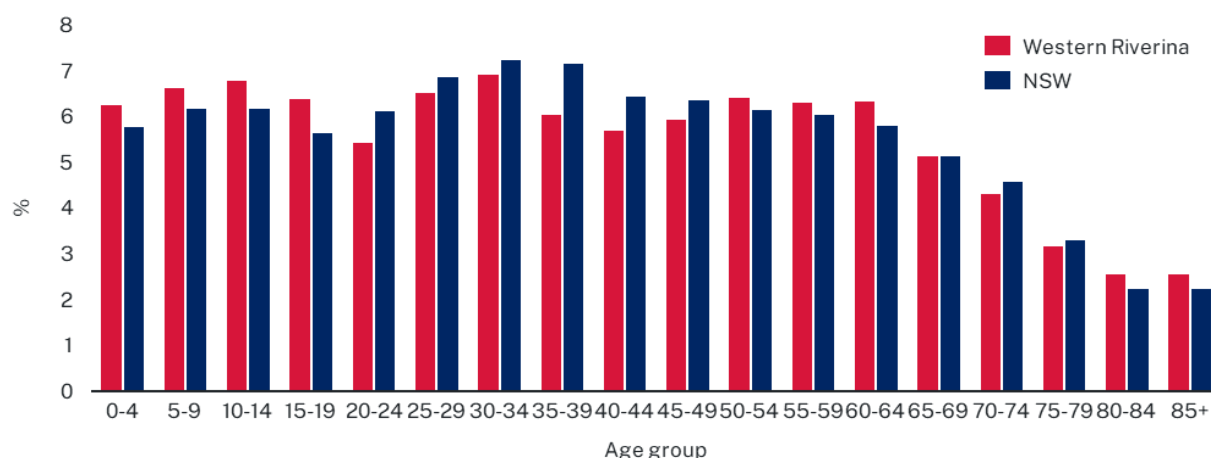


Figure 12: Western Riverina FER population by age 2021 (ABS Census 2021)

Rental housing supply in the Western Riverina has tightened during the pandemic but housing affordability remains a strength

The region has faced a decline in housing availability since 2018. This provides a significant challenge given the desire to attract new residents to the area. Increased demand for housing has been brought about by workers coming into the region for major projects such as the New Griffith Base Hospital.

Housing availability

As displayed in Figure 12, residential vacancy rates in the Riverina region have fallen from a peak of 3.7% in 2018 to 0.4% in August 2022. This fall aligns with a tightening of housing supply across regional NSW that has occurred since the start of the pandemic.

Residential building approvals in the region picked up in 2021 and 2022, averaging 18 approvals per month in the period January 2021 to August 2022. This is a marginal increase on the July 2018 to December 2020 period where the average was 12 approvals per month.

While there is always a degree of lag between supply and demand for housing, there is a need to ensure that state and local planning systems (and other land development enablers such as infrastructure provision) are appropriately calibrated to keep pace with projected demand for housing.

Housing affordability

House prices in the Western Riverina have performed strongly in the 4 year period between June 2018 and June 2022. Median house prices have increased by 55% in Griffith LGA to \$513,000, 92% in Leeton to \$393,000, and 62% in Narrandera to \$268,000. Carrathool and Murrumbidgee did not have enough sales to measure median price increases.^[16]

The average increase of 70% across these LGAs is similar to the whole of regional NSW (excluding Sydney) average increase across the period of 72%.^[17] The price to income ratio in July 2021 was 4.2 in the Western Riverina, almost half the NSW wide average of 8.12, suggesting housing affordability remains comparatively strong compared to many other parts of NSW.^[18]

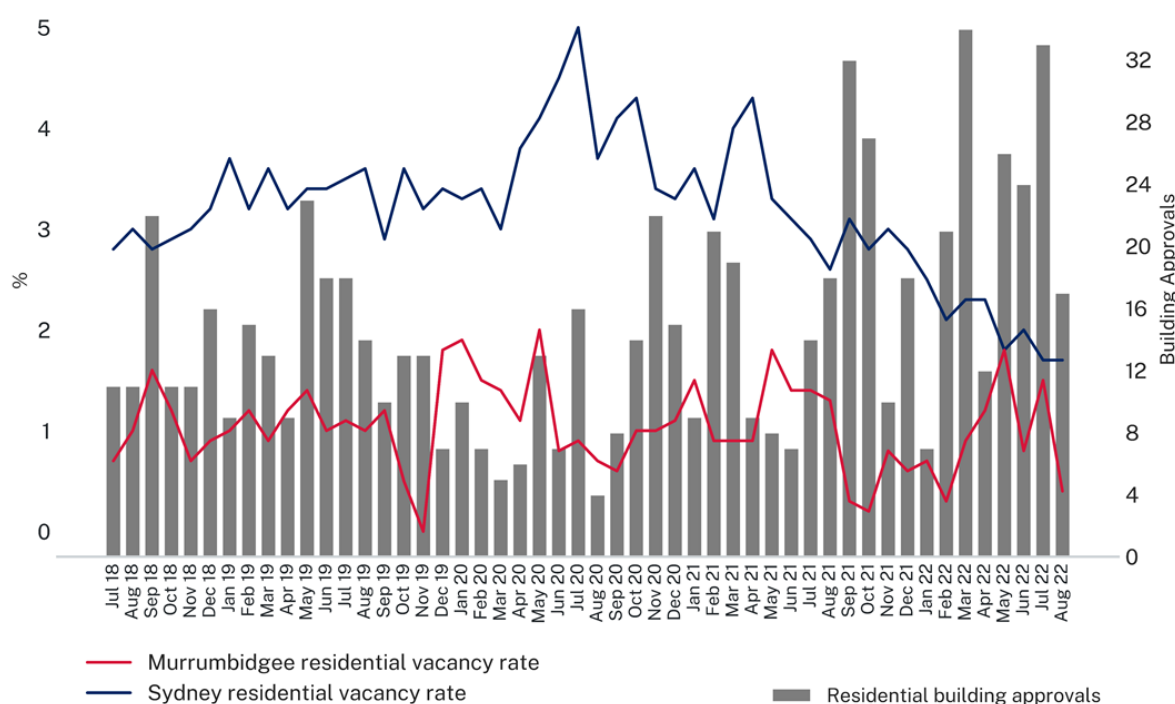


Figure 13: Western Riverina FER vacancy rate and building approvals, 2018-2022 (REINSW 2022).

Note: REINSW vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. These results are therefore intended to provide an indication of housing vacancies in the region.

There have been significant improvements in unemployment rates across the Western Riverina since 2018, while job vacancies have grown substantially

There have been significant improvements in the unemployment rate across the Western Riverina since 2018. However, with low levels of unemployment and substantial increases in job vacancies, the labour market is thin, so a key focus on skilled workforce attraction and retention is needed.

Employment

In June 2022, the average unemployment rate in the region was around 2.7%, substantially lower than the NSW rate of 3.3% (see Figure 13). During the pandemic period, the unemployment rate across the region reached a peak of 5.7% in October 2020, but generally remained stable.

Narrandera and Leeton in particular have seen large decreases in the unemployment rate from above 8% and 6% respectively in mid-2018 to 4.3% and 3.3% in June 2022.

Job vacancies in the broader Riverina and Murray region have been at record levels since November 2021 (see Figure 14). There were 2,472 job vacancies recorded in August 2022. These statistics may also not capture all vacancies in key industry sectors, with stakeholders highlighting that many businesses were no longer seeking to actively advertise roles given challenges in filling vacancies.

Key occupations with a particularly acute need for workers demonstrated by a high level of vacancies include carers and aides, administrative workers, medical practitioners and nurses, automotive and engineering and sale assistants.

Aboriginal employment

The Aboriginal unemployment rate in the Western Riverina region was 11.7% in 2021. This has decreased from 14.6% in 2016 and 16.5% in 2011, demonstrating sustained progress has been made towards improving economic outcomes for the Aboriginal community. However, this remains above the NSW Aboriginal unemployment rate of 9.8% and the broader NSW unemployment rate of 4.9%.

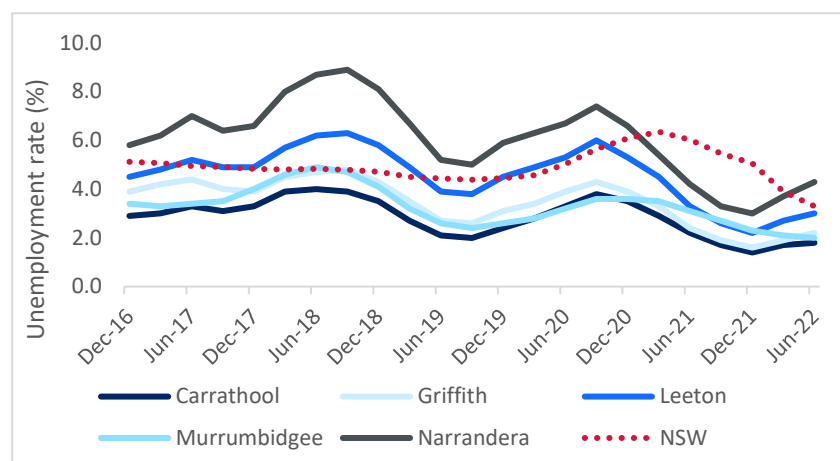


Figure 14: Western Riverina FER unemployment rates (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).

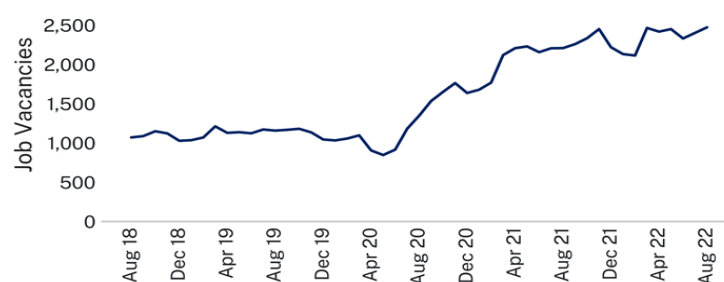


Figure 15: Job vacancies, Riverina and Murray region (2018-2022) (Regional IVI, National Skills Commission, 2022).

Note: The regional IVI – National Skills Commission job vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. Job vacancy data only includes online job vacancies. These results are therefore intended to provide an indication of job vacancies in the region noting the limitations mentioned.

Aboriginal unemployment rate: Western Riverina	2011	16.5%
	2016	14.6%
	2021	11.7%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census, 2021

Western Riverina 2023 engine and emerging industries

The Western Riverina is a \$3.5 billion economy with many industry strengths. Despite significant shocks since 2018, the region’s engine industries have remained a key source of stability for the regional economy, with the agriculture sector in particular continuing to perform strongly. The relative strength of industries in the region is highlighted through location quotient (LQ) analysis¹ in Figure 16, where the size of the bubbles correlates to industry size.

Engine industries

Agriculture (LQ of 8.65) is a key specialisation for the region, generating \$583 million in value-add to the local economy in 2020, with average annual growth of 6% since 2011. This is driven largely by a strong sheep, grains, beef and dairy sector, which generates 93.9% of the industry’s output in the region. Despite a range of challenges from drought, floods and the COVID-19 pandemic (see Section 4), positive growing conditions have seen the sector continue to prosper and play a key part in the regional economy.

The **manufacturing** (LQ of 2.53) sector remains a strong driver of economic output and competitive advantage for the Western Riverina region. The industry contributed \$526 million in GVA to the local economy in 2020. Wine, spirits & tobacco manufacturing and grain mill and cereal product manufacturing contributed a combined 34% of this output (\$179 million).

Water supply and electricity distribution (LQ of 2.23) also stands as a key source of economic output for the region, with the Griffith Solar Farm being a significant contributor to renewable energy supply. The two sub-sectors combined contributed \$144.33 million in GVA to the region in 2020.

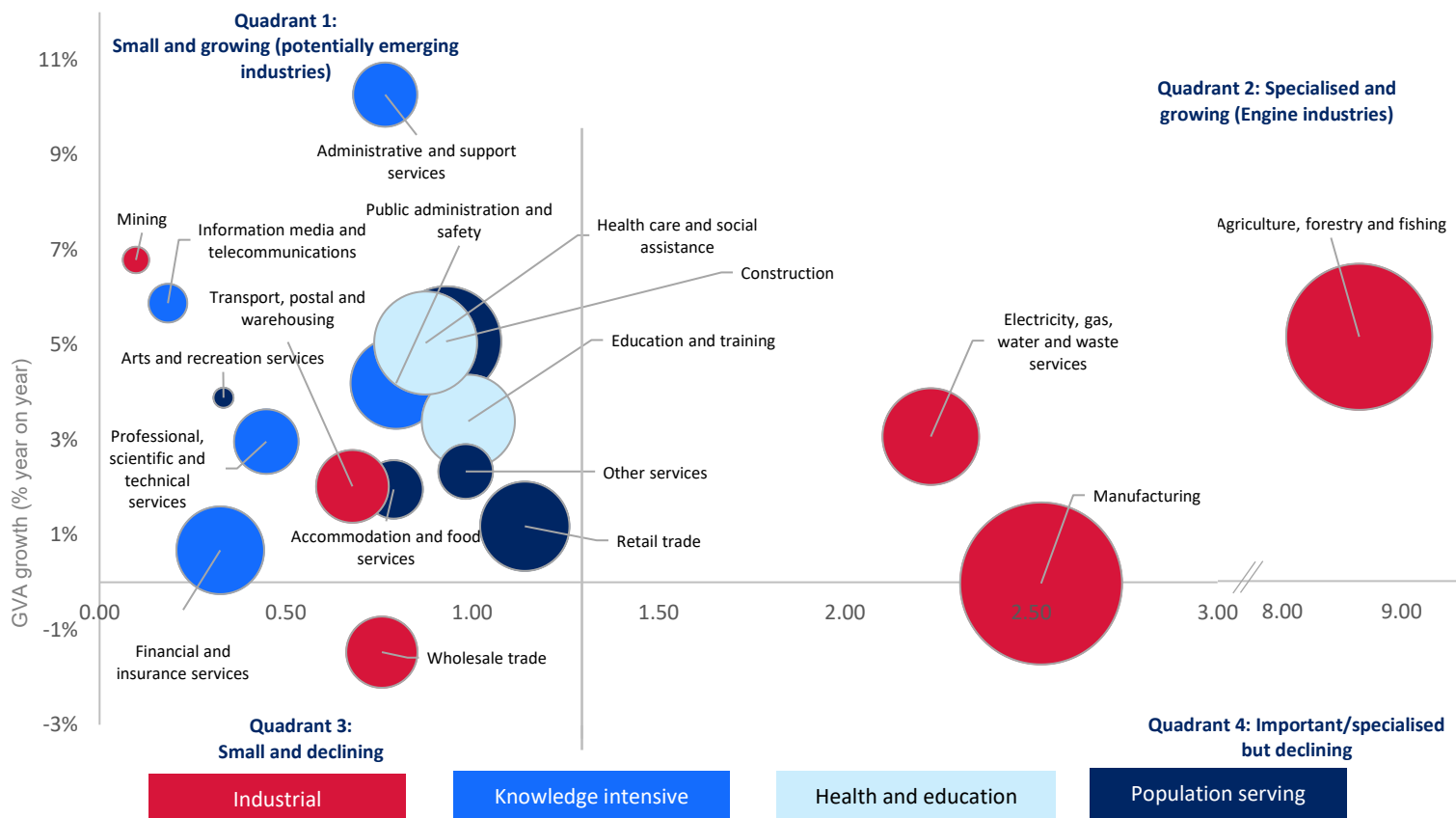


Figure 16: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPAN, 2020).

Note: While the 2018 REDS used employment data as the basis for LQ analysis, the 2023 Update has used GVA data. This allows for a clear demonstration of the changing economic impact of both engine and emerging industries across the region.

¹ LQ analysis is used to measure industry specialisation by comparing the relative size of an industry in the region versus the whole of NSW.

Emerging industries

The region's emerging specialisations have remained consistent since the 2018 REDS.

Knowledge-intensive and population-serving sectors in the Western Riverina have seen continuous growth in the region. These sectors grew by 10.3% from 2011-2020, contributing \$85 million in GVA to the local economy.

Information media and telecommunications recorded an average annual growth of 5.9% between 2011-2020, contributing \$32 million to the local economy in 2020.

Population-serving sectors including **healthcare** have also demonstrated strong growth and potential as emerging specialisations for the region. **Education** is also a key strength for the region, with the Western Riverina experiencing average annual growth of 3.4% in the sector. The sector contributed \$176 million to the local economy in 2020.

Growth across the population-serving clusters of industries is strong in the Western Riverina, with **construction** outstripping state-wide growth over the past decade to reach an average annual growth rate of 5.8%. **Retail trade** has also demonstrated above-average growth of 2.7% annual growth since 2011, more than double the state-wide average over the past decade, reflecting strong employment outcomes resulting from positive economic performance and ongoing resilience in key engine industries.

Although the **mining** industry recorded significant growth between 2011 and 2020, the sector remains relatively small for the region, contributing \$15 million to the local economy in 2020.

Whilst **tourism** is not a significant regional industry, the region has a strong visitor economy given business and family travel.

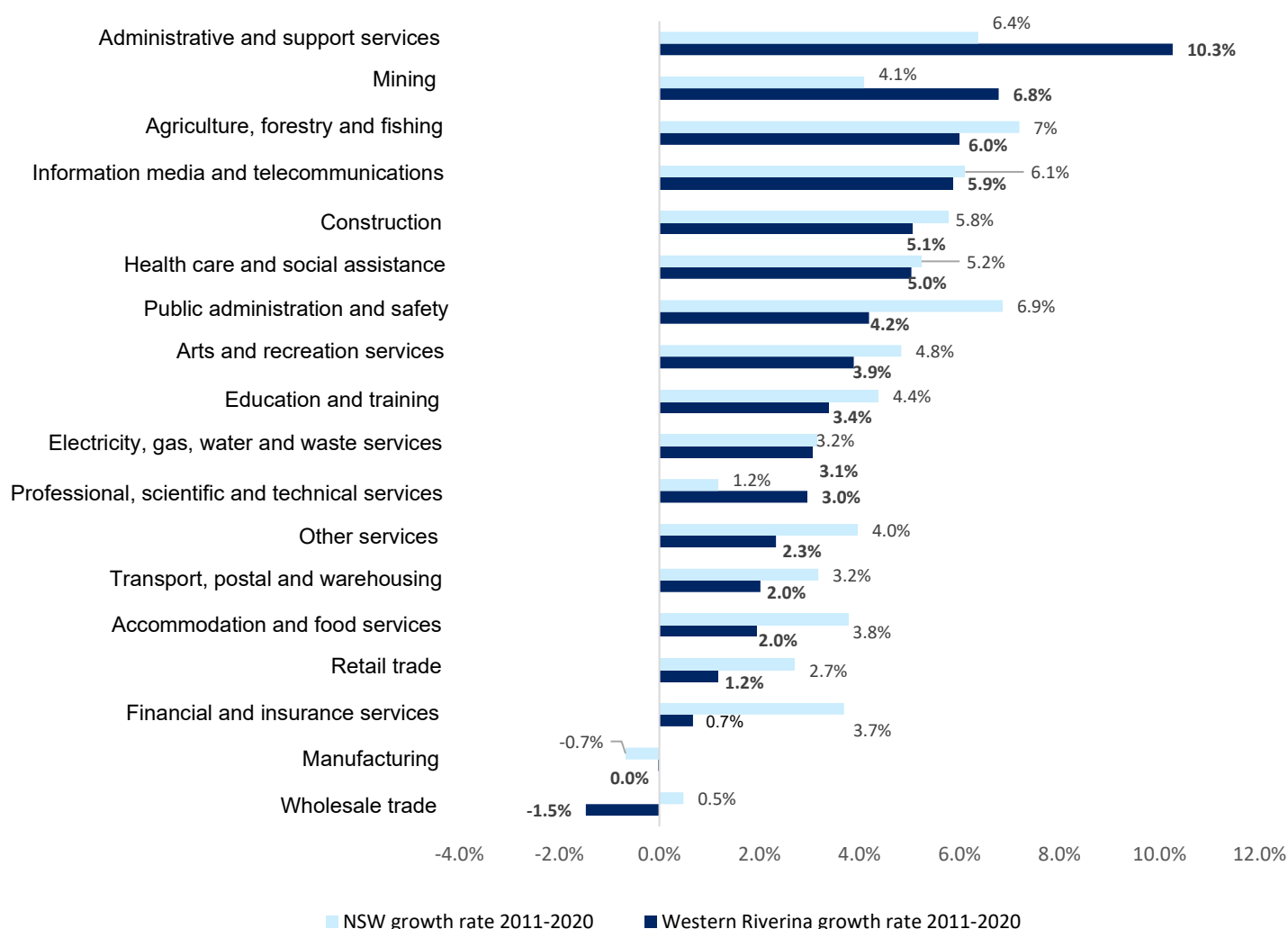


Figure 17: Change in GVA by Industry (\$% YOY), 2011-2020 (REMPPLAN, 2020).

Western Riverina region 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning Western Riverina's economy and regional competitiveness (see page 11 for the complete list). Despite recent shocks impacting many key endowments, consultation affirmed most remain valid, with key endowments including:

- Arable land and access to water and irrigation systems
- Proximity to major metropolitan markets which balance lifestyle, economic and social opportunities
- Extensive road and rail freight arterial infrastructure
- Increasing supply and value chain integration in agriculture and manufacturing
- Sophisticated water infrastructure and water security
- Private capital equipment and collaboration between private investors and operators
- Operational and entrepreneurial capability.

New endowments

While not yet reflected in the employment and industry specialisation (LQ) analysis, recent investments and policy efforts have led to the creation of new endowments which will underpin new economic opportunities and future specialisations. During consultation, stakeholders also identified an existing endowment that should be added as part of the 2023 REDS Update.

+	Griffith Base Hospital redevelopment	Redevelopment of the hospital will enhance its ability to serve the needs of the regional population and increase the attraction for healthcare workers to live in the region.
+	Major renewable energy facilities	The region has seen substantial investments made into the Griffith, Darlington Point and Coleambally Solar Farms, with the Avonlie Solar Farm and Yarrabee Solar Farm projects also progressing, and further major projects proposed that may also include wind farms and battery storage.
+	Wineries	The region is at the centre of the largest wine producing region in NSW, and opportunity exists to support ongoing growth by exploring agritourism opportunities. ^[19]



Figure 18: Willandra Shearing Shed, Carrathool LGA. Photo credit: Carrathool Shire Council.

8. Looking ahead: Strategic opportunities for growth, resilience and liveability

Opportunities and vulnerabilities in engine and emerging industries

Electricity and water supply (including renewables)

The Western Riverina region has been able to leverage its significant natural endowments and highly specialised infrastructure to deliver substantial growth in the electricity and water sectors.

GVA (2020, \$m)	144
Employment (2021)	382
Location Quotient (LQ) score (2020)	2.23
LQ electricity distribution (2020)	1.5
LQ water supply (2020)	5.3

Strengths

- The electricity, gas, water and waste services industry has experienced 3.1% average growth since 2011, contributing \$189 million to the local economy in 2020. Water supply and electricity distribution services were the main contributors to these specialisations.
- Proximity to existing transmission infrastructure supports the energy sector, while access to the Murrumbidgee Irrigation Main Canal and the Coleambally Irrigation Area represent competitive advantages for the region that supports its strength in water related industries.
- The region is now home to a number of solar farms including Griffith, Darlington Point and Coleambally Solar Farms, with facilities in development at Avonlie and Yarrabee Solar Projects. The proposed Dinawan Energy Hub may include a solar farm, wind farm and network battery facility.

Vulnerabilities

- The region's supply capacity across both water and electricity is vulnerable to policy shifts, in particular water restrictions during periods of low rainfall.
- Management of water supply from the Murrumbidgee Irrigation Main Canal in particular is largely subject to state and federal regulatory frameworks. Water resources are also vulnerable to a highly variable and changing climate.
- The region also faces energy network constraints, with 90% of the region lying outside the South West REZ and limited energy network capacity in some parts of the region, meaning they are unable to support large-scale, grid-connected renewable projects.

Opportunities

- Current major investments in renewables across the region, coupled with investment attached to the South West REZ and improved transmission connections via Humelink and EnergyConnect can support job creation as well as expansion in a number of production activities, such as manufacturing.
- The Murray, Murrumbidgee and Lachlan Regional Water Strategies under development can help create the strategic framework needed to support increased water security required to support growth in sectors such as agriculture, manufacturing and emerging circular economy opportunities.

Health and education

Population-serving sectors including healthcare and education are experiencing strong levels of growth and have potential as emerging specialisations for the region.

GVA (2020, \$m)	390
Employment (2021)	4,405
LQ education and training (2020)	1.0
LQ residential care and social assistance (2020)	1.0

Strengths

- The region has a combined emerging specialisation in health and education that has experienced an average annual growth rate of 4.2% since 2011, contributing \$390 million to the local economy in 2020.
- Health and education are labour intensive industries, accommodating for 19% of the region's total workforce.
- Major infrastructure investment such as the Griffith Base Hospital redevelopment will further build capacity and capability in the sector in the Western Riverina region.

Vulnerabilities

- Stakeholders reported that many health care workers moved away from the region during the COVID-19 pandemic, exacerbating the need for workers in the industry.
- The sector continues to be impacted by vacancies remaining unfilled for key roles such as general practitioners, nurses and specialists.^[20]
- A larger focus on skills attraction and development to close the skills gaps is needed, especially considering the region sources most of its labour from within the FER.

Opportunities

- The Griffith Base Hospital redevelopment will improve the delivery of acute and specialist healthcare for the Western Riverina, providing access to state of the art health infrastructure and reducing the need for residents to travel out of area to access specialised health services.
- A focus on leveraging the capabilities of Technical and Further Education (TAFE) campuses across the region, including in Griffith, Leeton and Narrandera can help ensure strong alignment between the educational programs offered and the skills needs for in demand roles in these key population serving sectors.

Manufacturing

The long-held strength in the manufacturing sector is continuing to support economic growth in the region, in particular given its strong alignment with the agriculture sector and the benefits associated with the region's well-established transport links.

GVA (2020, \$m)	526
Employment (2021)	3,827
LQ score (2020)	2.53
LQ alcohol and tobacco products (2020)	40.2
LQ sawmill products (2020)	17.2

Strengths

- The Western Riverina region has maintained its specialisation in the manufacturing sector, with an LQ of 2.53.
- While growth in GVA was on average flat across the period 2011 to 2020, this was well above the -0.7% average industry growth rate recorded across NSW as a whole.
- Fruit and grain product manufacturing in particular are key strengths for the region, in part due to close proximity and strong relationships with well-established agricultural producers.

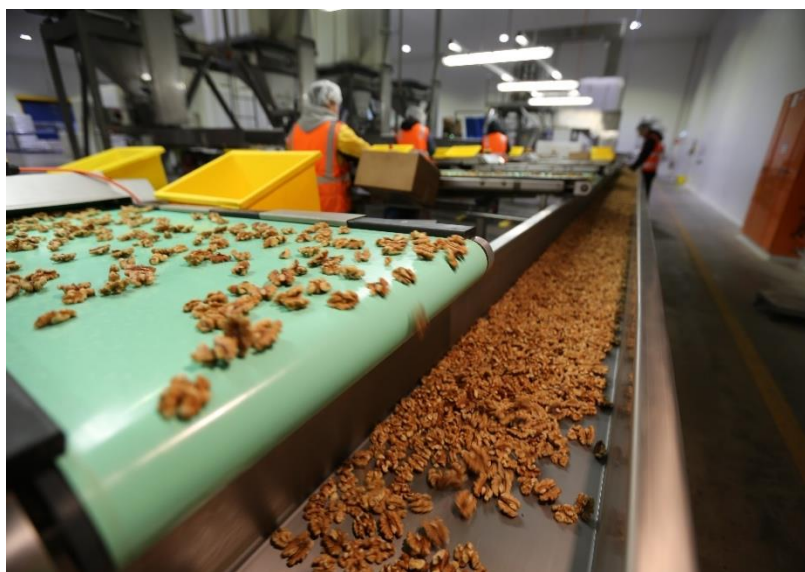


Figure 19: Nut sorting plant, Leeton LGA. Photo credit: Leeton Shire Council.

Vulnerabilities

- The key manufacturing specialisations rely upon inputs from the agriculture and forestry sectors. Disruptions to these supply chains due to environmental or socioeconomic externalities can be detrimental to industry productivity and output in the sector.
- A lower proportion of the population in the prime working age cohort poses challenges to filling skilled workers gaps, and ensuring availability of a workforce to support industry expansion.

Opportunities

- Investment in supply chain resilience can help ensure manufacturing can maintain its status as a key engine industry for the region.
- Investigation of advanced manufacturing opportunities could increase efficiencies and output in the sector and open up new opportunities that can support future growth.
- Building on existing, and formalising new synergies with local producers can help strengthen the manufacturing value-add industry, and opportunities also exist to increase collaboration with local education providers to support greater skills development to meet the needs of the sector.

Agriculture

The agriculture sector remains a key engine industry of the Western Riverina economy. Despite a range of significant challenges in recent years agriculture continues to drive economic prosperity in the region, with record harvests in recent years and significant investments continuing to be made into the sector.

GVA (2020, \$m)	583
Employment (2021)	3,926
LQ score (2020)	8.65
LQ sheep, grain, beef & dairy (2020)	7.3
LQ other agriculture (2020)	14.9

Strengths

- The agriculture sector has long been a specialisation for the Western Riverina, and average annual GVA growth of 6% between 2011 and 2020 demonstrates its continued strength, despite substantial challenges from droughts, a mouse plague, floods and the COVID-19 pandemic.
- The key natural endowment of fertile and high quality agricultural land delivers agricultural outputs 40% larger than the regional NSW average.
- Road and transport infrastructure linking the region to markets around NSW and Victoria act as key enablers for the industry.

Vulnerabilities

- The industry relies upon the availability of land and viable climatic conditions for production, both of which may present vulnerabilities in future given increased climate variability.
- Macroeconomic factors beyond the control of producers such as input costs, supply chains and commodity prices can significantly impact on the value of outputs.
- Ensuring sufficient labour supply to meet peak demands in the sector remains a critical challenge, in particular given the substantial reduced availability of migrant workers since the COVID-19 pandemic started in 2020. ^[21]

Opportunities

- Opportunities to expand the 'Farms of the Future' program could improve agtech uptake and increase automation of processes, which could over time help ease labour force challenges in the sector.
- Facilitating greater collaboration and stronger links with local value-add manufacturing can help maximise the value to be yielded from agricultural output.
- Development of a regional collective branding associated for the high-quality produce and food products of the Western Riverina region could create additional value in the sector.

Key themes in stakeholder consultation

Stakeholders in the Western Riverina reflected on the key challenges that have impacted the region since 2018, but were also keen to emphasise the strong performance of key sectors such as agriculture and the positive role these sectors were playing in delivering economic prosperity in the region.

Housing market challenges

Consultation input revealed concerns amongst stakeholders about key challenges in the housing market. Despite relatively flat population growth in recent years, since the commencement of the COVID-19 pandemic, the region has experienced significant growth in house prices and reductions in availability.

Stakeholders indicated expected future population growth in the region associated with large scale investments and projects is likely to exacerbate current challenges, and noted a key challenge was a lack of enabling infrastructure in some part of the region needed to support housing development. Opportunities may exist to partner with the NSW Government to explore opportunities for rezoning and/or infill development as a way to deliver additional housing stock throughout the region.

Support is needed to enable future growth

Stakeholders recognised that significant investment into major projects, such as renewable energy projects can present a key opportunity for the Western Riverina to leverage the state’s trajectory towards net zero to attract new industries.

Stakeholders indicated support is needed to help ensure enabling infrastructure and services can be put in place to support new industries, and that they need to be strategically planned for in order to manage risks of land use conflict and minimise the impacts on key engine industries such as agriculture.

Building resilience in the agricultural sector

Stakeholders outlined that the impact of major drought in 2018-2019 highlighted the vulnerabilities associated with the reliance on irrigated agriculture in parts of the region. Uncertainty about the ongoing approach to regulation of water allocations was also highlighted as a key concern, and the need to build resilience in the sector was also discussed.

Achieving better planning for the future

Stakeholder consultation revealed concerns over population projections for the region that suggest flat or negative population growth in the future, given a range of significant economic investments that will create jobs and support growth. Stakeholders noted a need to identify options to incorporate greater use of scenario planning into processes, so to provide a better basis for understanding future service provision needs in the region.

Western Riverina REDS - 2023 Update strategies

The 2018 strategies are considered to remain relevant to the Western Riverina. The strategies focus on supporting the region’s specialisations in agriculture and manufacturing and the need for priority to remain on attracting skilled labour to the region, supporting population growth and ensuring engine and emerging industries have access to reliable supply of key utilities.

Therefore, the 2023 REDS Update strategies for the Western Riverina listed below remain unchanged.

Existing	Develop and grow the agricultural and manufacturing ‘Engines of Growth’.
Existing	Invest in skills and the supply of key utilities critical to ‘Engines of Growth’.
Existing	Grow the Western Riverina population and labour pool.

Key enablers of economic growth

A number of key enablers have been identified to assist with delivering each of the strategies. This list is non-exhaustive, with a focus on identifying priority short-to-medium-term enablers. Responsibility for implementation of these enablers sits with various levels of government, and in some cases may also include business, industry or non-government bodies. Collaboration across these entities at a local level will be key to achieving results.

Strategy	New Enablers		Lead and support	Rationale
Develop and grow the agricultural and manufacturing 'Engines of Growth'.	Government, regulation and information	Support value-add and increased production efficiency in the agricultural industry, including through enabling adoption of agtech and expanding formal business networks.	Department of Primary Industries (DPI) , local councils, Department of Regional NSW (DRNSW)	Improve the value-add and efficiency of the region's agricultural sector.
	Infrastructure	Support councils to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.	NSW Telco Authority , local councils, DRNSW	Enhanced digital connectivity unlocks ag-tech capability and innovation in manufacturing.
	Government, regulation and information	Enable flexible land use and coordinated planning to release industrial lands and alleviate development constraints on manufacturing.	Department of Planning and Environment (DPE) , local councils, DRNSW, DPI, Destination NSW, Destination Riverina Murray	Improve local land use planning and long-term viability of the sector.
		Undertake strategic land use planning to identify and address the impact of land use conflict on agricultural producers, including conflicts relating to renewable energy projects and the visitor economy.		

Strategy	New Enablers		Lead and support	Rationale
Invest in skills and the supply of key utilities critical to 'Engines of Growth'.	People and skills	Engage with businesses and education providers to ensure that education and training programs are in place to develop an appropriately skilled local workforce in agriculture, manufacturing, healthcare, retail trade, construction and energy distribution.	Training Services NSW , DRNSW, TAFE NSW, local councils, Registered Training Organisations, Office of Regional Youth	Facilitate sustainable growth in the region's engine industry.
Grow the Western Riverina population and labour pool.	Government, regulation and information	Undertake scenario planning which accounts for the impacts of major projects and the growing population and deliver on future regional housing supply needs across relevant growth trajectories.	DRNSW ; local councils, DPE Planning, Infrastructure NSW	A shortfall in housing supply constrains the region's capacity to attract and retain key workers.
	People and skills	Enable partnerships with Murrumbidgee Local Health District (LHD) to support the delivery of new health worker accommodation in the region.	DRNSW , TAFE NSW, NSW Health, local councils	Persistent unemployment rates despite increasing job vacancies and a need to build workforce skills and capacity.

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Figure 19: Admiring the Wedge-tailed Eagle mural in Jerilderie. Photo credit: Murrumbidgee Council.