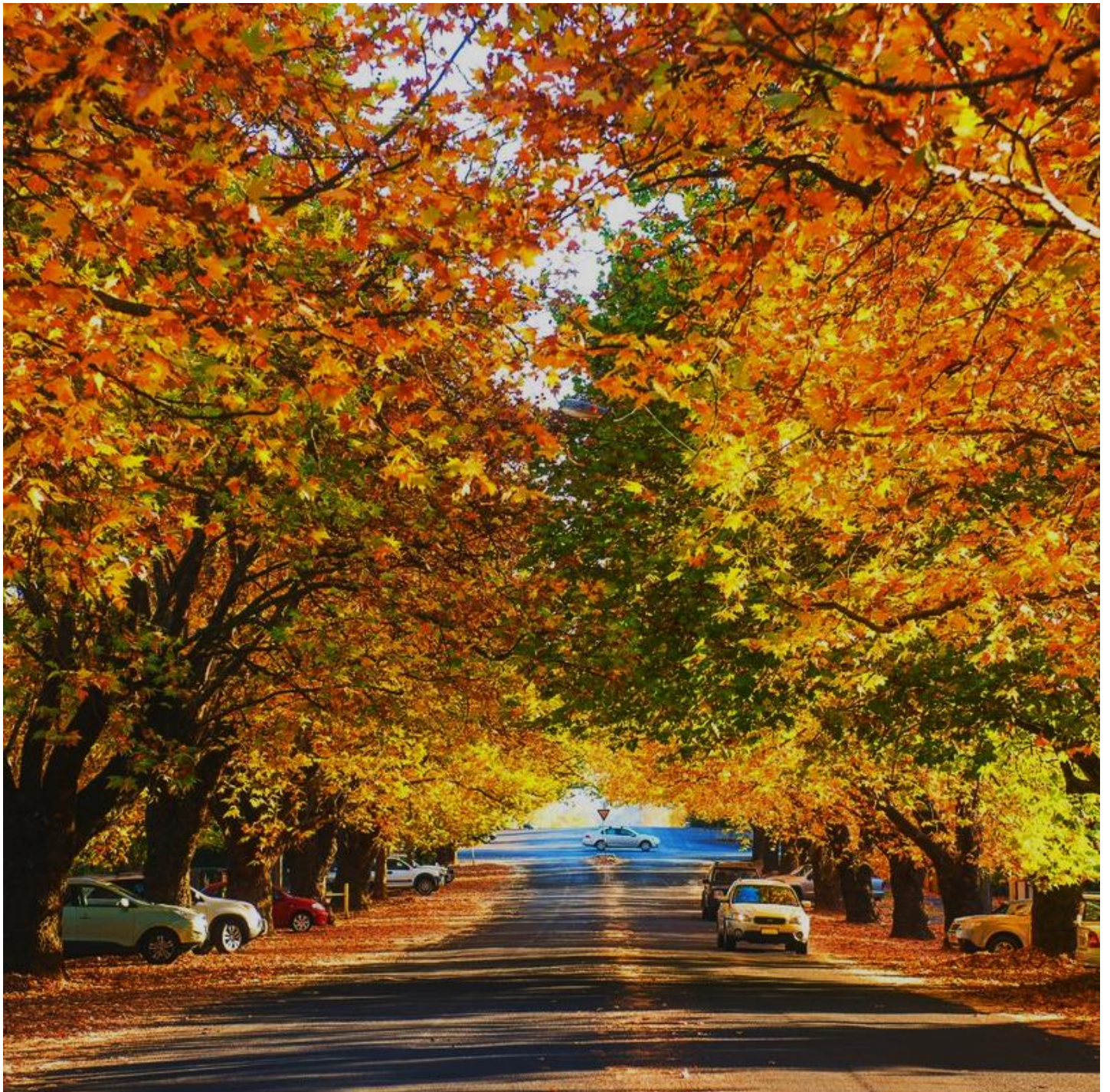
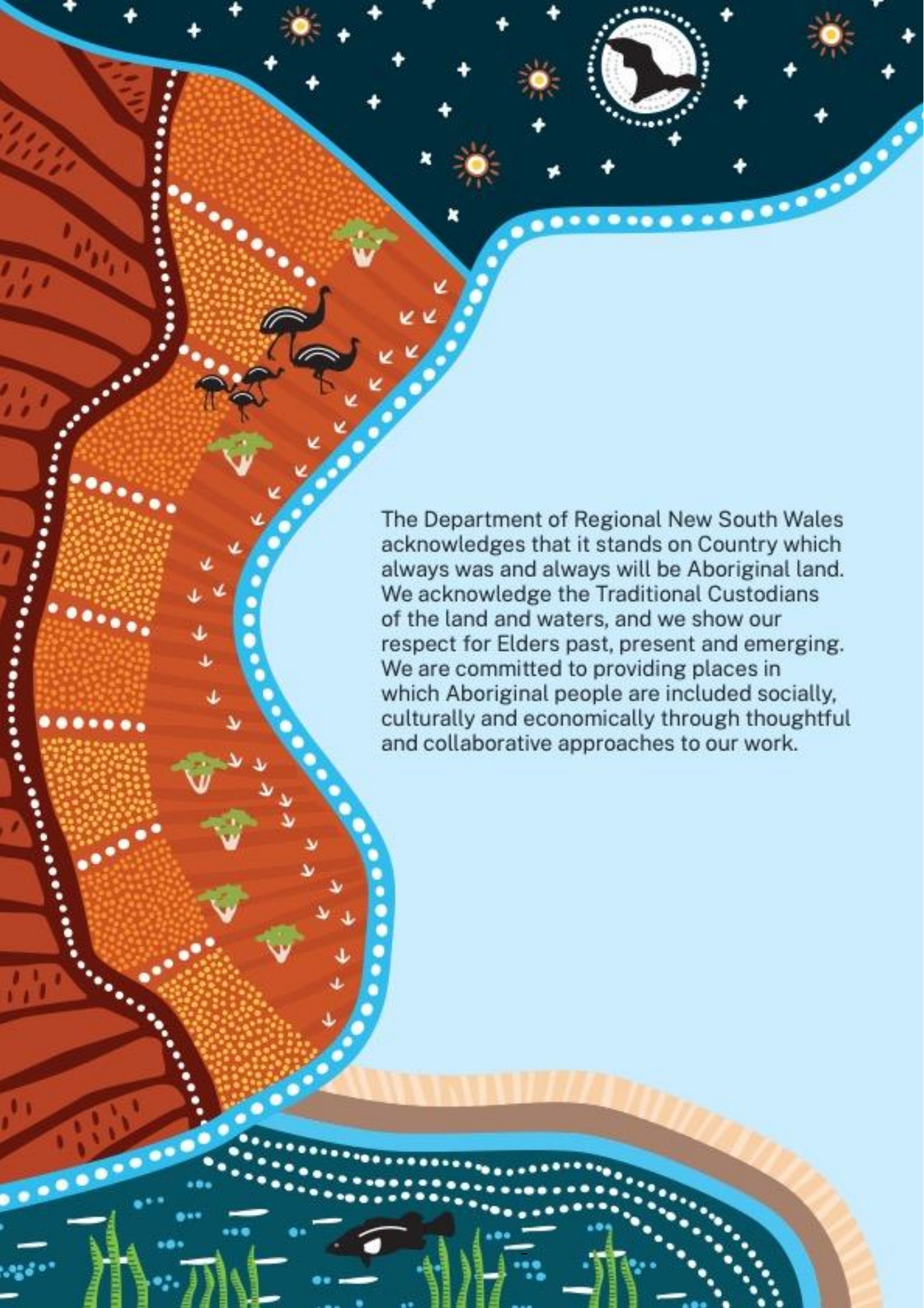


Orange, Blayney and Cabonne Regional Economic Development Strategy – 2023 Update





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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The Department of Regional NSW would like to acknowledge the significant contribution of many stakeholders in the Orange, Blayney and Cabonne region to the development of the 2023 REDS update, with particular thanks to staff from Orange City Council, Blayney Shire Council and Cabonne Council. The Department of Regional NSW also acknowledges the assistance provided by PricewaterhouseCoopers and ProjectsJSA to help deliver the 2023 REDS update project.

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 scrub 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: Sampson Street, Orange. Photo credit: Orange City Council

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1. Executive summary

Changes in the Orange, Blayney and Cabonne 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.

Orange, Blayney and Cabonne has received significant investment since 2018, with additional projects in the planning or delivery stages.



The **\$300 million Flyers Creek Wind Farm** will provide 450 gigawatt hours of electricity per year.



Over **\$200 million** committed to the **McPhillamys Gold Project**.



\$75 million invested to deliver the **NSW Government Offices in Orange**.



Over **\$80 million** has been invested into education infrastructure in the region including the **Charles Sturt University (CSU) Rural Medical School**.

The region is experiencing sustained population growth, a constrained labour market and rising house prices.



+ 0.62% per annum average population growth rate since 2018.



Housing vacancy rates sit at **0.7%**, with median house prices having risen by an average of **56%** since 2018.



The proportion of the population over 55 years has increased by **1.9%** since 2018.



Unemployment has decreased **by at least 1.7%** since 2018, **sitting below 2.5%** across the Orange, Blayney and Cabonne LGAs with job vacancies reaching an all-time high.

The region's key industries have remained resilient, with sustained growth recorded in the agriculture and healthcare sector



Agriculture, forestry and fishing

+ **6.1%** Year-on-Year (YoY) growth from 2011-2020

\$262 million Gross Value Added (GVA) in 2020

1,983 jobs supported in 2021



Mining

- **5.7%** YoY growth from 2011-2020

\$ 572 million GVA in 2020

1,720 jobs supported in 2021



Healthcare and social assistance

+ **4.9%** YoY growth from 2011-2020

\$ 463 million GVA in 2020

5,618 jobs supported in 2021



Manufacturing

- **1.9%** YoY growth from 2011-2020

\$ 312 million GVA in 2020

1,581 jobs supported in 2021

Key themes from local consultation

Stakeholders from the Orange, Blayney and Cabonne region highlighted the need for ongoing infrastructure development and investment, with a key aim of achieving high quality sustainable growth that delivers an equitable spread of benefits across all parts of the region and the community.

Enabling and community infrastructure



The region is currently delivering significant investment to support growth. Supporting increased releases of additional residential and industrial land to meet local demand, as well as improving and enhancing community infrastructure to support a high standard of amenity across all communities were highlighted as key priorities.

The Orange, Blayney and Cabonne region has great potential



In addition to the benefits arising from significant investments in mining and manufacturing, stakeholders highlighted the ongoing positive conditions driving agriculture sector growth, the sustained growth recorded in the visitor economy and the benefits from increased migration of people to regional NSW.

The need to ensure all members of the community benefit from growth



Continued investment in social and community infrastructure and services is seen as critical to supporting community wellbeing. There is a shared aim across the region of delivering high quality growth with long-term benefits to the entire community, that doesn't jeopardise the nature and character of the region.

Orange, Blayney and Cabonne REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p>Develop the value of the visitor economy and its connections to thriving local agriculture, food and wine industries.</p>	<ul style="list-style-type: none"> • Investigate barriers and opportunities to expanding the region’s tourism offering, including providing additional accommodation to ensure a greater number of ‘stay and spend’ visitors. • Enhance the regional marketing approach to support the development of an integrated tourism offering across the region.
<p>Enable sustainable growth in the region’s agriculture, agribusiness, mining and manufacturing industries by supporting access to a skilled local labour force, industrial land and supporting industries.</p>	<ul style="list-style-type: none"> • Explore and activate industrial and employment land, including opportunities to create specialised agriculture, mining and related industry hubs across the region.
<p>Drive inclusive growth by creating opportunities for engagement of local people in the economy, particularly through the development of the region’s growing and innovative education, public administration and healthcare specialisations.</p>	<ul style="list-style-type: none"> • Engage with local business and education and training providers to identify and map skills gaps impacting the region’s specialisations with the intent of aligning training to meet those needs. • Identify opportunities to support emerging healthcare specialisations and allied health industries within the region.
<p>Enhance the liveability of the region by ensuring the future supply of housing, stable supply of water, community infrastructure and community amenity in Orange, Blayney and Cabonne as the region’s population grows.</p>	<ul style="list-style-type: none"> • Examine the current and projected housing supply needs within the region through a Regional Housing Delivery Plan, considering future growth pressures and opportunities to improve housing supply. • Support investments in community spaces, services and recreation infrastructure to improve amenity, diversify the visitor economy, and support attraction and retention of a working age population.

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, mice 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.

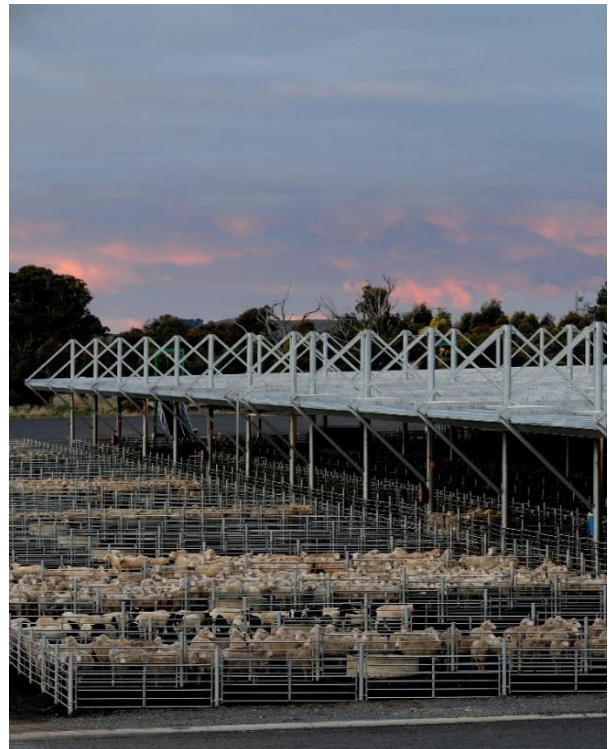


Figure 1: Central Tablelands Livestock Exchange.
Photo Credit: Blayney Shire Council.



Figure 2: The Canowindra Country Bakehouse.
Photo credit: Destination NSW.

3. About the Orange, Blayney and Cabonne region

The Orange, Blayney and Cabonne FER is located in Central West NSW, within a four hour drive from both Sydney and Canberra. As suggested by its name, the region incorporates the LGAs of Cabonne Shire, Orange City and Blayney Shire. Orange is the major population centre in the region, while other important towns include Blayney, Canowindra, Manildra, Molong and Millthorpe.

Total area covered (km ²)	7,836
Population (2021)	65,004
Blayney	7,508
Cabonne	13,760
Orange	43,736
Size of the economy (2020)	\$4.339 billion
Total employment (2021)	30,064

Source: ABS (2021) Estimated Resident Population, REMPLAN (2020), ABS Census (2021)



Figure 3: Map of the Orange, Blayney and Cabonne Functional Economic Region.

4. 2018 Orange, Blayney and Cabonne REDS







In the 2018 Orange, Blayney and Cabonne REDS, the region was focussed on supporting the growth of its key industry specialisations, in particular tourism and agriculture. Endowments recognised in the document spanned natural, social and infrastructure assets, many of which were central to the overall approach to enabling economic development for the region. These endowments and specialisations are highlighted below.

2018 Orange, Blayney and Cabonne strategies

	Support growth in mining and mining services.
	Develop existing strengths in agriculture, agricultural processing, agri-technology and manufacturing.
	Realise economic opportunity in education and public administration.
	Build on the region's core specialisation in healthcare.
	Drive tourism growth and enhance the liveability of the region.

2018 Orange, Blayney and Cabonne specialisations

The primary industry specialisations below were identified as comparative advantages for the Orange, Blayney and Cabonne region in 2018, based on employment concentrations in industry sectors.

	Healthcare and social assistance
	Agriculture, forestry and fishing
	Mining
	Manufacturing
	Education
	Road freight transport

2018 Orange, Blayney and Cabonne endowments

Orange, Blayney and Cabonne is home to a wealth of physical, institutional, built, and human endowments, which play a key role in enabling success and growth across its industry specialisations.











Endowment	Relevant 2018 specialisation
Water, climate and soil	
Mineral resources	
Agriculture infrastructure and services	
Orange airport	
Education infrastructure	
Location, accessibility and lifestyle benefits	
Natural resources	
Aboriginal heritage, historical heritage and villages	
Healthcare infrastructure	
Local institutions and strong leadership	



Figure 4: Lake Canobolas near Orange. Photo credit: Orange City Council.

5. The big picture: shocks and trends impacting the Orange, Blayney and Cabonne region since 2018

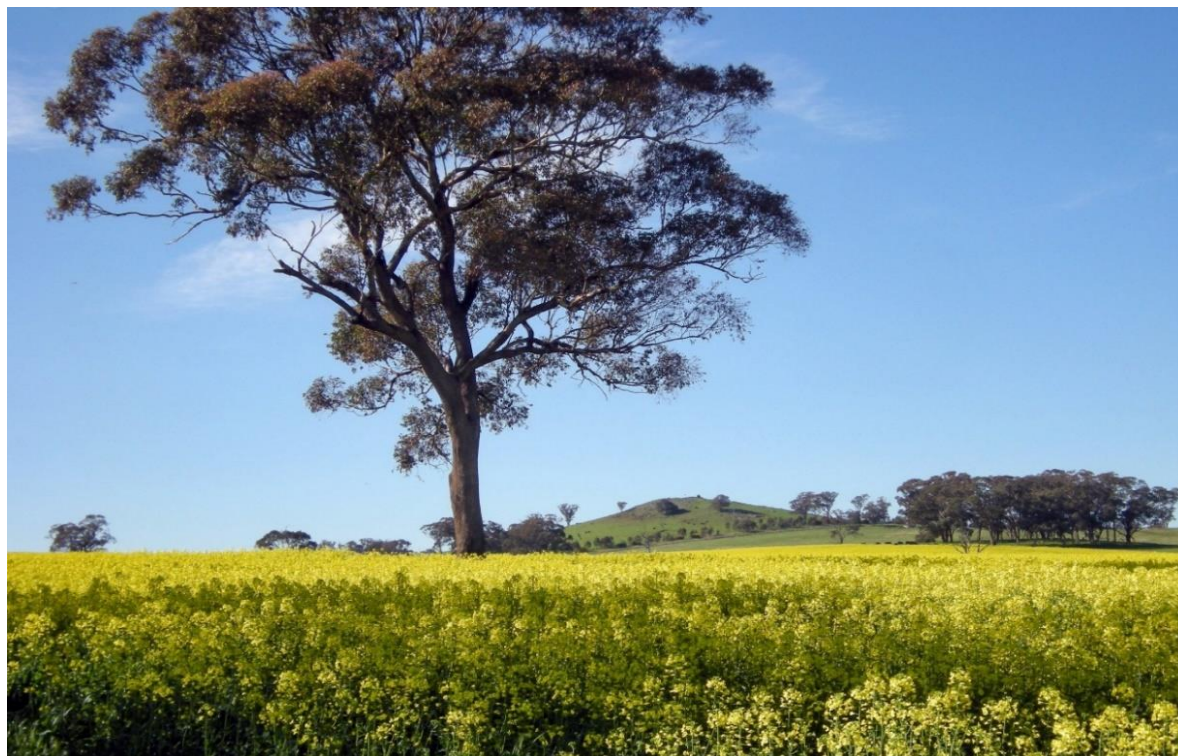


Figure 5: A canola field near Canowindra. Photo credit: Wendy Smith.

Significant events impacting major industries

A sustained period of drought, followed by the mouse plague and flooding had significant environmental and economic implications for the Orange, Blayney and Cabonne region. The COVID-19 pandemic further challenged the region with local businesses suffering from the initial impacts of movement and operating restrictions. During the period 2018 to 2022, the region had ten disaster declarations^[1] and received \$28.23 million in disaster recovery grants.^[2] Recovering from these events and enhancing industry and community resilience is a priority for the region.

Drought

Similar to many parts of regional NSW, Orange, Blayney and Cabonne experienced extreme drought conditions between 2017 and 2020. As a result, Suma Park Dam was reduced to just 27% capacity due to long periods without rainfall.^[3] The major investment in the Central West Water Security Project to deliver a pipeline between Orange and Molong helped ensure availability of water for Cabonne Shire, given no significant inflows into Molong Creek Dam.^[4]

The drought severely impacted the agricultural sector, with cattle and sheep farmers required to significantly reduce their herds due to insufficient feed and water, and many farmers placed under significant financial pressure for an extended period.^[5]

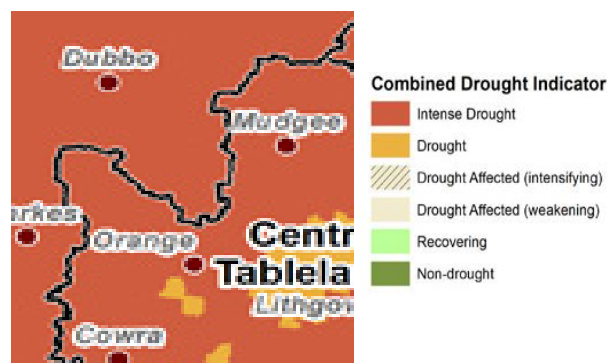


Figure 6: Combined Drought Indicator, 12 months to 31 December 2019 (Department of Primary Industries (DPI), 2022).

Mouse plague

The mouse plague was unprecedented throughout the region. Homes were infested with residents reporting that they had to remove anywhere from 40 to 60 rodents from their house each night, causing a significant health risk.^[6] Landholders and agricultural businesses were impacted by widespread crop damage, including spoiled hay causing health issues in livestock.^[7]

To support impacted communities, the NSW Government made available up to \$95 million for primary producers in financial need, and \$45 million for the Small Business and Household Mouse Control Rebate. A total of \$1.73 million was paid to 3,471 households and small businesses in the region under the rebate program.^[8]

Floods

The Orange, Blayney and Cabonne region had three disaster declarations due to severe weather and flooding in the second half of 2022.^[1] The most significant event was in November 2022, with severe flooding impacting many parts of the region.

Eugowra was devastated by major flooding after more than 120 mm fell into an already heavily saturated catchment. Combined with substantial spills from Wyangala Dam, this caused flash flooding, with hundreds of residents stranded in their properties.^[9] More than 20 per cent of the town's population had to be evacuated via boat or helicopter and property and buildings were damaged across the town.^[10]

In Molong, following major storms and heavy rain, around three quarters of the town was severely impacted by a wall of floodwater. The sheer force of the flood shifted two large shipping containers down the main street and into a position that blocked the Mitchell Highway.^[11] The flood destroyed the local supermarket and a number of other businesses, leaving many houses and properties inundated, badly damaged or destroyed.^[12]

Canowindra recorded its most significant flood event since 1955, with the Belubula River bursting its banks, closing the main highway route through town and temporarily splitting the town in two.^[13] This led to significant damage, with many properties in the historic town centre flooded.^[14]

The flooding events also caused significant damage to the agriculture sector in the region. Widespread damage was done to key infrastructure such as fences, sheds and buildings, livestock were stranded on higher ground or washed away, and summer crops were destroyed, with significant agricultural output lost after being inundated for extended periods of time.^[15]




COVID-19

Although the Orange, Blayney and Cabonne region has seen strong economic and population growth post COVID-19, the region was heavily impacted by the lockdown restrictions and travel bans, with 31% of businesses reported that COVID-19 negatively affected their business.^[16] There was also sustained increases in income support recipients after March 2020, with Jobseeker recipients rising by 50% and Health Care Card recipients by 25% from March to June 2020.^[17]

While COVID-19 pandemic lockdowns placed significant restrictions on the movement of people in 2020 and 2021 and saw international borders closed, the strong resilience and high-quality product offering of the region's visitor economy has minimised overall impacts on that sector. Good accessibility to the region from major population centres and a wide-ranging visitor offering has supported ongoing growth since the COVID-19 pandemic in domestic visitor spend and length of stays in the region.^[18]

Macroeconomic trends shaping the region’s future

Macro trends related to climate and migration have played a significant role in the Orange, Blayney and Cabonne region since 2018, and are likely to continue to have a strong influence on its future. With a growing population of remote workers, the impacts of successive natural disasters, and the shift towards net zero, the region faces both opportunities and risks associated with these trends.

Trend	Opportunities and risks	
 <p>Digital Transformation</p>	<p>The recent COVID-19 pandemic has accelerated the digital economy in Australia, with increased uptake of remote working arrangements, telehealth and online services such as education.^[19]</p> <p>As more remote workers migrate to the Orange, Blayney and Cabonne region, there is a need for current and efficient telecommunications that can support business growth and secure and attract innovative industries. Sustained investment is needed to continue to improve digital infrastructure quality and coverage across the region.</p>	<p>Remote working and digital service provision can help enable access to a greater labour pool and expand small business capacity and opportunity.</p> <p>Enhancing digital connectivity can support emerging industry opportunities and enable innovation in engine industries such as agriculture.</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.^[20]</p> <p>The Orange, Blayney and Cabonne region has seen sustained population growth in recent years. However, given the increased ability to work remotely, population growth does not necessarily lead to significant increases in local workforce supply. Stakeholders noted that local jobs are being filled and created, but the need to attract workers and skills to support growth in a range of sectors remains, in particular within emerging knowledge-based sectors.</p>	<p>Accelerated population growth can impact housing availability and affordability.</p> <p>Higher population also creates greater demand for services, particularly in the population serving health and education sectors, which are already facing significant workforce challenges.</p>
 <p>Towards Net Zero</p>	<p>Diversification in the energy sector presents potential future economic development opportunities for the region.</p>	<p>The increased role of renewable energy generation sector presents potential supply chain opportunities for local industry.</p>












	<p>Alongside existing renewable energy generation sites including the Manildra Solar Farm and Blayney Wind Farm, the Flyers Creek Wind Farm currently under construction will have capacity to generate approximately 450 gigawatt hours of electricity per year, equivalent to powering more than 80,000 Australian households, avoiding over 333,000 tonnes of carbon emissions per year.^[21]</p>	<p>Stakeholder consultation revealed strong support for exploring supply chain opportunities in renewable energy but highlighted a lack of available industrial land as a potential inhibitor to fully capitalising on this opportunity.</p>
 <p>Rising Uncertainty</p>	<p>The region has experienced a succession of extreme climate events since 2018, including drought, bushfires and floods. Climate events have had significant and ongoing impacts on local infrastructure and local industry.</p> <p>As the frequency and intensity of these events is anticipated to increase in coming years, there is a need to enhance climate resilience within industry and the community, with stakeholders highlighting this as a priority across all parts of the Orange, Blayney and Cabonne region.^[22]</p>	<p>Rising uncertainty presents an opportunity to support improvement in domestic supply chain resilience in sectors such as agriculture and energy.</p> <p>Rising uncertainty places upward pressure on inflation, driving up input costs and creating additional challenges for major projects. On the other side of this, uncertainty caused by global geopolitical tensions can increase revenue, such as in the agriculture sector.</p>



Figure 7: Wentworth Mine, Lucknow. Photo Credit: Orange City Council.

6. Responding to change: Initiatives and investments since 2018

Since 2018, local councils, the NSW Government and other organisations have delivered new and updated 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 REDS priorities and strategies.

Strategies and plans	Relevant 2018 strategies
<p>The Central West and Orana Regional Plan 2041 is a 20-year land-use blueprint to support a prosperous future for the region. Each council's Local Strategic Planning Statement then sets out strategic planning objectives for each LGA.</p>	
<p>Each council's Community Strategic Plan (CSP) sets out the community's priorities and aspirations. The Orange City Council CSP 2022-2032 provides a blueprint for long-term growth, community development and infrastructure renewal, the Blayney Shire CSP 2022-2032 addresses social, environmental and economic issues, while the Cabonne CSP 2022-2032 focusses on key considerations including leadership, infrastructure, community, economy and the environment.</p>	
<p>The Orange Housing Strategy, Blayney Settlement Strategy and Cabonne Settlement (Land Use) Strategy set out strategies to manage the future growth and enhancement of each of the settlements over the next 10-20 years.</p>	
<p>Orange City's Activate Orange Strategic Vision outlines how the city will support and activate growth so to leverage Orange's competitive advantages and enable it to become a powerhouse of inland NSW.</p>	
<p>The Central NSW Joint Organisation Economic and Social Environmental Scan reviewed relevant strategic documents across the government and private sector to identify the risks, opportunities and challenges for the region.</p>	
<p>The Orange Health and Innovation Precinct Masterplan sets out a key vision and high-level strategy to support Orange becoming a major regional health cluster.</p>	
<p>The draft Future Transport 2056 Central West and Orana Regional Transport Plan provides a blueprint for how Transport for NSW will respond to the transport needs of the region. Goals include boosting alternative transport (walk, cycle, public transport) and improving access to day return services to major destinations.</p>	
<p>The draft Central West Destination Management Plan (DMP) 2022-2030 seeks to establish a collaborative framework to guide growth of the visitor economy, with objectives of supporting industry recovery, building a regional brand, investing in major events and attracting investment into tourism in the Central West.</p>	
<p>The Orange Region Destination Management Plan (DMP) and the Cabonne Economic Development and Visitor Economy Strategy 2021 outline strategic frameworks to guide development of the s visitor economy in each of the LGAs.</p>	
<p>The updated Regional Water Strategies being developed for the Macquarie-Castlereagh and Lachlan regions to address the region's long-term security to support liveability and the ongoing productivity of the region's engine industries.</p>	

Significant investments since 2018

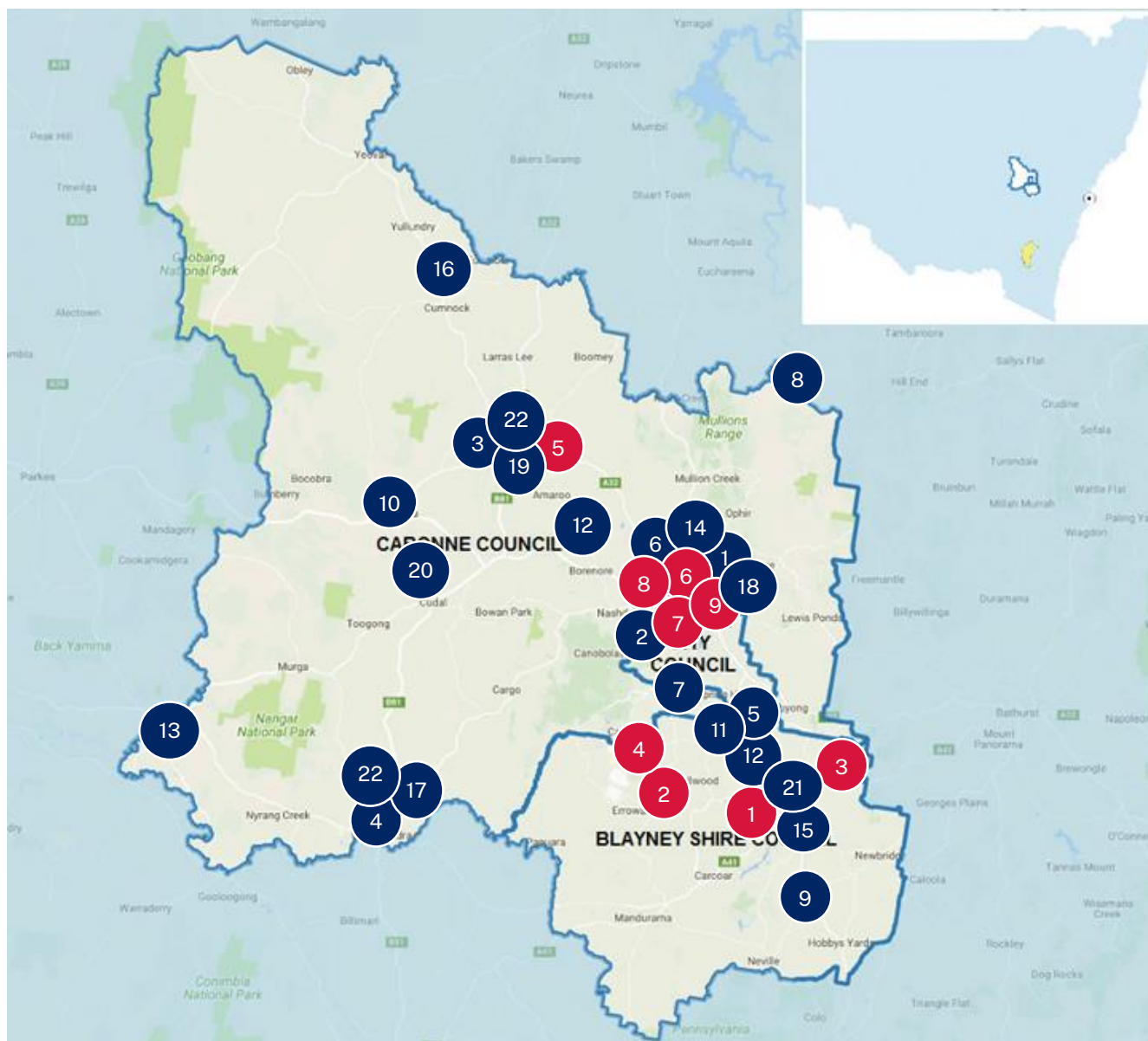


Figure 8: Significant investment in the Orange, Blayney and Cabonne Functional Economic regions since 2018.












Since 2018, the region has received 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 still in planning. Public investments have focused upon developing infrastructure which supports increased amenity and liveability, alongside projects to deliver new and upgraded health and education facilities. Grant funding has played a key role in many of these projects.

Major private investment since 2018













Investment	Estimated total project value	Relevant 2018 strategies
1 Expansion of Blayney Nestle Plant	\$90 million	
2 Flyers Creek Wind Farm	\$300 million	

3	McPhillamys Gold Project	\$200 million	
4	Cadia Mine upgrades and investment	Not available	
5	Molong Solar Farm	\$29 million	
6	103 Prince Street housing development	\$26 million	
7	Lives Lived Well health facility	\$5.5 million	
8	Orange Anglican School expansion ¹	\$5.2 million	
9	Storco sheet metal factory	\$6.6 million	

Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 Strategies
1 NSW Government Ian Armstrong Building	\$75 million	
2 Charles Sturt University Rural Medical School and Regional Health Institute	\$40 million	 
3 Molong Multipurpose Health Service	\$15 million	
4 Canowindra HealthOne Facility	\$5.5 million	
5 Millthorpe Primary School upgrade	\$20 million	
6 Bletchington Primary School upgrade	\$25 million	
7 Orange Airport upgrades	>\$2.5 million	
8 Dixons Long Point crossing	\$34.8 million	
9 Blayney LGA road upgrades	>\$10 million	
10 Mandagery Creek Bridge replacement	\$12 million	

¹ This project is also being supported by funding from the Commonwealth Government.

11	Millthorpe Railway Station upgrade	\$1.1 million	
12	Central West Water security projects – Orange to Molong and Orange to Blayney and Carcoar Pipelines	>\$40 million	
13	Eugowra Rural Fire Service Station	\$1 million	
14	Orange Sports Complex	\$35 million	
15	Blayney Centrepoint pool upgrade	\$4.8 million	
16	Cabonne LGA pools upgrades	\$2.9 million	
17	Canowindra sports oval upgrades	\$1.8 million	
18	Orange Regional Conservatorium and Planetarium	\$25 million	
19	Cabonne Community Centre	\$6.2 million	
20	Cudal autonomous vehicle research and testing facility	\$9.5 million	
21	Central West Equestrian and Livestock Centre	\$1.8 million	
22	Cabonne CBD Upgrades – Molong and Canowindra	Not available	

Regional grant programs

The Orange, Blayney and Cabonne region has received \$106.25 million in grants approved since 2018. A key program in the region has been the Resources for Regions, with \$41.35 million committed for projects ranging from new sports and recreation facilities to road upgrades. The Stronger Country Communities Fund has also provided \$17.15 million to deliver a range of projects to enhance local amenity and liveability across the region.

Grant category	Approved funding
Community	\$65.57 million
Economic	\$12.45 million
Disaster recovery	\$28.23 million

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

7. Orange, Blayney and Cabonne 2023 economic snapshot

The region continues to experience consistent population growth, however, an ongoing focus is needed on worker attraction and retention

The Orange, Blayney and Cabonne region has seen consistent strong levels of population growth in recent years, with this trend expected to continue. However, a lower percentage of the population in their primary working age highlights a need for focus on worker attraction and retention initiatives.

Population growth

As shown in Figure 9, the region saw an average population growth rate of 0.93% between 2011-2021 (468 people per year). A significant drop in the population growth rate from 1.03% to 0.49% was seen between 2019 and 2020, however this rebounded in 2021.

Stakeholder consultation suggested that strong levels of internal migration as a result of the COVID-19 pandemic are supporting population growth. Steady growth in the region's population is expected to continue over the next decade.

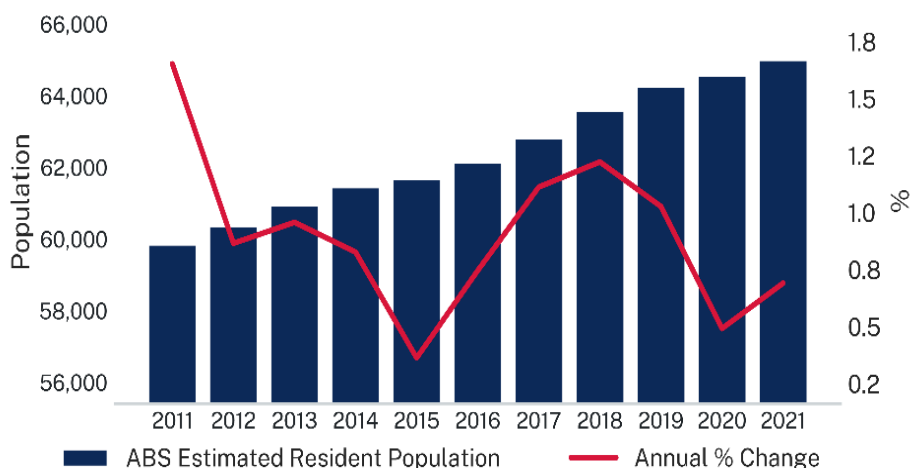


Figure 9: Orange, Blayney and Cabonne FER population growth, 2011-2021 (ABS ERP, July 2022).

Demographic profile

As at 2021, 31.2% of the region's population is over the age of 55, which is significantly more than the NSW average of 20.6% (see Figure 10). Only 62.8% of the population is in the primary working age cohort, compared to the whole of NSW at 64.2%. These two characteristics of the demographic profile suggests an ongoing challenge will be ensuring a sufficient workforce to meet the needs of the region.

However, the region is potentially well placed to address this challenge, given the higher proportion of the population in the 0-19 age range compared to the NSW average.

A focus is needed on ensuring educational pathways are well matched to the needs of engine industries, and that younger residents are encouraged to explore career opportunities that would see them remain in the region.

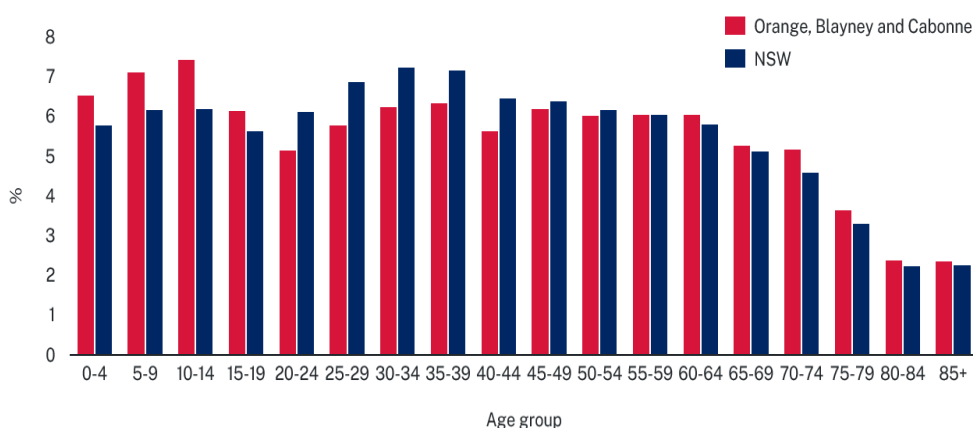


Figure 10: Orange, Blayney and Cabonne FER population by age, 2021 (ABS ERP, July 2022).

Actions to continue to enhance regional amenity can also encourage younger residents to stay in the region, with additional benefits associated with increasing the incentives for skilled workers to relocate to Orange, Blayney and Cabonne.

Declining housing availability and reductions in housing affordability present a challenge to attracting and retaining skilled workers.

The region has faced a decline in housing availability and affordability since 2018. This is likely being driven by ongoing population growth in the region, as well as increased demand for worker housing associated with major projects and ongoing growth in the visitor economy.

Housing availability

Residential vacancy rates in the region have dropped from 2.7% in March 2020 to 0.7% in August 2022 (see Figure 11), with COVID-19 related migration of remote workers to the region likely a factor in the significant reduction observed since the commencement of the pandemic in 2020.

Meanwhile, outside of a peak in March 2021, residential building approvals have remained relatively stable, with no evident increase in line with increased demand for housing. 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 enablers such as infrastructure provision) are appropriately calibrated to keep pace with projected increased demand for housing.

Housing affordability

As with much of regional NSW, the heightened demand for housing has resulted in significant growth in house prices. Between June 2018 and June 2022, the median house price in the Orange, Blayney and Cabonne region increased by an average of 56%. At the LGA level, Orange experienced a 73% increase in the median house price to \$699,000, Blayney recorded a 67% increase to \$548,000, and Cabonne a 26% increase to \$434,000.^[23]

Despite the sustained recent price growth, in 2021 the estimated price-to-income ratio in the region was 5.9, below the NSW average of 8.12.^[24] Therefore, while the region currently has a relative cost advantage related to housing, sustained further increases in house prices may constrain the ability to attract and retain skilled workers. This could have significant implications for major project delivery and economic growth across engine and emerging industries in the region.

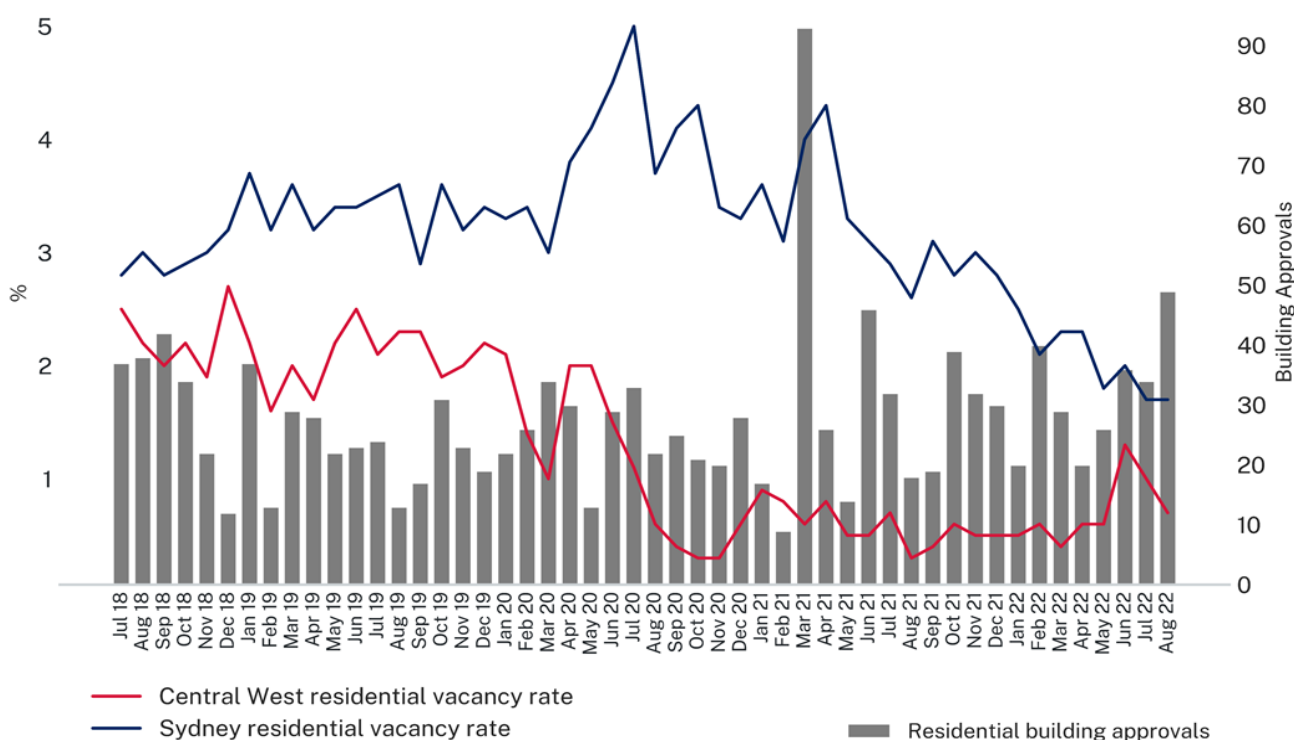


Figure 11: Orange, Blayney and Cabonne FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

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.

Unemployment rates in the region have dropped significantly since 2018, and job vacancies have more than tripled over the same period.

The labour market has become increasingly constrained in the Orange, Blayney and Cabonne region since 2018, with significant reductions in unemployment accompanied by substantial increases in job vacancies. A need to further develop skilled workforce attraction and retention initiatives was identified in the 2018 REDS, and this will need to remain a priority.

Employment

As shown in Figure 12, as at June 2022, Orange, Blayney and Cabonne had unemployment rates of 2.3%, 1.3% and 1.4% respectively, all well below the NSW benchmark of 3.9%. After an initial increase after the commencement of the COVID-19 pandemic, the unemployment rate has continued to trend downwards across the region.

Job vacancies in the wider Blue Mountains, Bathurst and Central West region, climbed to reach a high of 2,523 in August 2022, having more than tripled from 919 in December 2018 (see Figure 13). Main occupations with significant vacancies include carers and aides (236 vacancies), general administrative roles (167 vacancies) and retail salespersons (206 vacancies).

During consultation, stakeholders highlighted that job vacancy data is likely to understate current levels, as many roles in sectors, such as agriculture and tourism, are filled through networks rather than formal advertisements.

Stakeholders highlighted that migration of younger people back to the region from metropolitan areas since the COVID-19 pandemic in an opportunity to build workforce capability and capacity in the region.

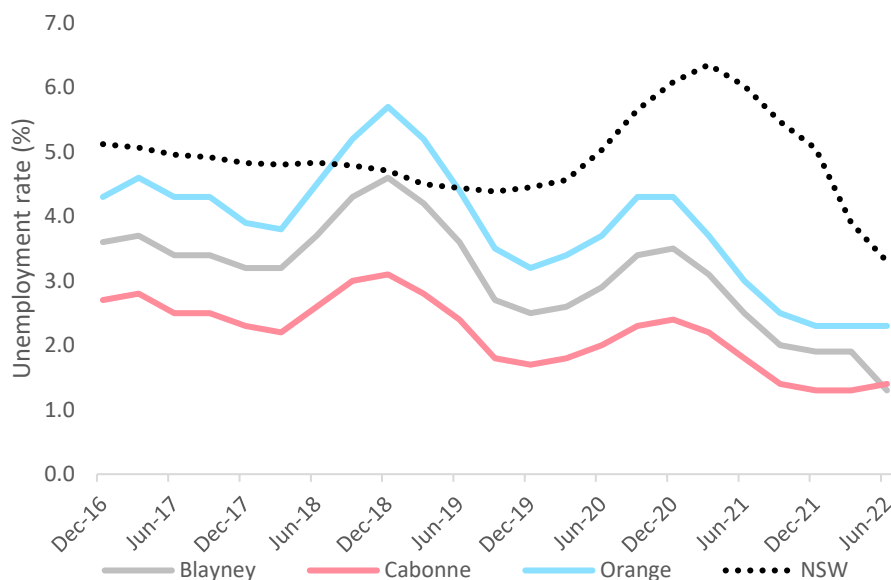


Figure 12: Orange, Blayney and Cabonne FER unemployment rates (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).



Figure 13: Job vacancies, Blue Mountains, Bathurst and Central West 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.

Aboriginal employment

There has been significant progress in improving Aboriginal economic participation outcomes for members of the Aboriginal community in Orange, Blayney and Cabonne in recent years.

The Aboriginal unemployment rate in the region has almost halved from 16.4% in 2016 to 8.6% in 2021, which is below the NSW Aboriginal unemployment rate of 9.8%. The rate however remains significantly higher than the equivalent NSW unemployment rate measure of 4.9%.

Continued positive engagement between local Aboriginal community representatives, businesses, industry and government representatives is needed to ensure that strategies and programs can be delivered in the region that are able to maximise economic opportunities for the region's Aboriginal communities. This can help ensure the positive trend in Aboriginal economic participation outcomes observed in recent years continues.

Aboriginal unemployment rate: Orange, Blayney and Cabonne	2011	17.2%
	2016	16.4%
	2021	8.6%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census 2021.



Figure 14: The historic town of Carcoar from above. Photo credit: Jim Gowing.

Orange, Blayney and Cabonne region engine and emerging industries

Despite the range of significant shocks since 2018, the Orange, Blayney and Cabonne region's \$4.339 billion economy continues to grow, with engine industries including agriculture, mining and tourism driving economic prosperity. The relative strength of key industries is highlighted through Location Quotient (LQ) analysis¹ in Figure 15, in which the size of the bubbles correlates with industry size.

Engine industries

Agriculture (LQ of 3.04) remains a driver of economic growth. The sector recorded 6.1% average annual growth between 2011 and 2020 and contributed \$262 million GVA in 2020. Sheep, grains, beef and dairy cattle is the primary subsector, generating 70% of the industry's overall output to the region.

Mining (LQ of 2.87) is a long-term specialisation in the region. Despite negative average annual growth from 2011 to 2020, the **mining** industry continues to make the largest contribution to GVA in the region, contributing \$572 million in 2020. Non-ferrous metal ore mining counts for 90% of output.

Healthcare (LQ of 1.48) generated \$463 million in value-add to the local economy in 2020, with growth averaging 4.9% between 2011 and 2020. Future growth in the sector will also be supported by the significant investment made by CSU to expand the Rural School of Medicine in Orange, and ongoing investments being made into the city's health precinct.

Tourism is another significant industry in the region, with visitors spending an estimated \$398 million in the region in 2021.^[25] The sector has experienced a long period of sustained growth, driven by strong collaboration between the three councils under the combined Orange360 tourism branding.

While **manufacturing** (LQ of 1.17) experienced -1.9% average growth between 2011 and 2020, it remains an important sector, adding \$312 million GVA economy in 2020. Key subsectors include grain mill & cereal products and other food products, which contributed a combined \$130 million GVA.

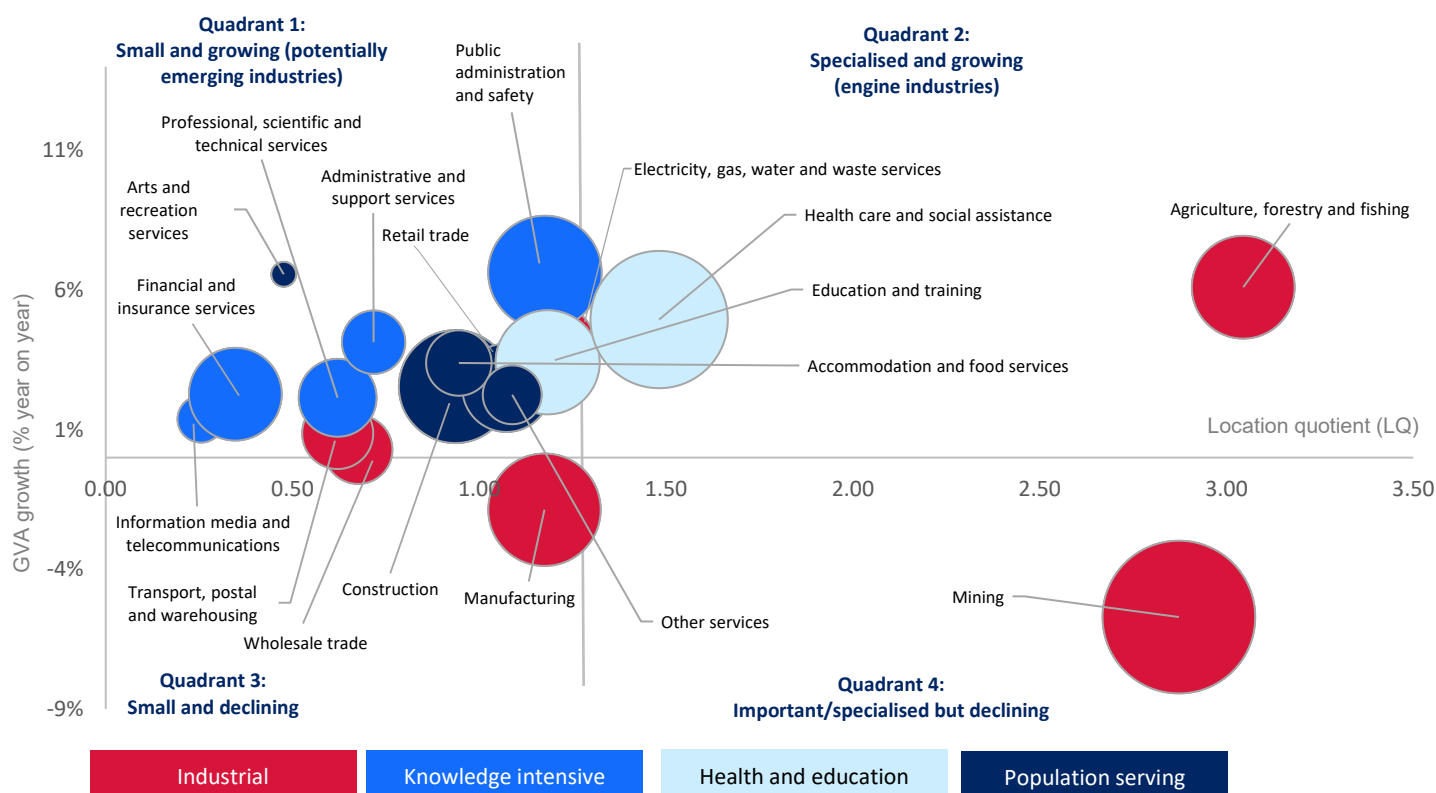


Figure 15: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPLAN, 2020).

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

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 (see Figure 16).

Public administration and safety has demonstrated strong growth between 2011 and 2020, averaging a 6.6% annual increase per year in GVA over that period. Public administration and regulatory services is the strongest subsector, contributing \$272 million to the FER economy in 2020.

Industry subsectors significantly driven by the tourism sector, including **accommodation and food services** and **retail trade**, represent emerging specialisations. Accommodation and food services recorded 3.4% average annual growth between 2011 and 2020, adding \$108 million GVA in 2020. Retail trade has grown by 2.5% on average per year since 2011, with \$194 million GVA in 2020.

Energy generation has demonstrated strong growth within the region, with a 2.2% average annual growth rate recorded between 2011-2020. While the sector only contributed \$23 million to GVA in 2020, its near-term growth will be enhanced by the delivery of the Flyers Creek Wind Farm.

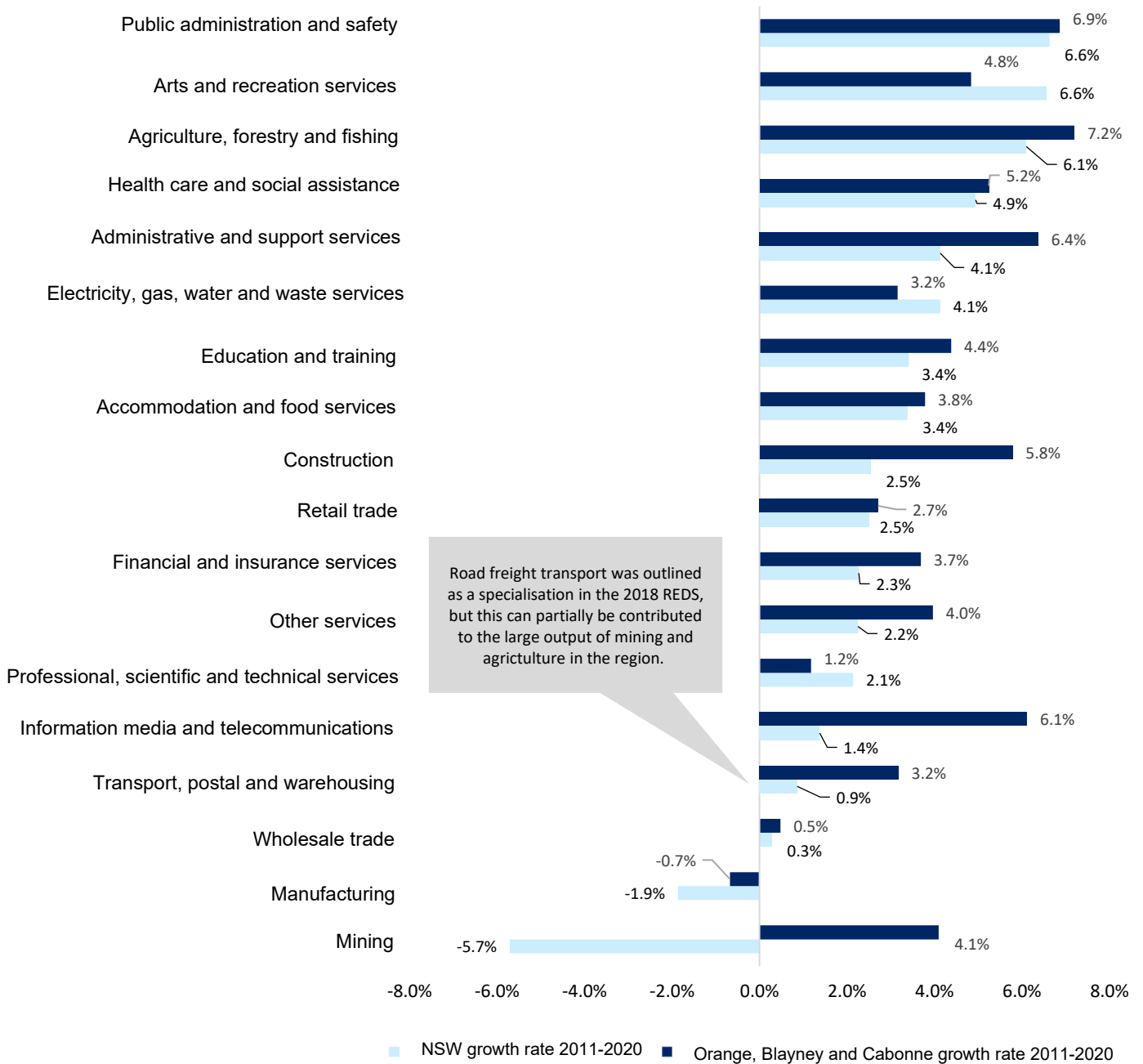


Figure 16: Change in GVA by Industry (% YoY), 2011-2020 (REMPPLAN, 2020).

Orange, Blayney and Cabonne region 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning Orange, Blayney and Cabonne's economy and regional competitiveness (see page 11). Despite recent shocks, consultation confirmed most remain valid with key endowments including:

- Mineral resources
- Agriculture infrastructure and services
- Orange airport
- Education infrastructure
- Location, accessibility and lifestyle benefits
- Natural resources, including a diverse supply of agricultural products available for value-add processing
- Aboriginal heritage, historical heritage and villages
- Healthcare infrastructure
- Local institutions and strong leadership



Figure 27: Hot air ballooning near Canowindra.
Photo credit: Destination NSW.

New endowments

While not necessarily reflected in the employment and industry specialisation (LQ) analysis presented above, 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 two endowments in the region which were not included in the 2018 REDS list.

+ Ian Armstrong Building – NSW Government Offices	This significant investment will help to ensure a continued significant state level public sector presence in the region.
+ Proximity to major precinct-based developments	The region is located close to the Parkes Special Activation Precinct, Inland Rail route and the Central West Orana Renewable Energy Zone – this proximity can support opportunities to grow both new and existing industries.
+ Mt Canobolas	Recognising an existing natural endowment that is a key feature of the natural beauty of the region and drives tourism.
+ Viticulture	The region's climate supports high quality cool climate wines, supporting a burgeoning viticulture industry that in turn is a key drawcard for the region's visitor economy.

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

Opportunities and vulnerabilities in engine and emerging industries

Mining

The Orange, Blayney and Cabonne region has significant natural endowments and specialised infrastructure that supports a substantial mining industry in the region.

GVA (2020, \$m)	572
Employment (2021)	1,720
LQ score (2020)	2.87
LQ Non-ferrous metal ore (2020)	33.5
LQ Support services (2020)	8.5

Strengths

- Mining is a long-established specialisation of the region, contributing \$572 million GVA in 2020. Non-ferrous metal ore mining accounts for 90% of the output, dominating employment with an LQ score of 33.5 within the specialisation.
- Strong road and rail freight transport links benefit the mining industry, with good access to transport corridors and export hubs throughout New South Wales.

Vulnerabilities

- Mining companies continue to face sustained workforce shortages and challenges, with roles needed to support growth in the sector, such as mining engineers particularly challenging to fill.
- Growth in other sectors such as agriculture, tourism and renewable energy may create increasingly competitive demands for access to land, which could give rise to potential land use conflict.
- Major new projects need to be supported by careful project planning so to build community support for their development, ensure impacts on local services and communities are effectively managed, and long-term equitable benefits are delivered to the community.

Opportunities

- The region still has significant unmined deposits of key minerals including gold and copper – significant scope continues to exist for new mines and/or further expansion of existing mines.
- Enhanced collaboration with local training providers to provide additional training and upskilling of the workforce can help retain workers in the industry and build broader workforce capability.
- Opportunities may exist for future projects to reuse existing assets and/or deliver broader positive outcomes for the community – for example, the McPhillamys Gold Project is proposed to include a 90-kilometre pipeline to supply surplus water from outside the region. This can initially meet water needs for the mine, but in future could potentially be used to supplement Blayney's water supply.^[26]

Agriculture

The region has been able to continue to leverage its significant natural endowments and specialised infrastructure to support growth in the agriculture industry. Future growth will need to be supported by a focus on developing enhanced resilience against the impacts of climate variability and natural disasters.

GVA (2020, \$m)	262
Employment (2021)	1,983
LQ score (2020)	3.04
LQ Sheep, grains & dairy cattle (2020)	4.2
LQ Other agriculture (2020)	2.6

Strengths

- The Orange, Blayney and Cabonne region has an abundance of natural endowments and high-quality farmland that supports agriculture as a specialisation specialisation.
- Good quality road freight transport links throughout the region, and availability of rail freight options support timely and reliable exporting of goods to markets and hubs across Australia.
- The sheep, grains, beef and dairy cattle subsector produces 70% of output, and is supported by significant regional facilities such as the Central Tablelands Livestock Exchange.
- The region's climate is ideal for cool climate wine making, which supports a burgeoning viticulture industry across the region.

Vulnerabilities

- The industry relies on the availability of land and viable climatic conditions, both of which may become vulnerable in the face of rising uncertainty and more frequent and severe climatic events.
- Parts of the region continues to face ongoing water security challenges which causes uncertainty in the industry.
- Geopolitical tensions and trade policy can impact the costs of industry exports, as demonstrated by the impact of tariff increases on wine in 2020.^[27]
- While transport links continue to improve, significant capacity constraints still remain for freight moving to and from some major ports, in particular Port Botany.

Opportunities

- A focus on diversification of the agriculture sector beyond the primary focus on livestock specialisations can help diversify the sector.
- The sector may be able accelerate future growth through supporting the uptake of agtech in farming processes as a way to support increased productivity and automation.
- Existing collaboration between industry and education providers can be enhanced so to promote early learning about agricultural science and plant technologies and encourage younger people to gain industry knowledge and consider careers in the sector.

Healthcare and social assistance

The region's specialisation in healthcare has benefited from substantial investment in recent years, and the sector is well placed to support specialised training opportunities that can aid attraction and retention of key skilled workers in the region.

GVA (2020, \$m)	463
Employment (2021)	5,618
LQ score (2020)	1.48
LQ Residential care (2020)	1.6
LQ Healthcare services (2020)	1.3

Strengths

- The Orange, Blayney and Cabonne region benefits from significant health infrastructure, such as the Orange Health and Innovation Precinct, which supports a large healthcare industry. There is also specialised health research in the region.
- The significant investment to expand the CSU Rural Medical School will enhance the education and training offering to support locally based, skilled workers in this industry.

Vulnerabilities

- Attracting sufficient skilled professionals, in particular for roles such as GPs, medical practitioners and nurses remains a challenge given growing demand in the region for healthcare and social assistance services.
- The occupations most in demand in the region are also those most in demand across regional NSW, meaning there is broad-based competition across regional areas for skilled healthcare workers.
- Exacerbating issues associated with skilled workforce attraction is the very tight housing market conditions being experienced across Orange, Blayney and Cabonne, which may restrict the capacity of service providers to attract health workers to move to the region.

Opportunities

- Significant opportunity may exist to leverage the health precinct's educational infrastructure to support training in broader health related professions - for example close collaboration with the local TAFE sector could see the precinct support enhanced care economy training.
- The enhanced CSU Rural Medical School facilities and programs will see more young people move to the region to study. A focus on complementary measures and actions that encourage students to stay in the region after they graduate can help support long-term growth in the skilled workforce.
- An ongoing focus on delivering the long-term vision outlined in the Orange Health and Innovation Precinct Master Plan can help maximise the broader benefits for the community from the significant investments made to enhance the healthcare sector.

Manufacturing

The manufacturing sector in Orange, Blayney and Cabonne continues to make significant contributions to the regional economy, despite broader challenges facing the sector across the NSW.

GVA (2020, \$m)	312
Employment (2021)	1,581
LQ score (2020)	1.17
LQ Oils & fats (2020)	9.2
LQ Grain mill & cereal (2020)	7.2

Strengths

- The Orange, Blayney and Cabonne region has maintained its specialisation in the manufacturing sector, which added \$312 million GVA to the local economy in 2020.
- Oils and fats manufacturing and grain mill and cereal manufacturing are key subsectors in the region, in part due to the large agriculture specialisation in grains and cattle/sheep farming.
- Major manufacturing facilities in the region include the Nestle Factory at Blayney, Manildra Flour Mill and MSM Milling in Manildra, and a range of manufacturing firms that support engine industries, such as mining and agriculture.
- Significant recent investments to upgrade key facilities including Nestle at Blayney demonstrate a long-term commitment to maintaining a strong manufacturing presence in the region.

Vulnerabilities

- Macroeconomic factors beyond the control of producers may influence local manufacturing and value-add activities – such as current challenges associated with finding skilled staff, and the need to enhance resilience in the supply chain given recent shocks.
- Manufacturing has experienced a decline in output in the region over the past decade with -1.9% average annual growth, in line with a broader trend seen across NSW and Australia.

Opportunities

- There is opportunity for the industry to increase links with local suppliers to bring materials into the supply chain faster and increase supply chain resilience in the region.
- Opportunities exist to leverage the strong existing relationships in the region with sectors, such as agriculture and mining to pursue growth in advanced manufacturing, which can support a long-term return to positive growth in the sector.
- Increased collaboration with local education institutions, such as TAFE and CSU can help to better target training and skills development to the emerging skills need of the manufacturing sector, in particular for key roles supporting new manufacturing technology, such as industrial engineers and robotics experts.
- Ongoing investments into key transport infrastructure, such as road upgrades, Inland Rail and the Orange Airport upgrade can help support increased investment into manufacturing in the region.

Tourism

The visitor economy is an increasingly important part of the regional economy, driven by strong collaboration across the LGAs which has supported sustained growth despite major external shocks.

Visitor spend (2021, \$m) ^[26]	398
Employment (2021) ^a	4,482
LQ score (2020) ^b	0.95
LQ Food & beverage services (2020)	0.92

a Summation of ANZSIC 1 digit Retail trade, Accommodation and food services, Arts and recreation services.

b LQ score is for the Accommodation and food services industry.

Strengths

- The visitor economy is an increasingly important part of the Orange, Blayney and Cabonne economy, with visitors spending \$398 million in the region in 2021.^[26] While not yet meeting the definition of an engine industry for the region, tourism is a major employer in the region, and growth in the accommodation and food services sector between 2011 and 2020 has outpaced that across NSW.
- Collaboration and partnership between the three councils under the Orange360 brand has been a key part of building the region's visitor economy brand.
- The natural endowments and beauty of the region support a wide range of visitor economy offerings. Mt Canobalos is a drawcard, alongside a range of national parks, state forests and nature reserves, Borenore Caves, the unique tree canopy of Orange and a wide range of different landscapes.
- The region has a range of significant towns and villages with historical and cultural value. Popular destinations include the National Trust Villages of Millthorpe and Carcoar (which was named NSW's Top Tiny Town in 2022), Canowindra, Molong and Borenore.^[28]
- The region's climate supports high quality cool climate wine production, supporting a significant food and wine sector that forms a drawcard for the region's visitor economy.
- The region has a range of major festivals and events including the Orange F.O.O.D week, the Banjo Paterson Poetry Festival, Canowindra International Balloon Challenge and Sculptures by the Bush.

Vulnerabilities

- While the sector has demonstrated strong resilience despite the significant shock of the COVID-19 pandemic, with average spending per domestic overnight visitor reaching record highs in 2021, the sector remains vulnerable to the impact of external shocks.
- The sector continues to face challenges associated with ongoing staff shortages, given heavy competition between sectors for workers and very low unemployment rates across the region.

Opportunities

- An ongoing focus on developing new and unique agritourism and ecotourism offerings represents an opportunity to enhance the region's visitor economy, while also providing opportunities for alternative income streams for primary producers.
- Development of new and enhanced multi-day experiences in the region, as demonstrated by successful food and wine trails and the Orange Villages Bicycle Trail can help drive higher expenditure and encourage visitors to see more parts of the region.
- Building a strong visitor economy brand and further enhancing an integrated visitor economy across the region can support sustained growth in the sector.

Key themes in stakeholder consultation

Stakeholders from the Orange, Blayney and Cabonne region noted that significant progress has been made against the directions outlined in the 2018 REDS, and that the longstanding positive working relationship between the three councils is continuing to deliver positive outcomes.

The region continues to experience strong levels of population and economic growth, and key industries are continuing to flourish. Stakeholders were focussed on challenges associated with population growth and natural disasters, and also highlighted the need to ensure that all members of the community can benefit from economic growth in the region.

Delivering enabling and community infrastructure is a key focus

Stakeholders outlined that the region is working hard to support economic development and growth. Current focus areas include supporting expansion of housing supply through increased releases of residential land and facilitating more industrial land releases to meet significant unmet demand.

Stakeholders also highlighted the need to ensure ongoing investment continues to be made to improve and enhance community infrastructure, with the goal of ensuring that all communities across the region benefit from growing economic prosperity in the region.

The region has great potential across its key strengths

While the region's economy will benefit significantly from major investments being made in the mining and manufacturing sectors, stakeholders were keen to highlight the positive opportunities in the region across the economy.

Key discussion points included the ongoing positive climate conditions driving sustained growth in the agriculture sector, the continued strength of the visitor economy driven by the Orange360 collaboration despite the challenges of COVID-19, and the significant opportunities for the region associated with increased migration of people to regional NSW.

Maximising benefits for all members of the community from growth in the region

Stakeholders were keen to ensure a focus is placed on ensuring all members of the community are able to benefit from significant economic growth in the region. While diversifying the economy, knowledge based sectors will help drive long term growth and deliver substantial opportunities for the region. It was also highlighted that pressures continue to increase on more vulnerable sectors of the community that may not directly benefit from this growth.

Stakeholders highlighted the need to focus on balancing the pursuit of high-quality growth with meeting the needs of existing communities and ensuring that focus on ensuring economic opportunities are available to all members of the community.

Maintaining the unique nature and character of the region

Consultation highlighted the need to ensure economic growth is delivered in a manner that doesn't jeopardise the unique nature and character of the different parts of the region.

Stakeholders outlined an ongoing need to recognise the significant value associated with the villages and towns of the region, and to support these communities to explore opportunities. A key focus is needed on delivering growth that balances the needs of Orange as a growing regional hub with protecting the broader characteristics of the region that create a high level of amenity and liveability.

The need for quality planning to support future growth

Stakeholders highlighted the need to enhance support for improving the quality of planning activities to support future growth. An example cited was the need to improve the quality of future projections around key economic factors such as population growth.

Opportunities to refine methodologies to incorporate greater use of scenario modelling was highlighted as one potential approach that could enhance the quality of key forecasts, which stakeholders outlined have a significant influence on the support provided to councils to assist them with meeting the needs of a growing population in the region.

Orange, Blayney and Cabonne REDS – 2023 Update strategies

The impact of policies and investments since 2018, combined with feedback from stakeholders and the analysis of the region’s economy undertaken have highlighted a need to adjust the focus of the strategies in the 2023 REDS Update. Changes have been made to the 2018 strategies to:

- refocus the tourism strategy from being centred primarily on promoting growth in the sector towards increasing the value of the visitor economy to the region,
- focus on delivering sustainable growth in the region’s engine industries through supporting local workforce development and ensuring access to sufficient industrial land,
- highlight the need to enhance liveability across the region by addressing challenges associated with housing supply, water supply, community infrastructure and local amenities.
- A new strategy has also been added detailing an objective of achieving inclusive growth in the region, with a focus on creating opportunities for local people within the economy, in particular in emerging specialisations such as public administration and healthcare.

Reflecting the changes outlined above, the 2023 REDS Update strategies for the Orange, Blayney and Cabonne region are listed below (amendments made to existing 2018 strategies are highlighted in **bold**):

Amended	Develop the value of the visitor economy and its connections to thriving local agriculture, food and wine industries.
Amended	Enable sustainable growth in the region’s agriculture, agribusiness, mining and manufacturing industries by supporting access to a skilled local labour force, industrial land and supporting industries.
New	Drive inclusive growth by creating opportunities for engagement of local people in the economy, particularly through the development of the region's growing and innovative education, public administration and healthcare specialisations.
Amended	Enhance the liveability of the region by ensuring the future supply of housing, stable supply of water, community infrastructure and community amenity in Orange, Blayney and Cabonne as the region’s population grows.



Figure 18: Hay bales on a farm near Blayney. Photo Credit: Wendy Smith.

Key enablers of economic growth

A number of 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 the value of the visitor economy and its connections to thriving local agriculture, food and wine industries.	Government, regulation and information	Investigate barriers and opportunities to expanding the region's tourism offering, including providing additional accommodation to ensure a greater number of 'stay and spend' visitors.	Local Councils, Destination Central West NSW, Department of Regional NSW (DRNSW), Department of Primary Industries (DPI), Destination NSW	Developing the visitor economy through a diversified and higher value stay offering can maximise the value of tourism in the region.
		Enhance the regional marketing approach to support the development of an integrated tourism offering across the region.		
Enable sustainable growth in the region's agriculture, agribusiness, mining and manufacturing industries by supporting access to a skilled local labour force, industrial land and supporting industries.	Government, regulation and information	Explore and activate industrial and employment land, including opportunities to create specialised agriculture, mining and related industry hubs across the region.	Local Councils, Department of Planning and Environment - Planning, DRNSW, Local Business Chambers	Encouraging increased diversity in key engine industries will boost the region's economic resilience and help to build capability to encourage increased value-add activities within the region.
Drive inclusive growth by creating opportunities for engagement of local people in the economy,	People and skills	Engage with local business and education and training providers to identify and map skills gaps impacting the region's	Training Services NSW, DRNSW, Local Councils, Business Chambers,	Bolstering the skilled workforce in the region can help it to meet current and

Strategy	New Enablers		Lead and support	Rationale
<p>particularly through the development of the region's growing and innovative education, public administration and healthcare specialisations.</p>		<p>specialisations with the intent of aligning training to meet those needs.</p>	<p>Charles Sturt University, TAFE NSW, Registered Training Organisations</p>	<p>future demand for labour from key sectors.</p>
	<p>Infrastructure and services</p>	<p>Identify opportunities to support emerging health care specialisations and allied health industries within the region.</p>	<p>Western Local Health District, DRNSW, Local Councils</p>	<p>Leveraging the growing capabilities of health infrastructure in the region to improve health delivery.</p>
<p>Enhance the liveability of the region by ensuring the future supply of housing, stable supply of water, community infrastructure and community amenity in Orange, Blayney and Cabonne as the region's population grows.</p>	<p>Government, regulation and information</p>	<p>Examine the current and projected housing supply needs within the region through a Regional Housing Delivery Plan, considering future growth pressures and opportunities to improve housing supply.</p>	<p>DRNSW, Local Councils, DPE Planning</p>	<p>Available housing is a crucial input to making a region liveable and attracting population growth.</p>
	<p>Infrastructure and services</p>	<p>Support investments in community spaces, services and recreation infrastructure throughout the region to improve amenity, diversify the visitor economy, and support attraction and retention of a working age population.</p>	<p>Local Councils, DPE Planning, DRNSW</p>	<p>A focus on improving liveability must be applied equitably, ensuring , the needs of smaller towns and villages are considered.</p>
	<p>Infrastructure and services</p>	<p>Implement the actions in the Macquarie and Lachlan Regional Water Strategies to improve the region's long-term water security.</p>	<p>DPE Water, Local Councils, DRNSW</p>	

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Figure 19: Local residents enjoying a well-earned rest in the village of Newbridge, Blayney LGA. Photo credit: Wendy Smith