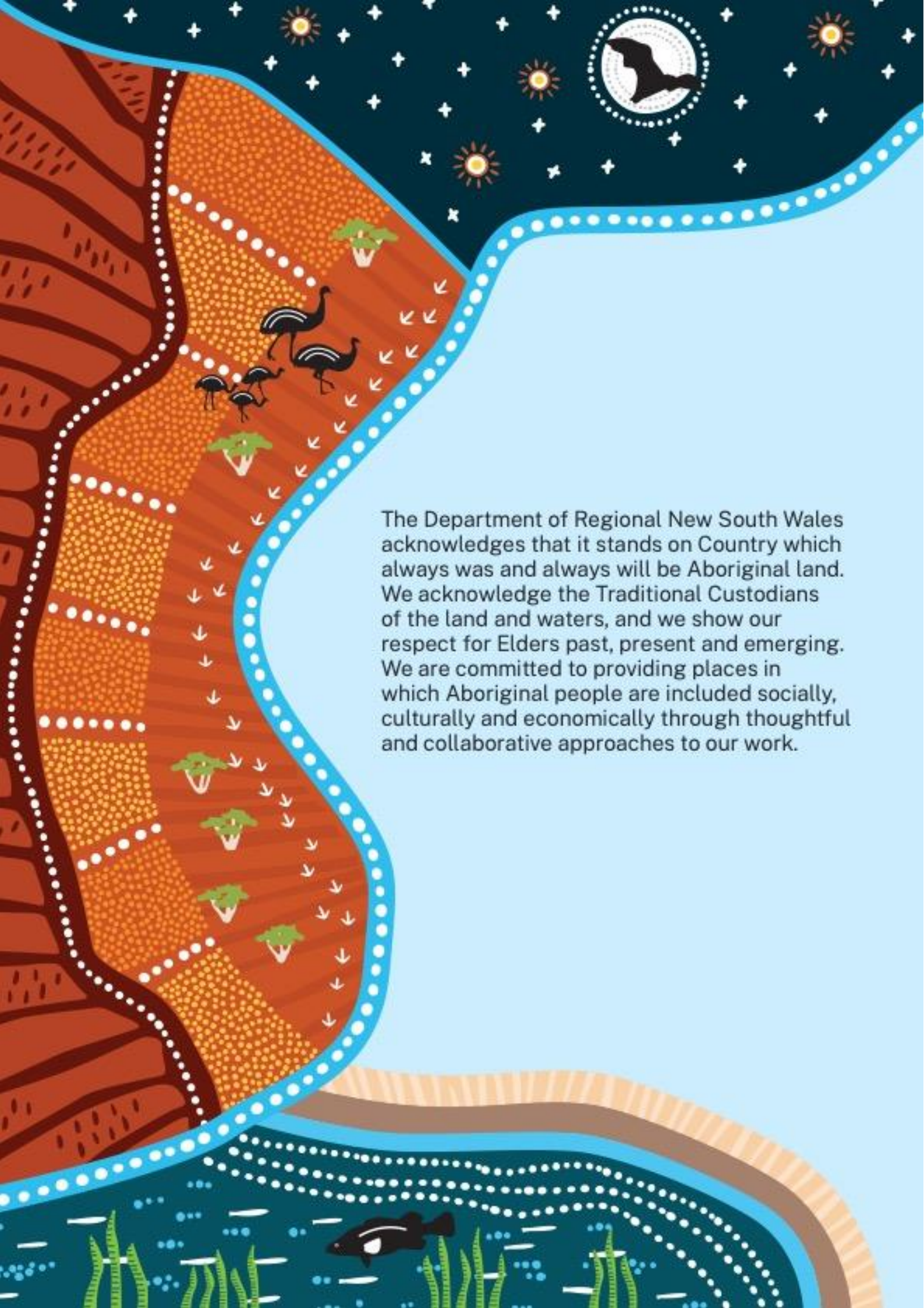


Mid-Western Regional Economic Development Strategy – 2023 Update





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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Unless otherwise indicated, photographs have been provided by Mid-Western Regional Council.

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 Mudgee Memorial Clock, commemorating those who served in World War Two.

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1. Executive Summary

Changes in the Mid-Western 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 Mid-Western region has seen significant investment delivered since 2018, with additional projects in the planning or delivery stages



\$70 million invested to upgrade the **Mudgee Hospital**.



More than **\$1.6 billion** committed to deliver major **renewable energy projects**.



Major upgrades to **school infrastructure**, totalling **\$33 million**.



Over **\$28 million** invested into major **arts, cultural and recreation infrastructure**.

The Mid-Western region has seen sustained population growth and significant reductions in unemployment, but is facing challenges in the housing market



+ 2.2% population growth in the region since 2018.



Housing vacancy rates sit **below 1%**, with median house prices having risen by **62%** since 2018.



34% of the Mid-Western region population is **over the age of 55**.



The unemployment rate has decreased significantly since 2018, reaching 2.5% in June 2022, with job vacancies reaching an all-time high of **2,523** in August 2022.

The region's key engine industries (including mining, agriculture and tourism) have remained resilient and continue to drive economic growth



Mining

+ **6.3%** Year-on-Year (YoY) growth from 2011-2020

\$1.8 billion Gross Value Added (GVA) in 2020

1,820 jobs supported in 2021



Agriculture

+ **5.8%** YoY growth from 2011-2020

\$147 million GVA in 2020

806 jobs supported in 2021



Tourism

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

\$228 million visitor spend in 2021

2,074 jobs supported in 2021



Energy supply (incl. renewable generation)

+ **3.5%** YoY growth from 2011-2020

\$ 30 million GVA in 2020

109 jobs supported in 2021

Key themes from local consultation

Stakeholders from the Mid-Western region have highlighted housing shortages, long-term skilled labour supply, and economic diversification as key priorities for the region.

Economic diversification



Seizing opportunities presented by a macro shift towards renewable energy sources was highlighted as a key factor in developing a diverse and resilient economic base.

Attracting and retaining a working population



Stakeholders expressed concern over the impact that housing availability issues are having on attracting and retaining much-needed skilled workers.

Matching labour pool to major projects



Ensuring major projects are accompanied by robust plans which consider labour supply and housing availability to secure long-term economic benefits for the community from significant investments in the region.

Mid-Western REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p>Develop a mature and diversified visitor economy.</p>	<ul style="list-style-type: none"> Facilitate investment in community infrastructure to support sporting and cultural precinct offerings that the region has developed.
<p>Grow industry clusters around mining, manufacturing, agriculture and renewable energy.</p>	<ul style="list-style-type: none"> Strategically plan for value-add opportunities and supply chain integrations in the region’s engine industries.
<p>Capitalise on existing viticulture strengths.</p>	<ul style="list-style-type: none"> Collaborate with state government agencies to identify and progress initiatives which support enhanced industry disaster-readiness through higher levels of technology uptake, improved access to export markets and co-investment opportunities.
<p>Support the attraction and retention of an increased number of diverse businesses and industries while developing a strong entrepreneurial reputation.</p>	<ul style="list-style-type: none"> Develop and implement a business attraction and investment action plan that supports industry diversification.
<p>Invest in housing and population-serving infrastructure and services.</p>	<ul style="list-style-type: none"> Develop a Regional Housing Delivery Plan to Identify short to medium-term actions to improve overall housing supply, including for workers and their families.

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: Couple enjoying a visit to Lowe Wines, Mudgee. Photo credit: Destination NSW.



Figure 2: Goods exchanged at a store in Mid-Western LGA.

3. About the Mid-Western region

As shown in Figure 3, the Mid-Western FER is situated within the Central West of NSW and borders the Hunter FER to the east and the Central Orana FER to the west. It comprises one LGA, Mid-Western Local Government Area. Mudgee is the key population centre in the region and is a growing regional hub, with other key towns in the region being Gulgong, Kandos and Rylstone.

Total area covered (km ²)	8,737
Population (2021)	25,704
Size of the economy (2020)	\$2.795 billion
Total employment (2021)	11,267

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









Figure 3: Map of the Mid-Western Functional Economic Region.

4. 2018 Mid-Western region REDS and 2020 bushfire addendum





In the 2018 Mid-Western REDS, the region was actively pursuing growth of its key industry specialisations, particularly tourism and agriculture. 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. Following the 2019-2020 bushfires, the NSW Government developed the 2020 Mid-Western REDS Bushfire Impact Addendum, which considered the impacts of the bushfires on the ability to progress the strategies outlined in 2018.

2018 Mid-Western strategies

	Develop a mature and diversified tourism sector.
	Grow industry clusters around mining, manufacturing and agriculture.
	Capitalise on existing viticulture strengths.
	Support the attraction and retention of an increased number of diverse businesses and industries while developing a strong entrepreneurial reputation.
	Develop an emerging retiree and aged care sector.
	In addition to the core strategies articulated in the Mid-Western region REDS, the Mid-Western Bushfire Impact Addendum found that the region's strategic priorities were not materially impacted by the 2019-20 bushfires and remained viable for the region. However, the addendum did note the regional tourism and viticulture industries had been impacted by the fires, and would benefit from targeted initiatives to support recovery.













2018 Mid-Western specialisations

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

	Coal mining
	Tourism
	Beverage manufacturing
	Agriculture and viticulture

2018 Mid-Western endowments

The Mid-Western region 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 industry specialisations.

Endowments	Relevant 2018 specialisation
Scenic mountain landscapes	
Cudgegong River Valley	
Proximity to Sydney and Newcastle	
Institutions - Council Economic Development Department, business chambers, Mudgee Region Tourism Incorporated.	
Viticulture cluster	
Cultural assets – museums, galleries, studios and artisanal producers.	
Freight network – the Castlereagh Highway and rail freight routes.	
Mudgee Airport	
Access to the Macquarie water catchment	
Glen Willow Regional Sports Complex	
Water and sewerage infrastructure	
Heritage assets – 400 individually listed heritage items and four heritage conservation areas.	

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



Figure 4: Spectators watch the Charity Shield rugby league game at Glen Willow Regional Sports Complex, Mudgee.

Significant events impacting major industries

A sustained period of drought, followed by major bushfires, had severe environmental and economic implications for the region. Between 2018 and 2022, the region had four disaster declarations^[1] and has received approximately \$13.81m in disaster recovery grants funding. The impacts of the COVID-19 pandemic have further challenged the region, but a consequential boom in domestic tourism has seen the Mid-Western region find a silver lining within the challenges created by the pandemic.

Drought

The region was subject to a prolonged period of intense drought from 2017, with substantially decreased water levels in major water storage facilities including Windamere Dam which led to the introduction of water restrictions between 2019 and 2021. ^[2] Significant rain in March 2021 helped to break drought conditions.

The region's specialisations in agriculture, including viticulture, were significantly impacted. Beyond reduced rainfall to supply crops and livestock, productivity waned as a result of insufficient fodder supplies and dried pastures.^[3]



Figure 5: Combined Drought Indicator, 12 months to 31 December 2019 (Department of Primary Industries (DPI), 2022).

Bushfires

The Mid-Western region felt the impacts of the 2019-20 bushfires, with direct impacts primarily focused in the east of the region. The visitor economy was affected by closed tourist attractions and damage to transport corridors, with reduced access also having implications for other export-based industries and access to products and services.^[4]

The region's agriculture and viticulture industry also suffered significant damage as a result of this shock, with approximately 90% of the region's 2020 wine grape harvest damaged by smoke taint, alongside significant damage to farming infrastructure in some parts of the region.^{[4][5]}



Figure 6: 2019-20 Bushfire impacted areas in the Mid-Western region.

COVID-19

Like many regions, the Mid-Western FER felt the impacts of the COVID-19 pandemic, with 49% of businesses reporting that COVID-19 negatively affected their business.^[6] The pandemic also brought about challenges for the community, with a sustained increase in income support recipients since March 2020 and an approximate 50% rise in Jobseeker recipients from March to June 2020.^[7]

However, the rise in domestic tourism as a result of the pandemic saw the local industry benefit from increased visitation and expenditure outside of the lockdown periods, and this has helped the sector rebound from the initial economic impacts of the pandemic.

Floods

There has been several significant severe weather and flood events that have impacted the Mid-Western FER over the last couple of years. The region has been disaster declared 3 times since November 2021. Sustained heavy rain in October 2022 resulted in it being the wettest on record,^[8] which resulted in localised flooding in some parts of the region and significant damage to a range of infrastructure, in particular the road network. Many roads remained closed for some time for debris to be cleared and damage assessed and repaired.^[9]

Changing market conditions



Given the prominence of the coal mining industry as a source of local economic prosperity, the sharp increase in coal prices since 2018 has provided significant economic benefits for the region. However, the ongoing national and global shift towards renewable energy has also opened up new opportunities for the region, with the Central-West Orana Renewable Energy Zone (REZ) and a range of significant renewables projects planned providing significant impetus for the region to become a leading part of the shift towards renewable energy generation.



Mouse plague

The Mid-Western region was also significantly impacted by the 2020-21 mouse plague. This was particularly problematic for the region's agriculture specialisation, with impacts of the plague including destruction of grain stores and crops, water contamination, and significant damage to farm equipment and infrastructure.^[10] 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. Over \$860,000 in rebates were paid to more than 1,700 impacted households and small businesses in the region through the rebate program.^[11]

Macroeconomic trends shaping the region’s future

The Mid-Western region has seen the shift towards energy mix diversification and emissions reduction impact the region since 2018, particularly given the significance of the mining sector to the local economy. Major investment in renewables, as well as a domestic tourism boom are bringing about structural changes to the region’s economy and community, bringing about a need to cultivate diverse and resilient industry specialisations to support sustainable growth.

Trend	Opportunities and risks	
 <p>Digital Transformation</p>	<p>The COVID-19 pandemic accelerated the digital economy in Australia, with remote working arrangements enabling people to live in the regions and maintain metro-based employment, increased access to out-of-region markets, and improved availability of service offerings such as online education and telehealth.^[12]</p> <p>However, blackspots and poor connectivity across parts of the Mid-Western region continue to act as an impediment to communities and industry benefiting from these opportunities, particularly outside the main population centres of the region.</p>	<p>Blackspots throughout the region continue to constrain business growth and attraction. An ongoing focus on addressing these challenges is needed.</p> <p>A widescale shift to 5G across the region can encourage the uptake of productive agtech, although challenges will need to be overcome in relation to some 3G based agriculture telemetry systems currently in use.</p>
 <p>Changing Migration Patterns</p>	<p>The COVID-19 pandemic has bolstered remote workers who are taking advantage of the regional lifestyle offering while maintaining metro-based employment. 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.^[13]</p> <p>Stakeholders from the Mid-Western region have indicated this population increase has been intensified by an increasing number of short-term residents moving to the region to support a COVID-related domestic tourism boom, and the impact of workers coming to the region to support major projects.</p> <p>This may be further compounded by the temporary workforce required by the Central West-Orana REZ, which is expected to support up to 3,900 construction jobs in the region.^[14]</p>	<p>A new skilled labour market of remote workers offers opportunities for local economic activity, particularly if they can be matched with local employment opportunities.</p> <p>Industry and government collaboration on understanding and meeting housing demand will be critical to enabling sustainable growth in the region, ensuring both long and short term accommodation needs are met to support industry specialisations, particularly tourism.</p>

Trend		Opportunities and risks
 <p>Towards Net Zero</p>	<p>Mining is a key specialisation for the Mid-Western region.</p> <p>The region can benefit from investment in renewable energy as it improves energy security for local businesses. However, there are challenges in ensuring long-term benefits from major renewable projects, particularly in providing significant employment post construction and ensuring long-term benefits flow to the community.</p>	<p>The Royalties for Rejuvenation Fund will be critical in supporting economic diversification activities in the Mid-Western region, which will help manage the impact of net zero policies on carbon intensive industries such as mining.</p>
 <p>Rising Uncertainty</p>	<p>With the frequency and intensity of natural disasters projected to increase,^[15] there is a need to enhance climate and economic resilience. This will require a focus on building community resilience as well as that of physical infrastructure, as part of achieving sustainable growth across the Mid-Western region.</p> <p>Major projects bring significant investment and employment opportunities to the region. However, this can put pressure on local amenities and enabling infrastructure when accompanied by population growth driven by an influx of workers.</p> <p>Delivery of these major projects also relies on an increasingly unpredictable supply chain influenced by macroeconomic events beyond the control of local industry.</p>	<p>Rising uncertainty presents an opportunity to improve supply chain resilience in key sectors, which can also support growth in local supply chain capacity.</p> <p>There is a need to apply a future focused lens when considering delivery approaches for major projects, with a key priority being the delivery of long term benefits to the communities in the region.</p>

6. Responding to change: Initiatives and investments since 2018



Figure 7: Outside the Centennial Hall in Gulgong, Mid-Western LGA.

Since 2018, Mid-Western Regional Council, the NSW Government and other key 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 key REDS priorities and strategies.

Strategies and plans	Relevant 2018 strategies
<p>The Central West and Orana Regional Plan 2041 sees a renewed focus on enhancing water security, improving infrastructure to support development, and maximising economic benefits from the state investment flowing into the region, including the Central-West Orana REZ.</p>	
<p>In the Mid-Western Local Strategic Planning Statement – Our Place 2040, the Mid-Western Regional Council sets out a 20-year vision for the region with a focus on enabling economic diversification while protecting land required for the growth of existing specialisations, such as agriculture.</p>	
<p>The Mid-Western Regional Council Economic Development Action Plan puts forth an agenda of strategic actions to enable growth across tourism, agriculture, retail, mining and construction.</p>	
<p>The Mid-Western Region Community Plan – Towards 2040 takes a long-term view to developing the region’s industry and enhancing liveability, with particular focus on community wellbeing and the delivery of infrastructure and services to meet the needs of a growing and changing community.</p>	






<p>The Orana Designated Area Migration Agreement (DAMA) represents an agreement between Regional Development Australia Orana and the Australian Government to support local business in sponsoring overseas workers in industries facing workforce shortages.</p>	
<p>The Royalties for Rejuvenation Fund and Central West Expert Panel (established under the <i>Mining Act 1992</i>) seek to alleviate economic impacts caused by changes in coal mining activities by supporting economic diversification in coal mining regions, including by funding infrastructure, services and programs.</p>	
<p>The draft Central West Destination Management Plan 2022-2030 seeks to establish a collaborative framework to guide growth of the visitor economy, with key 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 draft Macquarie-Castlereagh Regional Water Strategy aims to address key water security challenges in the broader region over the next 20 to 40 years, so to ensure the region has healthy, reliable and resilient water resources, and is well prepared for a more variable and changing climate.</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. Key goals include boosting alternative transport (walk, cycle, public transport) and improving access to day return services to major destinations.</p>	



Figure 9: Hot air balloons launching in Mudgee. Photo credit: Destination NSW.

Significant investments since 2018

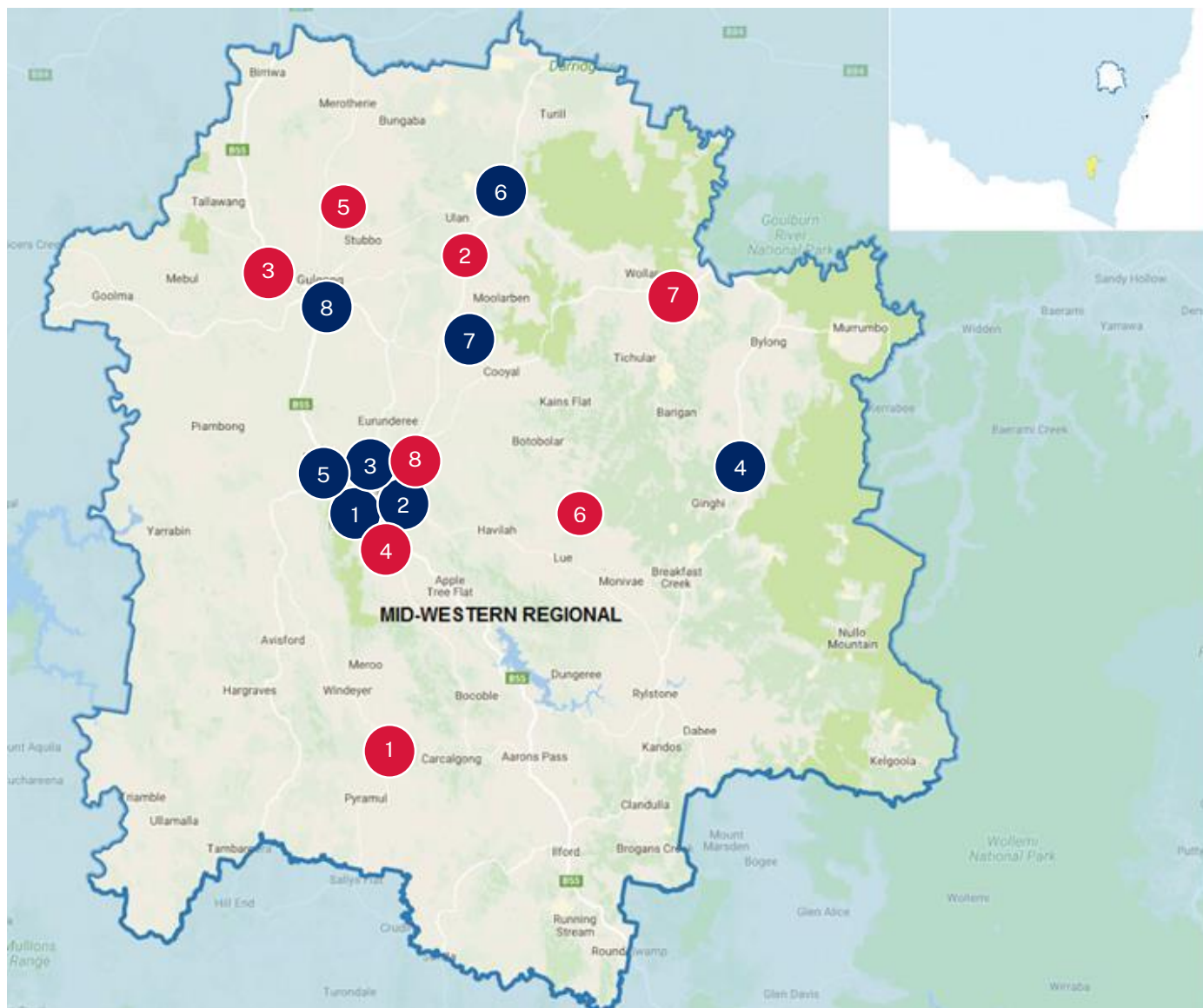
















Figure 8: Map of significant investments in the Mid-Western region since 2018, as set out on pages 18 and 19.














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 still in the planning stage. Public investments have focused on major health, recreational, arts and cultural infrastructure. Grant funding has played a role in many of these projects.

Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Crudine Ridge Wind Farm	\$250 million	 
2 Moolarben and Ulan Coal Mine Expansions	Not available	 
3 Beryl Solar Farm	\$138.7 million	 

4	St Matthews School new senior campus	\$33 million	
5	Stubbo Solar Farm	\$800 million	 
6	Bowdens Silver Project	\$310 million	
7	Wollar Solar Farm	\$431 million	 
8	Mudgee Spring Estate	\$12.8 million	 

Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Mudgee Hospital redevelopment	\$70 million	 
2 Glen Willow Sporting Complex upgrade	\$16.5 million	 
3 Mudgee Arts Precinct	\$8.4 million	  
4 Bylong Valley Way upgrades	\$5 million	 
5 Putta Bucca Eco Trail project	\$0.4 million	
6 Goulburn River bridge replacement	\$1.5 million	
7 Wollar Road upgrade	\$6.8 million	
8 Gulgong Natural History Museum	\$3 million	

Regional Grants Program Funding

The Mid-Western region has received \$49.96 million in grant funding approved since 2018. A key program in the region was the Drought Stimulus Package, which included \$10 million invested towards the upgrades of the Glen Willow Regional Sporting Complex. The Stronger Country Communities Fund and Resources for Regions have also been key programs in the region, investing in projects that increase community amenity and wellbeing.

Grant category	Approved funding
Community	\$30.93 million
Economic	\$5.22 million
Disaster recovery	\$13.81 million

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

7. Mid-Western 2023 economic snapshot

Mid-Western’s population continues to grow strongly, but a focus is needed on attracting people in their prime working years to the region

The Mid-Western region continues to record significant population growth, with this expected to continue as major projects in the region move from planning to delivery phase, and investment into the Central-West Orana REZ accelerates. Leveraging this population growth to enable long lasting and sustained economic growth will require targeted measures to attract and retain people in their prime working age, as the region’s demographic profile is currently skewed towards an older population.

Population growth

The Mid-Western region experienced an average annual population growth of 1.1% between 2011 and 2021 (see Figure 10). Since 2018, population has grown by an average annual rate of 0.8%, with a gain of 552 residents between 2018 to 2021. This highlights the region’s continued appeal, despite multiple shocks in recent years.

This growth is predicted to continue, given major investments in the region, along with heightened demand for workforce related to population serving industries including healthcare and social assistance.

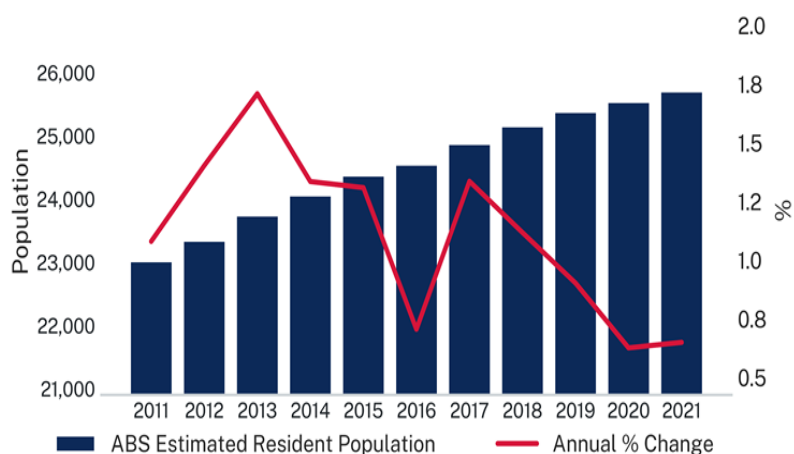


Figure 10: Mid-Western FER population growth, 2011-2021 (ABS ERP, July 2022)

Demographic profile

As shown in Figure 11 below, residents over 50 years represent 41% of the population in the Mid-Western region, well above the NSW population proportion of 35.8%. The proportion of the region’s population aged between 20 and 49 years is around 7% lower than the rest of NSW. The region also has a higher proportion of the population at 19.9% below 14 years old compared to 18.2% across NSW.

Larger older and younger cohorts will place upward pressure on demand for key population serving sectors such as health and education while a lower working age population proportion may impact the ability of the local workforce to meet labor demand, especially with major projects planned in the region and growing demand from population serving sectors.

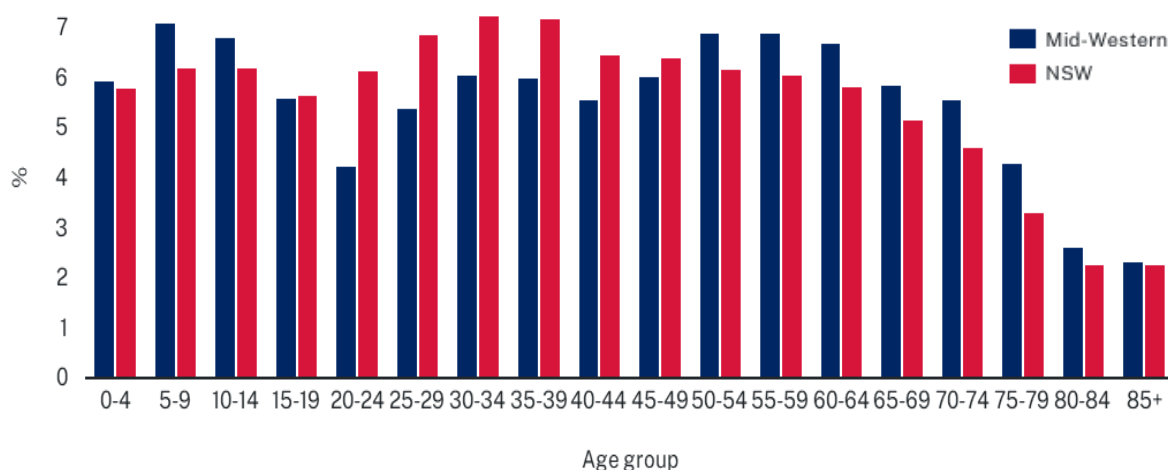


Figure 11: Mid-Western FER population by age, 2021 (ABS ERP, July 2022).

Declining housing availability and affordability may constrain the ability of businesses to attract and retain skilled workers

The region has seen a decline in housing availability and affordability since 2018, with a particularly steep reduction in vacancy rates since mid-2020. This issue is likely to be exacerbated by population growth in the region, as well as increased worker housing demand associated with planned major projects such as those associated with the Central-West Orana REZ.

Housing availability

Residential vacancy rates in the region have dropped from 2.7% in 2018 to 0.7% in August 2022, as shown in Figure 12 below. Increased internal migration is likely a key factor in the region, given the very strong sustained growth in population.

Meanwhile, residential building approvals were relatively steady between 2018 and 2021, before a significant sustained uptake in approvals across the first half of 2022. While there is always a degree of lag between supply and demand for housing, there is a need to ensure state and local planning systems (and other land development enablers such as infrastructure provision) are well calibrated to support ongoing increases in housing supply, in particular given the high levels of demand expected in coming years in the Mid-Western region.

Housing affordability

As with much of regional NSW, the heightened demand outlined above has also resulted in significant growth in house prices in recent years. Between June 2018 and June 2022, median house prices were estimated to have grown in the Mid-Western region by 62%, from \$385,000 to \$623,000.^[16]

Despite the significant increase in property values, the price to income ratio for the Mid-Western FER in July 2021 was 6.99, below the NSW benchmark average of 8.12 in July 2021.^[17] However, sustained price increases and lower housing affordability may act as a key constraint on the ability of the region to continue to attract and retain the key workers needed for major project delivery and to meet demand in population-serving industries.

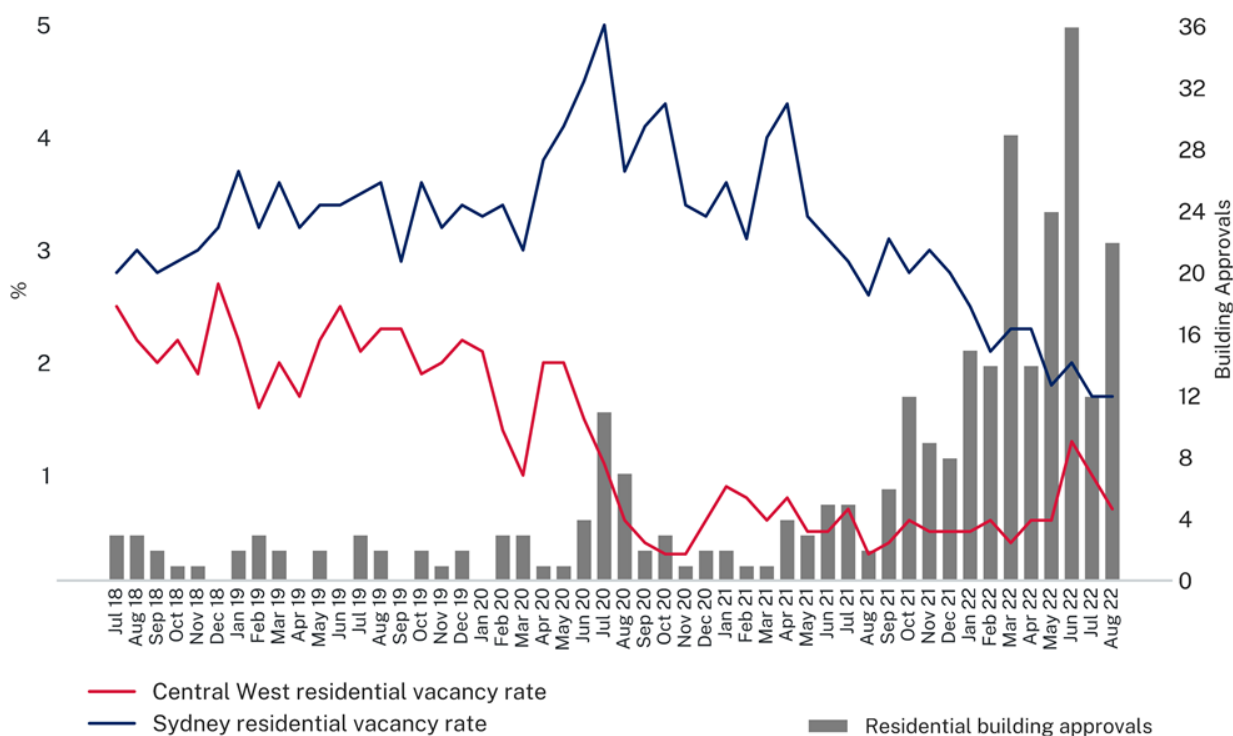


Figure 12: Mid-Western FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

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.

The Mid-Western region has recorded significant reductions in unemployment alongside rapid growth in job vacancies since 2018

An increasingly constrained labour market has been a key issue for the Mid-Western region since 2018, with job vacancies more than doubling across this period despite major shocks to industry and substantial reductions in the unemployment rate.

Employment

As at June 2022, the Mid-Western region had a substantially lower unemployment rate at 2.5% compared with the whole of NSW rate of 3.3% (see Figure 13). The rate has remained below the NSW rate since mid-2019. Despite a moderate uptick associated with the onset of the COVID-19 pandemic, a sustained downwards trend in the Mid-Western unemployment rate has continued to be recorded.

As shown in Figure 14, job vacancies in the wider region have also increased substantially since 2018. After a dip in the early stages of the COVID-19 pandemic to around 750 in May 2020, rapid growth has seen them more than triple to 2,523 in August 2022. Professions with particularly acute need for workers include carers and aides (236), administrative workers (167) and sales assistants (206).

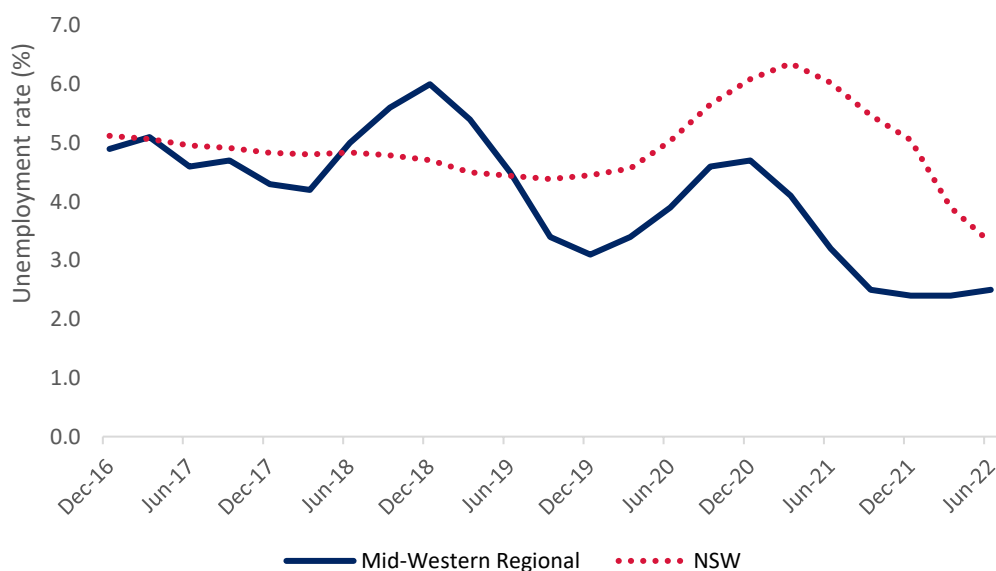


Figure 13: Mid-Western FER unemployment rate (%), 2016-2022 (National Skills Commission 2022, ABS Labour Force, 2022).



Figure 14: Job vacancies, Blue Mountains 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 regions. 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

Over the past 5 years, significant improvement has been achieved in employment outcomes for Aboriginal communities in the Mid-Western region. The Aboriginal unemployment rate has dropped from 15.0% in 2016 to 7.1% in 2021, which is well below the NSW rate of 9.8%.

Aboriginal unemployment rate: Mid-Western	2011	14.8%
	2016	15.0%
	2021	7.1%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census, 2021.

While the tight labour market is likely to have played a contributing role in helping to bring this rate down, it is critical that a continued focus is placed on ongoing close collaboration between Local Aboriginal Land Councils, traditional owners, businesses and government, so to ensure this positive trend can be sustained into the future. This can also help ensure the range of major projects and state significant development planned for the region in coming years can be successfully leveraged to deliver lasting benefits to the Aboriginal community.



Figure 25: Kangaroos grazing in paddocks near Buckaroo. Photo credit: Destination NSW.

Mid-Western region 2023 engine and emerging industries

The Mid-Western region has a \$2.8 billion economy. Despite significant shocks since 2018, the region's engine industries have remained a source of stability for the regional economy in maintaining consistent growth. The relative strength of industries in the region is highlighted through Location Quotient (LQ) analysis¹ as displayed in Figure 15, in which the size of the bubbles correlates with industry size.

Engine industries

The region's engine industries have remained relatively consistent since the 2018 REDS, with most demonstrating growth and continuing to make a major contribution to the economy (see Figure 16).

The **mining** (LQ of 13.26) industry remains the primary engine industry in the region, generating 64% of GVA in 2020 and contributing \$1.8 billion to the local economy. The industry grew on average by 6.3% per year between 2011 and 2020, a rate significantly above the NSW average for the sector of 4.1%.

In 2020, **agriculture** (LQ of 2.1) had a combined GVA of \$125 million for the region, with sheep, grains, beef and dairy farming accounting for 73% of this value. The Mid-Western region is also well-known for its viticulture offering, with other agriculture (which includes viticulture) accounting for \$15 million in GVA for the region in 2020. The agriculture industry has been characterised by strong growth over the past decade, increasing annually on average by 5.8% since 2011.

Food and beverage services, accommodation and retail trade combined to generate \$129 million in value-add for the region in 2020, indicating that **tourism** (LQ of 1.2) continues to play a key role in the local economy. Visitors are estimated to have spent \$228 million in the region in 2021, reflecting continued growth in the sector, despite the short-term challenges associated with the COVID-19 pandemic.^[18]

Although identified as a specialisation in the 2018 REDS, the manufacturing industry has seen significant decline from 2011-2020, with a drop of 44% in total GVA over this period. However, some subsectors continue to perform well, such as wine and spirits manufacturing, which contributed \$16 million to the regional economy in 2020 with a very high LQ of 7.3.

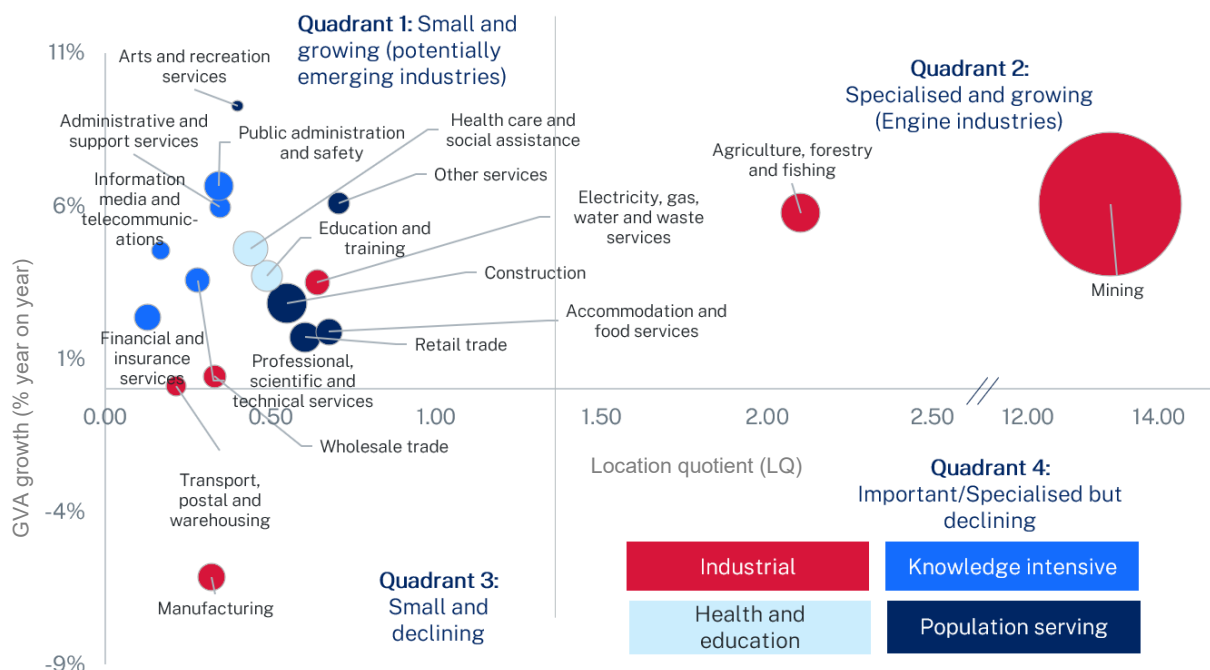


Figure 16: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPLAN, 2020).

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 Mid-Western region has seen the emergence of a number of new growth sectors since 2018 (see Figure 17).

As shown in Figure 16, the **energy supply (including renewable generation) industry** has demonstrated significant growth over the past decade, having added \$13 million to its value-add contribution since 2011 to reach \$48 million in 2020. In 2020, the electricity distribution sector accounted for 63% of this value, a proportion which is likely to increase with significant investment in major renewables energy projects. The Central-West Orana REZ is likely to see the electricity generation sub-sector become a high-value ongoing economic contributor for the Mid-Western region.

Population-serving industries such as **healthcare and social assistance, education and training and construction** have also shown strong growth over the past decade, reflecting increased demand for key services and a growing population in the region.

The **arts and recreation industry** has also recorded very strong growth since 2011, with GVA more than doubling in this period from \$4 million to \$10 million. Sports, recreation, and creative and performing arts account for 80% of this value. Supporting the continued growth of these sectors offers significant potential in bolstering the region's existing specialisation in tourism, as well as increasing the amenity offering which can support worker attraction and retention, in particular, people within the primary working age cohort.

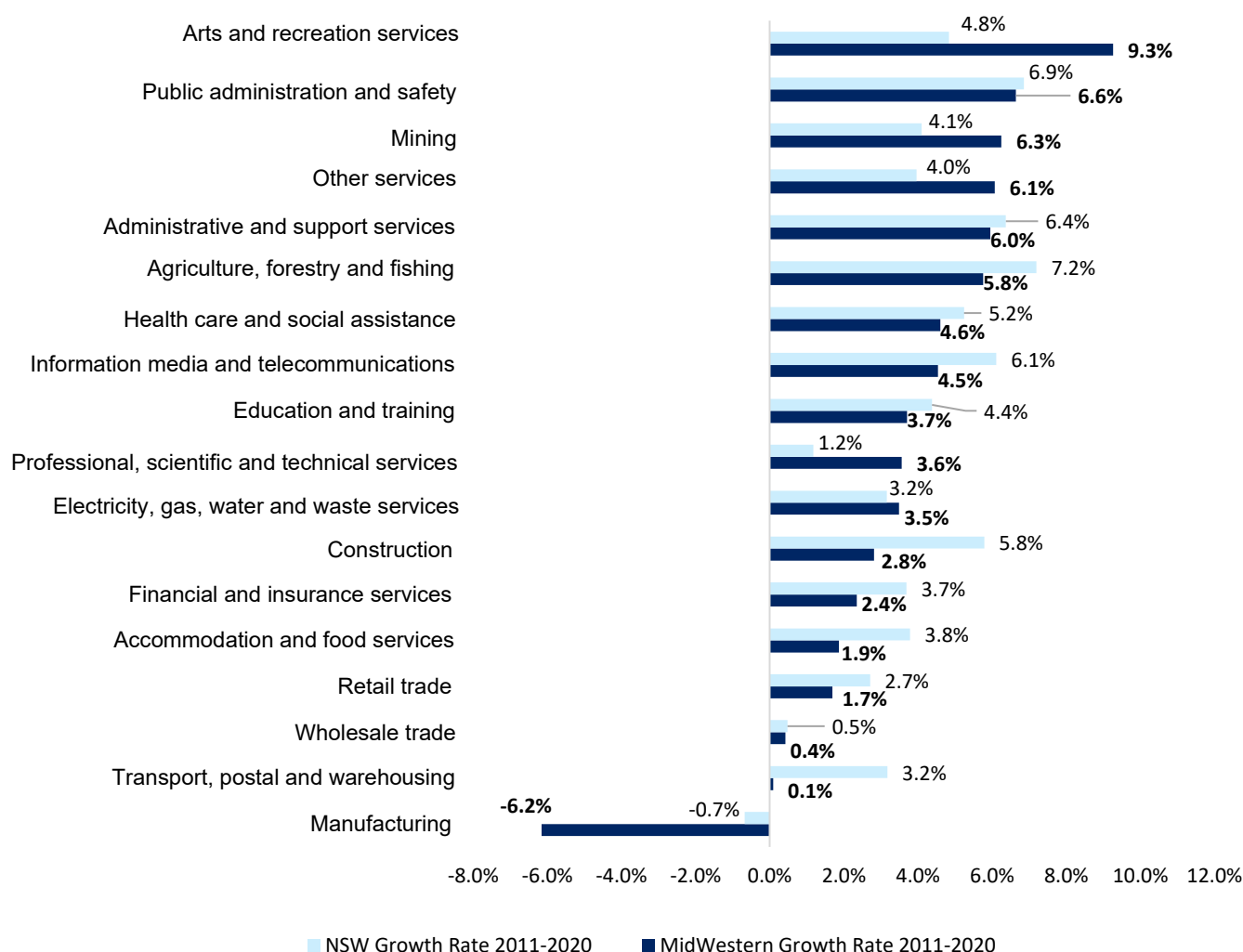


Figure 17: Change in GVA by Industry (\$m), 2011-2020 (REMPPLAN, 2020).

Mid-Western region 2023 endowments

Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning Mid-Western's economy and regional competitiveness (see page 11). Despite recent shocks impacting many key endowments, consultation and analysis confirmed they remain valid, with key endowments including:

- **Natural features** including the region's natural beauty and its close proximity and strong linkages to major centres including Sydney and Newcastle.
- **Institutional and industry features** including Mid-Western Council, business chambers, Mudgee Regional Tourism Incorporated and the Mudgee Wine Association.
- **Cultural features** including its food and wine culture, alongside a wide range of museums, galleries, studios and artisanal producers.
- **Physical infrastructure** including strong freight network connections, Mudgee Airport, Glen Willow Regional Sports Complex, water and sewerage infrastructure and over 400 heritage items and 4 heritage conservation areas.

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.

+ Central West-Orana
Renewable Energy Zone
(REZ) and renewable
energy industry cluster

The region has seen unprecedented investment and policy progression towards developing substantial renewable energy generation and storage capacity since 2018. While the Central West-Orana REZ forms a critical piece of this endowment, additional wind and solar projects facilitated through private investment are adding to this emerging regional strength.



Figure 18: Vineyards in the Mid-Western region.

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

Opportunities and vulnerabilities in engine and emerging industries

Mining

Mining remains the dominant engine industry in the Mid-Western region's economy, driven by its key specialisation in coal mining.

GVA (2020, \$m)	1,823
Employment (2021)	1,820
LQ score (2020)	13.26
LQ coal mining (2020)	15.8
LQ exploration & support services (2020)	5.3

Strengths

- In 2020, mining represented 64% of the region's GVA, with coal mining providing 99% of this value, reflecting its role as the dominant subsector. An LQ score of 13.3 for the industry (15.8 for coal mining) shows it remains a strong specialisation in the region.
- The region has an abundance of coal reserves, with good access to road and rail transport corridors well connected to key export hubs in Sydney and Newcastle.

Vulnerabilities

- While investment in coal mines continues to occur, future expansion may be impacted by the industry responding to changing consumer demand and the broader shift towards net zero.
- Challenges also lie in gaining or holding land rights in the face of increased competition for land use as the region's population grows.
- The mining industry supports a substantial workforce of 1,820 people in the Mid-Western region. Major decline of the industry will require appropriate retraining, upskilling or other workforce transfer arrangements to retain the local workforce.
- The decline of the region's manufacturing sector may also have negative impacts on the mining industry if value-add processing needs to be relocated out of region.

Opportunities

- In the short-term, the region's coal mining sector stands to benefit from increasing bulk commodity prices driven by global supply chain uncertainties. ^[19]
- There is a growth in demand for critical (rare/precious) minerals, and deposits of these exist in the region. There is an opportunity to capitalise on coal mining skills and develop critical minerals that provide inputs for renewables and other global manufacturing needs.
- The Royalties for Rejuvenation Fund provides opportunities to support economic diversification, including by the funding of infrastructure, training services, programs and other activities.

Agriculture and food and beverage manufacturing

There remains strong linkages between the agricultural sector and the food and beverage manufacturing sector. While a decline in the broader manufacturing industry has been observed over the past decade, this specialisation continues to leverage this strong alignment to support growth.

GVA (2020, \$m)	147
Employment (2021)	806
LQ score (2020) ^a	2.1
LQ sheep, grains and cattle (2020)	3.0
LQ wine & spirits manufacturing (2020)	7.3

^a LQ is for Agriculture, forestry and fishing. The average LQ across food and beverage manufacturing is 1.0, but with demonstrated strength in subsectors such as wine & spirit manufacturing.

Strengths

- The agricultural sector remains a specialisation for the Mid-Western region, contributing \$105 million value-add in 2020.
- Natural endowments including fertile agricultural and viticultural land, as well as a range of transport infrastructure links to markets and export hubs on the east coast.
- The region has a strongly developed wine and food culture, that supports both agricultural production and ongoing growth in the viticulture sector.

Vulnerabilities

- The region relies on the availability of land and good growing conditions for optimal productivity. Increasing competition for land use, climate uncertainty and increased incidence of natural disasters therefore present significant challenges to the industry.
- In addition, policy changes such as trade tariff increases in key international markets (as demonstrated by the impacts of increased tariffs on wine exports in 2020) can have an impact on industry exports and overall value add from the sector.

Opportunities

- The agricultural sector may be able to harness more rapid growth through supporting increased uptake of agtech in farming processes that can boost productivity and increase value add. However, with digital connectivity having been identified by local stakeholders as a key constraint for the region, investment to enhance digital infrastructure will be required to seize this opportunity.
- Supporting enhanced collaboration between local value-add food and beverage manufacturers and primary producers also presents an opportunity to maximise the value of outputs. Opening up additional industrial land for development will be a key enabler in supporting this opportunity.
- There are significant agritourism opportunities in the region that could assist in diversifying income streams for primary producers, leveraging the diverse agricultural specialisation in the region.

Tourism

The region has been able to leverage its significant natural endowments and recent investment to continue to grow in the tourism industry. Despite significant challenges associated with the onset of the COVID-19 pandemic, the Mid-Western region has benefited from the boom in domestic tourism.

Visitor spend (2020, \$m) ^[18]	228
Employment (2021) ^a	2,074
LQ score (2020) ^b	1.2
LQ accommodation (2020)	0.7
LQ food & beverage services (2020)	0.5

a Summation of ANZSIC 1 digit Retail Trade, Accommodation and Food Services and Arts and Recreation Services;

b LQ score is for the Accommodation and Food Services industry.

Strengths

- Mudgee has been awarded the Top Tourism Town award at the Australian Tourism Awards in both 2021 and 2022, reflecting its strong visitor economy offering particularly in the food and wine sector. This outcome reflects a strong regional capacity to achieve alignment across its diverse economic base.^[20]
- There are multiple tourist centres with a range of attractions in the region including Mudgee, Rylstone and Gulgong. The region's good accessibility from Sydney also provides a competitive advantage, with opportunities for both short and long stay visitation well catered for.
- The Mid-Western FER has received significant benefits from the domestic tourism boom that resulted from closed international borders associated with the COVID-19 pandemic.
- Tourism in the broader Central West region grew 21% from 2019 to 2020, compared to a 49% reduction at a national level across the same period. It is estimated that total visitor spend in the Mid-Western region reached \$228 million in 2021.^[18]

Vulnerabilities

- The industry is vulnerable to external shocks and events. This was demonstrated by bushfires that saw tourist attractions closed, and damage caused to transport corridors, as well as damage to key visitor attractions in the local wine harvest as a result of smoke taint.
- With multiple state significant developments being delivered concurrently or in planning, the arrival of temporary workers may impact the availability of short-stay accommodation for visitors.

Opportunities

- The region has seen significant investment in sporting and cultural infrastructure with the upgrades to the Glen Willow Regional Sporting Complex and the Mudgee Arts Precinct. This presents opportunities for the region to develop its cultural tourism offering, with close alignment to its wine and food tourism specialisation, and increased capability to attract major sporting events.
- Further improvements in transport infrastructure linking the region to key population centres and other tourism destinations in the broader region, including further upgrades to the Great Western Highway, can help unlock increased visitation to the region.

Energy generation (including renewables)

The region has significant natural endowments that can support large-scale renewable energy generation, which when combined with the Central-West Orana REZ, provides the opportunity for this sector to emerge as a key industry within the Mid-Western region.

GVA (2020, \$m)	30
Employment (2021) ^a	109
LQ score (2020)	0.7
LQ electricity distribution (2020)	0.7
LQ electricity generation (2020)	0.7

^a ANZSIC 1 digit Electricity, gas, water and waste services.

Strengths

- In addition to the coal mining specialisation that supports fossil fuel based energy generation (see page 26), the Mid-Western region has favourable climatic conditions suitable to support the development of a substantial number of renewable energy generation projects.
- The Central-West Orana REZ is expected to bring up to \$5 billion in private investment to the region, unlock 3 gigawatts of new network capacity and support over 3,900 jobs during the REZ's construction phase.^[14]
- The region's existing grid infrastructure represents a key competitive advantage in growing the renewable generation specialisation, and significant opportunity exists to develop a significant cluster of wind and solar projects, with a number of major projects currently at various stages of development.

Vulnerabilities

- Major projects associated with the REZ will require high volumes of temporary workers during the construction phase. Given significant constraints in the local labour market (see page 23) and very low housing vacancy rates, challenges may exist in maximising local participation in these projects and ensuring sufficient worker accommodation is available.
- Global uncertainty around material supply chains may challenge delivery of major renewable projects, with potential implications for cost, timelines, and overall project feasibility.

Opportunities

- The Central West-Orana REZ can support the region to explore circular economy opportunities, and can also help enhance supply chain reliability and productivity in key sectors such as agriculture, food and beverage manufacturing and mining.
- Ensuring local businesses are able to directly benefit from major REZ projects, undertaking actions to ensure local skills training is well matched to industry needs, and ensuring adequate housing is available will be key enabling actions needed to ensure long-term economic benefits for the region.

Key themes in stakeholder consultation

Stakeholders from the Mid-Western region noted that the area is facing both challenges and opportunities related to its population growth. The region is seeing significant investment in emerging industries such as renewable energy and established sectors including tourism, which can support diversification and help to build a solid economic base for the future.

It was also noted a focus on investment in population-serving infrastructure and services is also needed, particularly healthcare and education, so to keep pace with the growing demand associated with an increasing population.

Economic diversification

Stakeholders recognise that despite a boost in recent commodity prices and investment in expansion of existing mining operations, there is a macro shift towards renewable energy sources that will impact on the mining sector in the Mid-Western region over the longer term. Stakeholders identified a focus needs to be placed on developing a diverse and resilient economic base, with a need to prioritise actions that will support longer term economic diversification.

Attracting and retaining a skilled workforce

Attracting key workers to develop a skilled labour supply to support service delivery across all sectors was raised by stakeholders as a key challenge facing the region. Consultation participants noted that labour shortages were being felt across many industries and acted as a key constraint to business operation and growth. Stakeholders also noted that the region's healthcare sector was under pressure and attracting key workers to fill positions remains a key challenge.

Improving housing availability in the region was identified as a critical factor in enabling the attraction and retention of workers. Actions to improve local training offerings and better match them to key skills demanded by business and industry was also raised as a key priority.

Matching labour availability to major projects

The region stands to benefit from multiple state significant projects over the next decade, including those associated with the Central West-Orana REZ and other state significant projects. While stakeholders acknowledged these developments present significant opportunities for the region, it was also noted that the resultant influx of workers may exacerbate existing issues with housing availability and affordability, as well as the above mentioned undersupply of skilled workers.

Stakeholders noted a key need for these projects to be accompanied by robust planning that clearly considers the impact on local labour supply and housing availability, accompanied by a focus on ensuring long-term economic benefits can accrue to communities throughout the Mid-Western region.

Mid-Western REDS - 2023 strategies

The 2018 strategies remain largely relevant to the Mid-Western region. However, some changes have been made to reflect updated strategic priorities for the region:

- Given the emergence of energy distribution and generation as a specialisation for the region, renewable energy has been added to the strategy.
- An additional strategy has been added reflecting the need to prioritise investment in housing and population-serving infrastructure and services.
- The tourism strategy has been updated to encompass opportunities associated with the broader visitor economy.
- The 2018 strategy focused on developing the retiree and aged care sector has been removed, as it is not considered to represent a priority given economic conditions and broader goals of the region.

Reflecting the changes outlined above, the 2023 REDS Update for the Mid-Western region are listed below (amendments made to existing 2018 strategies are highlighted in **bold**):

Amended	Develop a mature and diversified visitor economy
Amended	Grow industry clusters around mining, manufacturing, agriculture and renewable energy
Existing	Capitalise on existing viticulture strengths
Existing	Support the attraction and retention of an increased number of diverse businesses and industries while developing a strong entrepreneurial reputation
New	Invest in housing and population-serving infrastructure and services

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 a mature and diversified visitor economy.	Infrastructure	Facilitate investment in community infrastructure to support sporting and cultural precinct offerings that the region has developed.	Mid-Western Regional Council , Create NSW, Office of Sport, Destination NSW, Destination Central West NSW, Department of Regional NSW (DRNSW)	Improve the region's visitor economy by increasing specialisation around arts and sporting infrastructure.
Grow industry clusters around mining, manufacturing, agriculture and renewable energy.	Government, regulation and information	Strategically plan for value-add opportunities and supply chain integrations in the region's engine industries.	Mid-Western Regional Council , Department of Planning and Environment (DPE) - Planning, DRNSW, Central West Royalties for Rejuvenation Expert Panel	Proactively planning for needs such as industrial land and enabling infrastructure will help support value add opportunities as they arise.

Strategy	New Enablers		Lead and support	Rationale
<p>Capitalise on existing viticulture strengths.</p>	<p>Government, regulation and information</p>	<p>Collaborate with state government agencies to identify and progress initiatives which support enhanced industry disaster-readiness through higher levels of technology uptake, improved access to export markets and co-investment opportunities.</p>	<p>Mid-Western Regional Council, Resilience NSW, DRNSW, Regional Development Australia (RDA) Orana</p>	<p>Boost the capability of the industry’s human and physical capital.</p>
<p>Support the attraction and retention of an increased number of diverse businesses and industries while developing a strong entrepreneurial reputation.</p>	<p>Government, regulation and information</p>	<p>Develop and implement a business attraction and investment action plan that supports industry diversification.</p>	<p>DRNSW, DPE Planning, Energy Co, Mid-Western Regional Council, Transport for NSW</p>	<p>Build the capability of the region’s workforce to participate in the Central West-Orana REZ and emerging supply chains.</p>
<p>Invest in housing and population-serving infrastructure and services.</p>	<p>Government, regulation and information</p>	<p>Develop a Regional Housing Delivery Plan to Identify short to medium-term actions to improve overall housing supply, including for workers and their families.</p>	<p>DRNSW, DPE Planning, Mid-Western Regional Council, Housing Plus</p>	<p>Improving planning pathways and stock of worker housing to boost supply of sustainable housing growth in the region.</p>

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