

Orana Regional Profile



DUBBO REGION | MIDWESTERN REGION | BOGAN | BOURKE
 BREWARINA | COBAR | COONAMBLE | GILGANDRA | NARROMINE
 WALGETT | WARREN | WARRUMBUNGLE



POPULATION

121,744
 (M: 48.1%, F 51.9%) ABS,
 2017



POPULATION GROWTH RATE (2011-2016)

0.5%



MEDIAN AGE

40



MEDIAN HOUSEHOLD INCOME

\$1,008



UNEMPLOYMENT RATE

3.2

(Small Area Labour Markets
 – December quarter 2017)



GROSS REGIONAL PRODUCT

\$8,075.387 M





ABOUT

The Orana region encompasses two major regional centres: Dubbo (Dubbo Region) and Mudgee (Midwestern Region), and takes in twelve smaller Local Government Areas (LGAs) including Bogan, Bourke, Brewarina, Cobar, Coonamble, Gilgandra, Narromine, Walgett, Warren and Warrumbungle.

The region contributes over \$8B annually to the NSW economy and is home to nearly 121,000 people. Dubbo is recognised as an Evocity and is acknowledged across the region as an inland capital.

The region is emerging to be of the critical importance New South Wales as a driver of national economic growth and job creation.

RDA Orana is keen to pursue a commitment from all three levels of Government to drive economic growth and encourage business and industry development.

The Inland Rail project is a key project identified by the Federal Government, expected to deliver a significant number of jobs, of which 70% are expected to be local.

The State Government's Regional Rail Project is anticipated to generate up to 280 direct and indirect jobs, with the project requiring several goods and services that Orana businesses can deliver.

Two proposed mines in the Mudgee region are expected to bring another 1000 jobs to region and Alkane's Dubbo Project is expected to generate more than 200 manufacturing jobs once fully operational.

Many significant renewable energy projects have commenced across the region that are set to define the Orana Region as the renewables centre of Australia. Employment opportunities are an additional benefit to this clean energy movement. One of the feature projects in this industry on a local level is the establishment of Australia's largest solar farm. AGL's 300 MW solar project is expected to inject some \$400M into the regional economy.

KEY SECTORS BY OUTPUT




















INDUSTRY SECTOR	\$M	%
Mining	\$2,940.36	18.30%
Agriculture, Forestry & Fishing	\$1,981.83	12.30%
Construction	\$1,828.31	11.40%
Rental, Hiring & Real Estate Services	\$1,417.93	8.80%
Manufacturing	\$1,321.04	8.20%
Health Care & Social Assistance	\$836.34	5.20%
Public Administration & Safety	\$769.81	4.79%
Education & Training	\$620.70	3.86%

KEY SECTORS BY EMPLOYMENT



























INDUSTRY SECTOR	\$M	%
Agriculture, Forestry & Fishing	6,711	13.50%
Health Care & Social Assistance	6,672	13.40%
Retail Trade	4,889	9.80%
Education & Training	4,811	9.60%
Public Administration & Safety	3,672	7.40%
Construction	3,668	7.40%
Accommodation & Food Services	3,555	7.10%
Mining	3,353	6.70%



























MAJOR PROJECTS:













- Total project pipeline value: \$7,927.02 Million
- Total build job demand¹: 15,328
- Direct Ongoing jobs: 2,023

PROJECT	DATE	TYPE	INDUSTRY	VALUE \$M	BUILD JOBS	ONGOING JOBS	STAGE
Dubbo Regional Council							
New Dubbo Bridge	2018 - 22	State		\$140.00	783	-	Announced
Newell Highway Mitchell Highway Intersection Upgrade	2018 - 20	State		\$20.00	112	-	Planning
Newell Highway Upgrade - West Dubbo	2017 - 19	State		\$11.00	62	-	Underway
Mitchell Highway Et Fitzroy St Upgrade	2018 -20	State		\$14.00	79	-	Planning
Wellington Pool Revamp	2018	LG		\$7.50	25	-	Underway
Wellington Caves Visitor Experience	2017- 19	LG		\$3.80	17	-	Proposed
Victoria Park upgrade	2017	LG		\$8.00	45	-	Announced
SES Upgrade	2017	State		\$2.30	13		Announced
Dubbo Solar Hub	2017	Private		\$55.60	312	4	Underway
Regional Rail Project	2018	State		\$50.00	280	100	Announced
Taronga Western Plains Zoo Redevelopment	2017-18	State		\$25.80	144	15	Underway
Dubbo Base Hospital Upgrade	2017-18	State		\$43.50	272	155	Underway
Wellington Solar Farm	2018-19	Private		\$400.00	2,161	5	Planning
Suntops Solar Farm	2019	Private		\$286.00	100	10	Planning
Fletchers Expansion	2018-20	Private		\$30.00	168	130	Planning
Alkane - Dubbo Project	2018-19	Private		\$1,290.00	3,000	250	Funding
MAAS Macquarie St - Mixed Use	2018-19	Private		\$115.00	643	100	Planning
RSL Lifecare "Horisons"		Private		\$12.00	67	78	Planning
NSW Rural Fire Services	2018-20	State		\$16.20	91	?	Planning

¹ Dubbo City Council and Wellington Shire merged to become Western Plains Regional Council in 2016, with a later name change to Dubbo Regional Council. Where ABS data has been accessed for 2006 and 2011, figures have been manually added to reflect the new Western Plains LGA. All tables and figures throughout this report have utilised the Western Plains LGA name as this reflects the position at the time data was collected.

Bogan Shire							
Nyngan Medical Centre	2017	LG		\$1.30	3	5	Completed
Cobar-Nyngan twin pipelines	2017/18	State		\$2.50	8	-	Announced
Road maintenance	2017/18	LG		\$1.65	3	-	Funded
Plant	2017/18	LG		\$1.30	3	-	Funded
Capital roadworks	2017/18	LG		\$1.40	3	-	Funded
Road gravel resheeting	2017/18	LG		\$1.01	2	-	Funded
Water supply and sewerage assets	2017/18	State/LG		\$0.94	2	-	Funded
Water storage	2017/18	State/LG		\$7.87	26	-	Funded
Nyngan Scadium Project	2019	Private		\$110.00	60	75	Approved
Lawlab	2018/19	Private		-	-	30	Planning
Bourke Shire							
Abattoir	2017-18	Private		\$61.00	226	200	Underway
Reconstruction/resealing roads	2018	LG		\$11.00	41	-	Announced
Indigenous anti-DV program	2010-2022	State/LG		\$1.50	-	-	Announced
Water treatment plant	2018	State/LG		\$8.50	32	-	Approved
Main St makeover	2017	State/LG		\$1.50	6	-	Approved
Brewarrina Shire							
Goodooga Rd upgrade/sealing	2018/19	State		\$21.30	86	-	Announced
Cobar Shire							
Copper City motel extensions	2017/18	Private		\$1.00	3	7	Scheduled
Cobar Water Board - Pipeline Replacement and Pumping System Upgrade	2017/18	State/LG		\$10.70	14	-	Announced
New water treatment plant	2017/19	State/LG		\$8.00	42	-	Announced
Sewer treatment plant upgrade	2017/18	State/LG		\$2.10	5	-	Announced
Cobar Airport - Lighting and Pavement Upgrade	2017/18	State/LG		\$2.50	3	-	Announced
Cobar-Nyngan twin pipelines	2017/18	State/LG		\$51.50	137	-	Underway
IGA development	2017/18	Private		\$1.00	3	-	Planning
CSA Mining - concentrate filter replacement	2017	Private		\$2.00	5	-	Underway
Sealing the Wool Track	2018	State/LG		\$52.00	138	-	Seeking funding
Heritage Centre extensions	2018	Fed/LG		\$31.00	82	-	Seeking funding

Mobile preschool relocation	2018	State/LG		\$1.40	4		Planning
Cobar Biohub and Solar Thermal Plant	2019	Private		\$250.00	665		Planning
Coonamble Shire							
Coonamble to Warren Rd upgrade	2017	LG		\$1.90			Planning
Gilgandra Shire							
Federation Street Upgrade	2018	State/LG		\$1.40			Underway
CBD Upgrade – Stage 2	2018/19	State/LG		\$2.00		-	Underway
Inland Rail	2024-25	Federal					Announced
Gilgandra Solar Farm	2018	Private		\$61.62	110	2	Scheduled
Mid Western Regional Council							
Bylong Coal Project		Private			800	470	Planning
Bowdens Silver Project	2020?	Private		\$150.00	200	150	Planning
Bylong East Duplication		State		\$106.30	464	-	Planning
Wollar Solar Farm		Private		\$450.00	300	5	Planning
Beryl Solar Farm		Private		\$171.00	150	3	Approved
Water and sewer infrastructure	2017-18	State/LG		\$12.80	55	-	Scheduled
Unsealed rural roads	2017-18	LG		\$11.10	49	-	Scheduled
Wilpinjong Mine Extension	2018/19	Private		\$101.00	135	75	Approved
Mudgee Hospital Upgrade	2017-18	State		\$70.00	275	6	Announced
Crudine Ridge Wind Farm	2018	Private		\$300.00	75	15	Approved
Sewer augmentation	2019/20	State/LG		\$15.90	69	-	Budgeted
Narromine Shire							
Inland Rail – Parkes to Narromine	2019-20	Federal		\$300.00	1,138	-	Planning
Narromine Airport Industrial Park	2017-18	State/LG		\$1.50	6	35	Announced
Agricultural value-added manufacturing[1]	2018-20	Private		\$23.50	125	50	Planning
Walgett Shire							
Walgett Solar Project		Private		\$51.00	42	1	Approved
Walgett Levee	2018/19	LG		\$2.40	9	-	Funded
Bugilbore Rd upgrade	2017	LG		\$3.50	13	-	Underway
Goangra Bridge Replacement	2018	LG		\$1.20	4	-	Underway
Lightning Ridge VIC Construction	2018/19	LG		\$1.30	6	-	Funded

Australian Opal Centre	2019/21	Private		\$30.00	112	5	Approved
Warren Shire							
Nevertire Solar Project	2018	Private		\$178.50	300	5	Approved
Regional Rd maintenance	2017	LG		\$1.00	3	-	Scheduled
Sewerage Treatment Plant	2018	LG		\$6.00	18	-	Funded
Reconstruction of Ellengerah Rd	2017	LG		\$1.06	3	-	Underway
Flood damaged road repairs	2017	LG		\$1.17	3	-	Underway
Warrumbungle Shire							
Dunedoo Solar Project		Private		\$90.00	100	2	Planning
Liverpool Range Windfarm	2018	Private		\$643.00	395	20	Approved
Three Rivers Regional Retirement Community	2017/18	LG/State		\$7.20	30	10	Underway
NSW Rural Fire Service Control Centre	2017/18	State		\$3.00	13	?	Underway
Regional projects							
Western Slopes (Gas) Pipeline	2018/19	Private		\$450.00	350	5	Planning
Inland Rail - Narromine to Narrabri	2020/22	Federal		\$1,500.00			Planning
TOTAL				\$7,927.02	15,328	2,023	

POPULATION

The Orana Region is home to more than 120,000 people, include 14.9% Aboriginal people. The population of the region grew between 2011 and 2016 by 0.5% with most of the growth occurring in the Dubbo Regional¹ area and Mid-Western Regional LGAs. Narromine also recorded a slight increase in population, with all other shires decreasing in population from 2011 to 2016.

LOCAL GOVERNMENT AREA	15-64 YEAR OLDS %	65+ YEARS %
Bogan	59.80%	19.80%
Bourke	63.20%	13.70%
Brewarina	66.30%	10.50%
Cobar	64.10%	13.60%
Dubbo Region	59.80%	16.60%
Gilgandra	62.70%	23.70%
Midwestern	60.00%	19.60%
Narromine	57.50%	21.20%
Walgett	60.80%	19.10%
Warren	58.10%	21.00%
Warrumbungle	55.90%	26.00%

The workforce in the Orana Region is declining, and aging at a slightly faster rate than that of NSW in general. According to the 2011 Census there were 75,258 people aged 15 to 64 years in the Orana RDA region, making up 62 per cent of the regional population, compared to 66 per cent state wide. This has reduced to 72,213 by Census 2016, indicating a working age population of 60.9% of the regional population (NSW 65.2%). Those aged over 65 years now make up 18.6% (NSW 16.3%) of the regional population, up from 16% in 2011. The Warrumbungle Shire is home to the largest percentage of over 65 residents.

UNEMPLOYMENT

December 2017 DEEWR data indicated the unemployment rate for the Orana RDA region was 3.4 per cent, lower than the national average of 5.4 per cent and the state average of 4.7 per cent.

Within the Orana RDA region there are large variations in labour market performance. A small number of shires exhibit significantly higher than average unemployment, namely Bourke (4.1%), Brewarrina (4.4%) and Walgett (6.0%), whilst the Bogan (2.6%), Cobar (1.3%) and Dubbo Regional Council (2.2%) show full employment.

All data since 2010 indicated the Cobar Shire has consistently low unemployment, with 4.4% (Dec 2010) the highest recorded rate and 1.3% (Dec 2017) the lowest recorded rate.

LOCAL GOVERNMENT AREA (LGA)	DEC-10	DEC-11	DEC-12	DEC-13	DEC-14	DEC-15	DEC-16	DEC-17
Bogan (A)	5.9	4.2	3.5	4.7	5	4.6	5.1	2.6
Bourke (A)	15.2	9.6	8.6	12.3	10.9	8.6	9.3	4.1
Brewarrina (A)	15	9.6	8.6	12.3	11	8.8	9.6	4.4
Cobar (A)	4.4	2.8	2	2.9	2.9	2.4	2.7	1.3
Coonamble (A)	8.3	5.6	5.2	7.6	7.4	6.4	8.2	4.3
Gilgandra (A)	5.7	3.8	3.2	5.2	5.4	4.3	5	2.8
Mid-Western Regional (A)	5.5	5.2	7.6	6.7	6.6	8.2	5	4.4
Narromine (A)	5.7	3.5	2.9	4.5	4.1	3.9	5.1	2.4
Walgett (A)	14.5	10.2	8.5	12.9	12	9.9	11.2	6
Warren (A)	6.1	4.3	3.6	5.1	5.3	4.8	5.4	2.7
Warrumbungle Shire (A)	6.5	5	4.4	6.2	5.8	5.3	5.4	3.1
Dubbo Regional (A)	5.4	3.9	3.1	4.6	4	3.5	4.4	2.2

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VOCATIONAL AND TERTIARY EDUCATION PROVIDERS ACTIVE IN THE ORANA REGION TERTIARY EDUCATION AND TRAINING

LOCAL GOVERNMENT AREA	UNIVERSITY OR OTHER TERTIARY INSTITUTION	TECHNICAL OR FURTHER EDUCATIONAL INSTITUTION (INCLUDING TAFE COLLEGES)
Bogan (A) (2016)	43	46
Brewarrina (A) (2016)	21	19
Bourke (A) (2016)	41	33
Coonamble (A) (2016)	49	55
Cobar (A) (2016)	57	90
Dubbo Region (2016)	986	1,177
Gilgandra (A) (2016)	49	53
Mid Western Regional (A) (2016)	347	485
Narromine (A) (2016)	82	100
Walgett (A) (2016)	61	92
Warren (A) (2016)	46	32
Warrumbungle Shire (A) (2016)	134	154

Approximately 4,252 (3.59%) of Orana Region residents are enrolled in Tertiary Education through TAFE, University or other providers. This compares with a state average of almost 6.95%.

As shown in the table below, enrolment in TAFE is similar to the state average at 1.9%, however the rate of enrolment in University courses is 1.6% compared to the state rate of 5%.

Type	Orana RDA (2016) zones		New South Wales (State) (2016)	
	Persons	%	Persons	%
Technical or Further Educational Institution (including TAFE Colleges)	2,336	1.97%	144,104	1.93%
University or other Tertiary Institution	1,916	1.62%	376,133	5.03%

As a region (Western NSW – Central West, Far West and Orana combined), the enrollment in non-degree training is similar to that of the state as a whole (Approx.1.2%, (NSW Department of Industry, 2017) , with 86% of training being Cert III. This figure does not include Statement of Attainment Training, such as Forklift, Chemical Cert, First Aid etc.

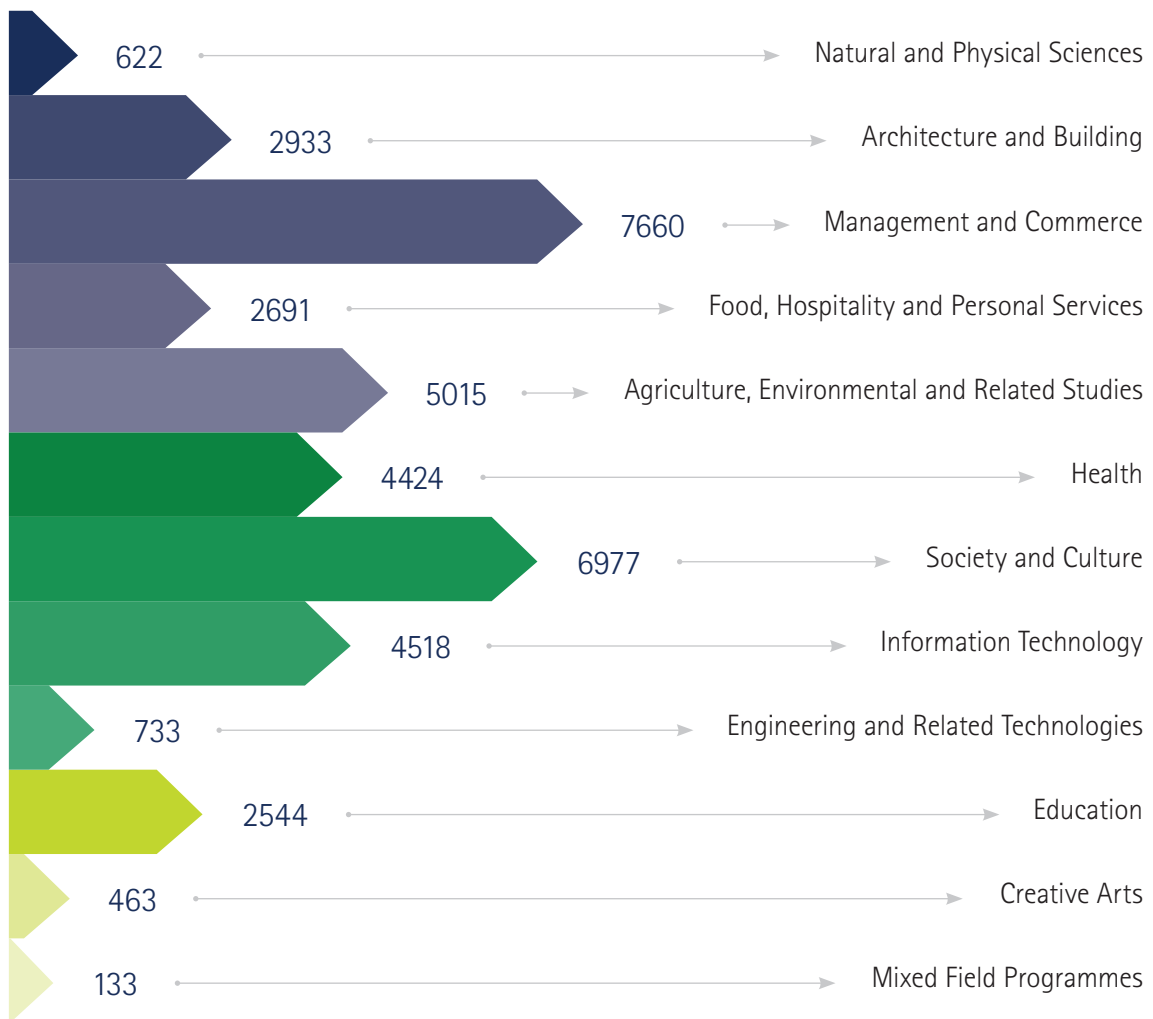
In the 15-25 years age group, males and females are enrolled at a similar rate in TAFE type education. For those students over 25 years, females are enrolled in training at approximately twice the rate of males. University enrolments are more than twice as high for 15-25 year old females than males, and in the older cohort, approximately double the rate.

There are opportunities to increase higher education qualification levels in the Orana RDA region and the options to live and study in the region. The major higher educational facilities in the region include TAFE Western, which has 13 campuses in the region; a number of registered training organisations; Charles Sturt



University, which has a campus in Dubbo delivering degree courses in nursing, education, business and social work; and the University of Sydney, which delivers some parts of its medical courses through the School of Rural Health in Dubbo. There is significant potential to capitalise on mining and agriculture, the two business strengths of the region, by expanding existing tertiary education facilities or establishing new ones.

ORANA REGION – QUALIFICATION FIELD OF STUDY



There are a number of training providers within the region providing training to meet the specific requirements of the agricultural, mining and transport industries. Many of these training providers are specifically targeting participants who are already working within their industry and require upskilling to meet legislative requirements of their chosen industry.

JOBS, SKILLS AND WORKFORCE DEVELOPMENT

Since the 2006 Census, the main employing industries in the Orana RDA region have consistently been: Agriculture, Forestry & Fishing, Healthcare & Social Assistance, Retail and Education & Training.

INDUSTRY OF EMPLOYMENT – PLACE OF USUAL RESIDENCE (PERSONS)

Industry	2016 Persons	2011 Persons	2006 Persons
Mining	2,634	2,461	1,572
Manufacturing	1,907	2,357	2,769
Electricity, Gas, Water and Waste Services	545	668	577
Construction	3,319	3,123	2,918
Wholesale Trade	1,091	1,523	1,572
Retail Trade	4,643	5,211	5,465
Accommodation and Food Services	3,310	3,348	3,123
Transport, Postal and Warehousing	1,696	2,018	1,975
Information Media and Telecommunications	336	377	476
Financial and Insurance Services	600	731	810
Rental, Hiring and Real Estate Services	431	504	518
Professional, Scientific and Technical Services	1,612	1,652	1,551
Administrative and Support Services	1,240	1,074	884
Public Administration and Safety	3,490	3,545	3,226
Education and Training	4,590	4,388	4,112
Health Care and Social Assistance	6,264	6,046	5,191
Arts and Recreation Services	546	534	457
Other Services	1,989	1,908	1,629
Inadequately described	1,069	493	521
Not stated	688	652	834
Not applicable	70,219	66,067	66,537
Total	118,590	115,652	114,626

Agriculture has been consistently ranked first for employment, however its' relative importance has declined with Healthcare & Social Assistance taking the number one spot in 2016. Take note, that manufacturing in this region, one of the highest rated sectors for output consists largely of processing agricultural products; cotton and sheep.

Since 2011 there have been large increases in the number of people employed in the Healthcare and Social Assistance sector as well as the Education & Training sector. The trend for increasing employment in the Healthcare & Social Assistance looks set to continue due to our aging population and increasing indigenous population. Employment prospects in the Education & Training sector are less positive in the long term. While more is being invested in Education & Training as our workforce upskills, an increasing portion of this training is being undertaken as Online or remote learning courses, or targeted shortcourses. Specific examples include TAFE Westerns' Western Connect programs where courses are undertaken at a set campus, via video link, and CSUs' Dubbo Campus Accounting subjects being offered via video link. So while participant numbers will be up, lecturer and support staff number will be reduced.

The regions' largest training institution, TAFE NSW cites enrolments of approximately 360 in agriculture related courses, with approx. 6% of the workforce enrolled, and approx. 4% of the current mining workforce



enrolled. A number of smaller RTOs offer mining related training, so the total number undergoing skills development would be significantly higher, whereas there are very few other significant players in the Agricultural education market.

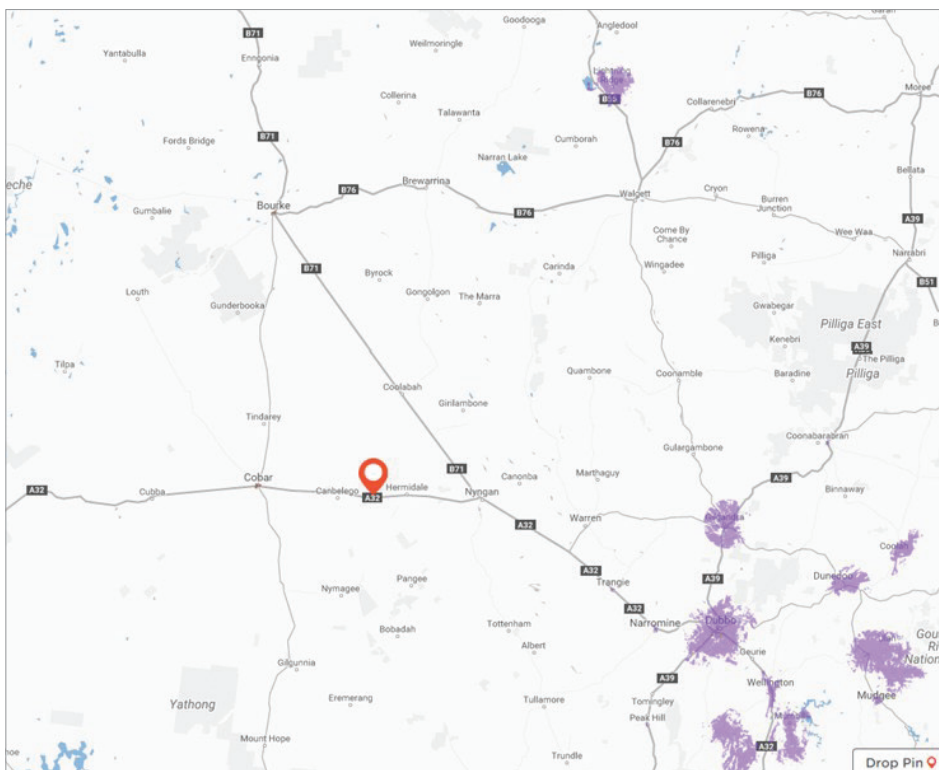
Of the two most significant industries for the Orana Region in terms of combined output and employment; mining and agriculture, neither industry has Undergraduate or Post Graduate training available within the region. Engineers are predominantly required to train in Sydney, Newcastle or Wollongong, while agricultural specialists are required to train in Sydney, Armidale or Wagga.

Mining is a leading contributor to revenue and employment in the Orana RDA region. The revenue produced per employee is among the highest of any sector in the region. The region has well-established mining enterprises in Cobar (copper, lead, silver, zinc, opal and gold), Lightning Ridge (opal), Nyngan (copper) and Mudgee (coal), which are experiencing new investment based on the commodities boom. Newer enterprises include the Tomingley Gold Mine and Dubbos' Rare Earth mine.

There will be further opportunities to develop businesses and services, including education and training, which support the expanded mining sector in the Orana RDA region.

TECHNOLOGY

In the Orana RDA region construction of the NBN fibre optic network and fixed wireless infrastructure has commenced with connections in Mudgee, Dubbo, Narromine, Trangie, Dunedoo, Coolah, Gilgandra and Lightning Ridge townships and some nearby villages. Construction is due to commence in Cobar mid-late 2017.



Source: NBN Co website, 6 Aug 2017



According to Census (2011 & 2016) Across the Orana Region, where NBN capabilities have been delivered, uptake is far less than the intended rate, with the Mid-Western Shire, the first to receive the NBN sitting at 57.4% of households currently accessing the internet from their homes. The Western Plains Regional Council, the amalgamation of the old Dubbo and Wellington Shires sits at 63.7% of households accessing the internet from their dwelling. Across the region there has been a 3.2 per cent increase in the number of homes with internet connections. The greatest increases have been in the Brewarrina (5.6%) and Warren Shires (5.1%)

Unlike the 2011 Census, data from the 2016 Census does not indicate the type of internet connection being used in the household, so it more needs to be done to document the actual uptake of NBN through the region.

	2011	2016
Bogan	47.30%	50.50%
Bourke	39.90%	42.40%
Brewarrina	37.80%	43.50%
Cobar	50.00%	49.30%
Coonamble	42.60%	42.10%
Dubbo Region	60.20%	63.70%
Gilgandra	49.40%	52.50%
Mid Western Regional	54.30%	57.40%
Narromine	52.70%	55.60%
Walgett	38.10%	40.80%
Warren	44.30%	49.40%
Warrumbungle	48.40%	50.30%



CONCLUSION SUMMARY

The Orana Region is emerging as a regional powerhouse, with a large pipeline of both public and private projects driving growth. It's an interesting region that is made up of distinct pockets of activity: mining dominates Cobar, Nyngan, Mudgee and to some degree Dubbo; agriculture drives Bourke, Gilgandra, Narromine and Walgett. In terms of population, again there are different tiers of need: urban growth in Dubbo and Midwestern regions; village economies; and then three pockets of communities with high Aboriginal population, which track to higher unemployment.

Critical issues for the region include: full employment in some communities; an ageing population, diminishing workforce; family drift; affordable housing and cost of living disincentives; all of which are addressed in the *Bracing for Change* position papers.