The background image shows a rural landscape with green fields and rolling hills under a clear blue sky.

# **Warrumbungle Shire**

## **Economic Development & Tourism Strategy**

### **2018 - 2023**

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# **WARRUMBUNGLE SHIRE ECONOMIC DEVELOPMENT & TOURISM STRATEGY**

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## ACKNOWLEDGEMENTS

**Warrumbungle Shire Council wishes to thank all residents, businesses and organisations that attended our consultative forums, met with our staff and consultant and provided information for our Shire's Economic Development & Tourism Strategy.**

**Photographs: Front Cover – Canola Fields, David Kirkland. Above: Macha Tor, Warrumbungle National Park, David Kirkland.**

# 1. INTRODUCTION

## 1.1 Background

Located in the central west of NSW, Warrumbungle Shire is a large rural Shire. The Shire's economy is driven primarily by the agricultural sector, with tourism also a significant contributor. The performance of the agricultural sector impacts directly on the local economy, with Shire businesses experiencing significant highs and lows as a result of variations in agricultural production, demand, commodity prices and weather. In recent years the Shire has experienced significant drought, wildfires and a reduction in surface and ground water allocations for agricultural use resulting from the introduction of the Murray Darling Basin Plan. Strong growth in the surrounding regional centres of Dubbo, Tamworth (both Evo-Cities) and Mudgee, and the on-line economy, has increased the competition for local businesses. On the plus side, there has been investment in new visitor facilities in the Warrumbungle National Park, Pilliga Forest and at Siding Spring Observatory; the Shire is attracting investment in renewable energy projects; and the aged care sector is growing. Generational change, new production technologies, advances in communication and information technologies, the declaration of the Warrumbungle Dark Sky Park, and the coming of the Inland Rail, are creating opportunities to improve the productivity of existing businesses and explore new business opportunities.

Warrumbungle Shire Council is seeking to grow and diversify the Shire's economy and build sustainability and resilience. Council's goal for the local economy is:

**'Our economy is strong and sustainable, providing our communities with localised employment opportunities and ease of access to markets, goods and services'.<sup>1</sup>**

Council and the Warrumbungle Shire community recognise that economic growth can be achieved by supporting the agricultural sector, growing the tourism sector, strengthening local businesses and attracting new residents, businesses and investment. Council is also seeking to capitalise on opportunities arising from the State and Federal Government's increasing focus on growing and strengthening regional economies through infrastructure investment and supporting key sectors including agriculture, tourism and renewable energy.

In facilitating economic growth Council is seeking to:

- Stabilise and potentially grow the Shire's population base.
- Support, retain, strengthen and grow local businesses.
- Position Warrumbungle Shire as a place where people wish to live, work, visit and invest.
- Attract new investment that is sustainable and compatible with the Shire's environment and community aspirations.
- Support the creation of local employment opportunities.
- Upgrade existing infrastructure and secure enabling infrastructure.
- Ensure responsible stewardship of resources.

While business development and investment will be driven primarily by the private sector, Council will play an active role in encouraging, supporting and facilitating this by ensuring that the Shire offers a positive investment environment.



<sup>1</sup> Warrumbungle Shire Council Community Strategic Plan 2032

## 1.2 Purpose of the Economic Development Strategy

The Economic Development Strategy provides the direction and framework to encourage, support and facilitate economic development within Warrumbungle Shire. It aims to:

- Ensure the foundations are in place to take the local economy forward and realise emerging opportunities.
- Guide Council's actions, policies, regulations and resource and funding allocations to 'deliver' a positive investment environment.
- Inform Government agencies and service providers of the potential and needs of Warrumbungle Shire, including its infrastructure needs.
- Encourage development and investment, including expansion, diversification and retention of existing businesses, attraction of new businesses, residents and investment into the Shire and creation of employment and wealth.

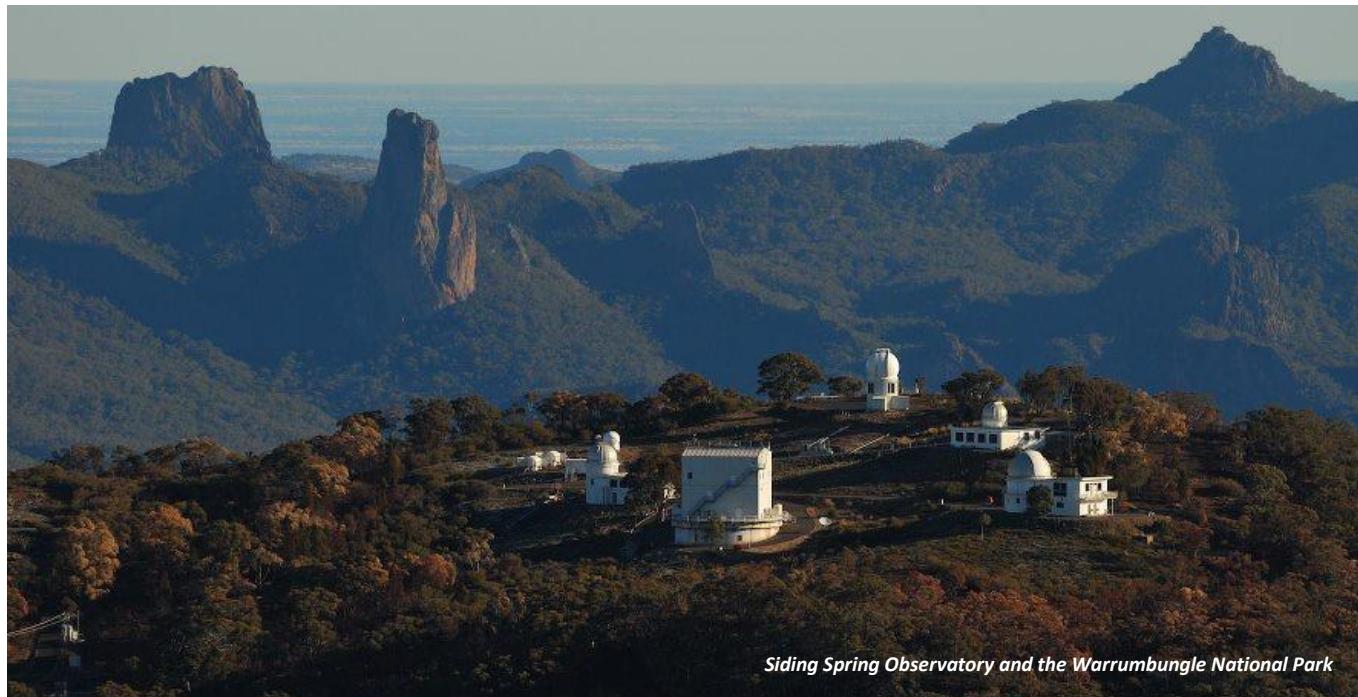
The Economic Development Strategy is aligned with the goals of the Warrumbungle Shire Community Strategic Plan 2032.

Economic development is the process of improving the economic wellbeing of the community, through efforts focused on strengthening local businesses, attracting investment and creating jobs

## 1.3 Key Players

Economic development in Warrumbungle Shire will require collaboration with, and support and investment from, a diverse range of stakeholders including:

- Federal and State Government Agencies
- Infrastructure and service providers
- Regional agencies and authorities
- Warrumbungle Shire Council, working both individually and in cooperation with other Councils within the surrounding region and along the main access corridors.
- Siding Spring Observatory / Australian National University
- Private sector – including local businesses
- Business and community groups
- The broader Shire community



Siding Spring Observatory and the Warrumbungle National Park

## 1.4 Community Priorities

In preparing this Strategy, input was sought from a diversity of representatives from each of the town within the Shire, the business community and the main industry sectors. The main priorities identified were:

- **For Council to have a positive, 'can do' attitude** focused on removing barriers and problem-solving, and improving communication.
- **To grow the population / attract new residents** to increase the viability of local businesses and to ensure that services are retained.
- **To diversify the local economy**, reducing the dependence on agriculture. Tourism was considered the main opportunity, with attracting tree-changers and retirees also identified as possible opportunities.
- **To improve infrastructure** (roads, water, sewerage, power and telecommunications) to improve business productivity and enhance lifestyle.
- **To provide employment locally and address skill shortages.**



Memorial Hall, Baradine

## 2. WARRUMBUNGLE SHIRE

### 2.1 Our Shire

Warrumbungle Shire is located on the central western slopes and plains of NSW. The Shire<sup>2</sup> lies approximately 450 kilometres north of Sydney, 150 kilometres north of Dubbo, 185 kilometres west of Tamworth, and 190 kilometres north of Mudgee. The Shire is part of the Orana Region of NSW and is bounded by Narrabri Shire to the north, Gunnedah and Shires to the east, Mid-Western and Dubbo Regional Councils to the south and Gilgandra and Coonamble Shires to the west.

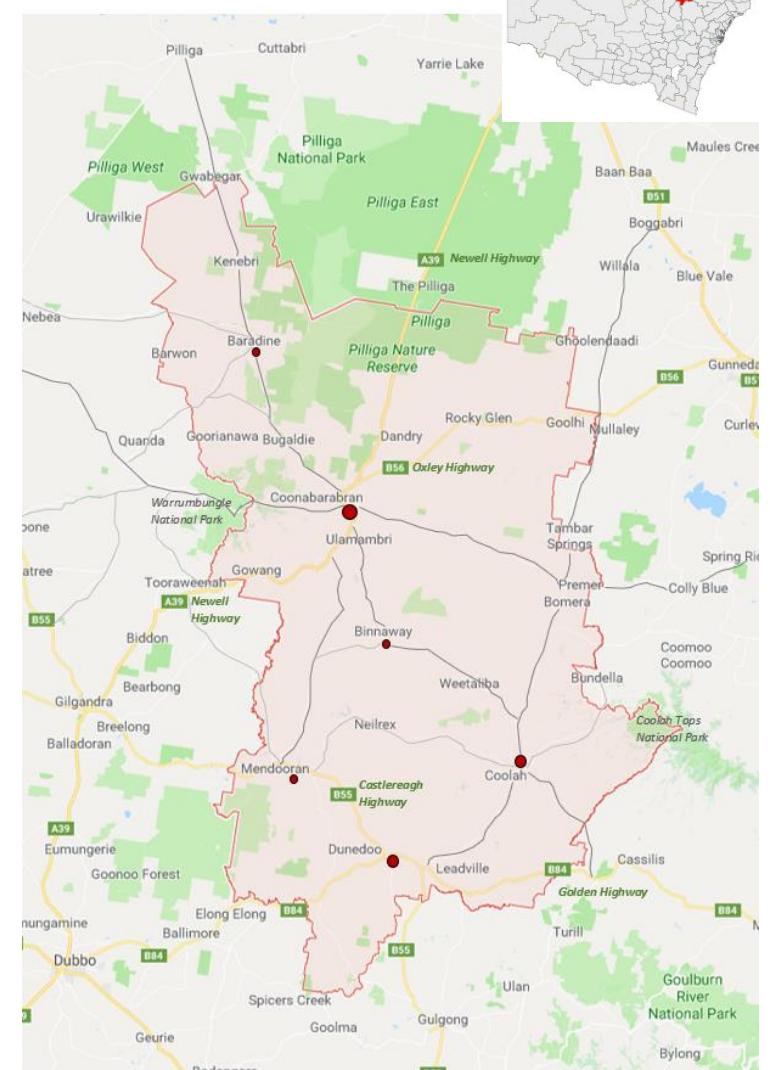
Four highways traverse the Shire – the Newell, Oxley, Castlereagh and Golden Highway, providing strong connections to the surrounding regional centres as well as to Sydney, Melbourne, Brisbane and Newcastle. The southern and central areas of the Shire have access to the Binnaway – Werris Creek, Gwabegar and Troy Junction to Merrygoen railway lines for freight transport.

Incorporating an area of 12,380 square kilometres, the Shire extends from the Liverpool Range in the east through to the ancient Warrumbungle shield volcano in the west. The topography ranges from the high basaltic plateau of Coolah Tops in the Liverpool Ranges, through rolling hills, the highly eroded volcanic landscape of the Warrumbungle National Park and alluvial plains. The south eastern and southern areas of the Shire lie within the Macquarie River catchment area; the central areas of the Shire are drained by the Castlereagh River; and the northern and north eastern areas lie within the Namoi River catchment. The eastern and southern parts of the Shire lie within the Gunnedah and Ulan geological basins and have extensive coal resources, while the northern part of the Shire has coal seam gas resources. There are currently no proposals to mine coal or extract coal seam gas within the Shire.

The Shire has a warm temperate climate with hot summers (average temperature range 15-32°C) and cool to cold winters (0-17°C)<sup>3</sup>. The average annual rainfall is 746.1mm in Coonabarabran and 613.9mm in Dunedoo, with rain occurring year-round with a summer peak. Frosts are prevalent in winter and snow falls have been recorded at Coolah Tops and in the Warrumbungle Ranges. The climate is conducive to cropping and grazing year-round.

Agriculture is the primary land use and economic activity, with cattle and sheep production and cereal cropping being the main activities. Other crops include canola, pulses (chick peas, mung beans, faba beans), cotton and pasture. The Shire has several piggeries, a large thoroughbred horse stud and several viticultural, horticultural and apiary producers. The Shire has a specialist native plant nursery and cut flower grower, and several native seed collectors and a large native seed distributor.

Figure 2.1 Warrumbungle Shire



Source: Base Map - Google Maps

<sup>2</sup> The distances given are by road to Coonabarabran which is the main town and administrative centre of the Shire.

<sup>3</sup> Bureau of Meteorology – minimum and maximum temperatures for January and July, Coonabarabran

Tourism is a significant economic activity, with the Shire having high profile tourist attractions including the Warrumbungle and Coolah Tops National Parks, Pilliga Forest<sup>4</sup>, Siding Spring Observatory, Pilliga Pottery and the recently announced Warrumbungle Dark Sky Park.

At the 2016 Census, Warrumbungle Shire had a resident population of 9,384<sup>5</sup>. From 2006 to 2016, the population of the Shire declined by 4.3% (424 people). With the status quo in economic activity, the population of the Shire is projected to continue to decline with the Shire's population forecast to decrease to 8,650 by 2036<sup>6</sup>. Increased economic activity with employment opportunities is needed to drive population growth. The population of the Shire is aging with the median age in 2016 being 49 years.<sup>7</sup>

Warrumbungle Shire has six small towns and eleven villages. Coonabarabran (population 2537)<sup>8</sup> is the largest town and the administrative centre of the Shire. Located at the junction of the Newell and Oxley Highways, Coonabarabran is a highway service centre as well as the main gateway to the Warrumbungle National Park. Coolah (pop. 795) located on the Black Stump Way, approximately 90km south-east of Coonabarabran, is the gateway to the Coolah Tops National Park. Dunedoo (pop. 747) located on the Golden and Castlereagh Highways on the southern edge of the Shire approximately 115km south of Coonabarabran, is a highway and rural service centre. The smaller towns of Baradine (pop. 626), Binnaway (pop. 425) and Mendooran (pop. 269) are local service centres, with Baradine being the gateway to the Pilliga Forest. From 2006 to 2016, the population of Coonabarabran (-2.8%), Dunedoo (-10.6%), Binnaway (-14.1%) and Mendooran (-15.7%) declined, with the population of Coolah remaining static and the population of Baradine (+5.6%) increased. Over the same period, the population of the rural areas declined by 4.2%, with the population declining 6.3% between 2006 and 2011, and growing (up 2.3%) between 2011 and 2016.



Sandstone Caves, Pilliga Forest

<sup>4</sup> The Pilliga Forest incorporates a number of National Parks, Nature Reserves, State Conservation Areas, State Forests and Aboriginal Areas.

<sup>5</sup> Australian Bureau of Statistics, Census of Population and Dwellings 2016, Resident Population, Warrumbungle Shire

<sup>6</sup> NSW Planning and Environment 2016 NSW Population and Household Projections – Warrumbungle Shire

<sup>7</sup> Australian Bureau of Statistics Census of Population and Dwellings, 2016: Warrumbungle Shire.

<sup>8</sup> Australian Bureau of Statistics Census of Population and Dwellings, 2016: Population of the towns is given for the urban locality.

## 2.2 Access

Warrumbungle Shire is well connected by road. There are four highways and several regional roads that feed into the Shire:

- Newell Highway - located along the western side of the Shire, the Newell Highway is the main inland interstate route linking Melbourne, via inland NSW to southern Queensland. The Highway is a designated national freight route and a very popular touring route. The Newell links Coonabarabran with Dubbo to the south and Narrabri to the north.
- Oxley Highway - a state highway linking the Pacific Highway at Port Macquarie to the Mitchell Highway at Nevertire, via Tamworth, Gunnedah and Coonabarabran. The Highway is used by agricultural producers in the Shire to access to the saleyards, grain and feed mills and livestock processing plants in Gunnedah and Tamworth.
- Castlereagh Highway – a state highway linking the Great Western Highway at Lithgow to Central Queensland, via Mudgee, Dunedoo and Gilgandra.
- Golden Highway – a state highway located along the southern edge of the Shire linking the Hunter Valley to Dubbo and the Great Western Plains, with this route being an important freight route providing access to the Port of Newcastle.
- Black Stump Way – a regional road along the eastern edge of the Shire connecting the Golden Highway near Dunedoo to the Oxley Highway at Mullaley with an unsealed link (Grain Valley Way) through to the Kamilaroi Highway at Boggabri.
- Purlewaugh Road – an important east-west link between Coonabarabran and Liverpool Plains Shire, with the route providing access to the grain receival sites, feedlots and feedmills in Liverpool Plains Shire.
- Baradine – Gwabegar Road – a north-south link along the north-western edge of the Shire, providing access to the Pilliga Forest and north to the hot artesian baths at Pilliga and Burren Junction.
- Timor Road – John Renshaw Parkway – linking Coonabarabran and the Warrumbungle National Park with local road connections through to Gilgandra and Coonamble Shires.
- Number 1 Break – an unsealed road through the Pilliga Forest, links the Newell Highway to Baradine and is part of the access road to Dandry Gorge and the Salt Caves. Different sections of the road are controlled by NSW National Parks, Forestry Corporation of NSW and Warrumbungle Shire Council

Roads and Maritime Services are forecasting significant increases in traffic, particularly freight traffic, on the Newell, Oxley and Golden Highways over the next 2 decades<sup>9</sup>.

The southern and central areas of the Shire have access to the Binnaway-Werris Creek, Gwabegar and Troy Junction to Merrygoen railway lines. These lines are part of the national rail freight network and are managed by ARTC. Binnaway and Dunedoo have rail access. The Gwabegar and Troy Junction to Merrygoen lines link Dubbo to the Port of Newcastle with connections south to Port Botany and Port Kembla, while the Binnaway-Werris Creek line, links north to join the Main North West and Mungindi lines at Werris Creek. The Mungindi line services the north west of NSW and will link with the Inland Rail line at Narrabri. The Gwabegar line



*Road Train – Bypass Stockfeeds, Baradine*

<sup>9</sup> RMS Highway Corridor Strategies

between Binnaway and Gwabegar is closed with the corridor identified as possibly suitable for a rail trail. The closed Coolah to Craboon rail line has also been identified as potentially suitable for a rail trail to link Coolah and Dunedoo.

The proposed Inland Rail line is located along the western edge of the Shire and will connect with the closed section of the Gwabegar line near Kenebri. The closest Inland Rail intermodal terminals (transport and logistic hubs) to Warrumbungle Shire are proposed for Narrabri to the north and Narromine to the south west. Both towns already have intermodal terminals for containerisation of grains, pulses and cotton. Baradine and Coonabarabran are ideally located to provide accommodation and services for rail workers and contractors during the construction of the Narromine – Narrabri section of the Inland Rail line and Council needs to advocate strongly for this to occur. Longer term, there may also be opportunities for accessing the line for the transport of grain and timber. Gilgandra Shire Council is advocating for the establishment of a construction camp and a transport and logistics hub at Curban.

TrainsNSW provides a coach service between Lithgow and Baradine, with the service stopping in each of the towns in the Shire. Transport NSW is currently trialling a twice weekly coach service between Tamworth and Dubbo, via Gunnedah and Coonabarabran. There is a commercial coach service operating along the Golden Highway between Newcastle and Dubbo which connects with the TrainsNSW service at Dunedoo. The nearest airports with commercial RPT services are located at Dubbo, Tamworth, Mudgee and Narrabri.



*Freight train on the Merrygoen line, at Merrygoen*



*Section of the closed Gwabegar Rail Line between Coonabarabran and Baradine – ideal for a rail trail*



*Reedman Transport, one of the Shire's trucking companies*

## 2.3 Economic Snapshot<sup>10</sup>

**Output**  
**\$810.638M**

Warrumbungle Shire is primarily dependent on agriculture. The Shire's Gross Regional Product (GRP) is estimated at \$452.349 million, equating to 5.59% of the Orana Region GRP and 0.08% of the NSW Gross State Product. GRP per capita is \$48,118 which is lower than the Regional average of \$68,095 with GRP per worker being \$145,222n which is also lower than the Regional average of \$161,926. From 2012 to 2016 the Shire achieved year-on-year growth in the GRP, with GRP decreasing in 2017, primarily due to the drought.

**GRP**  
**\$451.349M**

The total output (gross revenue) generated by the Shire economy is estimated at \$810.638M (5.04% of the Orana Region). The sectors with the highest output are Agriculture, Forestry, Fishing (\$260.235M); Rental, Hiring and Real Estate Services (\$92.938M); Construction (\$64.477M) and Public Administration and Safety (\$50.328M). The total value-add by the Shire's economy is estimated at \$405.496M (5.43% of value-added in the Orana Region), with the value of goods and services exported from the Shire being \$329.968M (5.6% of the value of exports from the Orana Region).

**Value Added**  
**\$405.496M**

The Agricultural sector is the major employer (900 jobs), followed by Health Care and Social Assistance (412 jobs) and Education and Training (412 jobs). From 2011 to 2016, employment increased in the Construction (57 additional jobs), Agriculture (56), Education and Training (49), Public Administration and Safety (39), Health Care and Social Assistance (38), Administration and Support (31) and Transport, Postal and Warehousing (22) sectors, with employment in other sectors declining. In March 2018, the unemployment rate in the Shire was 3.7%, which was lower than the Orana Region at 4.3%. There were 160 people in the Shire seeking work.

**Value Exports**  
**\$329.968M**

At June 2017, there were 1003 businesses in the Shire. Small businesses dominate with 63.6% of businesses being non-employing, 27.5% employed 1 to 4 people, with 8.1% employing 5 to 19 people and 0.8% employing 20 to 199 staff.

**Businesses**  
**1,003**

Industries within the Shire can be broadly divided into:

- Engines – industries that bring money into the Shire and drive the local economy
- Enabling – industries that support the engines (eg transport)
- Population serving – industries that support the local population (eg retail)

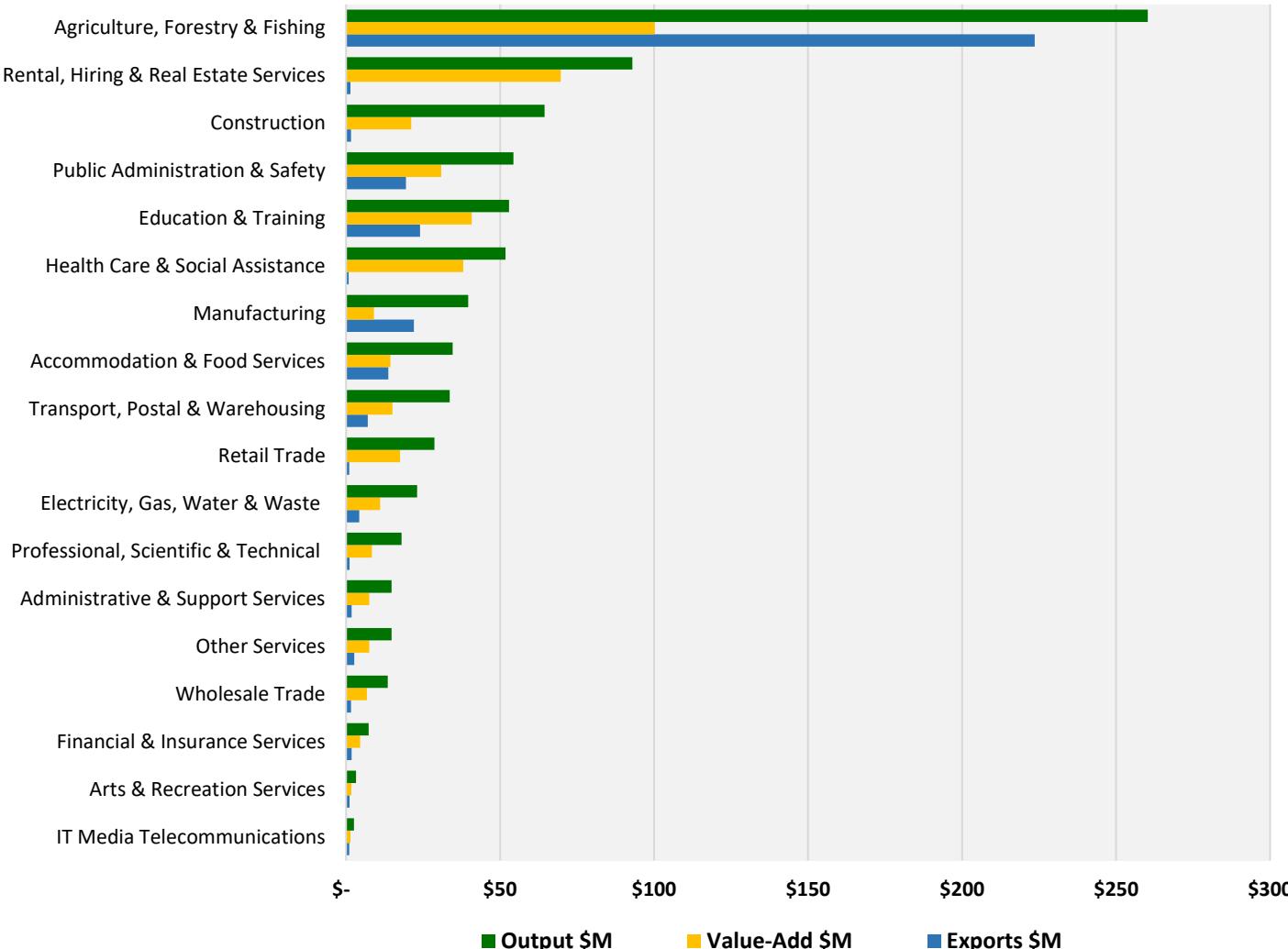
**Unemployment**  
**3.7%**  
**160 people**  
**seeking work**

To foster economic development, it is important to focus on the engine sectors that drive growth, and the enabling industries that support these. The fortunes of the population serving industries depend primarily on the success of the engine industries.

The primary engine industries in Warrumbungle Shire are agriculture and tourism. Other activities that bring money into the Shire include the Education and Training and Public Administration and Safety sectors. The Education and Training sector includes Siding Spring Observatory which is owned and operated by the Canberra-based, Australian National University.

<sup>10</sup> Economic data in this section has been extracted from the Warrumbungle Shire Economic Profile, prepared by REMPLAN based on 2016, 2017 and 2018 data.

**Figure 2.2 Performance (Output, Value Add, Export) by Industry Sector – Warrumbungle Shire**



## MAJOR EMPLOYERS

Warrumbungle Shire Council  
Woolworths Supermarket  
Cooinda Coonabarabran  
Siding Spring Observatory  
Western NSW Health  
NSW Department of Education



**Table 2.1 Warrumbungle Shire – Economic Indicators by Sector**

| Industry Sector                       | Output           |               | Value Add        |               | Value of Exports |               | Value of Imports |               | Net Value of Exports - Imports<br>\$ million | Employment   |              |               |               |                |             |
|---------------------------------------|------------------|---------------|------------------|---------------|------------------|---------------|------------------|---------------|--|--------------|--------------|---------------|---------------|----------------|-------------|
|                                       | \$ million       | % of Shire    |  | Jobs         |              | As % Total    |               | Change 2011-16 |             |
|                                       |                  |               |                  |               |                  |               |                  |               |  | 2011         | 2016         | 2011          | 2016          | No.            | %           |
| Agriculture, Forestry & Fishing       | \$260.235        | 32.1%         | \$100.191        | 24.7%         | \$223.550        | 67.7%         | \$96.794         | 40.1%         | \$126.76                                     | 844          | 900          | 27.8%         | 29.0%         | 56             | 6.6%        |
| Rental, Hiring & Real Estate Services | \$ 92.938        | 11.5%         | \$ 69.649        | 17.2%         | \$ 1.377         | 0.4%          | \$15.976         | 6.6%          | -\$ 14.60                                    | 17           | 16           | 0.6%          | 0.5%          | -1             | -5.9%       |
| Construction                          | \$ 64.477        | 8.0%          | \$ 21.138        | 5.2%          | \$ 1.592         | 0.5%          | \$20.379         | 8.4%          | -\$ 18.79                                    | 81           | 138          | 2.7%          | 4.4%          | 57             | 70.4%       |
| Public Administration & Safety        | \$ 54.328        | 6.7%          | \$ 30.838        | 7.6%          | \$ 19.454        | 5.9%          | \$12.962         | 5.4%          | \$ 6.49                                      | 203          | 242          | 6.7%          | 7.8%          | 39             | 19.2%       |
| Education & Training                  | \$ 52.940        | 6.5%          | \$ 40.776        | 10.1%         | \$ 23.974        | 7.3%          | \$ 7.528         | 3.1%          | \$ 16.45                                     | 363          | 412          | 11.9%         | 13.3%         | 49             | 13.5%       |
| Health Care & Social Assistance       | \$ 51.797        | 6.4%          | \$ 38.056        | 9.4%          | \$ 0.823         | 0.2%          | \$ 8.930         | 3.7%          | -\$ 8.11                                     | 374          | 412          | 12.3%         | 13.3%         | 38             | 10.2%       |
| Manufacturing                         | \$ 39.696        | 4.9%          | \$ 9.031         | 2.2%          | \$ 21.977        | 6.7%          | \$22.379         | 9.3%          | -\$ 0.40                                     | 105          | 85           | 3.5%          | 2.7%          | -20            | -19.0%      |
| Accommodation & Food Services         | \$ 34.569        | 4.3%          | \$ 14.419        | 3.6%          | \$ 13.695        | 4.2%          | \$15.531         | 6.4%          | -\$ 1.84                                     | 211          | 203          | 6.9%          | 6.5%          | -8             | -3.8%       |
| Transport, Postal & Warehousing       | \$ 33.686        | 4.2%          | \$ 15.073        | 3.7%          | \$ 7.013         | 2.1%          | \$ 9.313         | 3.9%          | -\$ 2.30                                     | 99           | 121          | 3.3%          | 3.9%          | 22             | 22.2%       |
| Retail Trade                          | \$ 28.681        | 3.5%          | \$ 17.522        | 4.3%          | \$ 1.067         | 0.3%          | \$ 6.225         | 2.6%          | -\$ 5.16                                     | 338          | 247          | 11.1%         | 7.9%          | -91            | -26.9%      |
| Electricity, Gas, Water & Waste       | \$ 23.039        | 2.8%          | \$ 11.037        | 2.7%          | \$ 4.276         | 1.3%          | \$ 3.593         | 1.5%          | \$ 0.68                                      | 42           | 24           | 1.4%          | 0.8%          | -18            | -42.9%      |
| Professional, Scientific & Technical  | \$ 17.961        | 2.2%          | \$ 8.356         | 2.1%          | \$ 1.110         | 0.3%          | \$ 5.550         | 2.3%          | -\$ 4.44                                     | 67           | 66           | 2.2%          | 2.1%          | -1             | -1.5%       |
| Administrative & Support Services     | \$ 14.814        | 1.8%          | \$ 7.481         | 1.8%          | \$ 1.819         | 0.6%          | \$ 4.019         | 1.7%          | -\$ 2.20                                     | 37           | 68           | 1.2%          | 2.2%          | 31             | 83.8%       |
| Other Services                        | \$ 14.788        | 1.8%          | \$ 7.540         | 1.9%          | \$ 2.663         | 0.8%          | \$ 5.291         | 2.2%          | -\$ 2.63                                     | 102          | 93           | 3.4%          | 3.0%          | -9             | -8.8%       |
| Wholesale Trade                       | \$ 13.492        | 1.7%          | \$ 6.715         | 1.7%          | \$ 1.635         | 0.5%          | \$ 3.864         | 1.6%          | -\$ 2.23                                     | 73           | 35           | 2.4%          | 1.1%          | -38            | -52.1%      |
| Financial & Insurance Services        | \$ 7.315         | 0.9%          | \$ 4.519         | 1.1%          | \$ 1.804         | 0.5%          | \$ 2.153         | 0.9%          | -\$ 0.35                                     | 29           | 10           | 1.0%          | 0.3%          | -19            | -65.5%      |
| Arts & Recreation Services            | \$ 3.274         | 0.4%          | \$ 1.716         | 0.4%          | \$ 1.146         | 0.3%          | \$ 0.879         | 0.4%          | \$ 0.27                                      | 45           | 26           | 1.5%          | 0.8%          | -19            | -42.2%      |
| IT Media Telecommunications           | \$ 2.609         | 0.3%          | \$ 1.439         | 0.4%          | \$ 0.993         | 0.3%          | \$ 0.898         | 0.4%          | \$ 0.10                                      | 11           | 10           | 0.4%          | 0.3%          | -1             | -9.1%       |
| <b>Total</b>                          | <b>\$810.638</b> | <b>100.0%</b> | <b>\$405.496</b> | <b>100.0%</b> | <b>\$329.968</b> | <b>100.0%</b> | <b>\$241.370</b> | <b>100.0%</b> | <b>\$ 88.60</b>                              | <b>3,041</b> | <b>3,108</b> | <b>100.0%</b> | <b>100.0%</b> | <b>67</b>      | <b>2.2%</b> |

Source: Warrumbungle Shire Council – Economic Profile - REMPLAN



## Agriculture

Agriculture (including Forestry) is the main economic activity and primary driver of the Shire's economy. Agriculture accounts for 32.1% (\$260.235M) of the output from the Shire, 24.7% (\$100.191M) of the value add and 67.7% (\$223.55M) of the Shire's exports. 53.7% (539) of registered businesses and 29.0% of jobs (900) are in the agricultural sector. In June 2017, 67% of agricultural businesses were non-employing, with 24.5% employing 1-4 people, 7.8% employing 5-19 people and 1.5% employing 20-199 staff.

The performance of the agricultural sector impacts directly on the performance of the transport, rental-hire-real estate, retail, wholesale, construction, financial, manufacturing and professional, scientific and technical services sectors.

In 2016<sup>11</sup>, around 45.7% of the land area of the Shire was in agricultural production, with 86.8% of this land used for livestock production (primarily grazing) and 13.2% for cropping. The gross value of production was \$153.761M, with livestock production accounting for 68.1% (\$104.724M) of the value of production and cropping 31.9% of the value (\$49.037M).

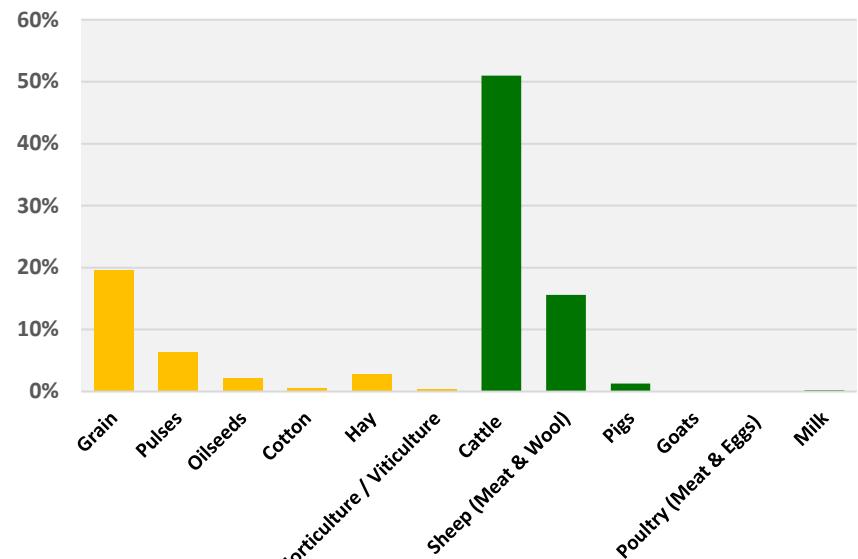
Cattle production (\$78.36M) dominates, accounting for 51% of the total value of production and 74.8% of the value of livestock production. There is increasing specialisation in cattle production. Sheep generated \$23.99M (15.6% of the total value of production) with \$10.08M coming from meat and \$13.91M from wool. The Shire also has several piggeries (\$2.0M) as well as small scale goat, dairy and poultry production, horse studs and several honey producers.

Cereal crops (wheat, oats, barley, triticale and sorghum) are the primary income earner (61.6% of gross value of crop production), followed by pulses (20.0%), hay and pasture seed (8.9%), oilseeds (6.7%), dryland cotton (1.7%) and horticulture / viticulture (1.1%).

Most of the grain produced in the Shire is exported, going primarily by road to receival sites in the surrounding regions or direct to the Port of Newcastle. Some of the grain also goes to feedlots in Liverpool Plains Shire and the Dubbo area and to mills and feed-mills in the surrounding regions. Baradine is the only active grain receival site still operating in the Shire, but is limited in the grain that it can receive. Some pulses are transported to Narrabri and Narromine for containerisation for export, with oilseeds going to Newcastle, Narrabri and Manildra for crushing and processing. Bilby Blooms is the main horticultural producer, producing native plants (wholesale nursery) and cut flowers. There are also several native seed collectors and a native seed distributor. Other niche activities include Mannin Grove Olives and poppy production for medicinal purposes.

**Figure 3.3 Contribution to Value by Production Type  
Warrumbungle Shire, 2015-16**

Source: Australian Bureau of Statistics – Agricultural Census, 2015-16



*Sheep breeders' sale, Dunedoo*

<sup>11</sup> Australian Bureau of Statistics Agricultural Census, 2015-16

Value-adding to agricultural produce is limited and includes the Bypass stock feedmill in Baradine and the Black Gate Distillery at Mendooran. The Abattoir on Warrumbungle Way midway between Coonabarabran and Binnaway, which closed in 2016, has been sold, with plans to re-open in the future.

Several of the Shire's producers are participating in the Regional Platters program, which is a paddock to plate initiative, which is helping to raise the profile of the Region's produce

Warrumbungle Shire has a range of services to support the agricultural sector including agronomists, rural suppliers, stock and station agents, transport / freight operators, farm contractors, earth-moving contractors, fencers, feral animal control, shearers, harvesters, wool classers and brokers, seed cleaners, and vets, as well as engineers / fabricators and financial and legal services. Many of the agricultural service providers are in the Rental, Hiring and Real Estate Services sector, which in terms of output, is the second largest economic sector in the Shire.

## Tourism

Although small in comparison to agriculture, the tourism sector is a significant contributor to the Shire's economy. Visitors bring 'new' dollars into the Shire, with this income being independent of the agricultural sector, generating cash flow year-round and reducing the impacts of seasonal and cyclical activities. Through marketing and promotion, and visitation, tourism helps to raise the profile of the Region and can play a part in relocation decisions.

The estimated output of the Shire's tourism sector is \$46.972M with tourism having a value-add of \$21.441M and employing 239 people<sup>12</sup>.

Tourism Research Australia estimated that in 2016, Warrumbungle Shire attracted 125,000 visitors who stayed one or more nights in the Shire, with 123,000 being domestic visitors and 2,000 being international visitors<sup>13</sup>. Estimates of the number of day visitors to the Shire are not available. Visitors stayed an estimated 258,000 nights in the Shire and spent in the order of \$30 million during their stay. From 2011 to 2016, the number of domestic overnight visitors increased by 17.1%, with the number of international visitors remaining static. The number of nights spent by domestic visitors decreased by 10%, with the average length of stay in the Shire falling from 2.56 nights in 2011 to 1.98 nights in 2016.



*Above: Agri-processing businesses include Bypass Stockfeeds at Baradine and the Black Gate Distillery at Mendooran  
Right: Regional Platters Promotional Collateral*

## REGIONAL PLATTERS CONNECTING OUR PRODUCTS WITH PEOPLE



*Open Day at Bilby Blooms, near Dunedoo*

<sup>12</sup> Warrumbungle Shire Council – Economic Profile – REMPLAN Note: The tourism industry cuts across most industry sectors including accommodation and food, retail and wholesale, transport, manufacturing and arts and recreation.

<sup>13</sup> Tourism Research Australia LGA Profile, 2016 - Based on a 4 year rolling average.

High profile tourist attractions, include:

- Warrumbungle National Park – currently attracts over 30,000+ visitors per year, however visitation was higher (45,000+/year) prior to the media coverage of the destruction caused by the 2013 Wamberlong bushfire. The Park is popular for camping, bushwalking, bird-watching and rock sports.
- Siding Spring Observatory – attracts 30,000+ visitors per year (35,500 in 2017/18).
- The internationally accredited Warrumbungle Dark Sky Park – the only Dark Sky Park in Australia.
- Pilliga Forest – with attractions including the Pilliga Forest Discovery Centre, Dandry Gorge and the Sculptures in the Scrub, Sandstone Caves, Salt Caves and the Fire Tower Lookout – the only one in NSW.
- Coolah Tops National Park.
- Pilliga Pottery – attracts 10,000+ visitors per year

These attractions are supported by a range of local attractions (eg Virtual Solar System Drive, Dunedoo Woodland Learning Centre, the Warrumbungle and Milroy Observatories, Black Gate Distillery, Crystal Kingdom, Tibuc Gardens), quality events, contemporary shopping and dining and a diversity of accommodation options.

In recent years, tourism in parts of the Shire has become stagnant, however the recent declaration of the Dark Sky Park, the opening of the new Warrumbungle National Park Visitors Centre, the proposed Royal Hotel redevelopment and the Australian Wildlife Conservancy in the Pilliga Forest provides opportunity to reinvigorate the industry.



*Top: Warrumbungle National Park   Bottom from left to right: Bracken Cottage Coolah Tops National Park; Pilliga Pottery; Sculptures in the Scrub at Dandry Gorge in the Pilliga Forest, Milroy Observatory*

## 2.4 Workforce

At March 2018, there were 4,282 people in the labour force within Warrumbungle Shire and 160 people actively seeking work<sup>14</sup>. Over the past 5 years, there has been an 8.8% increase in the number of people in the labour force within the Shire (348 additional people), with the unemployment rate falling from 6.3% to 3.7%.

At the 2016 Census, 67.6% of the workforce had formal qualifications with 17.9% having university degrees, 11.2% with diplomas and advanced diplomas and 38.5% with vocational certificates. The proportion of the workforce with qualifications in Warrumbungle Shire is slightly lower than the proportion for the Orana Region (72.3%).

Like most rural localities, businesses in Warrumbungle Shire find it difficult to attract and retain staff, particularly people with skills and experience. Job vacancies exist in most sectors. Factors that deter people from relocating to Warrumbungle Shire include the small size of the towns; availability of similar employment opportunities in larger towns; limited career progression opportunities; lack of suitable housing; perceived limited education options for children; and perceived lifestyle constraints.

## 2.5 Infrastructure & Services to Support Economic Growth

### Utilities

**Water** – Potable water supplies are available to each of the towns and to the villages of Kenebri and Bugaldie, with non-potable water available at Merrygoen. The water supply for Coonabarabran is not secure with the town on Level 6 water restrictions. Council is supplementing Coonabarabran's water supply with bore water and has approval to sink several 'emergency' bores. Council is also seeking to increase the capacity of Timor Dam. The water supply infrastructure in the Shire is approaching the end of its economic life.

**Sewerage** – Coonabarabran, Coolah, Dunedoo and Baradine are sewered. Mendooran and Binnaway not sewered, with this seen as a constraint to growth by both communities. The sewerage infrastructure in the Shire is approaching the end of its economic life.

**Power** – Warrumbungle Shire is part of Essential Energy's Beryl sub-transmission network, with a single 66kV line servicing Dunedoo and Coonabarabran. Being at the 'end of the line' the Shire experiences fluctuations in power supply, including surges, black outs and brown outs. Although variability of power is an on-going problem, particularly in Coonabarabran, the transmission grid is not identified as having limitations or requiring upgrading in Essential Energy's distribution planning<sup>15</sup>.

The approved Liverpool Range Windfarm, is located south east of Coolah. The Farm will have the capacity to generate 1,000MW of power, with this power to be fed back into the Hunter transmission network. It will not address the power supply issues in Warrumbungle Shire. A large solar farm is proposed for Dunedoo.

### UTILITY INFRASTRUCTURE PRIORITIES

**Water:** Securing the water supply for Coonabarabran and replacing aging infrastructure.

**Sewerage:** Replacing aging infrastructure

**Power:** Ensuring reliability through network upgrades and/or development of alternative sources

**Telecommunications:**

- Access to high speed, reliable, affordable internet with adequate carrying capacity
- Extend mobile phone coverage – a secondary network of towers is needed

<sup>14</sup> Australian Department of Employment (2016) Small Area Labour Markets, Warrumbungle Shire, March 2018.

<sup>15</sup> Essential Energy (2017) Distribution Annual Planning Report

**Telecommunications** – Telecommunications infrastructure in the Shire is limited and the internet is expensive to access. There are significant ‘black spots’ in the mobile phone coverage. Coonabarabran (town only) and the Dunedoo and Coolah areas have fibre to the node access to the NBN, with the remainder of the Shire having access to the NBN via satellite. The decision not to provide the NBN to the Coonabarabran industrial area is detrimental to economic growth, rendering both the industrial estate and the businesses within the estate, less competitive to those in the surrounding region which have fixed line NBN access. The 55 existing businesses within the estate, and future businesses have to rely on slow ADSL connections or unreliable and expensive satellite services to access the internet.

For the Shire to be competitive there is a need to increase the reliability, speed and affordability of the internet and extend mobile phone coverage. This is essential to enabling the application of technology to improve farming and business productivity, accessing national and global markets and increasing access to online service and training opportunities.

## Transport Infrastructure

**Roads** – With the closure of the Gwabegar rail line to the north west of Binnaway, and most of the grain receival sites and abattoir, there has been a significant increase in the use of road transport. This has increased costs for producers and impacted on the Shire maintained and funded road network. Grains and pulses are being transported to bulk receival sites in Gilgandra, Liverpool Plains, Narrabri and Gunnedah Shires; direct to the Port of Newcastle; to intermodal terminals in Narrabri and Narromine; to mills and feedmills in Dubbo, Gunnedah and Tamworth; and to feedlots in Liverpool Plains Shire and the Dubbo area. Livestock is primarily going to saleyards in Gunnedah, Tamworth, Mudgee and Dubbo; to feedlots in the Liverpool Plains and Upper Hunter; and to processing plants in Dubbo, Tamworth and the Hunter Valley.

Key routes for agricultural freight include the Newell, Golden and Oxley Highways, Black Stump Way, and the Baradine, Purlewaugh and Mendooran Roads. These routes are accessible to 25/26 metre general mass limit (GML) trucks. The Newell, Golden and Oxley Highways and the Purlewaugh and Mendooran Roads are accessible to high mass limit vehicles (HML). Road train access to the Shire is extremely limited. There is no road train access on the Newell Highway between Tooraweenah and Coonabarabran, nor to any areas to the east of the Highway. There is road train access from Baradine west to Coonamble and north to Pilliga. The farming community identified the Black Stump Way and the Purlewaugh and Baradine Roads as priorities for upgrading.

Roads and Maritime Services (RMS) is forecasting that from 2011 to 2031, the volume of truck traffic on the Newell will increase between 62% and 100% depending on the location along the Highway, with truck traffic through Coonabarabran to increase by 80%. The RMS is proposing to upgrade the Newell Highway to take high productivity vehicles (up to 36.5metres) along the length of the Highway. RMS has ranked the need for a by-pass around Coonabarabran as a medium term priority (within 10 years from 2016), and the preferred route corridor has been identified. Removal of heavy vehicle traffic from Coonabarabran will increase the amenity and safety of the town centre, however, a bypass could reduce other traffic coming into town, possibly resulting in a loss of revenue for some local businesses.

Heavy vehicle traffic on the Oxley Highway to the east Coonabarabran and on the Golden Highway through Dunedoo is also forecast to increase with the freight tonnage forecast to grow by 52% on the Oxley Highway<sup>16</sup> and 64% on the Golden Highway<sup>17</sup>.



*Unloading Hay, Dunedoo*

<sup>16</sup> RMS Oxley Highway Corridor Strategy, 2016

<sup>17</sup> RMS Golden Highway Corridor Strategy, 2016

Black Stump Way and the Baradine and Purlewaugh Roads need to be improved to cater for the increasing volume of freight and touring traffic. Gunnedah and Narrabri Shires are seeking funding to complete the seal of Grain Valley Way which will provide a fully-sealed link from the Black Stump Way to the Kamilaroi Highway, improving access from the eastern areas of Warrumbungle Shire to the cotton gins at Boggabri and Wee Waa, and to the intermodal terminals and Cargill Crush Plant (cotton and canola seed) in Narrabri. It also provides an alternative route to the Newell Highway for the drive touring market.

The feedlots in Liverpool Plains Shire are looking to expand, which will increase livestock and grain freight movements on the Purlewaugh Road. A large abattoir is proposed for Gunnedah which will result in an increase in livestock traffic along both the Black Stump Way and Oxley Highway. To the north west, Narrabri Council is seeking funding to seal Forest Way (Baradine Road) between Pilliga and Gwabegar. This will result in increased freight and touring traffic on the route, which will have direct benefits for Baradine. If Baradine gains access to the Inland Rail, this will further increase freight traffic on the Baradine Road.

Drive touring (which includes the touring caravan and RV markets) is increasing, with both Destination NSW and the Country and Outback Destination Network looking to significantly grow this market within the Country and Outback Region. From a tourism perspective, the key roads are the highways and regional roads that feed into the Shire, the regional roads (Warrumbungle Way, Mendooran Road and Baradine-Gwabegar Road) that connect the towns (providing off-highway touring routes), and the access roads to key attractions – Warrumbungle and Coolah Tops National Parks, Siding Spring Observatory, Pilliga Forest and Pilliga Pottery.

**Rail** - The operating rail infrastructure in Warrumbungle Shire is part of the National Rail Freight Network, with this infrastructure being progressively upgraded. The Gwabegar line between Binnaway and Gwabegar and the Coolah Branch line (Coolah to Craboon) are closed and it has been suggested that sections of these corridors could be suitable for rail trails. The proposed Inland Rail Line between Melbourne and Brisbane will connect with the closed section of the Gwabegar line near Kenebri. With the grain receival site at Baradine still operational, and the potential to export logs and timber from the Pilliga Forest, there may be potential to upgrade and utilise the railway infrastructure from Baradine to Kenebri to access the Inland Rail line.

**Aerodromes** – Warrumbungle Shire Council maintains aerodromes at Coonabarabran, Coolah and Baradine. The Coonabarabran aerodrome has a sealed runway and is licenced for general aviation. It is used for charter flights, recreational flying, air ambulance, rural fire service (RFS) and agricultural support services. The Coolah and Baradine strips are primarily used by the RFS and other emergency services. There is opportunity to use the Coonabarabran aerodrome for charter flights for high-yield tour groups visiting Siding Spring Observatory.

**Cycle** – Warrumbungle Shire Council is progressively developing cycleway networks in each of the towns. These networks will facilitate use of bicycles and enhance the lifestyle and liveability of the towns. Both cycle tourism (visiting a location specifically to ride or to participate in a cycle event) and the number of caravanners and RV's travelling with cycles is increasing, with visitors looking for attractive, safe places for people to ride. Rail trails would be ideal for these markets. A safe cycleway linking Coonabarabran with the

## ROAD & RAIL PRIORITIES

### Roads

- Plan for the Coonabarabran by-pass to deliver the best outcomes for the town centre and local businesses.
- Progressively upgrade the Black Stump Way and the Baradine and Purlewaugh Roads to support the agricultural sector.
- Support applications by neighbouring Councils to seal roads that feed into Warrumbungle Shire, including Grain Valley Way and Forest Way.
- Explore options for upgrading roads that provide access to the key tourist attractions.

### Rail

- Explore options to capitalise on the Inland Rail.
- Explore options to convert sections of the closed Gwabegar and Coolah rail lines for rail trails.

Warrumbungle National Park would also prove popular. They may be opportunities for mountain bike trails in parts of the Pilliga Forest and the Warrumbungle and/or Coolah Tops National Parks.

## Agricultural Infrastructure

The infrastructure to support agriculture within the Shire has been decreasing with the closure of the Gwabegar (Binnaway to Gwabegar) and Coolah Branch lines and most of the grain receival sites. Infrastructure available includes:

- GrainCorp receival site at Baradine (limited in the grain that it will accept).
- Saleyards at Binnaway, Dunedoo and Coonabarabran, with these operated by local agents. Sales are limited, with most of the stock in the Shire going to the larger saleyards in Gunnedah, Dubbo, Tamworth and Mudgee.

The Abattoir, which closed in 2016, has recently sold with the new owners looking to re-open the facility, possibly for halal kill. A truck wash is needed in the Shire to improve bio-security.



Cattle sale, Dunedoo

## Other Facilities & Services

Facilities and services to support the Shire community and facilitate economic growth include:

- **Education and Training** – Coonabarabran has a public High School and primary school, with the smaller towns each having a Central School (K-12). Catholic primary schools are located in Coonabarabran, Coolah, Baradine and Dunedoo. Coonabarabran High School has a very good reputation, with people moving to the town to access the school. The Coonabarabran and Dunedoo TAFEs are connected learning centres providing access to a range of TAFE courses.
- **Child Care** – Long day, pre-school, out-of-school-hours care and family day care are available in Coonabarabran, with pre-schools in each of the smaller towns, and family day care in Coolah and Dunedoo.
- **Health Services** – There is a district hospital in Coonabarabran and Multi-Purpose Health Centres in Baradine Coolah and Dunedoo. Coonabarabran also two medical centres, two dental services and several allied health practitioners. Coolah, Dunedoo and Baradine each have medical services with resident doctors, with Mendooran having a visiting doctor. Binnaway is seeking to attract a doctor. Like most rural LGAs, Warrumbungle Shire struggles to attract and retain doctors, registered nurses and other health professionals.
- **Aged Care** – Coonabarabran has a large aged-care complex with self-care units, hostel and nursing home facilities. An aged-care facility is currently under construction in Dunedoo. Nursing home beds are available as part of the Multi-purpose Health Centres in Baradine, Coolah and Dunedoo. There are facilities and services available to support aging-in-place. Baradine and Coolah have identified a need for self-care units, with Dunedoo needing additional nursing home beds.
- **Library Services** – Warrumbungle Shire is a member of the Macquarie Regional Library and operates libraries in each of the towns.

- **Business Services** – including post offices, accountants, banks and financial services, IT support and legal services. Baradine has a Rural Transaction Centre.
- **Supermarkets** – Coonabarabran has a Woolworths Supermarket, with an IGA Supermarket about to open. Coolah has an IGA supermarket with small supermarkets in Binnaway (Friendly Grocer), Dunedoo (Spar) and Baradine (IGA).
- **Construction, engineering and automotive** services are located in each of the towns.
- **Recreation and sporting facilities and Sporting Clubs** – playing fields/ovals, netball courts, swimming pools, golf courses, showgrounds and horse sport facilities, lawn bowls, tennis, are located in each of the towns with fitness gyms in Coonabarabran and Coolah, an indoor sports centre in Coonabarabran and skateparks in most communities. The Coonabarabran community is advocating for an indoor heated pool for year-round use.
- **Creative and performing arts** – the Shire has a range of creative and performing arts groups.
- **Clubs, hotels restaurants and eateries** – registered clubs and/or hotels in each of the towns and cafes in the larger towns and at Tibuc Gardens, Siding Spring Observatory and Pilliga Pottery.
- **Visitor Centres** – a Visitor Information Centre at Coonabarabran (Level 1 accredited), and information outlet in Coolah (Pandora's Gallery) and National Park Visitor Centres at Baradine and in the Warrumbungle National Park.
- **Accommodation** – As a highway service centre, Coonabarabran is well supplied with motel, hotel and caravan park accommodation with facilities to accommodate large groups including coach tour groups. Motel, cabin and speciality accommodation is available along Timor Road, to service the Warrumbungle National Park. Coolah and Dunedoo both have a motel, caravan park, pub hotel accommodation and B&B accommodation. Baradine, Binnaway and Mendooran have pub accommodation, Camp Cypress in Baradine provides powered sites, cabins and group accommodation. Primitive camping is available on the river at Mendooran, Binnaway (where visitors can also access power), near Coolah and in the Warrumbungle and Coolah Tops National Parks and Pilliga Forest. Siding Spring Observatory has quality lodge accommodation for astronomers and pre-booked tour groups, with Barkala Farm Stay (Pilliga Pottery) providing unique farm-stay accommodation and camping sites.



*From top to bottom: Horse racing at Mendooran, Tibuc Gardens Café & Gallery, Dunedoo Arts Unlimited Pencil Sculpture, Autumn at the John Oxley Caravan Park, Coonabarabran*

## 2.6 Land & Premises

**Industrial Land** – The five larger towns have general industrial areas which provide serviced industrial land. Coonabarabran has a purpose-built general industrial estate on the northern edge of town. The estate has vacant and under-utilised sites, however these sites are privately held. There are virtually no vacant sites and no factory units available for businesses looking to establish in Coonabarabran, and the absence of the NBN to the industrial area works against development. There are no factory units or sheds available for sale or lease in the smaller towns. The Warrumbungle Shire LEP permits (with consent) rural industries (including agricultural processing facilities) in rural areas.

**Commercial and Retail Premises** – Availability of retail and commercial properties for sale or rent in Coonabarabran, Coolah and Dunedoo is very limited. Premises are available in Baradine. Most of the vacant premises throughout the Shire are older buildings which require significant refurbishment. As there is insufficient return on investment, many owners are reluctant to invest in the premises, preferring to leave them vacant. It is difficult for businesses looking to establish in the Shire to find suitable premises.

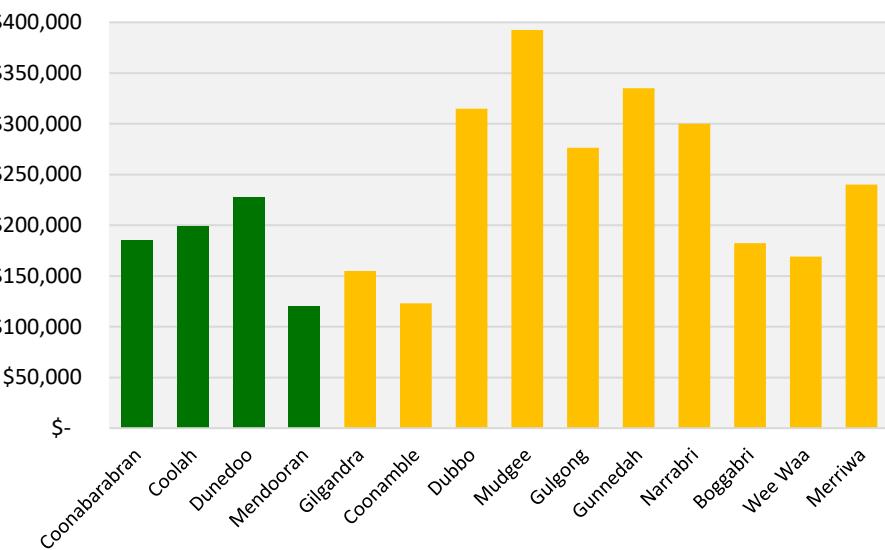
**Residential** – There is a range of residential properties in each of the towns for sale, with the property prices being highly affordable, particularly when compared to prices in the major regional centres and capital cities. Based on information provided by Realestate.com, the level of interest in residential properties in Coonabarabran, Coolah and Baradine is very low with viewers per property being 85, 73 and 85 respectively (NSW average 847 viewers). Interest in properties in Dunedoo and Mendooran is higher, 104 and 103 viewers per property respectively. In contrast, the interest in properties in Binnaway is significantly higher, attracting 513 views per property. Pre-2013, there were less than 35 residential properties per year sold in Coonabarabran, with sales post 2013 being 50-65 per year. There are around 20-25 sales per year in Coolah, 10-15 per year in Mendooran and Baradine and 10-20 per year in Binnaway. Pre-2017, there were less than 20 houses sold per year in Dunedoo, with 36 properties sold in 2017.

There are very few habitable rental properties available in the Shire, rendering it difficult for people to move to the area. Lack of capital gain is a major deterrent to investors entering the market.

Under the LEP there is provision for rural lifestyle lots (2 hectare minimum) adjacent to each of the towns. These lots are often too small for people looking for a ‘tree change’. There is a lack of lots from 10-200 hectares which have a dwelling entitlement, with this being property size that the real estate agents get enquiries for. The minimum lot size for rural holdings on which a dwelling can be built, is 500 hectares in the north of the Shire and 600 hectares in the south.

The limited availability of industrial land and premises, well presented retail and commercial premises, residential properties for lease and rural small holdings (10-200ha) are a constraint to business and population growth.

Figure 2.4 Median House Prices – Selected Towns, 2018



Source: Realestate.com Suburb Profiles, August 2018.

### 3. STRATEGIC CONTEXT

The Warrumbungle Shire Economic Development Strategy has been prepared within the framework set by the NSW Government through the Premier's Priorities and its 20 Year Economic Vision for Regional NSW, and aligns with regional plans and strategies, and the Warrumbungle Shire Community Strategic Plan.

#### 3.1 NSW Government Priorities

##### Premiers Priorities

The NSW Premier has identified 12 priorities for NSW. Of these, 4 will help to drive economic growth in regional areas. The Warrumbungle Shire Economic Development Strategy aligns with the Premier's priorities of creating jobs and building infrastructure.

##### Priorities for Regional NSW - A 20 Year Economic Vision for Regional NSW

In July 2018, the NSW Government released its priorities for driving economic growth in Regional NSW<sup>18</sup>.

##### Premier's Priorities

- Creating jobs – 150,000 new jobs by 2020
- Building infrastructure
- Improving education results
- Making housing more affordable / faster housing approvals

| Priorities & Initiatives | Key Directions  |
|--------------------------|---|
| <b>Infrastructure</b>    | <ul style="list-style-type: none"><li>• Improved digital connectivity beyond the NBN.</li><li>• Improved mobile phone coverage.</li><li>• Innovative delivery methods for health, education etc.</li><li>• Low-bandwidth infrastructure for application of agricultural technologies.</li></ul>   |
|                          | <ul style="list-style-type: none"><li>• Improving public transport options between rural communities and regional centres and to Sydney.</li><li>• Improved road and rail connectivity.</li></ul>   |
|                          | <ul style="list-style-type: none"><li>• Intermodal terminals in regional areas, with strong connectivity to ports.</li><li>• Improved east-west freight links across NSW.</li><li>• Realising the benefits of Inland Rail.</li></ul>  |
|                          | <ul style="list-style-type: none"><li>• Providing energy security, including new energy projects.</li><li>• Providing water security for engine industries and regional communities, including climate resilient water infrastructure.</li></ul>  |
| <b>Skills</b>            | <ul style="list-style-type: none"><li>• Aligning education and training with skills shortages and job opportunities in regional areas.</li><li>• Training support – including mentoring and assistance with transport and accommodation.</li><li>• Innovative training delivery models.</li><li>• Initiatives to encourage skilled workers to relocate to regional areas.</li></ul> |

<sup>18</sup> NSW Government (2018) A 20 Year Economic Vision for Regional NSW

| <b>Priorities &amp; Initiatives</b> |   | <b>Key Directions</b>   |
|-------------------------------------|---|---|
|                                     | Boost regional NSW's knowledge economy and excellence in innovation, particularly in agricultural technology, aged care, energy, aerospace, logistics, advanced manufacturing, and other areas linked to the future of the regions. | <ul style="list-style-type: none"> <li>• Industry, government and university partnerships.</li> <li>• Fostering development of industry clusters in regional areas.</li> </ul>  |
| <b>Advocacy and Promotion</b>       | Draw in more domestic and international tourists in areas with tourism potential.   | <ul style="list-style-type: none"> <li>• Improve infrastructure and transport to support tourism to wine and produce regions – focusing on areas where the NSW brand is recognised overseas.</li> <li>• Increase the efficiency and connectivity of east-west transport across NSW.</li> </ul>  |
|                                     | Attract more domestic and international students to regional NSW.   | <ul style="list-style-type: none"> <li>• Market and promote to further raise the profile of regional NSW's education, training and research strengths.</li> <li>• Dedicated campuses or precincts for international students to study in regional NSW.</li> <li>• Tertiary-accredited integrated work-study qualifications in sectors of strength in regional NSW.</li> </ul>   |
| <b>Business Environment</b>         | Provide an attractive environment for businesses to establish and invest in regional NSW locations, consistent with regions' economic endowments.   | <ul style="list-style-type: none"> <li>• Initiatives to encourage business investment in regional areas.</li> <li>• Attract skilled labour to regional areas.</li> <li>• Encourage increased value-add in agriculture and manufacturing in regional areas.</li> <li>• Streamline regulatory requirements.</li> <li>• Provide business support services and international trade advocacy.</li> <li>• Build flexibility into Crown land use to better respond to economic opportunities.</li> </ul> |
|                                     | Grow vibrant places to live and work to encourage business and population growth.   | <ul style="list-style-type: none"> <li>• Invest in cultural infrastructure in regional NSW.</li> <li>• Invest in recreation infrastructure in growing regional centres.</li> <li>• Ensure that planning delivers appropriate housing, utilities and transport to support growth in growing regional centres.</li> <li>• Activate regional town centre that have growth potential.</li> </ul>  |

Source: NSW Government (2019) A 20 Year Economic Vision for Regional NSW



## Tourism – Visitor Economy Industry Action Plan

Building the visitor economy is a key priority of the NSW Government, with the visitor economy recognised as having the potential to drive growth in the State's economy. In 2010-11, the NSW Government set a target for the Visitor Economy to double overnight visitor expenditure to NSW by 2020. The Visitor Economy Industry Action Plan sets the vision and framework for achieving the growth target, with destination management being part of the approach adopted.

DNSW have in-place a range of strategies to improve the product base and grow visitation to NSW, with the strategies relevant to Warrumbungle Shire being:

- Aboriginal Tourism Action Plan 2017-2020 – which focuses on supporting the development and promotion of NSW Aboriginal cultural tourism experiences, products and businesses.
- The NSW Regional Conference Strategy and Action Plan 2017-2021 – the Strategy aims to grow the business events market in regional NSW by building destination and industry capability and stimulating market demand.
- China Tourism Strategy 2012-2020 – The Strategy aims to increase NSW's competitiveness in the Chinese market and grow Chinese visitation to NSW. It includes strategies to improve the capacity of regional NSW to meet the needs of Chinese visitors.

DNSW is currently preparing an Agritourism Strategy and Action Plan.

DNSW's product development priorities include:

- Food and wine tourism experiences
- Nature-based activities and experiences
- Aboriginal products and experiences
- Regional conferences and events, including improving venues and infrastructure
- Getting products export-ready

Warrumbungle Shire has strengths in the areas of nature-based and Aboriginal products, activities and experiences. It also has several products that have the potential to become export ready.

*Aboriginal guided tours,  
Sandstone Caves, Pilliga Forest*

## Vision for the 2020 NSW Visitor Economy

By 2020, NSW will have a high-performance visitor economy that has doubled its contribution to the State's economy as measured by overnight visitor expenditure (in nominal terms).

NSW will be established as the premier destination for visitors from key priority target markets and market segments, including holiday/leisure, business, business event, education, employment, backpacker, and 'visiting friends and relatives' (VFR) visitors.

The best of the State will be showcased through appealing, authentic and high-quality visitor experiences. The 2020 visitor economy will be characterised by a culture of innovation, entrepreneurship and industry leadership. Businesses in the visitor economy will contribute strongly to NSW's economic, social and cultural strengths.

Destination Management Plans will provide clear frameworks to guide Government support at all levels and industry investment to deliver experiences that match and exceed visitor expectations and provide growth.

NSW will be a State that welcomes visitors and celebrates the NSW experience, reflecting civic pride in the State and its success.



## 3.2 Regional Plans & Strategies

### Central West & Orana Regional Plan 2036<sup>19</sup>

The Central West and Orana Regional Plan applies to twenty LGAS across the Central West and Orana Regions of NSW. The Plan designates Dubbo, Bathurst and Orange as Regional Cities; and Lithgow, Mudgee, Parkes - Forbes and Cowra as Strategic Centres. Coonabarabran and the main town in each of the rural shires are designated as Centres. The vision for the Region is:

**The most diverse regional economy in NSW with a vibrant network of centres leveraging the opportunities of being at the heart of NSW.**

The Goals and Strategic Directions for the Region are:

| GOAL 1:<br>The most diverse regional economy in NSW |   | GOAL 2:<br>A stronger, healthier environment and diverse heritage | GOAL 3:<br>Quality freight, transport and infrastructure networks | GOAL 4:<br>Dynamic, vibrant and healthy communities                                       |
|---|---|---|---|---|
| 1   | Protect the region's diverse and productive agricultural land     | 13 Protect and manage environmental assets                        | 18 Improve freight connections to markets and global gateways     | 22 Manage growth and change in regional cities and strategic and local centres            |
| 2   | Grow the agribusiness sector and supply chains                    | 14 Manage and conserve water resources for the environment        | 19 Enhance road and rail freight links                            | 23 Build the resilience of towns and villages   |
| 3   | Develop advanced manufacturing and food processing sectors        | 15 Increase resilience to natural hazards and climate change      | 20 Enhance access to air travel and public transport              | 24 Collaborate and partner with Aboriginal communities                                    |
| 4   | Promote and diversify regional tourism markets                    | 16 Respect and protect Aboriginal heritage assets                 | 21 Coordinate utility infrastructure investment                   | 25 Increase housing diversity and choice  |
| 5   | Improve access to health and aged care services                   | 17 Conserve and adaptively re-use heritage                        |   | 26 Increase housing choice for seniors  |
| 6   | Expand education and training opportunities                       |   |   | 27 Deliver a range of accommodation options for seasonal, itinerant and mining workforces |
| 7   | Enhance the economic self-determination of Aboriginal communities |   |   | 28 Manage rural residential development   |
| 8   | Sustainably manage mineral resources                              |   |   | 29 Deliver healthy built environments and better urban design                             |
| 9   | Increase renewable energy generation                              |   |   |   |
| 10  | Promote business and industrial activities in employment lands    |   |   |   |
| 11  | Sustainably manage water resources for economic opportunities     |   |   |   |
| 12  | Plan for greater land use compatibility                           |   |   |   |

A photograph showing a group of people, including a child, participating in a traditional sheep branding or marking activity. A sheep is being held by several men, and one man is performing the procedure on its side.

A photograph of a group of cyclists standing together with their bicycles. They are wearing various cycling gear like helmets and jerseys. The background shows some trees and a clear sky.

A photograph of a panel discussion at a Science in the Pub event. Five people are seated behind a table with microphones, and a screen in the background displays a colorful graphic related to space or science.

<sup>19</sup> NSW Planning and Environment Central West and Orana Regional Plan.

The Plan identifies agri-business, tourism, and transport and logistics as the key growth opportunities for Warrumbungle Shire and the priorities for Warrumbungle Shire as being:

- Encourage economic growth by supporting agriculture and other emerging industries such as value-add manufacturing and freight-related opportunities.
- Support the primacy of the main street and central business district in Coonabarabran and other towns.
- Support the agricultural sector and associated businesses in each locality.
- Continue to support and protect the Siding Spring Observatory from incompatible development.
- Support tourism opportunities, specifically for nature-based tourism, in the Warrumbungle, Pilliga and Coolah Tops National Parks.
- Protect agricultural land and rural industries from encroachment from residential development.

### **Regional Economic Development Strategy (REDS), Castlereagh Functional Economic Region**

The State Government, through the Department of Premier and Cabinet, has prepared a Regional Development Strategies (REDS) for 37 Functional Economic Regions in NSW. Warrumbungle and Gilgandra Shires form the Castlereagh Region. The vision for the Castlereagh Region is:

**A sustainable region that successfully builds on its natural, economic, and cultural features and resources to create growth opportunities for the community that enhance the economy and lifestyle of the region.**

The REDS identifies the key industries for the region as Agriculture, Tourism, and Health Care and Social Assistance. The REDS has five core strategies:

- Boost key industries' access to market and labour to reduce cost of transport, transactions, treatment and training.
- Invest in water and energy utilities infrastructure to achieve a sustainable economy and improve quality of life.
- Develop and enhance the regional lifestyle as attractive for work, leisure and business.
- Develop and promote a broad event and destination profile to increase visitation, and diversify the economy.
- Build support for local business by taking advantage of Inland Rail, integrating advantage into major projects and tenders and providing business upskilling opportunities.



## Destination Country and Outback NSW - Destination Management Plan (DMP)

In 2016, DNSW established six Destination Networks in NSW. Warrumbungle Shire lies within the Destination Country and Outback NSW Region. This Region, which incorporates the New England North West, Central NSW, Orana and Far West Regions of NSW, is administered by the Destination Network - Country and Outback (DNCO). The Destination Network has adopted a DMP for the Region, with the core ambition of the Plan being to:

**'Provide an inspiring and innovative approach to grow the visitor economy of Country and Outback NSW and create meaningful connection between the place, its communities and businesses with visitors to the region'.**

The DMP has six high level goals:

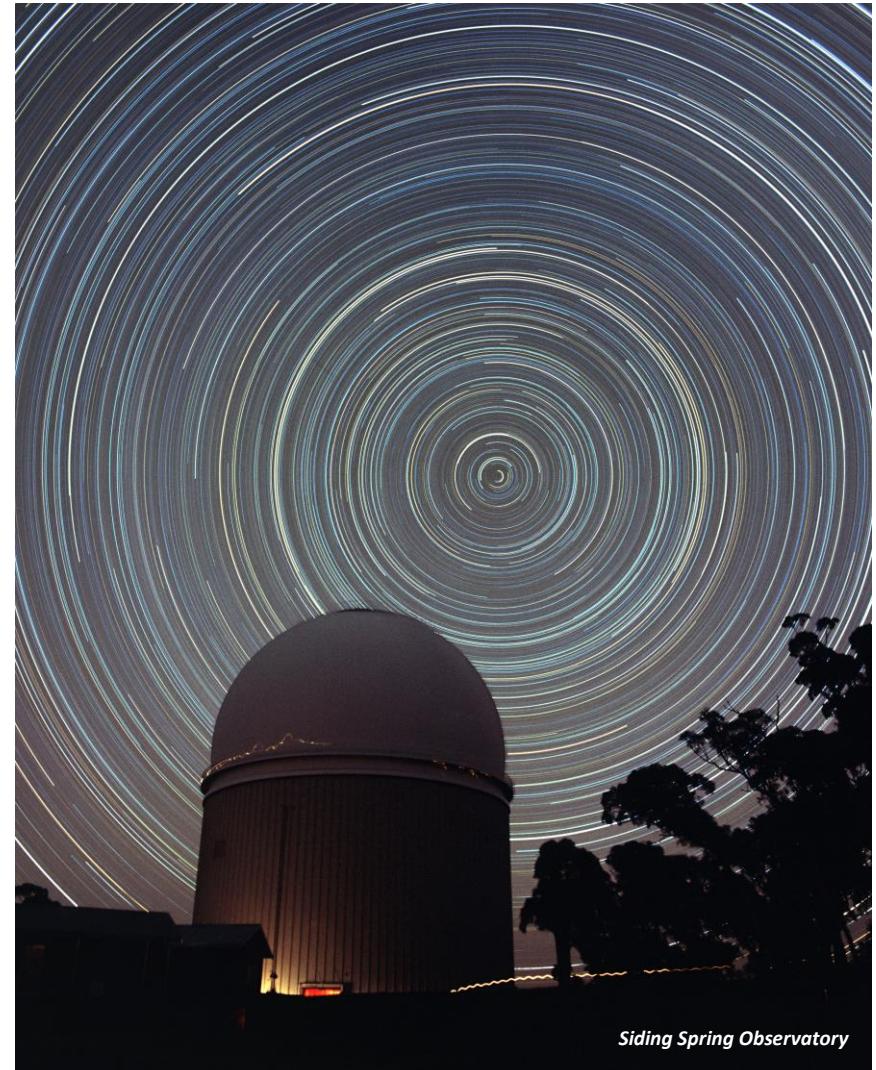
- Create a positive collaborative culture to support the growth of the visitor economy
- Increase visitation and yield to Destination Country and Outback NSW
- Strengthen the perception and awareness of Country and Outback NSW
- Build the capacity and capability of the industry and local government, to deliver on the expectations of visitors to the region.
- Facilitate the development or enhancement of products, experiences and events
- Enable effective and efficient communication with stakeholders and communities across the network.

The Destination Network is looking to grow existing markets:

- Touring, with the focus on 55+ years
- Visiting friends and relatives
- Event participants
- Nature and cultural visitors
- Short breaks with an emphasis on food and wine.

The Destination Network is also looking to diversify and build new markets including:

- Active families
- Younger adults
- More active 55+ years
- Conference and meeting markets
- International visitors – focusing on nature, cultural, and food and wine visitors.



For product development the Plan's positioning statement is:

**'Explore the unlimited possibilities of Country and Outback NSW, as mesmerising as the stars that stretch across the evening sky'.**

The Plan has 7 strategic product themes:

- **Celebrating culture on country:** enhancing existing and developing new meaningful and immersive Aboriginal cultural tourism experiences.
- **Wine Lovers and Foodie Finds:** Food, wine and agri tourism experiences including events and be-spoke experiences.
- **Unlimited horizons:** developing drive journeys and touring routes, flying tours and leveraging the night sky (eg camping under the stars).
- **Exploring Our Nature:** leverage opportunities for outdoor activities and adventures – bush walking, cycling, canoeing etc – both independent and guided tours.
- **Revealing our Heritage:** enhancing and expanding heritage experiences to bring heritage to life. This include events, trails and use of technology in story-telling and interpretation.
- **Little Places Big Stories:** leveraging small town stories and events to encourage travellers to explore and stay longer in the region.

Warrumbungle Shire has products and experiences that deliver on each of these themes, with the Shire's strengths lying in outdoors and nature-based, night sky and Aboriginal experiences.



*Flannel Flowers, Pilliga Forest*



*Woodland Learning Centre, Dunedoo*

### 3.3 Warrumbungle Shire – Community Strategic Plan 2032

The Warrumbungle Shire Community Strategic Plan 2032, articulates the vision, directions and framework for coordinating development, resource allocation and service delivery within the Shire. The Plan focuses on strengthening the Shire community and improving quality of life, protecting the environment, growing and diversifying the Shire's economy, and providing strong governance and leadership. Council's vision for Warrumbungle Shire is:

**What is most important to us is; our sense of community spirit, our children and our homes. Our plan for the future will support the growth, resilience and health of our people, our neighbourhoods, the environment and local economy.**

The Plan has 7 core goals, including strengthening the Shire's economy:

- **Natural Environment:** The good health of our natural environment and biodiversity is preserved and enhanced.
- **Local Economy:** Our economy is strong and sustainable, providing our communities with localised employment opportunities and ease of access to markets, goods and services.
- **Community and Culture:** The communities of our shire are safe, harmonious and supportive and are bound by vibrant social and cultural interaction and a strong local identity.
- **Rural and Urban Development:** Our Shire is characterised by its peaceful rural landscape, its thriving towns and villages and diverse agricultural activities.
- **Recreation and Open Space:** The communities of our Shire have abundant opportunities to participate in sporting and recreational interests of their choice.
- **Public Infrastructure and Services:** Our communities are provided with safe, functional, and well-maintained infrastructure and a comprehensive range of services.
- **Local Governance and Finance:** Warrumbungle Shire Council is recognised for its strong community leadership, sound financial and asset management, and ethical, accountable and responsive local government.



## 4. DRIVERS OF CHANGE

### 4.1 Macro Trends & Drivers

Warrumbungle Shire is operating in a national and global environment. There are a range of key macro-trends and drivers that have the potential to influence economic growth within the Shire.

| Macro Trends & Drivers   | Implications and Opportunities for Warrumbungle Shire   |
|--|---|
| <p><b>Changes in global markets</b> – globally, economic growth is being driven by the rise of the Asian and Indian markets. Increasing urbanisation, significant growth in household incomes and the use of agricultural land and produce for non-agricultural activities (eg bio-fuel), is creating strong demand for goods and services, particularly for food products.</p> <p><b>Food Security</b> – with the world's population growing by 1.1% per annum, and forecast to reach 8.4 billion by 2035, food security is becoming a major issue, with this driving research and investment in the agricultural sector and the expansion of agriculture in second and third world countries – eg Brazil, Chile, South Africa etc.</p> | <ul style="list-style-type: none"><li>• Growing demand for agricultural staples – meat, cereals, oil seeds and pulses.</li><li>• Potential for new niche crops and value-adding.</li><li>• Increased awareness of and willingness to pay for 'clean, green' produce.</li><li>• Much of the growth is occurring in the northern hemisphere, creating opportunities for counter seasonal production in the southern hemisphere.</li><li>• The opening up of new export markets.</li><li>• Growing competition from emerging agricultural producers (eg Brazil), with low cost structures – with Australian farmers needing to be more strategic, efficient and productive.</li><li>• Changes in farming practices, including a shift to more intensive production methods (eg feedlots, glasshouses), improved land and water management, and introduction of higher yielding plant and livestock varieties.</li><li>• Different freight requirements – increasing use of containers.</li><li>• New sources of capital from overseas investors.</li></ul> |
| <p><b>Climate Change</b> – increasing variability in climate and weather patterns is creating uncertainty regarding long term temperature and rainfall patterns as well as an increase in extreme weather events.</p>  | <ul style="list-style-type: none"><li>• Increased risk for agricultural producers and agricultural dependent industries and services.</li><li>• Warrumbungle Shire needs to diversify its economy to reduce its dependence on agriculture.</li><li>• Opportunities for development / adoption of technologies and/or land and water management practices to reduce risk.</li></ul>  |
| <p><b>Eco Efficiency and Sustainability</b> – the transition to a more sustainable and resource efficient economy moving towards a 'closed-loop' economy whereby all outputs become either inputs for other activities or are returned to natural systems as benign emissions rather than pollutants.</p>  | <ul style="list-style-type: none"><li>• Opportunities for new industries and businesses in energy and water efficient technologies; waste management, reduction and reuse; carbon farming; and alternative energy.</li><li>• Shift to investment in renewable energy and demand for land and/or materials for alternative energy production (eg solar and wind farms, bio-fuel production etc).</li><li>• Increased demand for 'green skills' within the workforce.</li><li>• Changing purchasing criteria and behaviour, with businesses increasingly needing to meet / comply with environmental / sustainability targets and accreditation criteria.</li><li>• Heightened community awareness and interest in 'clean – green' and locally produced products, creating opportunities for value-adding, niche marketing and premium pricing.</li></ul>   |
| <p><b>Digital Economy</b> – the internet and mobile technologies are transforming production techniques, business models and operations, communication modes and consumer behaviour.</p>   | <ul style="list-style-type: none"><li>• The ability to embrace and capitalise on the digital economy is dependent on access to high speed, reliable and affordable internet services and good mobile phone coverage.</li><li>• Increased opportunities for local businesses to improve their decision making and productivity, and access new markets.</li></ul>  |

| Macro Trends & Drivers  | Implications and Opportunities for Warrumbungle Shire   |
|---|---|
|   | <ul style="list-style-type: none"> <li>• Increased opportunities for some businesses and workers to relocate away from the cities and continue to operate nationally / internationally.</li> <li>• Potential for greater access to health, education, financial and other services through on-line delivery.</li> <li>• Opportunities for Warrumbungle Shire and businesses to significantly increase their exposure to, and engage and communicate directly with, potential customers.</li> <li>• Increased competition for local businesses from external businesses (eg internet shopping).</li> <li>• Growth in home-based, on-line and mobile businesses, moving away from shop-fronts and commercial premises.</li> <li>• Increased applications (eg remote monitoring, robotics) in agriculture and manufacturing – resulting in a reduction in demand for unskilled workers and increased demand for workers with IT / digital skills.</li> </ul> |
| <p><b>Changing population dynamics</b> in Australia including:</p> <ul style="list-style-type: none"> <li>• Aging population and workforce.</li> <li>• Generational change with 'baby boomers' moving into retirement and Gen X and Y becoming dominant in the work place. Gen X and Y have different aspirations and attitudes to work than the baby boomers.</li> <li>• Increasing focus on work-life balance and quality of life.</li> <li>• Diversified and growing cultural mix.</li> <li>• Consumers are becoming more aware, sophisticated and demanding.</li> </ul> | <ul style="list-style-type: none"> <li>• Aging population – increased demand for health, aged care and allied facilities and services.</li> <li>• The need to re-skill older workers, particularly in the use of IT and technology.</li> <li>• The need to be cognisant of the implications of generational change and social trends in developing investment and marketing strategies and marketing and promoting the Shire.</li> <li>• Lifestyle and work-life balance is playing an increasingly significant role in decision-making and needs to be incorporated in the development, positioning and marketing of Warrumbungle Shire.</li> <li>• Warrumbungle Shire needs to be a socially inclusive community that welcomes and embraces people from different ethnic and cultural backgrounds.</li> </ul>   |

## 4.2 Surrounding Region

Changes occurring in the Region surrounding Warrumbungle Shire that have the potential to impact on the Shire include:

| Changes Occurring   | Implications and Opportunities for Warrumbungle Shire  |
|---|--|
| <p><b>Increasing productivity of agriculture</b>, particularly in broadacre cropping, arising from changing technology, improved land and water management, and development of new crop varieties which are higher yielding and require less water.</p> | <ul style="list-style-type: none"> <li>• Opportunities for diversification.</li> <li>• Expansion of grain transport and receival facilities.</li> <li>• Growth in containerisation / intermodal services.</li> <li>• Establishment of new technology-based service providers and/or new products and services for existing businesses.</li> <li>• Changing skill needs within the agriculture and agri-business sectors.</li> <li>• Need for reliable, high speed, affordable internet / digital access to utilise emerging technologies.</li> </ul> |
| <p><b>Proposed expansion of feedlots</b> in the Liverpool Plains Shire and establishment of a large feedlot (25,000 head) near Denman in the Upper Hunter</p>   | <ul style="list-style-type: none"> <li>• Increased demand for livestock, feed, transport and related services.</li> <li>• Increased opportunities for backgrounding cattle for the feedlots.</li> <li>• Increased livestock freight movements to the east of the Shire.</li> </ul>   |

| Changes Occurring  | Implications and Opportunities for Warrumbungle Shire   |
|--|---|
| <b>Proposed development of large abattoirs</b> in Gunnedah (multi-species) and near Denman (cattle) in the Upper Hunter.   | <ul style="list-style-type: none"> <li>Increased options for cattle and possibly pig producers.</li> <li>Increased competition for the Binnaway Abattoir.</li> <li>Increased livestock freight movements to the east of the Shire.</li> </ul>   |
| <b>Expansion of coal mining</b> in the Gunnedah Basin, with the construction and operation of the Shenhua and Vickery South Mines (short term) – 1200 jobs during construction and 600-1000 when operational.                        | <ul style="list-style-type: none"> <li>Competition for labour, particularly trades and transport workers.</li> <li>Opportunities for seed collection and nursery businesses – supplying native plants and seed to the mines.</li> <li>Possible opportunities for local businesses to supply goods and services.</li> </ul>  |
| <b>Gas Extraction</b> in the Pilliga and pipeline construction – 1200 construction jobs and 200 operational jobs. Construction expected to commence within 2 years.  | <ul style="list-style-type: none"> <li>Possible employment opportunities.</li> <li>Possibly contract opportunities for local businesses.</li> <li>Opportunities for Baradine to provide accommodation and rental housing, particularly during construction.</li> </ul>  |
| <b>Inland Rail</b> , construction of the line from Narramine to Narrabri; expansion of the intermodal terminals in Narrabri; possible transport and logistics hub at Curban (longer term development proposed by Gilgandra Council). | <ul style="list-style-type: none"> <li>Opportunities for Baradine to become a base during the construction of the rail line – there is competition from Gilgandra Shire for this role.</li> <li>Possible access to the railway line at Baradine (likely to be longer term).</li> <li>Narrabri intermodal – increased options for Shire producers to diversify crops (eg pulses) and access market.</li> <li>Likely demand for hard rock aggregate for ballast – opportunity for Warrumbungle Quarry and other hard-rock resources.</li> </ul>   |
| <b>On-going expansion of Dubbo, Tamworth and Mudgee</b> – improved education and health services, rapid expansion of retirement housing and aged care facilities.  | <ul style="list-style-type: none"> <li>Increased leakage from Warrumbungle Shire.</li> <li>Competition for skilled and semi-skilled labour.</li> <li>Potential growth markets for day, short-breaks and event visitation to Warrumbungle Shire.</li> <li>Expanding tertiary education opportunities in Dubbo and Tamworth - students remaining in the region for tertiary education increases the likelihood of students and graduates seeking work within the region (including Warrumbungle Shire).</li> <li>Increased property prices in Dubbo and Mudgee, and social issues in Dubbo is resulting in outward migration to the smaller towns and villages in the surrounding area – Mendooran and to a lesser extent Dunedoo, are seeing interest in properties from Dubbo residents.</li> <li>Retirees (including farmers) gravitating to the larger centres rather than remaining in the Shire.</li> <li>Due to distance, possible opportunities for some Coonabarabran businesses to become a branch outlet for Dubbo and Tamworth businesses that are servicing the area.</li> </ul> |
| <b>Growth in the renewable energy sector</b> – proposals for wind and/or solar power generation in most LGAs in the Region and bio-fuel production in Dubbo.   | <ul style="list-style-type: none"> <li>Opportunities for local businesses and trades during construction.</li> </ul>  |
| <b>Upper Hunter horse studs</b> – the area is land-locked with very limited opportunity for expansion. The studs are starting to look at other localities including Liverpool Plains, Mid-Western and Dungog LGAs.                   | <ul style="list-style-type: none"> <li>Studs looking for land to expand – potential activity for the south-eastern corner of Warrumbungle Shire</li> <li>If the China racing market opens up (as forecast), there will be very strong demand for Australian racehorses, feed and equine services – this may create opportunities for establishment of studs in the south eastern corner of the Shire as well as increased demand for specialty horse feed and supplements.</li> </ul>   |

## 4.3 Warrumbungle Shire

Changes occurring in, or proposed for Warrumbungle Shire include:

| Changes Occurring / Proposed  |  |
|---|--|
| <b>Demographic Changes</b>  | <ul style="list-style-type: none"> <li>• Declining population – in the rural areas and in most of the towns and villages.</li> <li>• Aging population – 34% of population is 60+ years of age.</li> </ul>  |
| <b>Structural changes in the Agricultural Sector</b>                                  | <p>Changes in the agricultural sector include:</p> <ul style="list-style-type: none"> <li>• Increased specialisation in the livestock industry and a shift to cattle production.</li> <li>• Diversification in the cropping sector - there has been an increase in production of pulses as well as the introduction of dryland cotton.</li> <li>• Increase in productivity resulting from changes in land and water management practices, application of new technologies and the introduction of new crop varieties which are higher yielding and require less water. There has also been a significant increase in opportunistic feed-lotting to 'finish' stock.</li> <li>• Amalgamation of properties to create larger holdings.</li> <li>• Increase in on-farm storage of grain and pulses.</li> <li>• Generational change – younger people moving into the Shire</li> <li>• Increase in niche / boutique activities – production and value-adding- eg native plant nursery and cut flowers, native seed collection, olives, distillery.</li> </ul> <p>Changes in the Agricultural sector will have implications for the Shire's road network.</p> |
| <b>New and improved visitor attractions and facilities</b>                            | <ul style="list-style-type: none"> <li>• Warrumbungle Dark Sky Park – providing opportunities for development of products and experiences.</li> <li>• New Warrumbungle National Park Visitor Centre.</li> <li>• Siding Spring Observatory – upmarket lodge and the introduction of high-yield astronomy tours.</li> <li>• Royal Hotel redevelopment, Coonabarabran.</li> <li>• Proposed Binnaway Rail Museum.</li> <li>• Australian Wildlife Conservancy, Pilliga Forest (Narrabri Shire).</li> </ul>  |
| <b>Expansion of aged care facilities</b>  | <ul style="list-style-type: none"> <li>• Cooinda, Coonabarabran looking to expand.</li> <li>• Three Rivers Retirement Village in Dunedoo – under construction.</li> </ul> <p>Both developments will provided increased employment opportunities</p>  |
| <b>Re-opening of the supermarket, in Delgarno Street (east) Coonabarabran</b>         | <ul style="list-style-type: none"> <li>• Strengthen the shopping centre and providing more choice for residents.</li> </ul>  |
| <b>Newell Highway bypass of Coonabarabran</b>   | <ul style="list-style-type: none"> <li>• Likely to occur within 10 years</li> <li>• Taking trucks out of the town centre will improve the amenity of the Centre and provide opportunities for the town to be more life-style focused.</li> <li>• Potential decrease in visitor traffic coming into the town centre</li> <li>• Opportunities for a highway service centre / heavy vehicle mechanics and other service providers.</li> <li>• Likely demand for hard rock aggregate for road base – opportunity for Warrumbungle Quarry and other hard-rock resources</li> </ul>  |
| <b>Investment in Renewable Energy: Liverpool Range Wind Farm / Dunedoo Solar Farm</b> | <p>Construction of the Liverpool Range Windfarm is likely to commence in 2020, with a 3-year construction phase. The 267 turbine / 1000MW windfarm will employ up to 800 people (maximum of 250-300 on site concurrently) during construction and around 45 people when operational. A large solar farm is mooted for Dunedoo. These projects will generate demand for accommodation during the construction period, providing opportunities for accommodation and rental properties in Dunedoo and Coolah and possibly Binnaway and Mendooran.</p>  |

## 5. BUILDING OUR ECONOMY

### 5.1 Council's Goals

Council is seeking to build a strong and resilient economy, recognising that the strength of the Shire's economy underpins the prosperity and sustainability of the community. Council's goal<sup>20</sup> for the Shire's economy is:

**Our economy is strong and sustainable, providing our communities with localised employment opportunities and ease of access to markets, goods and services**

Economic outcomes being sought by Council<sup>21</sup> include:

- Strong agricultural sector that has long term viability
- Growth in the tourism sector
- Creation of local employment opportunities across a range of skill sets
- Providing goods and services locally to reduce economic leakage from the Shire
- Leveraging extractive and renewable energy projects to maximise benefits for the Shire community.

### 5.2 Driving Economic Development – Council's Role

Building the Shire's economy requires a 'whole of community' approach. Stakeholders extend well beyond Council and include businesses, industry groups, infrastructure providers, State and Federal Government Agencies, Siding Spring Observatory and regional organisations. Business development and investment will come primarily from the private sector. Warrumbungle Shire Council's will focus on providing a positive economic environment by:

- Being 'open for business' – providing a whole-of-Council approach that welcomes and facilitates appropriate development
- Encouraging, facilitating and advocating to remove 'road-blocks' to development, both internal or external
- Providing and maintaining enabling infrastructure to support growth
- Continuing to enhance the lifestyle and liveability of the Shire by protecting natural, heritage and cultural assets; improving facilities and services; and improving the presentation of the town centres
- Supporting local businesses
- Marketing and promoting the Shire to potential residents, businesses, developers and investors



*Autumn in Coonabarabran*

<sup>20</sup> Warrumbungle Shire Community Strategic Plan 2032

<sup>21</sup> Warrumbungle Shire Community Strategic Plan 2032

## 5.3 Strengths & Assets to Work With

The strengths and strategic assets that Warrumbungle Shire has to work with to encourage and facilitate economic development include:

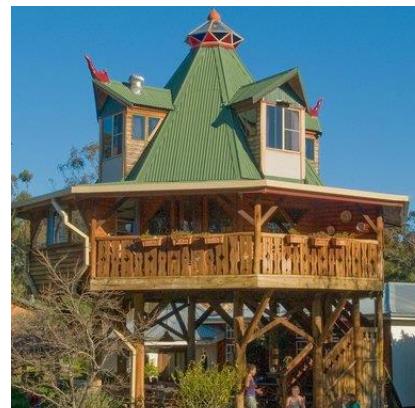
| Strength   | Assets to Work With   | Implications & Opportunities  |
|--|---|---|
| <b>Strategically located</b>                                     | <ul style="list-style-type: none"> <li>Halfway between Melbourne and Brisbane.</li> <li>5-6 hours from Sydney / 3-4 hours from Newcastle.</li> <li>Proximity to Dubbo and Tamworth – 2-2.5 hours, and the larger centres of Narrabri, Gunnedah and Mudgee – 1-1.5 hours.</li> <li>Location of Dunedoo on the Golden and Castlereagh Highways and Coonabarabran on the Newell Highway.</li> </ul>  | <ul style="list-style-type: none"> <li>Rural lifestyle with access to city facilities and services when needed.</li> <li>Access to Dubbo and Tamworth markets (over 100,000 people) for day trips, short breaks, events etc.</li> <li>Potential for Shire businesses to become distributors / branches of Dubbo and Tamworth-based businesses that service the Shire and/or to supply into these markets.</li> <li>Coonabarabran is Ideally positioned to attract the overnight stay for long-haul interstate travellers, with Dunedoo well located to attract the ‘pit stops’ along the Golden Highway.</li> </ul> |
| <b>Good road access and connectivity</b>                         | <ul style="list-style-type: none"> <li>Four highways and several regional roads feeding into the Shire – strong connectivity in all directions.</li> <li>Highway access to the Port of Newcastle.</li> <li>Good access to agricultural processing facilities in Dubbo, Gunnedah, Narrabri and Tamworth and existing and proposed feedlots – Liverpool Plains, Dubbo area and Upper Hunter – ready markets for local livestock and grain.</li> <li>Significant established and emerging touring routes into and through the Shire / local and regional road network provides alternative routes to the highway corridors (travellers can avoid heavy vehicles).</li> </ul> | <ul style="list-style-type: none"> <li>Potential opportunities for transport and logistics businesses.</li> <li>Further develop and promote touring routes.</li> <li>Reasonable access to agri-processing facilities discourages investment in facilities locally / poses competition to local facilities (eg Binnaway Abattoir).</li> </ul>  |
| <b>Rail Access</b>   | <ul style="list-style-type: none"> <li>Rail access and infrastructure in Dunedoo and Binnaway with rail access to the Port of Newcastle, Port Botany and Port Kembla.</li> <li>Closed railway corridors from Binnaway to Gwabegar and Coolah to Craboon.</li> <li>Good rail infrastructure (although not operating) at the Baradine Grain Receipt site.</li> <li>Inland Rail.</li> </ul>  | <ul style="list-style-type: none"> <li>Leverage opportunities arising from the construction of the Inland Rail.</li> <li>Inland Rail – provides access to the ports in Melbourne and Brisbane – access through intermodal terminals at Narrabri and Narromine, and possibly facilities at Baradine.</li> <li>Potential rail trail development on closed lines.</li> </ul>   |
| <b>Productive agricultural land / strong agricultural sector</b> | <ul style="list-style-type: none"> <li>Good soils and pastures with no mineral deficiencies.</li> <li>Reputation for producing quality livestock.</li> <li>Growing niche / specialty activities.</li> <li>Resilient and innovative farmers – adoption of new technology, business models and land management practices.</li> <li>Supporting infrastructure and services including the grain receipt site - Baradine, rural suppliers, veterinarian services, saleyards and transport and rural services contractors.</li> </ul>   | <ul style="list-style-type: none"> <li>Continued diversification and innovation.</li> <li>Intensive agriculture – feedlots, poultry production, horticulture.</li> <li>Capitalising on the reputation for quality livestock through branding.</li> <li>Value-adding.</li> <li>Diversification into goat production.</li> </ul>  |
| <b>Timber resources</b>  | <ul style="list-style-type: none"> <li>Pilliga Forest timber resource – the Baradine Sawmill timber quota is likely to be re-tendered.</li> <li>Strong demand for cypress timber in China (logs) and Japan (milled timber).</li> </ul>  | <ul style="list-style-type: none"> <li>Access to inland railway (at Baradine or Narrabri) may provide opportunities for the harvesting, processing and export of timber from the Pilliga Forest.</li> </ul>   |

| <b>Strength</b>   | <b>Assets to Work With</b>   | <b>Implications &amp; Opportunities</b>  |
|---|--|--|
|   | <ul style="list-style-type: none"> <li>Baradine Sawmill may come on the market – opportunity for a new operator.</li> </ul>  | <ul style="list-style-type: none"> <li>Explore options for forest by-products eg mulches, litter for poultry cages, bio fuels etc.</li> </ul>  |
| <b>Coal, gas, hard rock and sand resources</b>  | <ul style="list-style-type: none"> <li>Coal and coal seam gas resources underlying part of the Shire.</li> <li>Warrumbungle Quarry / hard rock resources.</li> <li>Sand resources.</li> </ul>  | <ul style="list-style-type: none"> <li>Seek to minimise impacts and maximise jobs and returns to the Shire community of any coal mining or gas extraction within or in close proximity to the Shire.</li> <li>Explore options to capitalise on hard rock resources for major construction projects – eg Inland Rail, Newell Highway bypass.</li> <li>Explore options for sand extraction and value-adding along the river corridors.</li> </ul>  |
| <b>Wind and solar resources</b>   | <ul style="list-style-type: none"> <li>Liverpool Range Wind Farm.</li> <li>Proposed solar farm near Dunedoo.</li> </ul>  | <ul style="list-style-type: none"> <li>Demand for accommodation and rental housing in Dunedoo and Coolah during construction.</li> <li>Potential for local business and trades to provide goods and services.</li> <li>Possible jobs – construction and operational.</li> <li>Employees potentially relocating to the Shire.</li> </ul>  |
| <b>Water Resources</b>  | <ul style="list-style-type: none"> <li>Quality mineral water – proposed water bottling plant near Dunedoo</li> <li>Historic Birrawa Homestead</li> </ul>   | <ul style="list-style-type: none"> <li>Use of the Homestead for unique accommodation / health spa.</li> <li>Potential to export water to China.</li> </ul>   |
| <b>National Parks, SCAs, Forests, Crown Reserves, Aboriginal Areas, wildlife and birdlife conservation programs</b> | <ul style="list-style-type: none"> <li>Three National Parks providing very different environments and experiences.</li> <li>Unique attractions / activities – Dandry Gorge, Fire Tower lookout.</li> <li>Aboriginal sites and experiences.</li> <li>Warrumbungle National Park Visitor Centre and Pilliga Forest Discovery Centre – quality experiences / educational resources.</li> <li>Warrumbungle Education Centre.</li> <li>Australian Wildlife Conservancy (AWC), Pilliga Forest – threatened species program.</li> <li>Dunedoo Woodlands Learning Centre / Barking owl conservation program.</li> <li>Platypus in the Coolaburragundy River at Coolah.</li> </ul>  | <ul style="list-style-type: none"> <li>Strong base for growing outdoor, adventure, nature-based, cultural and educational tourism.</li> <li>Potential unique sites for events.</li> <li>Conservation programs – unique stories and activities – position Dunedoo as a focal point for the Barking Owl conservation project and Baradine as a gateway to the AWC.</li> <li>Potential to create a platypus viewing and interpretative area at Coolah.</li> <li>Visitor Centres – ideal for coach tour groups.</li> <li>Lifestyle assets – highly marketable.</li> </ul>  |
| <b>Cluster of Astro-assets</b>  | <ul style="list-style-type: none"> <li>Siding Spring Observatory (SSO) – Exploratory &amp; Café, Lodge, Anglo - Australian Telescope, Tours, meeting facilities, stunning location / views: significant employer / brings money into the community.</li> <li>Dark Sky Park / quality night skies – first Dark Sky Park in Australia / international accreditation.</li> <li>Marketplace awareness due to media exposure – BBC and ABC Star Gazing Live Shows and other coverage.</li> <li>Commercial observatories – night-time activities for visitors to Coonabarabran.</li> <li>Virtual Solar System Drive.</li> <li>Very strong interest from the international in-bound markets for stargazing, particularly from the Chinese and other Asian markets.</li> </ul> | <ul style="list-style-type: none"> <li>Opportunities to work with the ANU to increase use of the SSO site.</li> <li>Leverage discoveries and scientific work to raise profile of the SSO and the Coonabarabran area.</li> <li>Grow astro-tourism – targeting both the domestic and international markets.</li> <li>Target national and international astronomy and dark skies conferences.</li> <li>Capitalise on the Siding Spring's lodge and meeting facilities – quality, unique experience.</li> <li>Grow the education, coach tour and group tour markets.</li> <li>Product development to capitalise on the dark skies – eg eco huts with glass roofs, hire of swags to sleep under the stars, educational / interpretative experiences.</li> </ul> |
| <b>Availability of accommodation</b>  | <ul style="list-style-type: none"> <li>Diverse range of accommodation.</li> <li>Sufficient accommodation capacity in Coonabarabran for conferences, coach tour groups and event attendees.</li> </ul>  | <ul style="list-style-type: none"> <li>Grow the volume visitor markets – conferences, coach tours, social groups, school excursions.</li> <li>Leverage the unique accommodation to raise awareness / build the profile of the Shire.</li> </ul>  |

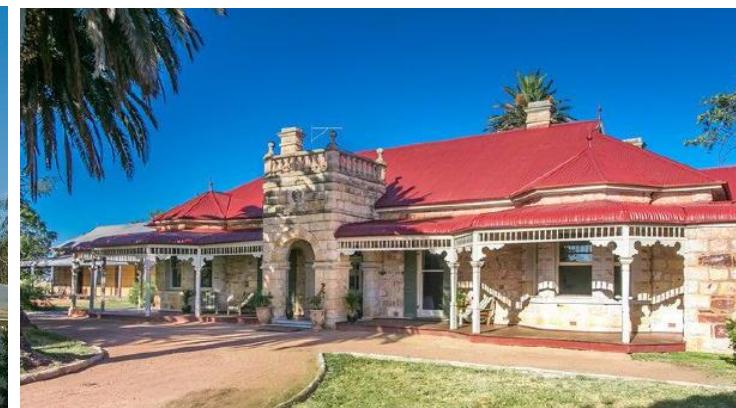
| Strength  | Assets to Work With  | Implications & Opportunities  |
|---|--|---|
|   | <ul style="list-style-type: none"> <li>Some unique accommodation – Siding Spring's Lodge, Pilliga Pottery – Barkala Farm Stay, Binnaway Railway Barracks.</li> <li>Royal Hotel re-development, Coonabarabran – a contemporary, boutique property.</li> <li>Accommodation suitable for groups.</li> <li>Attractive free and low-cost camping sites for the touring caravan and RV markets / riverside, national park and forest sites.</li> </ul> | <ul style="list-style-type: none"> <li>Leverage the proposed Royal Hotel redevelopment to build the regional day-trip and short breaks market.</li> </ul>   |
| <b>Attractive, well serviced towns</b>                | <ul style="list-style-type: none"> <li>Six attractive towns each with a different setting and offering different opportunities.</li> <li>Availability of all essential facilities and services for day-to-day living.</li> <li>Friendly, welcoming communities.</li> <li>Safe, caring environments.</li> </ul>   | <ul style="list-style-type: none"> <li>Availability of a range of lifestyle opportunities.</li> </ul>   |
| <b>Affordable land and premises</b>                   | <ul style="list-style-type: none"> <li>Availability of a range of competitively priced residential properties in each of the towns.</li> <li>Available, serviced industrial land in most of the towns.</li> <li>Planning scheme permits home-based businesses and agri businesses in rural area.</li> </ul>  | <ul style="list-style-type: none"> <li>Leveraged in marketing the Shire to potential residents, investors and new businesses.</li> </ul>  |
| <b>Good facilities for aging in place / aged care</b> | <ul style="list-style-type: none"> <li>Cooinda Retirement complex in Coonabarabran.</li> <li>Three Rivers Retirement Home in Dunedoo.</li> <li>Nursing homes beds in each of the towns.</li> <li>Facilities and services to support aging in place.</li> <li>Aging population.</li> </ul>  | <ul style="list-style-type: none"> <li>Opportunities to continue to expand aged care facilities and services.</li> </ul>  |
| <b>Reputation for good schools</b>                    | <ul style="list-style-type: none"> <li>Coonabarabran High School has a good reputation and achieves good results.</li> <li>Good child care and primary schools.</li> </ul>   | <ul style="list-style-type: none"> <li>Market Coonabarabran as an option for people from western and remote areas of NSW looking to relocate to access better education opportunities for their children but not wanting to move to / cannot afford to relocate to the larger regional cities.</li> </ul> |



*Royal Hotel, Coonabarabran*



*Barkala Farm Stay, Pilliga Pottery*



*Birriwa Homestead, Dunedoo*

## 5.4 Issues & Challenges

There are a range of challenges, barriers and issues that are impacting on Council's capacity to deliver growth; constraining or deterring development and investment; and/or rendering Warrumbungle Shire less competitive to other localities. These issues and challenges include:

| Issue  | Challenges for Warrumbungle Shire   |
|--|---|
| <b>Government regulations and policies –</b><br>The 'one size' fits all approach by the State Government to planning and LEPs is not conducive to development. Government 'red tape' can also discourage and/or delay development.   | <ul style="list-style-type: none"> <li>• Compliance with Government regulations has a time and cost impost on Council and also impacts on Council services and service delivery.</li> <li>• Cost shifting from Government to Council.</li> <li>• The time and resources required for Council and the private sector to navigate State Government approvals process.</li> <li>• Regulations have not kept up with changing technologies.</li> <li>• Ensuring that residents are aware of and understand the changes in regulations (eg planning controls and the development application process) and ways in which services are required to be delivered (compliance and accountability).</li> <li>• Limitations on creation of rural small-holdings with dwelling entitlements.</li> </ul>   |
| <b>Funding and resource constraints within Council.</b>  | <ul style="list-style-type: none"> <li>• Large size of the Shire, small population base and the need to deliver services in 6 towns and some of the villages.</li> <li>• Accessing the funds needed to maintain and augment infrastructure (eg roads) to facilitate and support economic activities and development.</li> <li>• Providing the range and level of services needed to compete effectively with regional cities and more affluent LGAs to attract and retain residents and businesses.</li> <li>• Ensuring that staff involved in customer service, planning and development matters maintain a facilitative and proactive approach.</li> <li>• Building in-house digital skills to maximise on-line and social media opportunities.</li> <li>• Improving communication within Council and between Council and the Shire community.</li> <li>• Completing projects and realising their full potential.</li> <li>• Providing the funds and resources to effectively market and promote the Shire to attract investment, workers, new residents and visitors.</li> <li>• Providing transparency in decision-making and resource allocation, and effectively communicating decisions to the community.</li> </ul> |
| <b>Negative perception of Council,</b> particularly in relation to gaining development approval.   | <ul style="list-style-type: none"> <li>• Council is perceived as being difficult to deal with rather than helpful for people interested in establishing / expanding businesses and/or undertaking development.</li> <li>• The planning process can be difficult for the general public to understand – it quickly becomes 'too hard' so developments do not proceed.</li> </ul>   |
| <b>Infrastructure capacity constraints</b> <ul style="list-style-type: none"> <li>• Water supply is not secure, particularly in Coonabarabran / poor quality of water in other localities.</li> <li>• Sewer infrastructure in some towns is at capacity and/or reaching the end of its economic life.</li> <li>• Being on the edge of the grid there are issues with the reliability of the power supply.</li> </ul> | <ul style="list-style-type: none"> <li>• Access to funds to replace / augment / maintain water, sewerage and drainage assets.</li> <li>• Advocating for electricity supply companies to augment the power supply and/or attracting investment to generate and reticulate power locally.</li> </ul>  |

| Issue  | Challenges for Warrumbungle Shire   |
|--|---|
| <b>Limited / costly telecommunications</b> <ul style="list-style-type: none"> <li>• No / minimal mobile phone coverage outside of the towns.</li> <li>• NBN fibre connections limited to the larger towns / not available to the Coonabarabran industrial area.</li> <li>• NBN only available by satellite throughout most of the Shire.</li> <li>• Internet – slow, unreliable and costly in most areas of the Shire.</li> </ul>                                  | <ul style="list-style-type: none"> <li>• Ensuring that all localities have good mobile phone coverage and improved, less costly internet access to enable adoption of new technologies and increase access to markets.</li> <li>• Difficulties in competing with larger centres that have faster / higher standard telecommunications infrastructure and services.</li> <li>• Coonabarabran industrial estate is not competitive with estates in other areas that have NBN connection, nor appealing to businesses that need high-speed internet access.</li> </ul>   |
| <b>Limited availability / lack of suitability of land and premises</b> , in particular: <ul style="list-style-type: none"> <li>• Industrial and commercial land and premises in Coonabarabran.</li> <li>• Industrial premises for lease or sale in other towns.</li> <li>• Residential rental properties in Coonabarabran and each of the smaller towns.</li> <li>• Limited availability of quality commercial / retail premises for lease or purchase.</li> </ul> | <ul style="list-style-type: none"> <li>• Lack of capital growth, particularly in the residential property market, is a deterrent to investors.</li> <li>• Virtually no suitable rental properties for people looking to relocate to the Shire and looking to ‘try before buying’ or who are relocating to the area for employment (particularly those for looking for quality housing). The very tight rental market also limits the ability of the Shire to provide short-term rental accommodation to leverage larger construction projects in the surrounding region.</li> <li>• Very difficult for someone interested in starting a business to find suitable land or premises, for sale or lease.</li> </ul>   |
| <b>Growing labour / skills shortages</b> – within the Shire and Regional NSW.  | <ul style="list-style-type: none"> <li>• Limited employment opportunities locally / limited career paths.</li> <li>• Difficulty is attracting workers, particularly skilled workers to the Shire. Lack of access to labour limits the ability of businesses to grow.</li> <li>• Understanding current and likely future labour and skills requirements and incorporating this into education and training programs.</li> <li>• Ensuring access to quality education and skills-based training to provide ‘work-ready’ employees and enhance and diversify workplace skills.</li> <li>• Providing strong pathways between education and employment to encourage young people to remain in, or return to, Warrumbungle Shire.</li> <li>• Supporting new business start-ups, including home-based, digital and mobile businesses.</li> </ul> |
| <b>Perceived remoteness and small size of the communities.</b>   | <ul style="list-style-type: none"> <li>• Recognising when formulating marketing activities that a significant ‘mind-shift’ is required for people to move from larger metropolitan areas to small, relatively remote towns.</li> <li>• Difficult to attract staff, particularly professional staff.</li> <li>• Effectively conveying the lifestyle attributes of Warrumbungle Shire in marketing and promoting the town.</li> <li>• Turning the remoteness into an advantage – leveraging off the distance by encouraging Dubbo / Tamworth based firms to establish branches / depots in the Shire and encouraging local businesses to expand their merchandise and/or service range by becoming ‘representatives’ for Dubbo / Tamworth-based businesses.</li> </ul>  |
| <b>Competition from Dubbo, Tamworth and Mudgee</b><br>Government investment and services are being increasingly focussed on regional cities (Dubbo, Tamworth) and designated strategic centres (Mudgee, Gunnedah). Services have been downgraded or withdrawn from smaller towns.  | <ul style="list-style-type: none"> <li>• Retaining services within the Shire.</li> <li>• Raising the Shire’s profile and differentiating it from other centres within the Region.</li> <li>• Encouraging people and businesses to support local businesses (buy local).</li> <li>• Ensuring that Government Agencies and decision-makers are aware of both the attributes and needs of Warrumbungle Shire and these are taken into consideration in the development of regional strategies and programs.</li> <li>• Having the funds and/or resources to participate in economic and community development programs and activities.</li> </ul>  |

| Issue   | Challenges for Warrumbungle Shire  |
|---|--|
| <b>Competition from other Shires</b> – most rural Shires are endeavouring to grow and diversify their local economies, and many offer a similar ‘product’ to Warrumbungle Shire.  | <ul style="list-style-type: none"> <li>• Raising the Shire’s profile and differentiating it from other LGAs / centres within the Region.</li> <li>• Continuing to improve the presentation of each of the towns – to create positive, memorable first impressions.</li> <li>• Ensuring that the Shire has a strong ‘open for business’ attitude and that this is effectively communicated, marketed and promoted.</li> <li>• Ensuring that comprehensive, up-to-date information and data is available and readily accessible for potential investors and residents.</li> <li>• Developing and implementing effective communications, public relations and marketing strategies.</li> <li>• Encouraging Councillors, the media and other ambassadors for the Shire to focus on the positives.</li> </ul> |
| <b>Very narrow economic base</b> with a strong dependence on agriculture.   | <ul style="list-style-type: none"> <li>• To further diversify the Shire’s economic base to reduce the dependence on agriculture, grow demand for goods and services, and inject additional revenue into the local economy.</li> </ul>  |
| <b>Increasing vulnerability of local businesses</b> – resulting from competition from other centres and on-line trading, declining and aging populations, increasing operating costs (particularly power), difficulties and cost of attracting, training and retaining staff, and limited business skills | <ul style="list-style-type: none"> <li>• Building capacity and resilience, to enable businesses to respond to change, leverage opportunities etc.</li> <li>• Upskilling business operators and the local workforce.</li> </ul>   |

Challenges and issues specific to the Shire’s key engine industries are:

| Agriculture   | Tourism   |
|---|---|
| <ul style="list-style-type: none"> <li>• Transport issues including distances and costs to grain receival sites, livestock sale yards, processing facilities etc; the poor condition of some local and regional roads (in particular the Baradine and Purlewaugh Roads and Black Stump Way); roads not approved for high productivity vehicles; high cost of fuel in the Shire compared to surrounding LGAs and no 24-hour fuel outlet (significant constraint during harvest).</li> <li>• No, or very poor mobile phone coverage / NBN satellite coverage is limited and expensive. This significantly limits the ability to adopt technology for land, water, stock and crop management; renders it difficult to market grain and other commodities (prices are updated hourly); make decisions in the field and communicate with staff, buyers etc; access online information and training; meet compliance requirements and undertake financial transactions on-line.</li> <li>• Difficulties in understanding, complying with and keeping up-to-date with Government and Council regulations – particularly EPA approval and licencing processes for feedlots and agri-processing activities; compliance paperwork; bio-security requirements; native vegetation act; bushfire regulations; and the time and costs involved in gaining planning approval, particularly for properties in the area around Siding Spring Observatory.</li> </ul> | <ul style="list-style-type: none"> <li>• The Shire’s key attractions (Siding Spring Observatory, National Parks, State Conservation Areas and State Forests) are managed by organisations for which tourism is an ancillary activity, not their core function. These organisations have limited funds and resources available for investment in visitor activities, facilities and services and to market and promote.</li> <li>• While tourism is a seven-day a week industry, very few businesses in the Shire are open Saturday afternoon, Sunday or public holidays. This is a significant constraint to targeting the regional day visit and short-breaks markets which predominately travels on weekends.</li> <li>• Some of the attractions and most of the accommodation properties are tired and/or dated. The external presentation of some properties is not inviting.</li> <li>• Accommodation capacity constraints in Dunedoo, and at times, Coolah. During the construction of the Liverpool Range Windfarm, workers could potentially take-up all the accommodation, displacing visitors.</li> <li>• Poor / limited customer service in some businesses.</li> <li>• Some tourism operators not effective in the digital space, with no or limited websites and/or a lack of on-line direct booking facilities. Many local businesses do not have a website and/or</li> </ul> |

| Agriculture  | Tourism   |
|--|---|
| <ul style="list-style-type: none"> <li>Difficulties sourcing labour – very few people have the skills needed. There is also a reluctance by some members of the community to take on work. Skills required are also changing rendering it more difficult to attract staff. The agricultural sector is also competing for labour with other sectors including mining and transport, with the competition likely to increase with the demand for labour for the construction of the Vickery South and Shenhua coal mines in the Gunnedah Basin, the Santos Gas Project in the Pilliga and the Liverpool Range Wind Farm/</li> <li>Many farms sizes are too small, with increasing reliance on off-farm incomes to supplement farm earnings. Employment opportunities in the Shire are relatively limited.</li> <li>Weed, feral animal and bushfire issues resulting in part from NPWS and NSW Forestry Corporation not having the funds or resources to properly manage their landholdings.</li> <li>Climate change and increasing number of severe weather events.</li> <li>Water restrictions / difficulty to increase water entitlements</li> </ul> | <p>have not claimed their google business listing and as such are not identified when travellers are searching for services.</p> <ul style="list-style-type: none"> <li>Poor mobile and digital coverage limiting access to information and booking engines while travelling.</li> <li>Warrumbungle Shire's Tourism Unit has a limited digital presence and is not active on social media.</li> <li>Tourism operators and businesses, and each of the towns, tend to work independently rather than collaboratively.</li> <li>Very few products and experiences in the Shire are 'export ready'.</li> <li>Difficulties in hosting events due to issues with the cost of insurance, limited / inadequate venue facilities, and attracting volunteers.</li> </ul> |



## 5.5 Opportunities

Securing the economic future of Warrumbungle Shire requires:

- Focusing on the engine industries that will generate income for and employment within the Shire, namely:
  - Strengthening the agricultural sector, focusing on increasing productivity and profitability of cattle, sheep and cropping activities; and diversifying into intensive and specialised production and value-adding opportunities.
  - Growing the tourism sector – both visitor numbers and yield.
  - Facilitating growth in the aged care sector
- Capitalising on natural resources – wind and solar, forest, hardrock aggregate and sand.

Possible opportunities are summarised below.

### Agriculture

Agriculture will remain the primary driver of the Shire's economy. The sector will continue to evolve with changes in land and water management and farming practices, application of technology, introduction of new crops and crop varieties, changing global and domestic markets and changing business practices. This will create opportunities along the length of the supply chain. Agriculture will however remain a cyclical industry with performance dependent on a range of climatic, market and other factors outside of the control of local farmers.

The opportunities lie in:

- Increasing productivity and profitability of agricultural activities. This requires investment by Government in improving transport and telecommunications infrastructure; streamlining the regulatory and compliance processes; on-going research and development coupled with agricultural extension services; and addressing labour and training needs.
- Intensification of production – encouraging activities that are more capital and labour intensive – including feedlots, horse studs, piggeries, poultry and game-bird production, and horticulture (including protected / glasshouse production).
- Controlling the supply chain – from paddock to plate. This can create opportunities for processing, blending and packaging.
- High yield niche products – for restaurant trade, fresh produce and medicinal use.



*Tour Group, Trip Point Lookout, SSO*



*Stud Bull, Chadwick Downs, Coonabarabran*

## Goat Production

Goat farming is a growth industry both in Australia and globally. Goats are farmed for meat, milk production and fibre, with goats for meat production being the fastest growing sector.

Australia is the world's largest exporter of goat meat with the meat exported in several forms – live goats (generally air-freighted to the Middle East), fresh and frozen carcasses, and processed and packaged meat products. The global demand for goat meat significantly exceeds supply, with Australian farm-bred meat goats attracting a premium price in the European, Asian and Middle Eastern markets. Domestically, demand also significantly exceeds supply, particularly for halal killed meat. Issues with continuity of supply are the major constraint to growing the industry.

Warrumbungle Shire has several assets which render it ideal for goat production:

- Large tracts of marginal land: Goats consume around 80% woody shrubs and 20% pastures. Goats are ideally suited to small holdings in marginal country, with stocking rates being considerably higher than cattle (5-7 goats = 1 cow). Goats require less work than sheep and are currently fetching similar prices.
- Feral goat populations in the Pilliga Forest area and other forests which could potentially be harvested.
- Binnaway Abattoir has recently sold, with the buyer being interested in Halal kill.
- Proximity to the Port of Newcastle – for export of goat meat.



## Piggeries

Warrumbungle Shire has several piggeries.

Over the past decade the swine industry in Australia has contracted, while the consumption of pork in Australia increased by 20%, with imports increasing from 31% of pork consumed to over 50% of pork and 80-90% of bacon.

With the growing focus on 'fresh' and 'locally produced' food there is very strong demand from both independent butchers and the restaurant trade for locally produced, quality pork. There is also demand from the restaurant trade and from Asian markets for suckling pigs.

The closure of abattoirs and/or the move to specialised abattoirs and/or halal certification has resulted in piggeries in Warrumbungle Shire having to transport stock to Sydney or Kempsey to be killed. This stresses the pigs, significantly increases costs and reduces profitability.

The availability of small prefabricated slaughterhouses may provide opportunities for the Shire piggeries to kill, process and package onsite, increasing profitability and providing local employment opportunities.

## Specialist Poultry and Game Birds

There is strong demand for specialist poultry and game birds for the restaurant market and from ethnic communities within the domestic market. There may be potential for specialist production and processing in the south eastern corner of the Shire that has ready access to the Sydney, Hunter Valley, Mudgee and Central West markets.

The availability of prefabricated slaughterhouses suitable for poultry, provides opportunities for value-adding.



## Horse Studs

Land capacity constraints in the Upper Hunter is limiting the growth of the thoroughbred and stock horse studs and related activities, with breeders looking for options to expand.

There is a high probability that the China racing market will open-up, generating strong demand for Australian racehorses, feed and equine services – this may create opportunities for the establishment of studs in the south eastern corner of the Shire as well as increased demand for specialty horse feed and supplements.

## Native Seed & Plant Production

Warrumbungle Shire has a small cluster of businesses that specialise in native plants - Bilby Blooms which is a wholesale native plant nursery and cut flower supplier, Diversity Native Seeds which is a producer and distributor of bulk native seeds and several native seed collectors.

There may be potential to build on this expertise, capitalising on the demand in restaurant and boutique food production sectors for quality native food plants as well as growing demand from Australian Gin producers for native plants (eg finger limes, cinnamon and lemon myrtles, pepper leaf, pepper-berry, wattle seed, bush tomatoes etc) for production of flavoured gins. There is also growing demand for native plants for use in cosmetics, toiletries and medicine.



## Tourism

Growing the tourism sector will inject dollars directly into each of the towns. With the impact of the Wambelong bushfire and limited investment over the past decade in new visitor products, experiences, facilities and infrastructure, tourism has stagnated in parts of the Shire. The Shire is at a turning point. The declaration of the Warrumbungle Dark Sky Park coupled with the recent media exposure through the ‘Stargazing Live’ television series, the new Warrumbungle National Park Visitor Centre, the proposed Australian Wildlife Conservancy (Pilliga Forest in Narrabri Shire) and the Royal Hotel re-development provides opportunities to reinvigorate the tourism sector. Going forward, the Shire needs to focus on:

- Leveraging its astronomy and astro-related assets, positioning the Shire as the ‘must see’ place to visit to experience the night skies.
- Outdoors, nature-based and Aboriginal experiences – positioning the Warrumbungle and Coolah Tops National Parks and the Pilliga Forest as destinations in their own right, each offering a very different experience; and capitalising on the proposed Australian Wildlife Conservancy and the Barking Owl conservation project to raise the profile of the Shire for bird, wildlife and wildflower viewing.
- Place-making in each of the towns to enhance both their attractiveness to passing traffic and the touring market, as well as their ‘liveability’ for existing and potential residents.
- Linking and packaging assets and experiences – eg through scenic drives and themed trails and routes.
- Supporting and growing events, leveraging every opportunity to showcase and raise the profile of the Shire.

Sitting beneath this, there is a need to improve and strengthen local attractions, and progressively build new facilities and activities (eg cycle tourism). Potential opportunities are outlined below.



## Leveraging Astronomy and Astro-related assets

Astro-tourism has been flagged as the ‘next big thing’ in global travel.<sup>22</sup> Promoting the night skies is a priority of the Country and Outback Destination Network. Stargazing also appeals very strongly to the inbound Asian market.

The recent declaration of the Warrumbungle Dark Sky Park provides the Shire with international recognition for the quality of the night sky. The Shire has concentration of astro-assets – Siding Spring Observatory (SSO), Milroy and Warrumbungle Observatories, Virtual Solar System Drive, Starfest, and the interpretative information in the new Warrumbungle National Park Visitor Centre. The recent publicity generated by the Stargazing Live series and other media coverage of the SSO has also raised the profile of the area. Allied to this are the radio telescopes at Parkes and Narrabri and the proposed Planetarium at Tamworth, each offering opportunities for cross promotion.

Opportunities and actions required include:

- Bringing all the astro-attractions and experiences together to create a product cluster – this requires breaking down the ‘silos’.
- Re-structuring the Warrumbungle tourism website to have a dedicated Astro page that stimulates interest and shows visitors how they can experience the night skies.
- Developing a strong ‘story-line’ for the Dark Sky Park – incorporating both the brilliance of the night sky and the benefits of the absence of light pollution. The benefits to bird and wildlife ties in with bird and wildlife ‘themes’.
- Encouraging products, experiences and activities that capitalise on the dark sky – eg Eco huts with glass roofs; glamping tents with clear roofs; providing campsites and swags to enable visitors to sleep outdoors under the stars; running astro-photography classes.
- Establishing a free night time viewing area close to Coonabarabran where people could drive or walk to (similar to the sunset viewing areas on the Hay Plains and at Silverton). This could be set up with oversized, permanent deck chairs (eg the big bench at the Lookout at Broken Hill) where people can sit back and enjoy the night skies. Accommodation operators could support this by providing guests with red light torches (as used at Siding Spring), specially created quilts and powerful binoculars to make the experience memorable.
- Cross promotion and value-adding: accommodation operators working with the commercial observatories – adopting the McDonalds ‘do you want fries with this’ approach – encouraging guests to book an observatory tour when they book their accommodation.

- Strengthening the relationship with Siding Spring, and providing support to expand educational activities (exploratory, tours etc), grow astronomy tours and related activities such as astro-photography workshops and promote the Lodge and conference facilities as a ‘unique’ venue. A more coordinated and cooperative approach to marketing and promotion is required to maximise the benefits from media coverage generated by the SSO, and to showcase and promote the work being undertaken and the discoveries that have and are being made.
- Re-vamping the Virtual Solar System Drive, increasing awareness and supporting the drive with a downloadable APP to provide more detailed information and interactive activities with this targeted to the family market.
- Capitalise on the night skies / space themes in public art, playground equipment, events etc. For example, explore the feasibility of holding an annual photography competition / exhibition that features all things night.

*Coonabarabran could take inspiration from Broken Hill’s Big Bench, to provide a quirky place in town to view the night sky*



## **Outdoors, Nature-based and Aboriginal experiences**

The opening of the new Warrumbungle Shire Visitors Centre provides the opportunity to focus attention on the Shire's national parks, forestry and woodland assets; as well as the outdoor, adventure, nature-based and Aboriginal experiences available in the Shire; wildlife and birdlife conservation programs; and the Shire's specialisation in native seed collection and native plant production. The opening of the Australian Wildlife Conservancy will provide another attraction in the Pilliga Forest as well as another significant promotional opportunity.

Opportunities include:

- Working with NPWS to maximise the publicity from the opening of the new Visitor Centre and 're-launch' the Warrumbungle National Park – possibly tying it in with drought initiatives to encourage urban dwellers to visit the area, as well as with the Dark Sky Park. As part of the re-launch, direct market to activity-based clubs, organisations and media – 4WD, bushwalking, birdwatching, rock sports etc; and explore options for joint marketing with Siding Spring Observatory – Dark Sky Park.
- Targeting the regional market (day trips and short-breaks) – encouraging them to visit the new Warrumbungle Visitor Centre and experience the Park.
- Positioning the Warrumbungle and Coolah Tops National Parks and Pilliga Forest as three very distinct and different destinations, with a focus on cross-promotion.
- Establishing a geo-trail, building on the work undertaken for the Geo-Park.
- Capitalising on the Barking Owl project, seeking to position Dunedoo and the Woodland Learning Centre as the focal point for telling this story. Dunedoo is also a prime location for introducing visitors to other conservation and land management projects in the Shire and surrounding region and promoting Bilby Blooms and the seed collection activities.
- Building on the wildlife viewing and conservation themes, explore options for platypus viewing in the river at Coolah.
- Ongoing development and promotion of the Pilliga Forest – improving road access, promoting the Australian Wildlife Conservancy, exploring options to introduce virtual and augmented reality experiences at the Pilliga Forest Discovery Centre and linking these with activities and sites within the forest – eg history of forestry – Wooleybah Sawmill site; bushfires and the fire tower lookout.
- Working with NPWS to improved access to and visitor facilities in the Coolah Tops National Park, and strengthening the link between Coolah and Coolah Tops.
- Working with Forestry Corporation and National Parks, to explore opportunities for developing mountain-bike trails. The Yarrigan CCA has been suggested as a potential area.
- Bringing the wildlife / birdlife / wildflower themes into arts-based events and activities, public art, town centre streetscapes and other public spaces.



## Place-Making & Strengthening Local Attractions

Each of the towns is dependent in part on passing traffic and the drive touring markets. Providing quality visitor facilities and enhancing presentation of the gateway corridors, town centres and parks and gardens, supported by welcoming, friendly and efficient customer service, will encourage travellers to stop, explore and spend in the towns, and build repeat visitation and word-of-mouth referrals. Improving / developing local attractions will encourage travellers to stay longer in the area.

Opportunities to strengthen the towns include:

### Coonabarabran

- Continue to improve the presentation and amenity of the town centre and individual businesses, including incorporating public art.
- Continue to upgrade Neilson Park and the riverside reserves, exploring opportunities for themed plantings and public art.
- Establish a viewing area (see Astro Tourism Opportunities) for night-sky viewing.
- Update the displays in the Coonabarabran VIC.

### Coolah

- Continue to improve the presentation of the town centre and town entry corridors.
- Explore options to improve access to the Coolaburragundy River – create a riverside reserve, platypus viewing area with interpretation, and a riverside shared walking-cycle pathway.
- Provide a shared pathway between the caravan park and town centre – suitable for ‘gophers’ and people with mobility limitations.
- Improve directional signage to (eg from the Golden Highway and the Vinegaroy – Coolah Creek Road intersection).
- Explore options for rail and horse trails

### Dunedoo

- Encourage property owners to improve the presentation of their shop fronts, bringing them up to the same standard as the Old Bank building.
- Position the town as the focal point for the Barking Owl conservation project – with a large barking owl sculpture and interpretation in the town centre park.
- Raise the profile of and improve visitor facilities and interpretation at the Woodland Learning Centre.
- Investigate the feasibility of converting the silos into a lookout / gallery, modelled on the Berri Water Tower Lookout in South Australia.
- Enhance the Talbragar River corridor
- Explore options for showcasing native plants – with the link to Bilby Blooms.
- Explore opportunities to encourage the black swans to return

### Binnaway

- Continue to improve the primitive camping area at Pumphouse Reserve – resolve land ownership issues, and provide a dump point and a shared riverside pathway between the reserve and the town centre.
- Support the Binnaway community in establishing the rail museum.
- Continue to improve the landscaping in the main street, building on the town’s rail heritage.
- Explore the feasibility of utilising the closed railway line to establish a rail-trail between Binnaway and Coonabarabran.

### Baradine

- Continue to improve the presentation of the main street. Explore options to include sculptures / public art showing the native species being re-introduced by the Australian Wildlife Conservancy (AWC).
- Work with the NPWS and Forestry Corporation to improve road links and directional signage between Baradine and Dandry Gorge, Pilliga Pottery and other Forest attractions.
- Continue to improve Camp Cypress, including providing walks, and trails for mountain-bikes and horses.
- Assess the feasibility of establishing a rail trail between Coonabarabran and Baradine.

### Mendooran

- Improve the presentation of and facilities at the park / rest area along Merrygoen Creek.
- Improve facilities and upgrade road access (Bandulla Street) to the primitive camping area and recreation reserve on the Castlereagh River. Link this area to the town centre with a sealed shared pathway.
- Improve access to the Castlereagh River bed, providing an area when canoes can be launched (when the River has water).
- Signpost and promote the Castlereagh Highway / Mendooran Road as an alternative touring route between Dubbo and Coonabarabran.



## Events & Activities

Events form part of the attraction and activity base of the Shire. Locally they are also part of the cultural and social fabric of the area, providing an opportunity to bring visitors and residents together, ‘tell stories’, and create memorable experiences. For visitors, events provide a reason to visit – they are essentially a ‘call to action’. They also generate publicity and focus attention on the area. Events can be a key driver in economic, social and cultural development and play a role in the ‘tree change’ process.

Warrumbungle Shire has a diverse program of events, some of which draw significant numbers of visitors into the Shire. There is opportunity to continue to build and value-add to existing events, bid for ‘footloose’ events (eg CMCA rally) and introduce new events and activities.

There is a need to continue to improve infrastructure to support events, and provide event signage in strategic locations throughout the Shire, with events supported by effective marketing and promotion. There is also a need to explore opportunities to reduce insurance costs.

## Creative Arts

Warrumbungle Shire has a strong creative arts community, arts-based activities, events and attractions including Pilliga Pottery, Tibuc Gardens and the sculptures in Dunedoo and Baradine. Harnessing the arts can be used very effectively to:

- Showcase, link and strengthen key product themes (eg astro, nature-based).
- Improve the presentation and attractiveness of town centres and other public spaces.
- Strengthen and value-add to attractions and events.
- Provide activities that attract visitors to the Shire – eg photography and arts-based workshops and exhibitions.
- Contribute to the Shire’s positioning as a lifestyle destination – a vibrant, creative place to live and visit.

## Cycle Tourism

Cycle tourism is a strong growth sector, with independent travellers, social groups and cycle clubs travelling specifically to areas to ride, as well as an increasing number of visitors, travelling with bicycles. Warrumbungle Shire has a very attractive setting for cycle tourism, with the towns and villages being well connected and well-spaced for the road cycling enthusiasts. The historic pubs and contemporary cafes are also favoured by this market.

The cycling infrastructure in the Shire is currently very limited, however there are possible opportunities for product development, including:

- Rail trails between Binnaway – Coonabarabran – Baradine utilising the closed section of the Gwabegar Rail line, and possibly between Coolah and Dunedoo on along the former Coolah line.
- Cycleway along Timor Road, from Coonabarabran to and through the Warrumbungle National Park.
- Developing and promoting mountain bike touring routes, through the Pilliga Forest and possibly the National Parks.
- Developing purpose-built mountain bike trails / Mountain bike park



*Exhibits from ‘The Common Thread – Custodians of Knowledge Exhibition, held at the Pilliga Forest Discovery Centre, Baradine*

## Leveraging Natural Resources

Natural resources that could potentially be leveraged to provide employment in production and value-adding, include timber and bio-mass from the Pilliga Forest, wind and solar resources for renewable energy generation, extraction of river sand and quarrying hard-rock for aggregate.

### Forestry / Timber

Forestry was previously a significant engine industry for Warrumbungle Shire with the Pilliga Forest being the largest resource of white cypress in NSW. The 2006 Brigalow Forest agreement resulted in large tracts of Forestry holdings being transferred to National Parks, with approximately 258,000 hectares of forest remaining in production<sup>23</sup>. In 2006 the Forest supported 16 sawmills, the last of which at Baradine has recently closed. The Brigalow Forest Agreement assessed the sustainable logging yield at 40,000 cubic metres per annum. Three logging contracts were awarded, the two largest to Baradine Sawmill (20,000m<sup>3</sup> pa) and Grants Holdings from Narrandera (14,390m<sup>3</sup> pa) with the contracts in place to 2025<sup>24</sup>. Grants is actively harvesting in the Pilliga with the logs transported to Narrandera for milling. Grants supplies cypress pine timbers for both the domestic and export market and produces a range of landscape products from the residual. Baradine Sawmill has ceased operations and its timber allocation returned to the Forestry Corporation of NSW.

The Forestry Corporation of NSW is likely to re-allocate all or part of the Baradine Sawmill timber rights. There is very strong demand in the domestic market for cypress pine flooring and other products. There is also strong demand from China for sawn logs and from Japan for milled cypress timber. By-products are in demand for landscape supplies, 'litter' for poultry sheds and potentially bio-mass / bio-fuel production. With the intermodal terminal at Narrabri having access to both the Inland Rail and the NSW rail network and the intermodal at Wee Waa having access to the NSW rail network, there may be opportunity to harvest, mill and containerise timber in Baradine and export it through Narrabri or Wee Waa. Longer term, it may be possible to utilise the rail infrastructure in Baradine to access the Inland Rail.

### Renewable Energy

Renewable energy is a new industry for the Shire. The Liverpool Range Windfarm has been approved with construction expected to commence in 2020, with the windfarm commissioned at the end of 2022. The construction workforce is estimated at 800 people with 250-300 on-site concurrently, with an operational workforce of 45 people. A 66MW solar farm has been proposed for Dunedoo, with the project at the initial investigation stage.



### Sand Extraction

There are significant sand resources in the Castlereagh River and potentially the Talbragar River that could potentially be extracted. There is a shortage of sand for construction activities in NSW. There is also potential to utilise the sand to produce pavers. Further investigation should be considered.

### Hard Rock

Warrumbungle Shire has a hard rock quarry as well as hard rock resources, suitable for production of aggregate for road base and the construction industry. The construction of the Inland Rail and the proposed Newell Highway by-pass will require significant volumes of ballast and road base. Given the process and timeframes involved in gaining approvals to increase production rates in existing quarries and developing new resources, the process would need to be started almost immediately to capitalise on these opportunities. Glen Innes Severn Council in northern NSW has used their quarry pits for water storage to drought-proof the town. There may be opportunity for Warrumbungle Shire to adopt a similar approach.



<sup>23</sup> The Pilliga Forest is spread over Warrumbungle (51,000ha), Narrabri (185,000ha), Coonamble (17,800ha) and Gilgandra (4,450ha) Shires.

<sup>24</sup> Forestry Corporation of NSW Timber Agreements

## Other Opportunities

Other opportunities for economic growth and new business development suggested by the Shire community included:

| Aged Care  | Transport & Logistics   | Other  |
|--|---|--|
| <ul style="list-style-type: none"><li>Expansion of Cooinda, Coonabarabran</li><li>Additional nursing home beds, Dunedoo</li><li>Self-care retirement units and hostel, Coolah</li><li>Self-care retirement units, Baradine</li><li>Additional services to support aging in place</li></ul> | <ul style="list-style-type: none"><li>Truck wash</li><li>24 hour fuel outlet in Coonabarabran</li><li>Highway service centre – Newell Highway bypass</li><li>Containerisation facilities at Baradine</li><li>Storage / truck depots</li></ul> | <ul style="list-style-type: none"><li>Encouraging self-employed professionals, home-based businesses, specialty manufacturers and trades people (construction, mechanical and engineering) to relocate to the Shire.</li><li>Encouraging people to turn hobbies and interests into micro-businesses.</li></ul> |



## **6. PRIORITIES, STRATEGIES & ACTIONS**

**In facilitating economic growth Council is seeking to:**

- Stabilise and potentially grow our population base.
- Support, retain, strengthen and grow local businesses.
- Position Warrumbungle Shire as a place where people wish to live, work, visit and invest.
- Attract new investment that is sustainable and compatible with community aspirations and the Shire's environment.
- Support the creation of local employment opportunities.
- Upgrade existing infrastructure and secure enabling infrastructure.
- Ensure responsible stewardship of resources.

**We envisage an economic future where our:**

- Population is increasing.
- Community is vibrant, engaged and inclusive.
- Economy is diversified, sustainable and resilient.
- Farms and businesses are innovative, entrepreneurial, profitable and sustainable.
- Visitor economy is thriving.
- Workforce is well educated, skilled, capable and productive.

### **Strategic Initiatives:**

Our strategic initiatives to facilitate and drive economic development are:

- Initiative 1: Warrumbungle Shire is 'Open for Business'.
- Initiative 2: The foundation blocks needed to stimulate and support economic development are in place.
- Initiative 3: A strong and positive profile Warrumbungle Shire.
- Initiative 4: Grow from within - support and nurture key engine Industries, emerging Industry sectors and local businesses
- Initiative 5: Target new businesses, investment and economic activities



Dunedoo

## Strategic Initiative 1: Warrumbungle Shire is ‘Open for Business’

Council, through its various touch points, is typically the first point of contact for potential new residents, businesses, developers and investors. Being ‘open for business’ is fundamental to facilitating economic growth. As part of providing a positive, supportive and responsive investment environment, Council will:

- Provide leadership and direction.
- Ensure that the service it delivers is welcoming, professional and efficient.
- Be pro-active and willing to discuss ideas, concepts and projects, and work through concerns and issues with the proponent to deliver the best outcomes for the Shire.
- Advocate strongly with Government Agencies to protect the interests of the Shire, deliver critical infrastructure and find innovative solutions that will stimulate appropriate and sustainable development.
- Communicate effectively with stakeholders

### Strategies

Strategy 1: Be a pro-active and supportive Council

Strategy 2: Build strong partnerships and strategic alliances

Strategy 3: Establish effective networks and communication channels



| Strategies   | Actions   |
|--|---|
| <b>Strategy 1: Be a pro-active and supportive Council</b>  |   |
| 1.1 Provide the framework and resources to coordinate and drive economic development   | <ul style="list-style-type: none"><li>1.1.1 Ensure that Council’s culture, structure, roles and responsibilities and internal communication channels are conducive to driving economic development within the Shire.</li><li>1.1.2 Align plans and strategies to deliver growth.</li><li>1.1.3 Ensure that staff resources and funds are in place to implement the EDS and coordinate and drive economic development.</li></ul>   |
| 1.2 Ensure that Council’s customer service procedures for handling development enquiries and processing development applications are ‘best practice’ – welcoming, helpful, professional and efficient. | <ul style="list-style-type: none"><li>1.2.1 Review Council’s policies, plans, processes and regulations to ensure that they facilitate and support development.</li><li>1.2.2 Ensure that Council’s systems and procedures for handling and processing development and investment enquiries are welcoming, streamlined and customer focused, with systems in place to follow-up and monitor and report on ‘leads’ and opportunities.</li><li>1.2.3 Identify ‘touch points’ where visitors who may be interested in relocating to / investing in the Shire, come into contact with Council staff (eg Council Reception, VIC) and provide training for staff in recognising and responding to enquiries, including providing information, taking details and possibly making introductions.</li><li>1.2.4 Ensure that internal communication protocols (between customer service, VICs, planning and economic development) are effective, with linkages to the General Manager, Senior Staff and Mayor.</li><li>1.2.5 Put in place a monitoring and feedback system and continue to improve practices and procedures.</li></ul> |
| 1.3 Ensure that developers / investors and potential new residents and   | <ul style="list-style-type: none"><li>1.3.1 Ensure that all plans, strategies and policies relevant to development, clearly articulate Council’s vision and objectives for the Shire, with these documents readily identified on Council’s website and easy to download.</li></ul>  |

| <b>Strategies</b>   |       | <b>Actions</b>   |
|---|-------|--|
| businesses have access to up-to-date, comprehensive information on the Shire.   | 1.3.2 | Continue to provide Community and Economic Profile data.   |
|   | 1.3.3 | <p>Continue to improve and expand Council's website to incorporate:</p> <ul style="list-style-type: none"> <li>○ Information for new residents – a downloadable New Resident's Guide / pack.</li> <li>○ Information for potential developers / investors – information on the Shire and its advantages / strengths, link to the Community and Economic Profile data, industrial land available, Council and Government initiatives to encourage and support development.</li> <li>○ An introduction to the planning process – providing an overview of what to do and what is expected.</li> <li>○ Service guide for existing businesses – links to Government Agency websites that provide services.</li> <li>○ A more prominent link to the Warrumbungle Tourism Website.</li> </ul> |
| <b>Strategy 2: Build strong partnerships and strategic alliances</b>  |       |  |
| 2.1 Strengthen relationships with Government Agencies, Regional Organisations, infrastructure and service providers.                  | 2.1.1 | Build strong relationships with key Government Agencies, regional and infrastructure and service providers.  |
|   | 2.1.2 | Brief and continue to update the regional Government offices on the key priorities and projects for Warrumbungle Shire. Endeavour to ensure that the Shire's priorities and projects are recognised in regional strategies, plans and priority project lists.  |
|   | 2.1.3 | Actively participate in forums and workshops run by these Agencies and respond to invitations to comment on draft plans and strategies.  |
|   | 2.1.4 | Advocate to host regional meetings in the Shire.   |
|   | 2.1.5 | When needed, advocate strongly for improved infrastructure and services.   |
| 2.2 Engage with Members of Parliament.  | 2.2.1 | Ensure that Members of Parliament representing the Shire and surrounding region are regularly updated of changes occurring in the Shire and the needs of the Shire – eg facilities, infrastructure, services etc.  |
| 2.3 Build and strengthen strategic alliances with Councils within the surrounding region and along strategic road and rail corridors. | 2.3.1 | Continue to build and strengthen the alliances and promote regional cooperation between Warrumbungle Shire and neighbouring Councils to achieve regional and sub-regional economic development and tourism outcomes.   |
|   | 2.3.2 | Participate in regional training, economic development, tourism, marketing and promotional activities.   |
|   | 2.3.3 | Explore options for sharing data and resources and undertaking cooperative marketing and promotional initiatives.  |
| 2.4 Engage pro-actively with local producers, businesses and business / industry organisations, and community groups.                 | 2.4.1 | Continue to build knowledge and understanding of local economic sectors and businesses.  |
|   | 2.4.2 | Encourage and facilitate opportunities for professional development, networking and innovation.  |
|   | 2.4.3 | Continue to support industry (sector), business and community groups and networks.   |
| <b>Strategy 3: Establish effective networks and communication channels</b>  |       |  |
| 3.1 Continue to improve communication between Council, local business, industry and community groups and with business operators.     | 3.1.1 | Review Council's communications and media framework / approach to ensure that it is meeting business and community needs.  |
|   | 3.1.2 | Build and maintain an industry / business data base.   |
|   | 3.1.3 | Produce a business e-newsletter to maintain regular contact with key groups, business operators and other key stakeholders.  |
|   | 3.1.4 | Attend meetings of relevant industry, business and community groups.   |
| 3.2 Encourage business operators to communicate with each other.  | 3.2.1 | Encourage and facilitate opportunities for business networking.  |
|   | 3.2.2 | Encourage / support industry associations to hold functions and activities that will enable business operators to communicate and network.   |

## **Strategic Initiative 2: Ensure that the foundation blocks needed to stimulate and support economic development are in place**

Factors that play a significant role in the decision to relocate to and/or invest in an area include:

- The reputation, amenity and attractiveness of the area, as a place to work and live.
- Location and accessibility.
- Availability and affordability of suitable land and/or premises (to buy or lease).
- Facilities and services available – including retail, health, education, recreation, childcare, broadband and mobile services.
- Access to a skilled workforce, and for potential residents, access to employment.
- Access to and capacity of utility infrastructure.

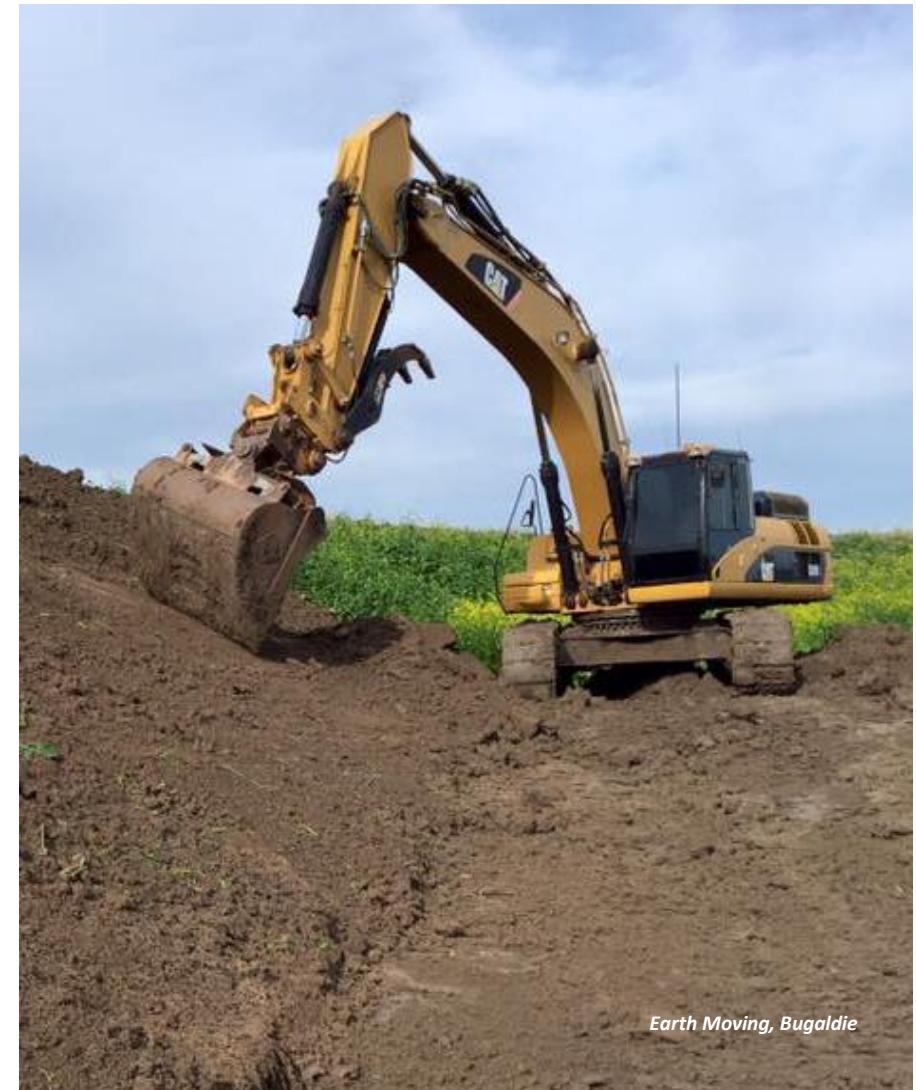
Lifestyle and work-life balance will play a major role in relocation and investment decisions. The amenity (appeal) of the Shire and its towns and villages, the facilities and services available, access to recreation, arts and cultural activities, opportunities for engagement and social inclusion, and safety, are factors that businesses and people looking to relocate to the Shire will take into consideration.

Council will focus on:

- Working with local communities to enhance ‘lifestyle’ and ‘liveability’.
- Ensuring that the foundation blocks (land and premises, infrastructure and workforce) are in place to support growth.

### **Strategies**

- Strategy 4: Enhance lifestyle and liveability
- Strategy 5: Ensure that there is suitable residential, industrial and commercial land and premises available in the Shire to facilitate growth
- Strategy 6: Ensure that the utilities and infrastructure needed to support economic development are in place
- Strategy 7: Build a strong and skilled local workforce



*Earth Moving, Bugaldie*

| Strategies   |   | Actions |   |
|--|---|---------|---|
| <b>Strategy 4: Enhance Lifestyle and Liveability</b>   |   |         |   |
| 4.1  | Protect and enhance the Shire's natural and scenic assets.                      | 4.1.1   | Continue to ensure that planning policies and controls protect rural and bushland areas, the dark sky, water resources, productive agricultural land and significant view-sheds from non-compatible development.  |
| 4.2  | Create strong, positive impressions   | 4.2.1   | Continue to improve the presentation of the gateway arrival points and entry corridors – to the Shire and its towns, including removing or replacing tired and dated signage.   |
|  |   | 4.2.2   | Continue to maintain entry corridors, town centres and parks and playgrounds and to a high standard, encouraging tree planting and garden beds to add colour and vibrancy and attract attention.  |
|  |   | 4.2.3   | Ensure that industrial precincts are maintained and well presented.   |
|  |   | 4.2.4   | Explore opportunities for quality public art – both temporary and permanent installations.  |
|  |   | 4.2.5   | Work with the community to encourage property and business owners to continue to improve the presentation of their buildings and businesses, including activating the footpaths.  |
| 4.3  | Work with the town communities and businesses to ensure on-going sustainability | 4.3.1   | Encourage and foster distinct identities for each town, reinforcing their key attractions and attributes.   |
|  |   | 4.3.2   | Work with each of the towns to formulate a 'town plan' which articulates the 'identity', vision, branding and positioning of the town and how this will be reflected in urban design and streetscaping; priority projects and the roles of Council and the various community groups.                                |
|  |   | 4.3.3   | Continue to market and promote the towns, encouraging travellers to explore the Shire and experience country hospitality.   |
|  |   | 4.3.4   | Continue to support and assist the town communities to access grant funding to improve facilities and infrastructure.   |
| 4.4  | Enhance lifestyle   | 4.4.1   | Continue to improve and expand the cultural, recreation, sporting and leisure facilities within the Shire.  |
|  |   | 4.4.2   | Support, foster and promote arts and cultural activities.   |
|  |   | 4.4.3   | Encourage, host and promote a dynamic and vibrant program of events and activities.   |
| 4.5  | Encourage and support community development.                                    | 4.5.1   | Advocate strongly for the retention and expansion of community services (eg health, education, disability, services for the aged).  |
|  |   | 4.5.2   | Ensure that the Shire's facilities and services have the capacity to support 'aging in place'.  |
|  |   | 4.5.3   | Continue to support activities (eg events, sport, creative arts etc) that encourage engagement and social inclusion and build pride in, and commitment to, the local community.   |
|  |   | 4.5.4   | Support community initiatives to develop, grow and enhance the liveability of the town / Shire.   |
|  |   | 4.5.5   | Work with the town communities to produce and distribute new resident 'Welcome' packs.  |
|  |   | 4.5.6   | Explore opportunities for providing information, activities and programs that will help new residents assimilate into the community.  |
| 4.6  | Retain and improve services   | 4.6.1   | Continue to advocate for the retention and improvement of health, aged care, social assistance, child care and education services throughout the Shire.   |
|  |   | 4.6.2   | Participate in relevant initiatives from the State Government and the Western Health to attract and retain health care professionals to the Shire / Region.   |
| <b>Strategy 5: Ensure that there is suitable residential, industrial and commercial land and premises available to facilitate growth</b> |   |         |   |
| 5.1  | Ensure suitable land is available to facilitate and accommodate growth.         | 5.1.1   | Monitor demand and regularly review land use plans and strategies to ensure that sufficient land is zoned to accommodate growth.  |
|  |   | 5.1.2   | Advocate for Government funding to assist in providing enabling infrastructure to facilitate subdivision and development.   |
| 5.2  | Ensure that there is a range of housing choices available within the Shire.     | 5.2.1   | Advocate for a flexible approach to housing development which reflects local needs.   |
|  |   | 5.2.2   | Re-visit the planning provisions for rural residential development, taking into consideration changes in technology that enable people to 'live off the grid' as well as the potential for niche agricultural activities (eg goat production, intensive horticulture) that do not require access to large holdings. |
|  |   | 5.2.3   | Work with the proponents of the Liverpool Range Windfarm and the Coolah, Dunedoo and surrounding rural communities to meet the accommodation needs of construction workers.   |

| Strategies |   | Actions |  |
|------------|---|---------|--|
|            |   | 5.2.4   | Explore with Inland Rail and Santos Gas the likely need for housing and other accommodation for construction workers and contractors and formulate an accommodation strategy to maximise benefits for the local communities. |
|            |   | 5.2.5   | Encourage the development of over 55's housing and aged care accommodation.  |
|            |   | 5.2.6   | Explore options to work with real estate agents to attract investor interest in the Shire to build the supply of rental properties.  |
| 5.3        | Improve retail / commercial premises              | 5.3.1   | Encourage the refurbishment and re-use of retail and commercial buildings within the towns.  |
| 5.4        | Endeavour to provide industrial land and premises | 5.4.1   | Explore options for facilitating the development of industrial land and premises within the Shire.   |
|            |   | 5.4.2   | Track available industrial and land premises within the Shire and keep regional agencies (eg RDA Orana, Premiers and Cabinet – Dubbo) advised on the land and premises available.  |

#### Strategy 6: Ensure that the infrastructure and utilities needed to support economic development are in place

##### Utilities

|     |                                 |       |  |
|-----|---------------------------------|-------|--|
| 6.1 | Water security                  | 6.1.1 | Secure the water supply for Coonabarabran and other towns and villages as required.                                      |
| 6.2 | Water & sewerage infrastructure | 6.2.1 | Advocate strongly for funding support to upgrade and augment the water and sewerage infrastructure throughout the Shire. |
| 6.3 | Reduce energy use and costs     | 6.3.1 | Encourage businesses and households to participate in energy use reduction programs offered by Government agencies.      |
|     |                                 | 6.3.2 | Advocate for Energy Providers to improve the reliability of the power supply to the Shire.                               |
|     |                                 | 6.3.3 | Explore options to generate power locally to improve supply and reduce costs.  |
|     |                                 | 6.3.4 | Support the development of renewable energy producers in appropriate locations within the Shire.                         |
| 6.4 | Improve telecommunications      | 6.4.1 | Advocate strongly for mobile telephone coverage throughout the Shire.  |
|     |                                 | 6.4.2 | Advocate strongly for the NBN to be extended to the Coonabarabran industrial area.                                       |

##### Transport & Freight Infrastructure

|     |  |       |  |
|-----|--|-------|--|
| 6.5 | Continue to improve the capacity of the road network within the Shire to increase freight productivity and grow visitation to the Shire. | 6.5.1 | Advocate for and seek funding to upgrade and maintain strategically important roads.   |
|     |  | 6.5.2 | Support funding applications by neighbouring Council to seal / improve roads that feed into Warrumbungle Shire, including Forest Way, Grain Valley Way.    |
|     |  | 6.5.3 | Advocate and plan for the Newell Highway by-pass.  |
|     |  | 6.5.4 | Continue to develop and promote touring routes and scenic drives, including improving signage.   |
| 6.6 | Provide infrastructure and services to facilitate and support road transport.  | 6.6.1 | Assess the need for 24 hour fuel outlet on the Newell Highway by-pass.   |
|     |  | 6.6.2 | Assess the need for truck washing facilities, and if needed, apply for grants to establish.  |
| 6.7 | Provide access to the Inland Rail line.  | 6.7.1 | Investigate options to use the rail infrastructure at Baradine to provide access to the Inland Rail line for the movement of grain and potentially timber. |

#### Strategy 7: Build a strong and skilled local workforce

|     |   |       |   |
|-----|---|-------|---|
| 7.1 | Identify workforce requirements and skills gaps.  | 7.1.1 | Profile and articulate existing and future (eg Windfarm, Solar Farm, Inland Railway) local workforce requirements and jobs and skills gaps.   |
|     |   | 7.1.2 | Ensure that Warrumbungle Shire's needs are recognised in regional training and employment strategies.   |
|     |   | 7.1.3 | Work with regional organisations and education and training providers to address job and skill gaps and formulate and deliver 'job readiness' and skills development opportunities. |
| 7.2 | Grow the local workforce, ensuring that it is aligned with local and regional industry needs. | 7.2.1 | Consider listing job vacancies in the Shire on the Council and/or tourism websites and through other promotional channels.  |
|     |   | 7.2.2 | Consider having a 'position vacant' board in the Coonabarabran VIC and possibly at the local supermarkets.  |
|     |   | 7.2.3 | Work with industry and businesses to attract skilled workers to the Shire to fill vacant positions and address skills gaps.   |
|     |   | 7.2.4 | Work with TAFE, Coonabarabran High School and the Central Schools to deliver programs / activities that align with workforce needs.   |

| Strategies |  | Actions  |
|------------|--|--|
|            |  | 7.2.5 Encourage the development of partnerships, such as mentoring and workplace training programs, between local producers and businesses, TAFE and the schools.  |
|            |  | 7.2.6 Explore opportunities to provide mentoring and/or business skills development programs for young people who have completed apprenticeships and traineeships, to encourage them to establish businesses within the Shire. |
|            |  | 7.2.7 Work with the Chamber and town communities to formulate and implement programs to welcome and orientate new employees / residents to assist them to integrate into the community.  |

### Strategic Initiative 3: Build a strong, positive profile for Warrumbungle Shire

Raising the profile of Warrumbungle Shire and positively promoting the Shire as a place to live and invest is imperative to attracting investment, development and new residents. Warrumbungle Shire is competing with other LGAs within the surrounding region that have higher profiles in the market place. Marketing and promotional activities need to have consistent messages and feature the attributes and competitive advantages of the Shire, including its attractive setting, affordability and lifestyle.

Council will focus on:

- Delivering consistent messages about Warrumbungle Shire's attributes, competitive advantages, affordability and lifestyle.
- Enhancing the Shire's on-line presence.
- Generating positive publicity for the Shire.

| Strategies   |  | Actions   |
|--|--|---|
| <b>Strategy 8: Build a strong, positive profile for Warrumbungle Shire</b> |  |   |
| 8.1  | Align communication and marketing strategies.            | 8.1.1 Articulate the brand values, positioning and key marketing 'messages' for the Shire.<br>8.1.2 Formulate communications and marketing strategies for the Shire, articulating clear and consistent key messages.<br>8.1.3 Ensure that the branding is consistent across all of Council's promotional documents, display materials, web and facebook sites.<br>8.1.4 Ensure that images used in Council documents, on-line sites and promotional materials reflect the branding and lifestyle values of the Shire.<br>8.1.5 Ensure that Councillors and Council staff are cognisant of the communications strategy and key messages and provide training on how to communicate and reinforce these messages.<br>8.1.6 Encourage community and business groups involved in marketing and promotion to incorporate the key communication messages and images.  |
| 8.2  | Continue to build Warrumbungle Shire's digital presence. | 8.2.1 Continue to improve and maintain the Warrumbungle Shire Council website, recognising that the site is one of the first 'touch points' for individuals and businesses looking to relocate and has a dual function of providing information and promoting the Shire.<br>8.2.2 Develop a stand-alone tourism website that is semantic search and mobile optimised with the website supported by social media.<br>8.2.3 Encourage the town and village communities to develop and maintain websites that dovetail and link to the Council and tourism website and provide information for local and potential residents as well as promoting businesses, services and facilities.<br>8.2.4 Capitalise on opportunities to promote Warrumbungle Shire and its products and activities, through third party websites and apps, including touring, event, venue and activity websites, ensuring that the information available is up-to-date and accurate. |

| <b>Strategies</b> |   | <b>Actions</b>  |
|-------------------|---|---|
| 8.3               | Endeavour to generate positive publicity for the Shire. | <p>8.3.1 Work with the local and regional media to identify and strongly promote local ‘heroes’ and achievements – individuals (particularly young achievers and emerging leaders) and businesses that are innovative and strongly reflect the desired positioning and branding of the Shire.</p> <p>8.3.2 Encourage businesses, producers and community groups to enter awards, and celebrate achievements.</p> <p>8.3.3 Explore opportunities to use Shire events to generate media coverage of and exposure for the Shire.</p> <p>8.3.4 Formulate and adopt a public relations strategy that provides the direction and ‘tools’ for counteracting negative publicity.</p>  |
| 8.4               | Continue to raise the profile of Warrumbungle Shire.    | <p>8.4.1 Continue to participate in regional economic development and promotional initiatives</p> <p>8.4.2 Utilise opportunities to gain free / low cost exposure in the regional media, including ‘What’s On’ listings.</p> <p>8.4.3 Explore opportunities for billboard advertising in strategic locations, ensuring that the images used are vibrant, eye-catching and ‘memorable’; and updated regularly to remain ‘fresh’.</p> <p>8.4.4 Work with the Regional and State tourism and economic development organisations to bring media and industry ‘famils’ to Warrumbungle Shire.</p> <p>8.4.5 Endeavour to improve and expand the Warrumbungle Shire content in regional promotional material.</p> <p>8.4.6 Work with Siding Spring Observatory, National Parks and industry sectors (eg cattle producers, sheep producers, innovative producers) to capitalise on opportunities showcasing the achievements of the Shire and leveraging marketing and promotional opportunities.</p> |

## **Strategic Initiative 4: Grow from within - support and nurture key engine industries, emerging industry sectors and local businesses**

Adopting a ‘growth from within’ approach in which existing local businesses are supported and nurtured, is the most effective way to stimulate growth. The business environment is changing rapidly and business operators need sound information and business acumen and skills to remain viable and continue to grow. Encouragement and assistance is required for some businesses to improve skill levels and to focus on working ‘on’ their business not just ‘within’ their business. Businesses need to embrace innovation and creativity, and be aware of and open to, the adoption of new technologies. Some businesses also need assistance to reduce their exposure to ‘boom – bust’ cycles.

Warrumbungle Shire Council has a role to play in stimulating growth by improving communication, coordination and information distribution within the business community. There is also a range of advisory programs and services available in the Region and through State and Federal Government programs to assist businesses.

Council will focus on

- Supporting and building the main engine industries – agriculture and tourism
- Capitalising on opportunities from major projects occurring within the Shire and surrounding Region
- Supporting and strengthening local businesses.



## Strategies

- Strategy 9: Support, strengthen and grow key engine industries  
 Strategy 10: Facilitate growth of emerging industry sectors and activities  
 Strategy 11: Leverage major projects  
 Strategy 12: Support and nurture local businesses



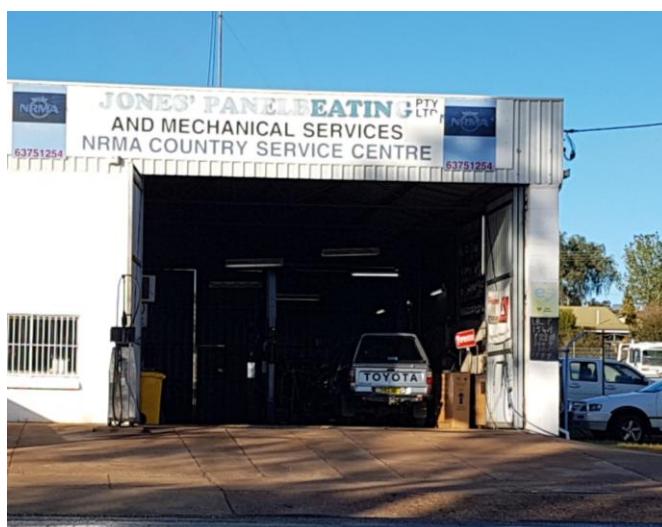
| Strategies  |   | Actions |   |  |  |
|---|---|---------|---|--|--|
| <b>Strategy 9: Strengthen and grow key engine industries</b>  |   |         |   |  |  |
| <b>Agriculture &amp; Agribusiness – support primary production, and build on competitive advantages</b> |   |         |   |  |  |
| 9.1   | Provide a positive planning and investment framework.                 | 9.1.1   | Continue to protect productive agricultural land and water resources within the Shire.  |  |  |
|   |   | 9.1.2   | Ensure that planning controls for rural land have the flexibility to accommodate new activities and innovative business models that may include horizontal or vertical integration and/or tourism activities and events.                  |  |  |
| 9.2   | Strengthen the foundation blocks.                                     | 9.2.1   | Support farmers in advocating for water security.   |  |  |
|   |   | 9.2.2   | Ensure that the needs of the Shire's agricultural sector are recognised in regional industry and infrastructure development plans and strategies.   |  |  |
|   |   | 9.2.3   | Continue to advocate for additional funding to improve road networks to ensure efficient and safe movement of agricultural produce.   |  |  |
|   |   | 9.2.4   | Advocate for and assist producers to develop strategies to address labour and skills shortages including, developing the local workforce and accessing skilled migration and temporary visa programs.                                     |  |  |
|   |   | 9.2.5   | Advocate for DPI, Local Land Services and other agencies to deliver extension programs within the Shire and provide access for Shire producers to research and development, innovation and best practice.                                 |  |  |
| 9.3   | Encourage diversification and build sustainability and profitability. | 9.3.1   | Encourage and support adoption of new activities and technologies, sustainable land management practices, and innovative business models.   |  |  |
|   |   | 9.3.2   | Encourage and facilitate the development and expansion of intensive production.   |  |  |
|   |   | 9.3.3   | Encourage and facilitate the development and expansion of agri-processing and other value-adding activities.  |  |  |
| 9.4   | Raise the profile of and showcase the Shire's producers.              | 9.4.1   | Explore with agricultural producers, opportunities to 'brand' and/or 'position' Warrumbungle Shire as a producer of premium products.   |  |  |
|   |   | 9.4.2   | Encourage specialty producers to participate in regional produce initiatives – eg Regional Platters, Food and Wine Festivals.   |  |  |
| 9.5   | Endeavour to improve access to meat processing facilities.            | 9.5.1   | Facilitate the re-opening of the Binnaway Abattoir, subject to meeting environmental requirements.  |  |  |
|   |   | 9.5.2   | Support and facilitate the introduction of pre-fabricated and mobile slaughterhouses to support agricultural activities.  |  |  |
| 9.6   | Support growth in native plant horticulture and related activities.   | 9.6.1   | Support the growth and development of native plant horticulture and related activities such as seed collection and distribution.  |  |  |
|   |   | 9.6.2   | Explore opportunities to showcase these activities as a specialisation for the Shire and to re-inforce the quality and diversity of the environment (clean green) for tourism and lifestyle.  |  |  |
| <b>Tourism – Continue to grow and diversify the Shire's visitor economy</b>                             |   |         |   |  |  |
| 9.7   | Leverage the Shire's dark sky, astronomy and astro-related assets.    | 9.7.1   | As part of destination management planning, formulate an Astro-tourism strategy that brings together dispirit activities to create a strong product cluster and leverage the Warrumbungle Dark Sky Park.                                  |  |  |
|   |   | 9.7.2   | Explore the opportunity to establish a designated night sky viewing area in Coonabarabran – a place that travellers can readily access to gain an appreciation of the night sky.  |  |  |
|   |   | 9.7.3   | Educate residents and businesses, in particular the accommodation operators, on the Dark Sky concept.   |  |  |
|   |   | 9.7.4   | Endeavour to strengthen the relationship between Siding Spring Observatory, Council and the local community and to work collaboratively to grow the education and visitor markets and to showcase and promote SSO and Warrumbungle Shire. |  |  |

| Strategies |   | Actions  |
|------------|---|--|
|            |   | <p>9.7.5 Explore options for revamping and strengthening the Virtual Solar System Drive – including the development of an APP.</p> <p>9.7.6 Encourage and support the development of innovative tourism products and experiences that leverage the night sky.</p> <p>9.7.7 Explore options to capitalise on the night sky / astronomy themes in streetscaping, public art, events etc.</p>   |
| 9.8        | Leverage the Shire's National Parks, Forests and Reserves.  | <p>9.8.1 Position and promote the Warrumbungle and Coolah Tops National Parks and the Pilliga Forest as three high quality, destinations that offer very different experiences.</p> <p>9.8.2 Work with the NPWS to maximise the publicity for the re-opening of the Visitor Centre and to use the event to 're-launch' the Park in the regional, Sydney, Central Coast and Hunter Valley markets; with this supported by follow-up marketing and promotion over the next 12 months.</p> <p>9.8.3 Support the ongoing development and promotion of the Pilliga Forest, exploring options to:</p> <ul style="list-style-type: none"> <li>○ Improve road access to and through the Forest and connectivity between Baradine, Pilliga Pottery, Dandry Gorge and other key attractions.</li> <li>○ Expand the interpretative displays / story telling at the Pilliga Discovery Centre and other strategic locations.</li> <li>○ Work with the owner of the Wooleybah Sawmill to access grant funding to preserve and interpret the site.</li> <li>○ Leverage the Australian Wildlife Conservancy project to build visitation and raise awareness of the Forest.</li> <li>○ Establish mountain-bike and possibly horse trails.</li> </ul> <p>9.8.4 Advocate for improvements in access to and visitor facilities at Coolah Tops National Park, and strengthen the link between Coolah Tops National Park and Coolah.</p> |
| 9.9        | Develop the Warrumbungle Geo Trail.   | 9.9.1 Develop the Warrumbungle Geo Trail linking the different landscapes and rock formations in the Shire.  |
| 9.10       | Capitalise on the Shire's wildlife, birdlife and wildflowers and leverage conservation initiatives. | <p>9.10.1 Work with the Narrabri Shire Tourism Unit to maximise publicity for the opening of the Australian Wildlife Conservancy.</p> <p>9.10.2 Endeavour to capitalise on the Barking Owl Conservation project, positioning Dunedoo and the Woodland Learning Centre as the focal point for 'telling' this story.</p> <p>9.10.3 Explore options for facilitating the return of the black swans to Dunedoo.</p> <p>9.10.4 Explore options to provide a platypus viewing area and interpretation along the river at Coolah.</p> <p>9.10.5 Endeavour to bring wildlife, birds and wildflower themes into arts-based event and activities, streetscapes, parklands and public art.</p>  |
| 9.11       | Improve and diversify attractions and facilities.   | <p>9.11.1 Continue to improve existing local attractions, including parks and gardens.</p> <p>9.11.2 Explore options to improve access to and visitor facilities in riverside parks and reserves in Coonabarabran, Coolah, Dunedoo, Binnaway and Mendooran.</p> <p>9.11.3 Support local initiatives to develop new products and experiences – eg Binnaway Rail Museum, use of the Dunedoo silos.</p> <p>9.11.4 Encourage and support the development of rural (on-farm) and bushland attractions, activities and experiences.</p> <p>9.11.5 Explore options to develop cycling routes and experiences including:</p> <ul style="list-style-type: none"> <li>○ Rail trails</li> <li>○ Coonabarabran – Warrumbungle National Park cycleway</li> <li>○ Riverside cycleways / shared pathways in Coonabarabran, Coolah, Dunedoo and Binnaway</li> <li>○ Mountain bike trails and touring routes</li> </ul> <p>9.11.6 Explore options to develop horse trails in Coonabarabran, Coolah and Baradine.</p> <p>9.11.7 Explore options to up-date the displays in the Coonabarabran VIC, including using digital technology for 'story-telling'.</p>  |
| 9.12       | Use touring routes to bring travellers into and through the Shire.                                  | <p>9.12.1 Continue to develop and promote existing touring routes – Newell Highway and Black Stump Way, and scenic drives within the Shire.</p> <p>9.12.2 Explore options to work with adjoining Councils to develop new touring routes – eg Warrumbungle Loop, Forest Way.</p>  |

| <b>Strategies</b>   |  | <b>Actions</b>  |
|---|--|---|
| 9.13  | Grow the festivals and events sector, and use this sector to enhance lifestyle, drive visitation and raise the profile of the Shire. | 9.13.1 Support the town and village communities to improve infrastructure and facilities to enable them to grow their events and activities.  |
|   |  | 9.13.2 Explore options to remove barriers to holding events – eg reducing insurance costs, providing an event manual with templates to facilitate development approval / road closures etc.   |
|   |  | 9.13.3 Continue to develop the Shire's event calendar, encouraging community groups and event organisers to list their events and seek assistance from Council's Tourism Unit / VIC staff to market and promote their events.   |
|   |  | 9.13.4 Bid for 'foot loose' events, encouraging event organisers to bring events to the Shire.  |
|   |  | 9.13.5 Leverage opportunities to value-add to events, re-inforce key product themes and generate positive media coverage for the Shire.   |
| 9.14  | Encourage and facilitate diversification and improvements to the Shire's accommodation base  | 9.14.1 Support the development / expansion / upgrading of accommodation throughout the Shire.   |
|   |  | 9.14.2 Continue to improve and promote commercial and free camping facilities and opportunities within the Shire, and explore opportunities to leverage the caravan and touring RV markets.   |
|   |  | 9.14.3 Encourage and support the establishment of farm stay and B&B accommodation, and listing on sites such as   |
|   |  | 9.14.4 Explore options to utilise the sharing economy (eg Air B&B, Stayz, YouCamp) to address issues with capacity constraints (eg during events, accommodating construction workers) and expand the amount and range of accommodation available.                                     |
|   |  | 9.14.5 Encourage accommodation operators to increase their on-line presence, including updating their websites so that they are semantic search and mobile friendly and offer on-line (real time) booking facilities.   |
| 9.15  | Provide comprehensive and accessible information on the Shire at all stages in the 'path to purchase'.                               | 9.15.1 Develop a stand-alone tourism website with this website is linked to other 'touch points' including the Council and touring route websites.  |
|   |  | 9.15.2 Use social media to promote the Shire and communicate with visitors and journalists  |
|   |  | 9.15.3 Continue to operate the Coonabarabran VIC and develop it into an attraction in its own right, showcasing local industries and producers, and featuring and selling local products.   |
|   |  | 9.15.4 Explore options to improve information delivery in each of the towns.  |
|   |  | 9.15.5 Progressively improve promotional, directional and interpretative signage throughout the Shire, including providing information boards and event signage at strategic locations.   |
|   |  | 9.15.6  |
|   |  | 9.15.7 Continue to update and improve promotional (hard-copy and on-line) material with key brochures and maps downloadable from the tourism website.   |
|   |  | 9.15.8 Continue to up-date Shire products and events on the NSW Connect / STDW and other relevant third-party data bases and websites.  |
| 9.16  | Effectively market and promote the Shire   | 9.16.1 Provide funds and resources to market and promote the Shire.   |
|   |  | 9.16.2 Formulate and implement a digital marketing strategy   |
|   |  | 9.16.3 Maintain strategic alliances with DNSW, Country & Outback NSW RTO, Western Plains Marketing Groups and Touring Route Marketing Groups and participate in cooperative marketing and promotional activities and campaigns.   |
|   |  | 9.16.4 Continue to pursue cost-effective public relations and on-line / digital marketing and promotional activities.   |
| <b>Strategy 10: Facilitate growth of potential / emerging industry sectors and activities</b> |  |   |
| 10.1  | Support Forestry   | 10.1.1 Advocate for the Forestry Corporation to maximise value-add and employment opportunities for the Shire community when re-allocating timber agreements in the Pilliga Forest and surrounding area.  |
|   |  | 10.1.2 Facilitate the re-opening of the Baradine Sawmill and/or the establishment of other sawmilling and value-added opportunities in the Shire.   |
| 10.2  | Renewable Energy   | 10.2.1 Encourage and facilitate the development of renewable energy projects in suitable locations.   |
| 10.3  | Extractive Industries  | 10.3.1 Explore likely future demand for hardrock aggregate within the Shire and surrounding region, including demand from the development of the Inland Rail line and the Newell Highway bypass, and opportunities to use resources in the Shire to capitalise on the growing demand. |
|   |  | 10.3.2 Assess opportunities for sand extraction and processing / value-adding in the Shire.   |
| 10.4  | Aged Care  | 10.4.1 Support and facilitate the expansion of Cooinda in Coonabarabran.  |
|   |  | 10.4.2 Monitor the need for additional nursing home beds in Dunedoo and advocate for additional beds if needed.   |

| Strategies  |   | Actions |  |
|---|---|---------|--|
|   |   | 10.4.3  | Support and facilitate the development of self-care living units and/or hostel accommodation in Coolah and Baradine.   |
|   |   | 10.4.4  | Encourage the expansion of facilities and services to support aging-in-place.  |
| <b>Strategy 11: Leverage major projects within the surrounding region</b> |   |         |  |
| 11.1  | Inland Rail   | 11.1.1  | Endeavour to build a strategic relationship with ARTC, attend briefing sessions and endeavour to seek representation on key committees, working groups etc.  |
|   |   | 11.1.2  | Advocate for the design of the railway corridor between Narromine and Narrabri, to provide access to the line from Baradine, utilising the rail corridor and infrastructure between Baradine and Kenebri for bulk and containerised transport of grain and possibly timber products.   |
|   |   | 11.1.3  | Explore with ARTC the potential to accommodate construction workers in Baradine, opportunities for local businesses to supply goods and services, likely demand for ballast and other construction material and likely workforce requirements; and formulate and implement strategies to capitalise on opportunities identified.   |
| 11.2  | Liverpool Range Windfarm and Dunedoo Solar Farm   | 11.2.1  | Explore with the developer: <ul style="list-style-type: none"> <li>○ Likely accommodation needs for the construction workforce and opportunities to accommodate workers in Coolah, Dunedoo and surrounding areas.</li> <li>○ Opportunities for Shire businesses to provide goods and services.</li> <li>○ Likely employment opportunities and the skills required during construction and when operational, formulate a local workforce strategy.</li> </ul> |
| 11.3  | Gunnedah Basin Mining Projects – construction of the Vickery South and Shenhua coal mines | 11.3.1  | Keep abreast of the coal projects occurring within the Gunnedah and endeavour to participate and/or encourage local businesses that could potentially provide services to participate, in the workshops and briefing sessions for local suppliers.   |
| 11.4  | Santos Gas Project – Pilliga Forest   | 11.4.1  | Explore with the Santos: <ul style="list-style-type: none"> <li>○ Likely accommodation needs for the construction workforce and opportunities to accommodate workers in Baradine and Coonabarabran.</li> <li>○ Opportunities for Shire businesses to provide goods and services.</li> <li>○ Likely employment opportunities and the skills required during construction and when operational, formulate a local workforce strategy.</li> </ul>               |
| <b>Strategy 12: Support and nurture local businesses</b>                  |   |         |  |
| 12.1  | Encourage businesses to improve their skills and expertise.                               | 12.1.1  | Identify and address skills gaps and training needs - liaise with the business community to identify skills gaps and training needs and the types of programs that businesses would benefit from (eg customer service, merchandise display, building an on-line presence, digital marketing etc).  |
|   |   | 12.1.2  | Provide and promote information and resources relevant to local businesses – Include business support information on Council's websites and promote the website as the 'go to' place for businesses looking for statistics, information and support services and business listings.  |
| 12.2  | Improve access to the business advisory and support services and programs available.      | 12.2.1  | Continue to build relationships with Government agencies and training providers and advocate for training and development programs to be held in the Shire.  |
|   |   | 12.2.2  | Explore options to hold a business / careers expo in the Shire, inviting Government Service Agencies to attend and explain and promote the services available to support businesses and people looking to start-up businesses.   |
|   |   | 12.2.3  | Facilitate opportunities for professional development, networking and innovation and encourage the exchange of ideas through business clusters and networks.   |
|   |   | 12.2.4  | Provide information and assist local businesses to register / become accredited for Local Government and State Government contracts and with other organisations such as Woolworths and Siding Spring / ANU.   |

| Strategies |  | Actions |   |
|------------|--|---------|---|
| 12.3       | Assist businesses in leveraging opportunities. | 12.3.1  | Encourage and assist local businesses and producers to list on relevant industry data bases and websites and where relevant, participate in programs such as trade missions.  |
|            |  | 12.3.2  | Explore with local businesses the level of interest in attending 'tender writing' workshops, and provide advice and assistance with the preparation of tender documents.  |
|            |  | 12.3.3  | Encourage local businesses to explore opportunities to become depots / distribution outlets / collection points for businesses in the larger centres within the Region (eg Dubbo, Tamworth).  |
|            |  | 12.3.4  | Work with RDA Orana, NSW Department of Industry and other State and Federal Government Agencies and Peak Industry Associations to identify export opportunities for local businesses.   |
| 12.4       | Build the profile of local businesses.         | 12.4.1  | Develop a Shire-wide business directory and data base, with this accessible from the Council, Tourism and town websites.  |
|            |  | 12.4.2  | Encourage and assist businesses identify and access on-line business and marketing opportunities, including developing websites, claiming their Google business listing, utilising social media and listing on relevant Government and industry data bases.     |
|            |  | 12.4.3  | Work with local and regional media to showcase and promote Warrumbungle Shire industries, businesses, products and people.  |
|            |  | 12.4.4  | Explore opportunities to showcase and promote Warrumbungle Shire, producers and/or products at regional events, field days etc.   |
|            |  | 12.4.5  | Encourage relevant businesses to participate in marketing activities (eg trade missions, industry and trade expos etc) organised by Regional, State and Federal Government agencies.  |
|            |  | 12.4.6  | Explore opportunities for Council / the Shire to host industry and media famils and trade delegations and missions.   |
|            |  | 12.4.7  | Encourage local producers, businesses and community groups to participate in Regional and State business awards to build awareness and recognition and potentially generate publicity for their business and the Shire. Acknowledge and celebrate achievements. |
| 12.5       | Encourage retailers work collaboratively.      | 12.5.1  | Explore options for strategic and cooperative marketing and promotion, increasing the effectiveness of marketing dollars spent by local businesses.   |
|            |  | 12.5.2  | Support the Chamber / business operators to implement creative marketing activities that encourage residents to shop locally and to attract residents from surrounding LGAs to the Shire.   |



## Strategic Imperative 5: Target new businesses, investment and economic activities

The strategic location of Warrumbungle Shire, the affordability of land and premises, the attractive setting and rural lifestyle contribute to make the Warrumbungle Shire an attractive location to live and work.

Council will:

- Leverage opportunities to showcase and market the attributes of the Shire to potential residents and investors.
- Provide advice and assistance to those interested in exploring what the Shire has to offer.
- Investigate and pursue development and investment opportunities.

### Strategy

Strategy 13: Target and pursue new businesses, investment and economic activities



| Strategies   |  | Actions |   |
|--|--|---------|---|
| <b>Strategy 13: Target and pursue new businesses, investment and economic activities</b> |  |         |   |
| 13.1   | Encourage and nurture micro-businesses and business start-ups. | 13.1.1  | Provide access to information and business advisory services.   |
|  |  | 13.1.2  | Assess feasibility of hosting business start-up events to link people with business ideas to business advisory and support services (eg RDA, NSW Department of Industry, Australian Small Business Advisory Service). |
| 13.2   | Encourage the transition from hobbies to businesses.           | 13.2.1  | Organise a forum on 'how to turn a hobby into a business' – combine speakers / examples of people who have done this and information on the process and assistance available.   |
| 13.3   | Formulate the framework for business attraction.               | 13.3.1  | Investigate possible business attraction incentives and formulate a Business Assistance Policy to clearly articulate the support Council can offer new businesses and investors and the assessment criteria.          |
| 13.4   | Target and pursue new businesses.                              | 13.4.1  | Produce investment, business and resident attraction promotional material.  |
|  |  | 13.4.2  | Participate in forums, expos, trade missions, marketing campaigns and other activities organised by State and Regional organisations that have the potential to bring new businesses / investment into the Shire.     |
|  |  | 13.3.3  | Promote the Shire as an affordable lifestyle destination, ideal for trades people and people with home-based businesses.  |



## 7. MONITORING PROGRESS

**The progress and success of the Economic Development Strategy will be evaluated by:**

- Completion of the implementation actions listed in the Strategy.
- Monitoring key statistics that measure changes in population, visitation, business activity and employment.

| Outcome  | Measure  | Target                                       | Benchmark/s             | Data Source  |
|--|--|--|-------------------------|--|
| <b>Population Growth</b>                         | Resident Population                              | Increase to 9,500 by 2021 and 10,000 by 2026 | 9,384 (2016)            | ABS Population Census - 2016<br>ABS Population Censes - 2021                                   |
| <b>Increase visitation to the Shire</b>          | Visitation to the Coonabarabran VIC              | Increase to 35,000 within 3 years            | 32,000                  | VIC statistics   |
|  | Domestic Overnight Visitors                      | 5% increase within 3 years                   | 125,000 (2016)          | Destination NSW – LGA Visitor Profiles – Domestic overnight visitor statistics and expenditure |
|  | Increase length of stay                          | 2.1+ nights                                  | 1.98                    |  |
|  | Visitor Expenditure                              | \$35+ million                                | \$30 million            |  |
|  | Event attendance                                 | 5% increase within 3 years                   | Create bench mark       | Council data base  |
|  | Visitors to SSO                                  | 40,000 within 3 years                        | 35,000                  | SSO  |
|  | Visitors to Warrumbungle National Park           | 40,000 within 3 years                        | 30,000                  | NPWS   |
|  | Visitors to Pilliga Forestry Discovery Centre    | 10,000 within 3 years                        | 6,500                   | NPWS   |
| <b>Growth in productivity</b>                    | Gross Regional Product                           | 3% per annum                                 | \$450 million (2016/17) | Council LGA Data - Remplan   |
|  | Value-Add  | 3% per annum                                 | \$406 million (2016/17) | Council LGA Data - Remplan   |
|  | Worker Productivity (GRP / Worker)               | Over \$150,000+ by 2020                      | \$145,222 (2016/17)     |  |
| <b>Improved business and investor confidence</b> | Number of Businesses                             | 10 additional businesses within 3 years.     | 1003 (2018)             | Council LGA Data - Remplan   |
|  | Number of existing businesses that have expanded | 5 businesses expanding within 3 years.       | New measure.            | Council data base  |
|  | New Business Start-ups                           | 2 / year                                     | New measure             | Council Data Base  |
|  | Business Exits                                   |  | New measure             | Council Data Base  |
| <b>Job Creation</b>                              | Number of people in the labour force             | 4,350+ within 3 years                        | 4,282 (March 2018)      | Department of Employment – Small Area Labour Market Statistics.                                |
|  | Unemployment Rate                                | Remains below 5%                             | 3.7% (March 2018)       | Department of Employment – Small Area Labour Market Statistics.                                |

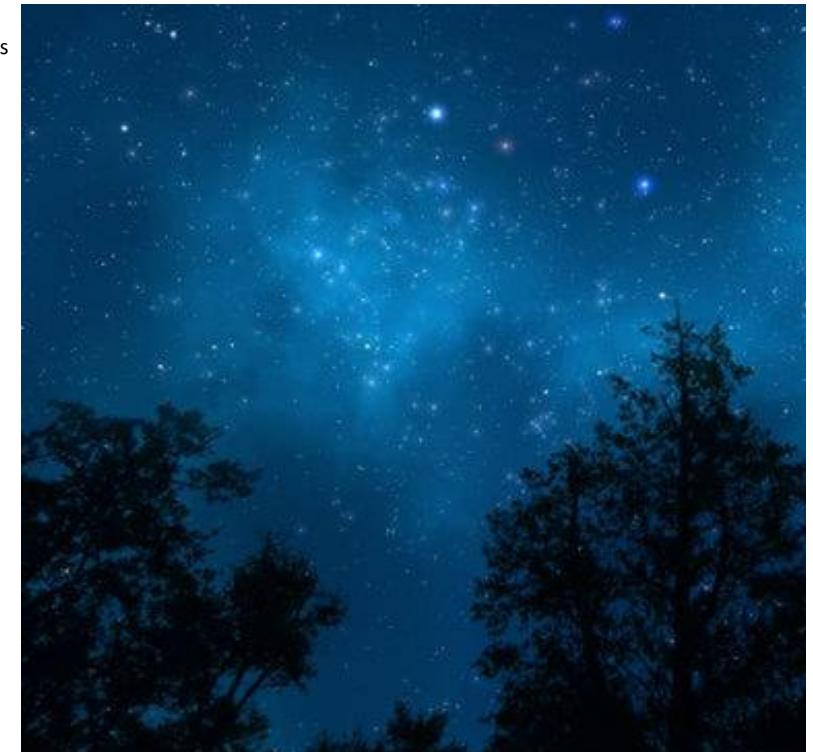
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*Sculptures in the Scrub, Dandry Gorge*

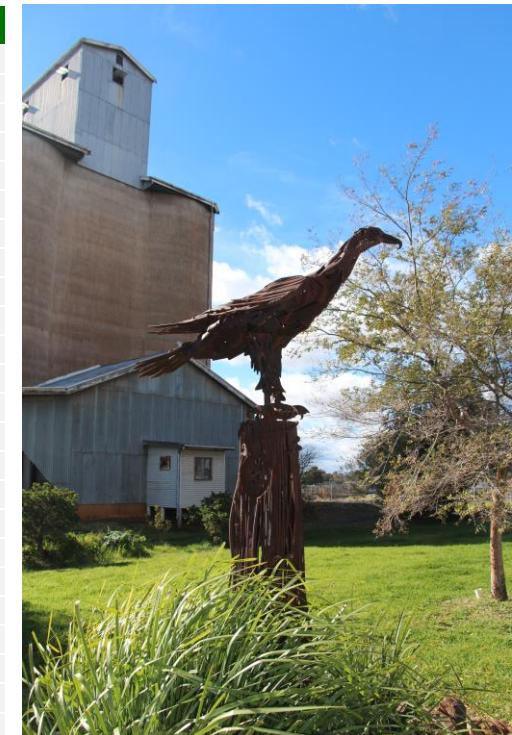
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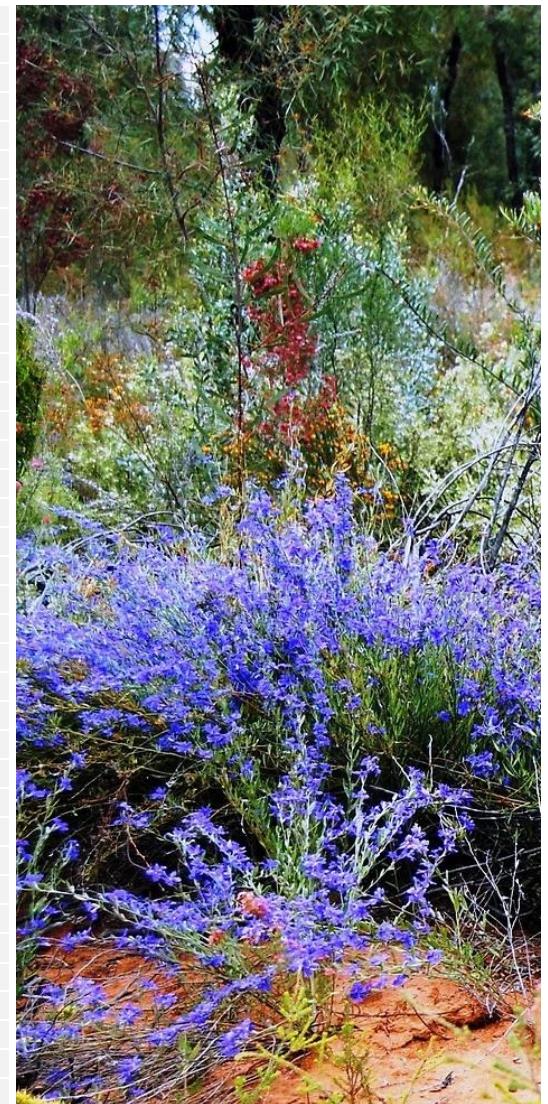
*Virtual Solar System Model Billboards*

## PHOTOGRAPHS – LIST

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**Wildflowers of the Pilliga**