



SOUTH AUSTRALIA

Regional Blueprint 2023-2024

Edition 4

September 2023



Acknowledgement of Country

Regional Development
South Australia would
like to acknowledge the
traditional owners of the
South Australian lands on
which we work and pay
our respects to the elders
past and present.

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Executive Chair Summary



As we publish our fourth Regional Blueprint, we reflect on the origins of the document, commencing as a desire to capture and accelerate investment in region in COVID-19 recovery. We have well and truly moved to the next phase of project realisation.

As key economic agencies, the eight independent Regional Development Australia boards play an integral role in driving economic development in South Australian regions. To drive growth RDAs work with multiple layers of government and business, aimed at strategic and practical implementation. We provide the insights in the 2023 RDSA Regional Blueprint as an opportunity to work with ourselves, industry, government and community to seize the opportunity and collectively realise the opportunities presented.

Central to this Regional Blueprint is the collating of the Regional Investment Pipeline (RIP) data, of which RDAs assisted/tracked for State Government **1081** projects that have a potential capital value of **\$62.56B** (to 30 June 2023).

These investments must be under active contemplation, funding consideration and/or construction for commencement in the next five years. This represents the highest figure since the RDAs have collected this data, and while these projects will not always be realised it gives a very good indicator of business sentiment in regional South Australia.

This year we have also included analysis of where the 1081 projects track against:

- the new Commonwealth Government *Regional Investment Framework*;
- a breakdown of the tracked projects against Industry Sectors;
- analysis of public vs private investments.

The analysis shows that the proposed capital expenditure is not surprisingly focused in the areas of agriculture, mining, manufacturing, infrastructure, and electricity generation. The realisation of 20% of these projects alone would generate up to 21,702 construction jobs (Source: REMPlan).

As we navigate the uncertainty of construction, workforce, cost escalation, sparsity of housing supply and workforce, the challenge is how can we collectively realise these projects and particularly those projects which generate on-going jobs and wealth in regional South Australia.

This Regional Blueprint identifies common issues that affect all regions including regional workforce, migration, housing, water, infrastructure, and investment. Consistent with last year, access to housing and workforce are critical issues which are impacting on existing business's ability to service clients, and without solutions will impact on any new investment realisation.



Image courtesy South Australian Tourism Commission

The South Australian RDA boards recognise the enormous investment that all three levels of government are delivering to the regions. Sincere thanks are given to the following key stakeholders for their ongoing support:

- Minister Catherine King MP and Minister Kristy McBain MP and the Department of Infrastructure, Transport, Regional Development, Communications and the Arts;
- Minister Claire Scriven MLC and the Department of Primary Industries and Regions SA;
- Mayor Dean Johnson and the Local Government Association of South Australia;
- All 52 regional local government partners for their ongoing support;
- The 61 employees who work tirelessly for our regional communities;
- The 73 local board members of Regional Development Australia across South Australia drawn from business and local government, who give their time for the betterment of their communities.

Without your support we could not deliver local place-based and state-wide solutions that are so critical to long term regional growth in South Australia.

Hon Rob Kerin

Executive Chair, Regional Development South Australia

Economic Foreword



With the COVID-19 pandemic now in the rearview mirror, Australia is turning to the future. As we look ahead, the long-run forces shaping our economy – climate change, technological disruption and demographic shifts – all present major challenges as well as opportunities.

These changes are present across the country, but are magnified in our regions. With the 2022/23 River Murray flooding and 2019/20 Black Summer bushfires still fresh in our minds, South Australians know only too well the impact of natural disasters. Such events will become more frequent and more severe as temperatures rise.

Federal Treasury estimates that without adaptation measures global warming could see Australian crop yields fall by up to four per cent by 2063¹. Rising temperatures could also have an impact on tourism and other services, as our beaches and natural attractions come under threat. In the aftermath of the 2019/20 bushfires, an estimated 80,000 tourists cancelled or postponed activities across Australia².

On the flipside, however, there could be increased demand for South Australia's agricultural exports, as modelling suggests other countries in the region could be more affected by climate change³.

Our state has also been at the forefront of the global energy transition. In just over 15 years, we have successfully shifted our energy base from one per cent renewable energy to around 70 per cent – an achievement that has received international recognition⁴. Continued investment in clean-energy resources will help us to reach the goal of net-zero emissions by 2050.

While the energy transition is not expected to have a big impact on the total number of jobs in the national economy, it will change the nature of work across a broad range of sectors⁵. Some sectors will decline, while others will grow. There will be opportunities for high quality work in renewables, electricity networks and energy performance across utilities, agriculture, mining and transport⁶.

Investment in connectivity will also be critical – whether this involves physical infrastructure such as roads, railways and airports, or digital infrastructure like telecommunications and high-speed internet. Harnessing the opportunities of digital disruption will require a skilled and adaptable workforce. Investment in digital infrastructure will need to be coupled with investment in digital skills, so that businesses and communities are empowered to harness the full potential of new technologies. This is particularly important for our regions because digital inclusion declines with remoteness, and the digital ability gap between capital cities and other parts of the country persists⁷.

Another key ingredient of a dynamic labour market is job mobility. Job mobility in Australia has declined over several decades and is now in the bottom third of OECD countries⁸. Enabling people to move for work leads to better skills matching – that is, getting the right people into the right jobs – and better productivity. Regional South Australia has enjoyed a net inflow of people in the wake of the pandemic, but the labour market is tight and competition for talent remains intense⁹.

While job mobility is important, we also know that around 70 per cent of young adults born in Australia live in the same local labour market that they grew up in¹⁰. This means that we must also ensure that all Australian have access to quality employment and continuing education wherever they live.

International migrants will also play a critical role in complementing existing capabilities and filling skills gaps in a targeted way. This includes making better use of the skills of the nearly one quarter of permanent skilled migrants in Australia who are working in a job beneath their skill level¹¹.

Attracting more workers to our regions is increasing demand for housing. The South Australian housing market is under pressure, having experienced the most rapid house price growth in Australia over the past year.

Prices have risen by almost six per cent in Adelaide and more than nine per cent in the rest of the state¹². Our rental markets are also currently among the tightest in the country: the rental vacancy rate in regional South Australia is currently just one per cent, while the vacancy rate in Adelaide is even lower¹³. Improving housing affordability will require significant long-term investment to increase the supply of housing available to renters, owner occupiers and those needing assistance in the form of social housing.

Regional communities also need affordable, high-quality services in order to thrive. Health care and social assistance is already the largest employer in regional RDAs, at more than 13 per cent of the workforce¹⁴.

Growth in Australia's care economy – including childcare, healthcare, aged care and disability services – is set to be one of the most prominent shifts in our society in coming decades¹⁵.

The South Australian Royal Commission into Early Childhood Education and Care has identified that economic opportunity is being left on the table because of a lack of childcare in regional areas¹⁶. Improving access to childcare would help to boost participation in paid work, particularly for women, and could go some way to reducing the widening gap in workforce participation between Adelaide and the rest of the state¹⁷.

Australia's population is also ageing. Over the next four decades the number of Australians aged 65 and older will double, while the number of people aged 85 and older is set to triple¹⁸. This will place huge strain on the aged-care workforce, which is expecting an annual shortfall of up to 35,000 direct care workers over the coming decade¹⁹. In regional RDAs, half of the resident worker population is already aged 45 or older, compared with 43 per cent across the state²⁰. In the same way that tele-health has increased the availability of health care in remote communities, embracing the opportunities of technology in the aged-care sector could play a pivotal role in improving the quality of care and reducing the administrative burden on staff²¹.

It is against this backdrop of change that The Regional Outlook 2023 sets out regional South Australia's key priorities and investment pipeline. If we are to harness the opportunities and meet the challenges presented by climate, technological and demographic shifts, we need a plan. The investments we make today will be crucial for setting us up for success tomorrow. And the best outcomes will be achieved if communities, businesses and governments are able to work together for the greater good.

Melissa Wilson

Senior Economist (SA), Committee for Economic Development of Australia (CEDA)

Regional South Australia's Economic Performance

525,094 ↑ **14,603**

REGIONAL POPULATION

31.78 ↑ **2.92**

GROSS REGIONAL PRODUCT (\$B)

46,466 ↑ **1,623**

NUMBER OF BUSINESSES

62.564 ↑ **17.928**

REGIONAL INVESTMENT PIPELINE (\$B)

217,209 ↑ **6,872**

NUMBER OF JOBS

Source: Australian Bureau of Statistics, Gross Regional Product compiled by .id (Informed Decisions) and Regional Investment Pipeline compiled by Regional Development Australia

Regional Insights & Strategic Alignment

Regional Development South Australia Priorities



Regional Development South Australia (RDSA), as an independent and bipartisan network, is well-placed in providing specific local intelligence to advance regional challenges and evidence-based decision making. To realise the pipeline of investment opportunities, critical infrastructure needs to be aligned and coordinated effectively across all three levels of Government.

Accordingly, RDAs in 2023/2024 have embarked on projects to provide further information and informed decision making to accelerate commercial activities:

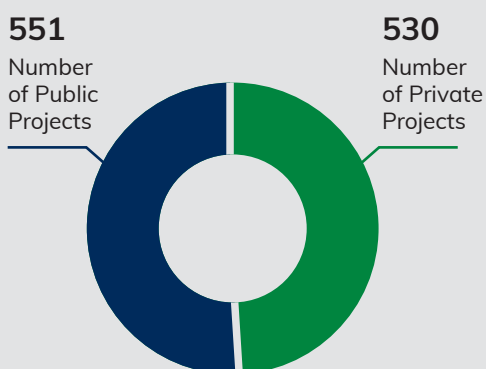
- RDSA 2023 Infrastructure Prioritisation which is our five yearly update;
- Mapping of proposed public infrastructure projects in South Australia (in the coming five years).



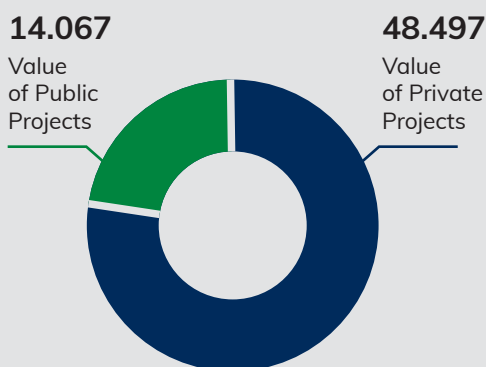
Image courtesy South Australian Tourism Commission

Analysis of the Regional Investment Pipeline highlights that while the number of projects is nearly evenly split between public and private investment, the CAPEX leans heavily towards the value of the private projects. In addition, the ANZSIC Code analysis reveals that the number of projects has increased in the renewable energy space, and the number and value of agricultural projects has decreased. Some of this decrease is due to the removing of projects from the pipeline as they are completed.

Public & Private Projects – Number



Public & Private Projects – \$B



Commonwealth Government Regional Investment Framework

Announced in the 2023 Australian Government budget the new framework across regional investment is welcomed and clearly identifies the investment priorities going forward. We have commenced the process of mapping our Regional Investment against these key priorities:

Projects Aligned to Commonwealth Government Regional Investment Framework	
Investing in People	12
Investing in Places	478
Investing in Services	61
Investing in Industry & Local Economy	530
Total	1081

2023 South Australian Economic Statement

The key missions drawn from the South Australian Economic Statement are critical to the success of regional South Australia:

- Mission One- Capitalise on the global green transition (79 projects proposed);
- Mission Two- Partner of choice in an insecure world;
- Mission Three- Build South Australia's talent.

We are moving towards similarly mapping the Regional Investment Pipeline to a full set of priorities in the South Australia Economic Statement.

Major Projects & Investment

Each RDA within the South Australian network provides integral support to government departments and businesses within each of their regions and works to develop a range of projects in cooperation with various domestic and international stakeholders.

This year we have included an indicative snapshot of recently completed projects which have been removed from the Regional Investment Pipeline as either industry or government have substantially completed construction of these projects:

- Port Wakefield By-Pass;
- Electra-Net upgrade Eyre Peninsula;
- Joy Baluch Bridge Duplication;
- Thomas Food International Processing Facility;
- Bi-energy Connect Projects- 30 projects across six industries;
- Pye Group Processing Expansion;
- Remarkable Southern Flinders EPIC Mountain Bike Loop;
- Murray Bridge Study Hub;
- Mount Gambier Airport Upgrade;
- Kangaroo Island Desalination & Water Supply.

In addition we have included a snapshot of the spread of projects across Industry Sectors by analysing against ANZSIC Codes.

Regional Projects by Industry ANZSIC Code	Number
A – Agriculture, Forestry and Fishing	190
B – Mining	35
C – Manufacturing	83
D – Electricity, Gas and Water and Waste Services	147
E – Construction	57
F – Wholesale Trade	16
G – Retail Trade	32
H – Accommodation and Food Services	63
I – Transport, Postal and Warehousing and Storage	7
J – Information Media and Telecommunications	3
K – Finance and Insurance Services	0
L – Rental, Hiring and Real Estate Services	0
M – Professional, Scientific and Technical Services	95
N – Administrative and Support Services	13
O – Public Administration and Safety	156
P – Education and Training	29
Q – Health Care and Social Assisitance	72
R – Arts and Recreational Services	67
S – Other Services	16
Total	1081



Image courtesy South Australian Tourism Commission

Major Projects

A snapshot of major projects under contemplation in Regional South Australia:

- Space - Koonibba Test Range & Whalers Way orbital launch complex
- Strezlecki Track - sealing
- Photon Energy- Solar Storage Project
- Great Australian Wine Capitals Trail
- Murray River Flood Re-construction works
- Cape Hardy- Green Hydrogen & Industrial Precinct
- Rex Minerals Hillside Mine
- Renascor Resources- Siviour Graphite Project
- Plant Protein Facilities across Northern South Australia
- Copenhagen Infrastructure Partners Green Hydrogen Project*
- ElectraNet Upgrades- Cultana and Yadharia & Tailem Bend and Tungkillo
- Port Bonython- Hydrogen Hub
- Hydrogen Jobs Plan at Whyalla
- Northern Water Supply
- Port Lincoln De-salination Plant
- Technical Colleges- Port Augusta and Mount Gambier
- CH4 Global- Seaweed Production Facility
- Hallett Group Green Cement Facility
- Truro By-Pass

*Value of Investment not included in Regional Investment Pipeline (RIP) until regulatory change occurs.



Adelaide

	Adelaide 2023	Adelaide 2022	Regional SA 2023	Regional SA 2022
Population	1,296,443	1,261,439	525,094	510,491
Number of Businesses	110,416	103,602	510,491	44,843
GRP	\$92.5731B	\$88.519B	\$31.781B	\$29.754B
TOTAL NO JOBS	691,644	641,394	217,209	211,443

Adelaide

Regional Development Australia Adelaide (RDAA) aims to facilitate, lead and collaborate to improve economic development in all South Australian regions.

Funded by the Australian Government to provide a collaborative voice for regional South Australia, the aim of RDA Adelaide in 2023/2024 is to increase promotion of Regional South Australia. In particular to capitalise on unprecedented opportunity for population and industry growth. We are focused on bringing together data, policy and solutions to key challenges including workforce, housing, and infrastructure to meet industry demands. RDAA also plays an important role in bringing together policy and capability for the Regional SA RDAs where required.

RDA Adelaide plays a unique role linking all regions within South Australia to key stakeholders in the metropolitan area. We strive to identify ways to alleviate regional issues through coordinating strategic initiatives between government, stakeholders and industry and collaborating across borders and jurisdictions to drive investment and deliver critical infrastructure. Our goal is to not only improve the quality of living and business environments across regional South Australia, but lead sustainable, long-term projects that deliver generational benefits to our regions.

When setting the strategic priorities, we have ensured that they can deliver outcomes in line with the new RDA Charter and address critical issues which are relevant across multiple regions. These specifically include the four areas identified in the new Australian government Regional Investment Framework:

- Investing in People
- Investing in Services
- Investing in Places
- Investing in Industries & Local Economies

The close working relationship that RDA Adelaide has with the seven regional RDAs within the State enables strong collaboration, and we will continue to advocate at both the State and Commonwealth level to facilitate action and deliver results across the entire network.

RDA Adelaide is focused in 2023/2024 on achieving the following priorities:

Pillar One: Building great relationships through increasing awareness of Regional SA's investment opportunities

Pillar Two: Increasing visibility of the work of RDA's by bringing together key initiatives and building branding and Public Relations activities

Pillar Three: Driving Regional SA Investment & Economic Growth by co-ordination of an Investment Pipeline and cross-regional investment projects

Regional Priorities

1. **Awareness & Advocacy:** Creating awareness and advocating for regional South Australia
2. **Collaboration:** Facilitating collaboration across regions
3. **Connect:** Facilitating connections for economic outcomes in regional South Australia
4. **Co-ordinate:** Co-ordinating the development and delivery of strategic regional plans and documents
5. **Engage:** Engaging with and supporting Commonwealth regional initiatives



RDA ADELAIDE
STRATEGIC
OPERATIONAL
PLAN



Adelaide Hills, Fleurieu & Kangaroo Island

	2023	2022	Difference	% Change
Population	140,089	134,661	5,428	4.03%
Number of Businesses	12,141	11,609	532	4.58%
GRP	\$6.253B	\$5.793B	\$0.47B	7.94%
TOTAL NO JOBS	691,644	42,253	4,274	10.12%
PIPELINE PROJECTS	\$3.03B	\$3.06B	\$0.24B	7.83%

Adelaide Hills, Fleurieu & Kangaroo Island

Population growth was a top contributor to economic growth in the Adelaide Hills, Fleurieu & Kangaroo Island, expanding by 1.6% per annum, or more than 2 times the state average.

This growth was driven by net domestic migration from metropolitan Adelaide and has supported an increase in population service industry jobs (education, construction and health). Tourism visitation to the region increased strongly at 4.6% per annum, twice as fast as the state. Strong population growth has increased residential and non-residential building approvals in population service buildings (retail and wholesale, education and aged care buildings).

Strong growth in the region's highly competitive export orientated industries supports growth in jobs, economic value, and productivity. These industries are agriculture, food and beverage processing, beauty products (chemical), manufacturing and metal ore (copper) mining.

The regional drivers of economic growth present challenges and include reliance on population for job growth, shortage of workers, exposure to emerging forces and slowdown in jobs growth as the region faces macroeconomic headwinds.

In the next five years to 2027, the region's GRP growth is forecast to be strong at 2% per annum, driven by a strong performance from the agriculture, health care and mining industries. However, job growth is forecast to be 0.4% per annum, significantly lower than historical growth rates. Key to future success will be the focus on the following areas.

Regional Priorities

- 1. Regional Productivity:** Support for our regions' public infrastructure development is a high priority. Infrastructure that is enabling not only lowers commercial barriers and increases productivity of supply chains and market access but growth liveability through facilitation of social inclusion (connectivity and accessibility), employment, improved placemaking and amenity, and increased resilience. RDA AHFKI's role in supporting our local government partners to develop, design and seek funding for key liveability and community assets is a key focus.
- 2. Innovation and Preparedness:** In an increasingly fast-paced world of change, our community's ability to adapt and growth through significant disruptions is paramount. Four key disruptors have been identified as critical areas for the region to become more innovative and resilient-climate change, demographic change, digitisation and demand for skills workforce.
- 3. Strengthening our most competitive Industry Sectors:** The region's economy is diverse with multiple sectors contributing relatively evenly to value-added, employment and exports. All three sectors can be strengthened at individual business and industry levels through provision of supported access to business information and resources, increased awareness of government and industry programs, targeted problem-solving and investment attraction. All these areas are core to the business of RDA AHF&KI and will continue to provide valuable assistance directly to business as well as through bespoke programs like the Hills & Coast Business Grant focused on supporting manufacturers.



RDA AHF&KI
STRATEGIC
REGIONAL PLAN



Barossa, Gawler, Light & Adelaide Plains

	2023	2022	Difference	% Change
Population	78,794	74,905	3,889	5.19%
Number of Businesses	5,986	5,710	276	4.83%
GRP	\$3.858B	\$3.632B	\$0.23B	6.22%
TOTAL NO JOBS	28,731	27,821	910	3.27%
PIPELINE PROJECTS	\$2.16B	\$2.29B	-\$0.12B	-5.44%

Barossa, Gawler, Light & Adelaide Plains

The RDA Barossa Gawler Light Adelaide Plains (RDA BGLAP) region is experiencing significant housing and population growth with further growth forecast for the next fifteen years and beyond. RDA BGLAP is focused on supporting delivery of economic investment, business sustainability and growth, job creation and local skills development to support that population growth.

The pipeline of economic investment and business growth opportunities are aligned to our regional strengths and capitalise on our competitive advantages. Key sectors include wine, food, tourism, creative industries and primary industries, with significant opportunities for value add and circular economy outcomes. The aged care, childcare, primary and allied health, education, and professional services sectors also present significant growth potential aligned to planned and forecast population growth.

Over the next twelve months our focus will be on unlocking new investment, job creation (particularly in 'future jobs'), increasing economic diversity and sustainability, and unlocking latent skills, workforce, and housing capacity. Whilst significant housing growth is forecast for our region, there remains a critical shortage in rental housing required to attract and retain workforce and their families.

RDA BGLAP is working collaboratively with stakeholders to gather and share regional data and intelligence to inform land use, infrastructure, core service and liveability planning to support sustainable communities and economic development. RDA BGLAP plays a vital role in connecting stakeholders, establishing common priorities, and advocating for action.

Regional Priorities

- 1. Housing:** Advocate for initiatives to unlock latent housing supply, increase rental housing, affordable housing, and greater housing diversity (size, style, location and affordability) to increase housing supply for workers, families and to enable ageing in place.
- 2. Workforce, Education & Skills:** Gather and share intelligence around highest areas of need and work collaboratively to connect employers to workers and to available support (and vice versa); and to create local pathways into education and work to unlock latent workforce capacity.
- 3. Sustainability:** Support and advocate for priority environmental projects (climate, drought resilience, water security, circular economy), connect industry with government initiatives and programs and assist businesses to transition to net zero.
- 4. Infrastructure & Land Use Planning:** Provide regional data and intelligence to inform land use and infrastructure planning processes by all three levels of government and advocate for delivery of priority infrastructure to support planned growth.
- 5. Water:** Support stakeholder water supply and demand analysis and water security planning that enables long-term sustainability and growth of our regional economy and communities. Identify and facilitate potential partnership projects to optimise sustainable use of available water including opportunities for water capture and reuse.



RDA BGLAP
REGIONAL
STRATEGIC
PLAN



Eyre Peninsula

	2023	2022	Difference	% Change
Population	58,947	57,631	1,316	2.28%
Number of Businesses	5,056	4,928	128	2.60%
GRP	\$3.804B	\$3.535B	\$0.27B	7.61%
TOTAL NO JOBS	25,835	25,710	125	0.49%
PIPELINE PROJECTS	\$28.49B	\$14.47B	\$14.02B	96.90%

Eyre Peninsula

Today, the Eyre Peninsula is one of South Australia's most productive regions generating almost \$4 billion in gross regional product annually. With an abundance of wind, solar, copper, graphite and other rare-earth resources, is set to be at the epicentre of the State's industrial renaissance and will play a pivotal role in global efforts to decarbonise industry through hydrogen product and the transition to electrification.

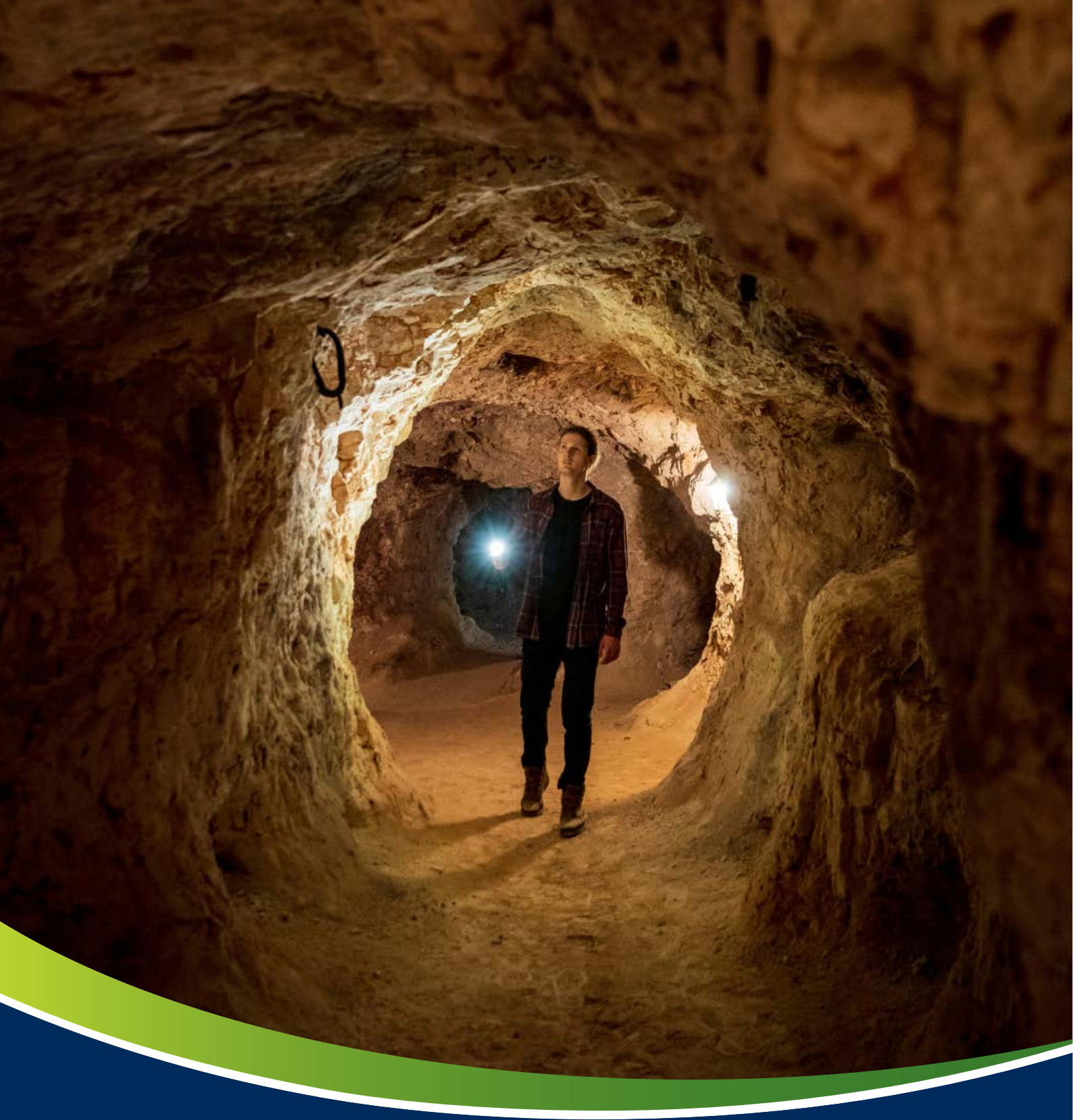
The region is highly export oriented and benefits from established agriculture, commercial fishing and aquaculture industries, exporting on average over 90% of its grain and over 80% of seafood produced in the region. Linked to our new collaborative Eyre Peninsula Strategic Regional Plan 2023- 2026 (jointly developed with Eyre Peninsula Local Government Association and Eyre Peninsula Landscape Board) we undertook a detailed economic analysis of the Eyre Peninsula and identified the following opportunities which will influence the region's economy over the coming years.

Regional Priorities

- 1. Social Capacity – Workforce attraction, retention, training and support:** It is essential that RDAEP support and develop the foundations on which the community is built. The people of Eyre Peninsula are resilient and have a strong sense of identity. However, they need to be supported by a variety of services to grow and thrive. Retaining and attracting a strong population base and active workforce is a key goal of RDAEP and is vital to supporting economic growth and strong communities.
- 2. Infrastructure Capability – Provision of economic enabling infrastructure:** Infrastructure plays a critical role in connecting communities, services and markets. Having fit for purpose infrastructure is critical to facilitating growth and strong communities. Promoting strategic infrastructure investment is a key goal of RDAEP. The provision of adequate infrastructure is vital to ensure business operations remain competitive and grow. The challenge of distance and connectivity remains an issue for the Eyre Peninsula. For this reason, it is critical that the region not only seek to enhance its network but also maintain existing infrastructure and services.
- 3. Economic Prosperity – Economic growth through improved business efficiencies and industry diversification:** The Eyre Peninsula benefits from a strong economy. Rich mineral deposits form the foundation of a strong mining and manufacturing industry, while expansive plains and plentiful seas support agriculture and aquaculture. These industries are the largest sectors in terms of export value in the region. They are also significant on a state-wide scale, with the Eyre Peninsula producing approximately 80% of South Australia's seafood product and a considerable amount of its grain.
- 4. Environmental Sustainability- Ecologically sustainable development and natural resource management:** The Eyre Peninsula's economy relies upon its environment. From resource extraction to agriculture, aquaculture and nature-based tourism, impacts associated with climate change will negatively affect the productivity of our existing and established industries. The future success of these industries will rely upon rapid decarbonisation as well as adapting to the effects of climate change. Stakeholders have recognised this and want to protect these assets for future generations by ensuring long term management and mitigation practices are at the forefront of decision-making processes.



EYRE PENINSULA
STRATEGIC
REGIONAL
PLAN



Far North

	2023	2022	Difference	% Change
Population	26,672	26,209	463	1.77%
Number of Businesses	1,286	1,234	52	4.21%
GRP	\$4.339B	\$4.548B	-\$0.21B	-4.60%
TOTAL NO JOBS	21,946	20,837	1,109	5.32%
PIPELINE PROJECTS	\$10.65B	\$9.09B	\$1.56B	17.13%

Far North

Regional Development Australia Far North (RDAFN) covers the vast northern areas of the state, 799,850 square kms of rugged beauty rich in natural assets, resilient communities, innovative business, and a diverse industry base.

With significant infrastructure projects currently under way or planned, numerous largescale projects in various stages of development, a thriving small business community, expanding educational facilities/offers, and a plethora of other new opportunities, the Far North region continues to experience increased growth.

Housing Demand: The surge in population and economic activity is leading to increased demand for housing. This demand is outpacing the availability of affordable housing options, resulting in rising housing costs and housing shortages. It is crucial to develop adequate housing infrastructure to accommodate the growing population.

Skilled Workforce: With the region experiencing growth, there is a need for a skilled workforce to meet the demands of various industries and projects. The increased opportunities are creating a shortage of skilled labour, requiring efforts to attract talent from other areas or investment in local skill development programs to bridge the gap.

Supporting existing businesses to maintain productivity: The region's expanding opportunities are placing strain on existing businesses and organisations. They face challenges in scaling up their operations, meeting increased demands, and maintaining high levels of productivity. Supporting the growth of existing businesses and attracting new ones is vital to strengthen the region's corporate capacity.

Capacity Demands from Infrastructure Construction: While infrastructure projects contribute to the region's growth, they also present challenges during the construction phase. These challenges include managing logistics, ensuring timely completion, minimising disruption to existing services, and coordinating various stakeholders involved in the projects.

Pressure on existing public services: Increased growth in the region is putting strain on existing public services such as healthcare, childcare, utilities, and other social services. The demand for these services is exceeding their current capacity, leading to potential issues in providing efficient and effective service delivery.

Balancing environmentally sustainable practices: The Far North region's growth and increased economic activity may have environmental consequences. It is important to carefully consider sustainable practices, environmental protection measures, and the preservation of natural resources during the development process.

Regional Priorities

1. **Economic Development:** advancing the major growth sectors in the Far North Investment Pipeline through working with key industry sectors and businesses to assist them reach their potential.
2. **Strategic Infrastructure Investment:** identifying strategic infrastructure requiring investment with a focus on connectivity across the Far North further opening the region to industry, tourism and business.
3. **Business Capacity Building:** support private investment by local and regional businesses, and attraction of new industries and businesses addressing market gaps, as well as harnessing the visitor economy through the promotion of the region.
4. **Population:** support projects/initiatives which improve the liveability of the Far North Region.
5. **Collaboration:** support collaboration with other key stakeholders, including RDAs across SA and Australia to share ideas and grow local knowledge



ECONOMIC
GROWTH &
INVESTMENT
STRATEGY



Limestone Coast

	2023	2022	Difference	% Change
Population	68,799	68,542	257	0.37%
Number of Businesses	7,764	7,539	225	2.90%
GRP	\$4.612B	\$4.151B	\$0.46B	11.11%
TOTAL NO JOBS	33,323	33,449	-126	-0.38%
PIPELINE PROJECTS	\$2.83B	\$2.69B	\$0.14B	4.85%

Limestone Coast

The majority of businesses in the Limestone Coast are small, with 85% either self-employed or employing one to four people. While they have limited resources, the region has grown Gross Regional Product by 11% over the past 12 months, reaching \$4.612B.

In a competitive job market, high demand is causing workforce challenges for business and local government. Regional Development Australia Limestone Coast (RDALC) is assisting our region's employers by providing workforce support, migration information, and delivering employer of choice workshops and seminars to help businesses attract and retain staff.

Housing Availability: Housing availability and affordability has been an issue across our region for more than 15 years. This has been exacerbated by large scale relocation from metro to country areas during COVID-19, with Mount Gambier making the national top 5 regional locations on the Regional Australia Institute Movers Index in 2022/ 2023.

Renewable & Circular Economy: The region has unique opportunities for renewable energy and as the largest industries in the Limestone Coast, Agriculture, Forestry & Fishing and Manufacturing are leading adaptation towards a Net Zero economy. Local businesses are developing innovative Circular Economy opportunities and RDALC is supporting uptake with connections to potential supply and markets, as well as linking businesses to potential funding and other innovators.

Infrastructure: One of the major limiting factors for economic and population growth is the availability of suitable physical and social infrastructure. From roads, water supply and telecommunications to childcare, healthcare and education, the region needs further high-quality infrastructure.

Regional Leadership & Business Support: The dual approach of supporting emerging and existing leaders is establishing a solid foundation for future growth through the PIRSA funded Limestone Coast Leadership Program. Overall, RDALC is fostering resilience by supporting businesses and economic growth across the region.

Regional Priorities

1. Invigorate the working age population, by attracting and retaining more people across the region to fill key skills gaps and support vibrant and sustainable regional communities.
2. Take advantage of growing global demand for sustainable, high quality agricultural produce by building on our strong reputation for red meat, dairy, wine, horticulture, and fishing, as well as forestry production.
3. Capture employment opportunities in growing sectors of healthcare and social assistance .
4. Support the development of a vibrant business ecosystem.
5. Collaboration to develop a more coordinated regional tourism market
6. Securing investment to deliver regional infrastructure priorities enabling growth.
7. Support solutions to address the housing shortage across the region.



LIMESTONE
COAST
REGIONAL
GROWTH PLAN



Murraylands & Riverland

	2023	2022	Difference	% Change
Population	73,264	73,034	230	0.31%
Number of Businesses	6,672	6,506	166	2.55%
GRP	\$4.641B	\$4.145B	\$0.5B	11.97%
TOTAL NO JOBS	31,137	31,054	83	0.27%
PIPELINE PROJECTS	\$2.98B	\$2.37B	\$0.61B	25.97%

Murraylands & Riverland

The Murraylands and Riverland region is known for its community spirit, resilience, technical excellence in irrigation, dryland farming, biosecurity, and food and wine production and for our enviable lifestyle.

The Murray River (Moorundi) is the lifeblood of our region; a natural and economic corridor that sustains our communities, lifestyle and economy. The Murray connects us into Adelaide, through its water supply, and beyond South Australian borders into New South Wales, Victoria and Queensland through the Murray-Darling Basin. The Mallee is our connection to country (Ruwe), with vast open spaces and world leading dryland, livestock and groundwater-fed horticultural production.

Throughout 2021 and 2022, Regional Development Australia Murraylands and Riverland (RDAMR) worked closely with regional partners, the Murraylands and Riverland Landscape Board and Murraylands and Riverland Local Government Association, and our communities to develop the Murraylands and Riverland Plan (MR Plan). We listened to over 550 people, each contributing an average of seven hours, and they told us what our region's priorities are:

Regional Priorities

1. Leadership in Action - Develop a system of leadership and nurture both formal and informal leaders in the region:

- Leadership engages deeply with their community in shaping their futures
- Communities are respected and listened to
- Support leaders to grow, develop and connect in their communities
- Our leaders are empowered

2. Prepared and Proactive - Create a proactive, adaptive, and innovative system of planning for and leveraging disruption

- Take a long term strategic view to planning
- Planning focuses on both the reactive and the preventative
- Planning is collaborative across sectors, is community driven, and evidence based

3. Productive and Collaborative Futures - Create the conditions for industry and business to thrive now and into the future by:

- Enabling improved collaboration, communication and information availability
- Encouraging diversification of industry both across the region and within sectors
- Investing in business – to encourage innovation, inclusivity, and a future focus
- Promoting the region

4. Together Community - Enable and Support the development of a connected and inclusive community

- Don't leave anyone behind
- Provide easy access to services and supports
- Apply place-based models to enable communities to grow and develop

As RDAMR moves on from our 2020-23 Strategic Plan and into a 2023+ Strategic Direction, we will be delivering on our purpose, to connect our region for a resilient and sustainable future, in a way that progresses the region's priorities, including building back better after the 2022-23 River Murray Flood Event. Through our strategic direction, we will continue to act locally and interact globally in partnership with other aligned organisations, with a view to developing an overarching business case that connects our region to a resilient and sustainable future. To achieve this and then evolve it as required, we will continue to connect with, listen to and empower our communities.



MURRAYLANDS
& RIVERLAND
PLAN



Yorke & Mid North

	2023	2022	Difference	% Change
Population	78,529	75,509	3,020	4.00%
Number of Businesses	7,561	7,317	244	3.33%
GRP	\$4,274B	\$3.95B	\$0.32B	8.20%
TOTAL NO JOBS	29,710	29,258	452	1.54%
PIPELINE PROJECTS	\$12.16B	\$10.67B	\$1.49B	13.97%

Yorke & Mid North

Yorke and Mid North is a region of many opportunities, fantastic place to live and work, and has a \$12.16B pipeline of projects planned over the next five years, which the RDA Yorke and Mid North (RDAYMN) Board is committing to assisting to bring to fruition.

However, there are many strategic challenges facing the region. In common with most regions across Australia the demographics of our community has changed significantly over the last 20 years. We have seen an outflow of school age children, young workforce participants and parents/homebuilders and an inflow of older workers, retirees, seniors and elderly aged. This results in a reduced pool of available labor for local business. Employment has declined in our traditional industries of agriculture, manufacturing and retail and increased in service industries such as Health Care, Social Services and Education.

Our communities comprise a significant number of small townships and villages, alongside a small number of larger regional centres. These townships and centres play a crucial role in supporting our regional populations living on primary production land spread across the entire breadth of our geographic region. It is the people who live and work in these communities that make the Yorke and Mid North region what it is.

The regional economy is built around its traditional strengths in primary production (broadacre cropping, grazing and livestock production, and viticulture) and value add manufacturing (including in metals refining and fabrication, food and wine). In more recent years, tourism and renewable energy have become increasingly important sectors of the local economy, supported by our favourable natural environments locally and proximity to key infrastructure and population centres.

RDA Yorke & Mid North's intent is to provide a clear sense of the region's priorities and to enable stakeholders to make better informed decisions via place-based approaches, while also delivering on our core functions of supporting businesses, community groups and (local) government to investigate, plan and deliver projects, and to promote and facilitate engagement with government programs.

Regional Priorities

1. Great Infrastructure & Technology:

- All business, education and health will have access to technology in the region in line with Adelaide CBD.
- All businesses and new proponents will have access to freight enablers to facilitate industrial growth.

2. Economy Built on Innovation and Value Adding:

- Extend our lead in growth industries of renewable energy, tourism and primary production.
- Develop existing and new entrepreneurs in the region.

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3. People with the Capabilities to get the Job done:

- Skill our businesses to be employers of choice.
- Work with industry to grow our labour force through targeted skills and training programs.

4. Growing a Diverse Population:

- Attract and retain a diverse working population to underpin industry needs
- Position the liveability and amenity of the region to reflect the regions strengths.



RDA YMN
STRATEGIC PLAN

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Image courtesy South Australian Tourism Commission

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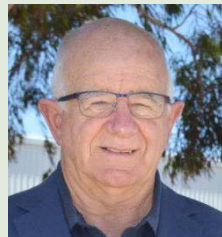
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Referencing:

Regional Development South Australia Regional Outlook
Edition 4 | September 2023

For further information about Regional Development South Australia, the Regional Development Australia network in South Australia, and economic development in regional South Australia visit regionaldevelopmentsa.com.au.

Co-ordinated by Regional Development Australia Adelaide on behalf of Regional Development South Australia.



Government
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Local Government Association
of South Australia

