

**AGRICULTURE** - Crop production makes up more than 50 per cent of the Great Southern's total agricultural output. Major grain and oilseed crops include wheat, barley, lupins, oats and canola.



# GREAT SOUTHERN

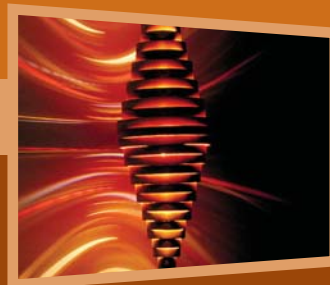
## Economic Perspective



**TOURISM** - The Albany wind farm situated along the south coast is a popular attraction for tourists.



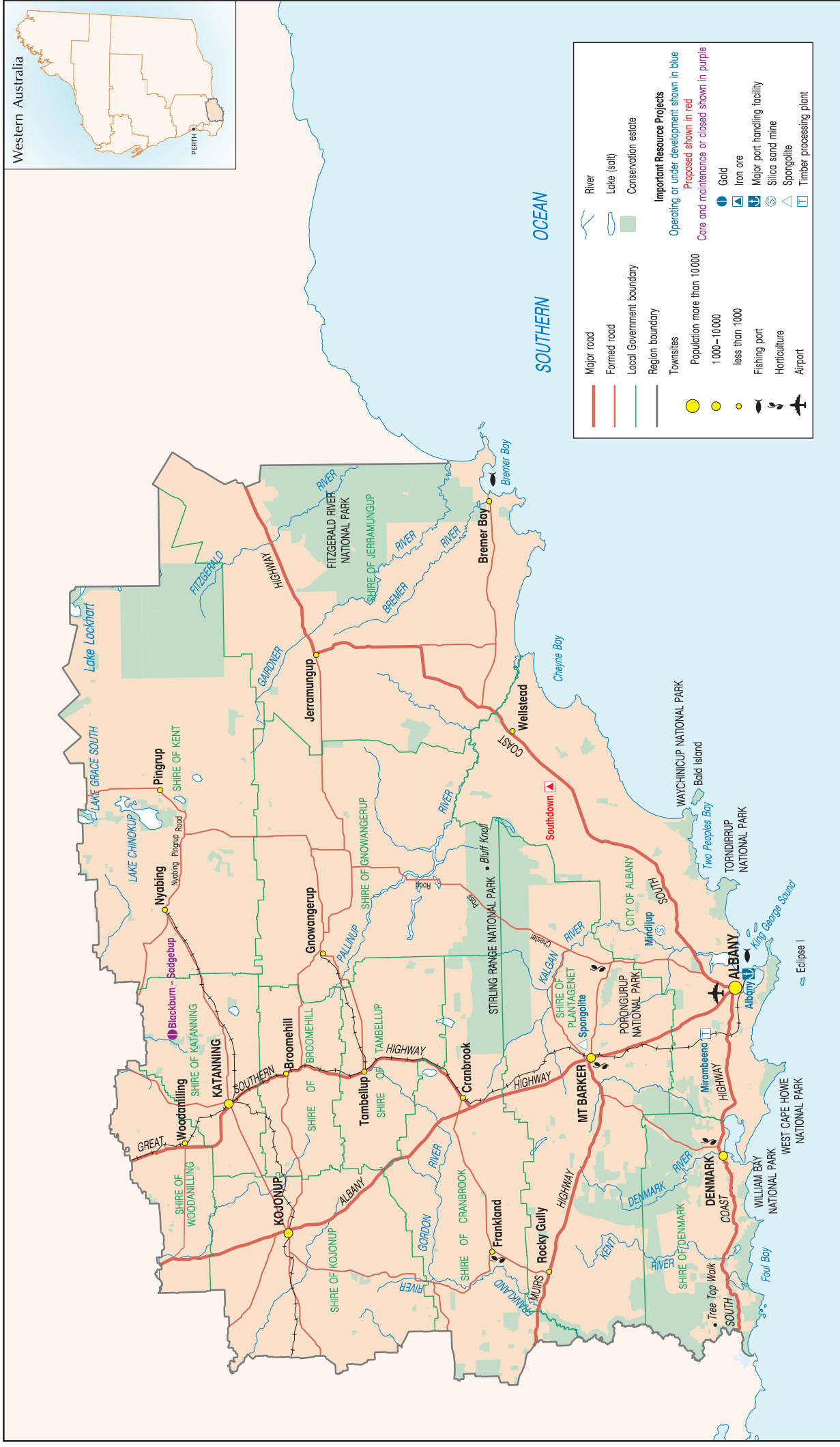
**WINE** - The regional wine industry is made up of the Frankland, Mt Barker, Porongurup, Albany and Denmark sub-regions.



**FINE WOOD DESIGN** - Fine wood design is a prominent part of the Region's craft industry and value adds to timber at the highest level.



**FISHING** - The prized Patagonian toothfish is caught in the sub-Antarctic fisheries and unloaded at Albany port.



# GREAT SOUTHERN REGION

## KEY FEATURES

THEME	SOURCE	DATE
Cultural	DUI/DOIR	1988
Transport	DLI	1988
Hydrography	DLI	1988
Tenure	CALM	Mar 2005
LGA Boundaries	DLI	2004
Aboriginal Communities	Department of Indigenous Affairs	2004
Important Resource Projects	DoIR - modified from MINEDEX and WAPIMS databases	Nov 2004

Produced by the Geological Survey of Western Australia.  
 Map product is to be used for broad based planning only.  
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 September 2005



**FOREWORD**

The Great Southern Economic Perspective was prepared by the Department of Local Government and Regional Development in conjunction with the Great Southern Development Commission, as one of a series of nine documents. Each of the documents addresses a different non-metropolitan region of the State.

The Economic Perspectives are the core economic documents for the regions and provide a useful insight into regional Western Australia. Each document has been prepared in an easy-to-read format and provides the latest available information on population, labour force and employment, taxable income, tourism, fishing and aquaculture, agriculture, mining, construction, manufacturing, commerce, project investment, indigenous economic development and infrastructure. Each economic section contains a brief analysis and is supported by graphs to illustrate the trends over time.

The Great Southern Region remains the second largest producer of agriculture commodities in Western Australia. In 2003/04, the Region's agriculture production was valued at \$810.9 million, with the traditional broadacre crops, livestock and wool making the prevalent contribution. The Region was successful in diversifying agricultural production to include canola, olives, vegetables, wine grapes and blue gum plantations. The commercial links between the primary industries and other sectors, such as manufacturing, have successfully added value and strengthened the Region's economy.

Around 60 per cent of the Region's residents live in the municipality of Albany. The Region has experienced steady population increases in the past ten years. In addition to the city of Albany, significant population growth has also occurred in the Shires of Denmark and Plantagenet.

Commercial activity in the Region continues to grow. Albany is the main business and service centre and hosts a wide range of business activities.

In addition, the Great Southern is endowed with many kilometres of spectacular coastline and inland natural attractions. This, along with the Region's rich history, draws over a half a million domestic and international visitors each year.

As Minister for the Great Southern Region, I invite you to read the Great Southern Economic Perspective document. I am sure you will find it interesting and informative.

A handwritten signature in black ink, appearing to read 'John Bowler'. The signature is fluid and cursive, with a large initial 'J'.

Hon. John Bowler JP MLA

**MINISTER FOR RESOURCES AND ASSISTING THE MINISTER FOR STATE DEVELOPMENT; EMPLOYMENT PROTECTION; GOLDFIELDS-ESPERANCE AND GREAT SOUTHERN.**

## THE REGION

The Great Southern Region is located on the south coast of Western Australia, adjoining the Southern Ocean where the coast extends for approximately 250 kilometres. It is also bordered by the South West Region to the west and extends 200 kilometres north where it meets the Wheatbelt Region. The Goldfields-Esperance Region is located to the east.

The total land area is 39,007 square kilometres (including offshore islands), representing approximately 1.5 per cent of the State's total area. The estimated resident population in 2005 was 53,738.

The historic port town of Albany, which is the State's oldest European settlement, has one of the best natural anchorages in the Southern Hemisphere and is the Region's administrative centre. It is also the transport hub from where most of the Region's crops and livestock are shipped.

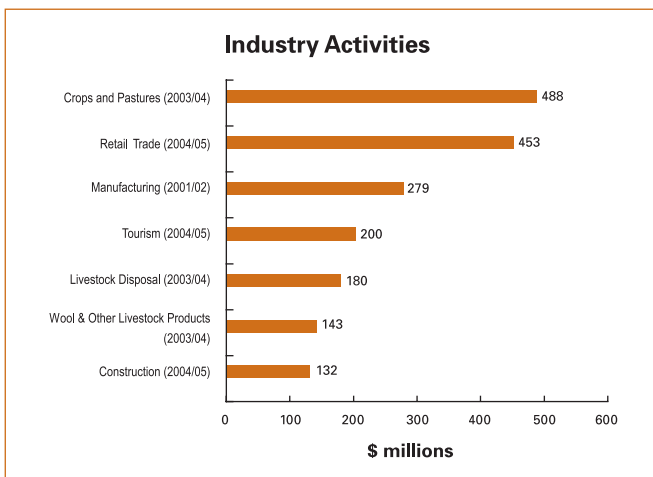
The Great Southern's economy relies on having the most productive crop and livestock land in the State and is notably the second largest wool-producing region in Western Australia. It also features some of the most rugged and beautiful coastal scenery in Australia and contains natural tourist locations, such as the Stirling Ranges and the Porongurup National Park.

## OVERVIEW

The Great Southern's Gross Regional Product was estimated at \$2.2 billion (indicative only) in 2004/05, representing a 7.4 per cent increase compared to the previous year.

The Great Southern Region remains the second largest producer of agricultural commodities in Western Australia, accounting for almost 13 per cent of the State's agriculture output. The main agriculture industries include broadacre cropping, livestock and wool. Some other major industries include retail trade, manufacturing, tourism and construction.

These industries have been ranked by their contribution to the regional economy (see Industry Activities graph).



*Note: Industry activities are based on value of production, turnover and expenditure, whereas Gross Regional Product is the value of final goods and services produced in the Region less intermediate inputs.*

Source: Department of Local Government and Regional Development.

In 2003/04, the total value of agricultural production in the Great Southern was \$810.9 million. Crops accounted for \$488 million, livestock disposals accounted for \$180 million, and wool and other animal product accounted for \$143 million (see page 6).

Commercial activity in the Region has been increasing. The Department of Local Government and Regional Development estimates that retail turnover reached \$452.5 million in 2004/05 (see page 11). Employment by industry, which is released every five years (part of the Australian Bureau of Statistics Census 2001) indicated that 18.3 per cent of the Region's workforce (ABS Usual Residence) were employed in retail and wholesale trades and another 16.0 per cent were engaged in education, health and community services (see page 4).

Manufacturing activity in the Region is based largely on the supply of equipment and machinery to the agricultural sectors and for the processing of agricultural commodities. From the latest manufacturing data (2001/02), total sales and service income was estimated at \$279 million (see page 10).

Tourism continues to have strong potential for the future. Across 2004 and 2005, there were on average 539,800 overnight domestic and international visitors to the Region. Total tourism expenditure was estimated at over \$200.4 million (see page 5).

The building and construction industry has grown in recent years. There were 586 dwelling approvals in 2004/05 and total approvals were valued at \$132 million (see page 11).

Mining production was valued at \$4.0 million in 2004/05 and was comprised largely of silica sand, valued at \$2.5 million and spongolite valued at \$1.4 million (see page 9).

The value of the fishing industry was estimated at \$4.7 million in 2004/05 and the total catch was 2,570 tonnes. In addition, considerable effort is being directed toward the development of aquaculture (see page 9).

Blue gum plantations in the Region are increasing at a rate of 5,000 hectares a year. There is an estimated 135,000 hectares planted. There is also a resource of 8,514 hectares of pines, consisting of 3,714 hectares of *Pinus radiata* and 4,800 of *Pinus pinaster*. The approximate value of the plantations is \$500 million (see page 10).

Other sections included in this document are Population (page 3), Labour Force and Employment by Industry (page 3), Average Taxable Income (page 5), Project Investment (page 12), Indigenous Economic Development (page 12) and Infrastructure (page 12).

## POPULATION

### Population Structure and Characteristics

The estimated resident population of the Great Southern Region was 53,738 in 2005, which amounts to 2.7 per cent of the State's population and 10 per cent of all the people living in regional Western Australia. In terms of population size, the Region is currently ranked fourth largest of the nine non-metropolitan regions in Western Australia.

### Population Distribution

The Great Southern Region's population is concentrated in the City of Albany. In 2005, the city had a total population of 31,981, which accounts for 60 per cent of the Region's total. The Shire of Denmark is the second largest population centre with a population of 5,229 or 10 per cent of the Region's total, followed by the Shire of Plantagenet (9 per cent) and the Shire of Katanning (8 per cent).

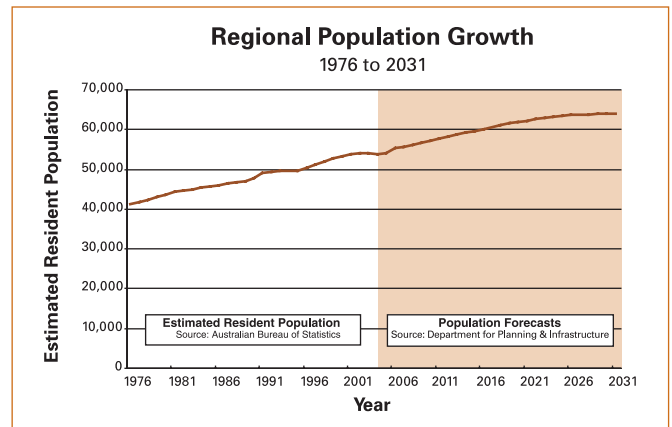
From 1995 to 2005 the Region's average annual growth rate was 0.8 per cent. Over the 12 months to 2005, the Region's population experienced a 0.4 per cent increase compared to a 1.7 per cent increase for regional Western Australia and a 1.6 per cent increase for the State.

While the overall population for the Region is increasing, the distribution is changing with the inland and agricultural shires experiencing decline or slower growth and the coastal local government authorities experiencing a greater concentration of population. The population shift is tied to the 'sea change' phenomenon and changing farming practices such as increasing capitalisation and the trend toward fewer, but larger farms.

### Growth Projections

Projections by the Department for Planning and Infrastructure indicate future average growth rates of approximately 0.9 per cent per annum from 2005 to 2015, and 0.4 per cent per annum from 2015 to 2031. As a result, the Great Southern's population is expected to reach 55,900 by 2008, 59,900 by 2011 and 63,800 by 2031.

However, new economic developments proposed for the Region have the capacity to boost population, resulting in a higher growth rate.



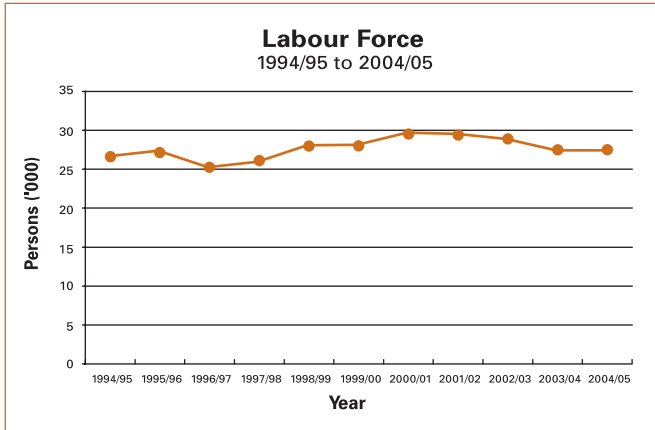
Source: Australian Bureau of Statistics and Department for Planning and Infrastructure.

Estimated Resident Population 1995 - 2005						% Share of the Region 2005	1 yr Annual Growth 2004-2005 %	5 yr AAGR 2000-2005 %	10 yr AAGR 1995-2005 %
LGA	1995	1998	2001	2004	2005p				
Albany (C)	27,634	29,486	31,236	31,586	31,981	60	1.3	0.9	1.5
Broomehill (S)	510	506	523	506	507	1	0.2	-0.8	-0.1
Cranbrook (S)	1,153	1,113	1,068	1,055	1,036	2	-1.8	-0.9	-1.1
Denmark (S)	3,749	4,187	4,715	5,117	5,229	10	2.2	2.5	3.4
Gnowangerup (S)	1,846	1,757	1,579	1,431	1,391	3	-2.8	-3.2	-2.8
Jerramungup (S)	1,335	1,289	1,244	1,172	1,172	2	0.0	-1.6	-1.3
Katanning (S)	4,719	4,703	4,483	4,236	4,075	8	-3.8	-2.1	-1.5
Kent (S)	796	730	638	576	540	1	-6.3	-4.4	-3.8
Kojonup (S)	2,382	2,411	2,298	2,185	2,119	4	-3.0	-1.8	-1.2
Plantagenet (S)	4,224	4,390	4,688	4,611	4,634	9	0.5	0.1	0.9
Tambellup (S)	739	735	732	681	672	1	-1.3	-1.9	-0.9
Woodanilling (S)	361	384	394	388	382	1	-1.5	-0.2	0.6
Great Southern	49,448	51,691	53,598	53,544	53,738	100	0.4	0.3	0.8

p = preliminary. AAGR = Average Annual Growth Rate.  
 \*The Town and Shire of Albany amalgamated in July 1998 to form the City of Albany.  
 Source: Australian Bureau of Statistics - Estimated Resident Population.

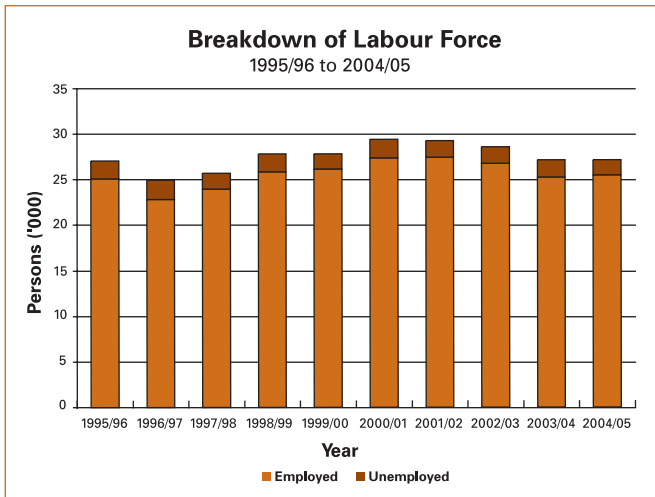
## LABOUR FORCE AND EMPLOYMENT BY INDUSTRY

The labour force consists of all people who are employed and unemployed but looking for work. Over the last 10-year period, the number of people in the Great Southern's labour force has remained fairly stable, ranging from 24,983 in 1996/97 to 29,397 in 2000/01 (peak). By 2004/05, there was an estimated 27,126 people in the labour force.



Note: Each financial year is calculated on a four-quarter average.  
Source: Department of Employment and Workplace Relations.

In 2004/05, there were 25,480 people employed in the Region, with a further 1,646 people seeking employment. The number of people employed has followed a similar trend to labour force, and ranged from 25,073 persons in 1995/96 to 25,480 in 2004/05.



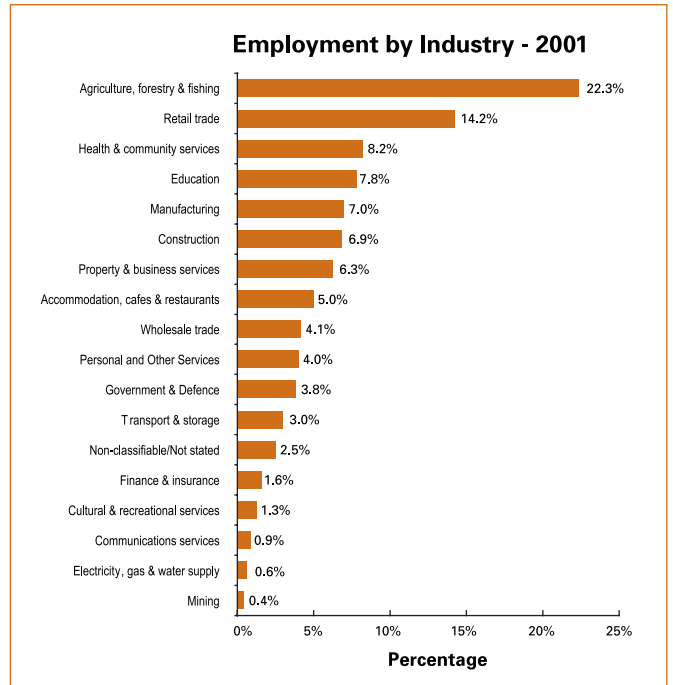
Note: Each financial year is calculated on a four-quarter average.  
Source: Department of Employment and Workplace Relations.

The unemployment rate for the Great Southern has fluctuated around the trend line for the State, remaining lower for the majority of the 10-year period. In 1995/96, unemployment in the Great Southern was 7.4 per cent, while the State's rate was 8.5 per cent. However, by 2002/03 the Region's rate rose above the State's and unemployment was 6.4 per cent, rising to 7.1 per cent before dropping to a low of 6.1 per cent in 2004/05. By contrast, the unemployment rate for Western Australia was 5.0 per cent in 2004/05.



Note: Each financial year is calculated on a four-quarter average.  
Source: Department of Employment and Workplace Relations

According to the most recent census (2001), the production sectors of agriculture, manufacturing and mining employed 22.3 per cent, 7.0 per cent and 0.4 per cent of the Region's workforce respectively. The service sector industries accounted for the remainder of the workforce and included retail trade (14.2 per cent), health and community services (8.2 per cent) and education (7.8 per cent).



Source: ABS Census Usual Residence - Employment by Industry.

In comparing the census employment data between 1996 and 2001, agriculture experienced the largest relative change in employment share dropping from 26.2 per cent in 1996 to 22.3 per cent in 2001. Personal and other services fell by 1.4 percentage points. The health and community services industry increased its relative share from 6.0 per cent in 1996 to 8.2 per cent in 2001. Both retail trade and property and business services increased their relative shares by 1.4 percentage points.

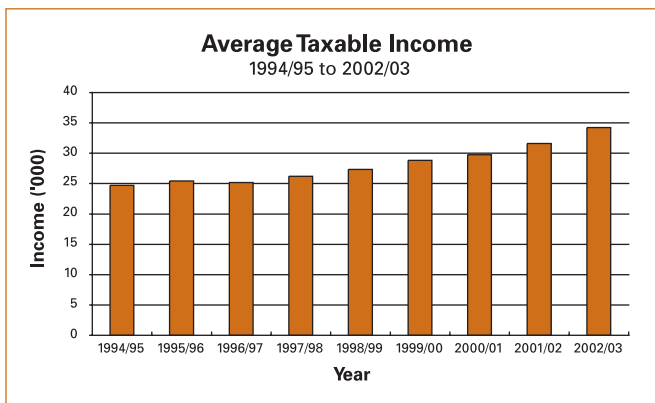
**Employment by Industry - 1996 & 2001**

Industry	1996 % Share	2001 % Share	Change in Percentage Points
Agriculture, Forestry and Fishing	19.0	16.7	-2.2
Mining	3.6	4.3	0.7
Manufacturing	3.7	3.5	-0.1
Electricity, Gas and Water Supply	1.3	1.0	-0.3
Construction	6.1	5.6	-0.5
Wholesale Trade	4.9	5.0	0.2
Retail Trade	11.1	12.9	1.8
Accommodation, Cafes and Restaurants	8.1	9.4	1.3
Transport and Storage	4.8	5.2	0.4
Communication Services	1.9	1.3	-0.6
Finance and Insurance	1.1	0.6	-0.4
Property and Business Services	3.8	4.7	0.9
Government Administration and Defence	6.2	8.3	2.1
Education	6.7	6.2	-0.5
Health and Community Services	8.9	5.8	-3.0
Cultural and Recreational Services	1.0	1.7	0.7
Personal and Other Services	3.2	4.3	1.1
Non-Classifiable/Not Stated	4.7	3.3	-0.3
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>0.0</b>

Source: ABS Census Usual Residence - Employment by Industry.

**AVERAGE TAXABLE INCOME**

The estimated average taxable income in the Great Southern has increased from \$24,725 in 1994/95 to \$34,232 in 2002/03. By comparison, the average taxable income for regional Western Australia in 2002/03 was \$39,254 and the State (as a whole) was \$40,155.

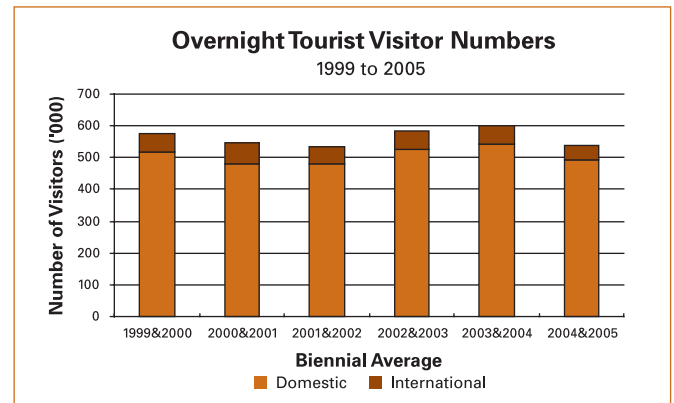


Source: Australian Taxation Office.

**TOURISM**

Tourism is a significant contributor to the Great Southern Region's economy. Visitors are drawn to the Region primarily because of its natural attractions, such as the coastline, the Stirling and Porongurup Ranges, Fitzgerald biosphere and forest, which are mostly contained within National Parks. Other attractions complement the natural environment. These include heritage experiences related to the coast and Albany, as the first European settlement in Western Australia. In addition, the Region has a strong pioneering history in its rural communities.

The number of overnight domestic and international visitors to the Great Southern Region, when averaged across 2004 and 2005, totalled 539,800. These visitors stayed over 2.1 million nights and accounted for 4.8 per cent of all visitor nights for Western Australia for those years.



Note: Visitor numbers are calculated based on a two-year average. Source: Tourism Western Australia.

Across 2004 and 2005, average overnight visitor expenditure totalled \$200.4 million. Domestic visitor expenditure was estimated at \$187.8 million across 2003 and 2004, decreasing slightly to \$182.3 million across 2004 and 2005. By contrast international visitor expenditure rose from \$15.4 million to \$18.2 million over the same period.



Note: Visitor Expenditures are calculated based on a two-year rolling average. Source: Tourism Western Australia.

**Domestic Visitors**

Domestic visitors dominated the tourism market in the Region accounting for 91 per cent of total visitors across 2004 and 2005. Of the 491,000 domestic visitors, 83 per cent came from intrastate (WA) and 17 per cent came from interstate.

On average, domestic visitors stayed 3.8 nights in the Great Southern Region and spent an average of \$97 per day. Most tourists visited between January and March in the summer and across Easter school holidays. Of all the domestic visitors staying overnight, approximately half stayed for holiday/leisure purposes, 32 per cent stayed to visit friends and relatives and the rest stayed for business and/or other purposes. When staying overnight in the Region, 36 per cent chose to stay at the home of friends or relatives, 29 per cent stayed in hotels, resorts or motel inns, 13 per cent stayed at a caravan park/commercial camping ground and a further 10 per cent rented a house or apartment.

**International Visitors**

On average, 48,800 international visitors came to the Region across 2004 and 2005 (9 per cent of total visitors). Twenty nine per cent of the international visitors came from the United Kingdom, ten per cent from Germany, ten per cent came from Singapore, and eight per cent from New Zealand. International visitors stayed an average of 4.8 nights in the Region, and spent an estimated \$78 per day. The most popular months for international visitors to the Region are from October to December during the wildflower season and in summer from January to March.

The Region’s natural environment is an attraction for visitors and 88 per cent of international tourists indicated they came to the Region for the purpose of holiday/leisure. A significant proportion indicated their participation in outdoor or eco-tourism activities. In 2004/05, 42 per cent of international visitors chose hotel, resort or motel accommodation. Twenty four per cent selected caravans and another 14 per cent were backpackers or stayed in hostels. The rest rented houses or apartments, lived with friends or relatives or stayed in guesthouses.

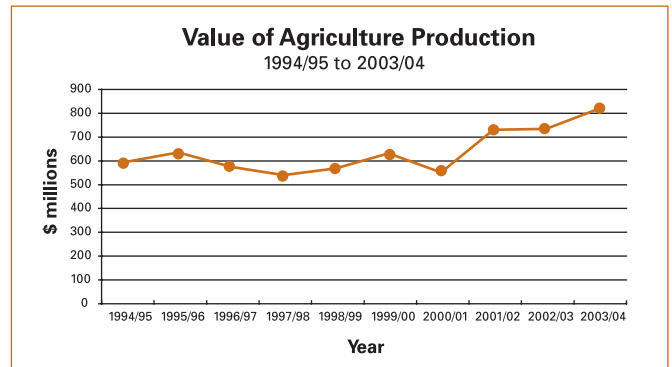
**Tourism Projects**

Significant projects are being implemented that will add to the range of visitor experiences on offer in the Region, including:

- The \$27 million Albany Waterfront development, which will deliver a protected boat harbour, boat pens, a serviced jetty, seawalls and serviced land development. In addition, pedestrian and traffic facilities will be installed, including a footbridge connecting the Waterfront to the CBD from Stirling Terrace. The City of Albany has selected the Waterfront precinct as the location for the \$20 million Albany Convention and Entertainment Centre.
- The Hidden Treasures Drive Trail covers a collection of Northern Shires in the Great Southern Region. Steeped in the heritage of early settlers the drive trails offer a unique glimpse at the ‘real backbone’ of our farming communities. Grand old homesteads and huge grain operations showcase modern agriculture and unique scenery. Further iconic tourism projects in each Shire location are in early planning stages.
- The Jones Building located in Broomehill is being restored around the historic ‘gold rush era’ theme. Pending approval of a liquor licence, wine cellar sales will be available from 2006. Restaurant operations, accommodation facilities, a local art gallery and bakery will also be developed at a later stage.
- The Great Southern Food and Wine Touring Guide is a comprehensive guide to all the wineries and cellar doors in the Region together with farm gate, restaurants and accommodation in all wine subregions in the Great Southern. The Guide, now in its fourth edition, is distributed to Visitor Centres, retail outlets and other locations frequented by tourists.

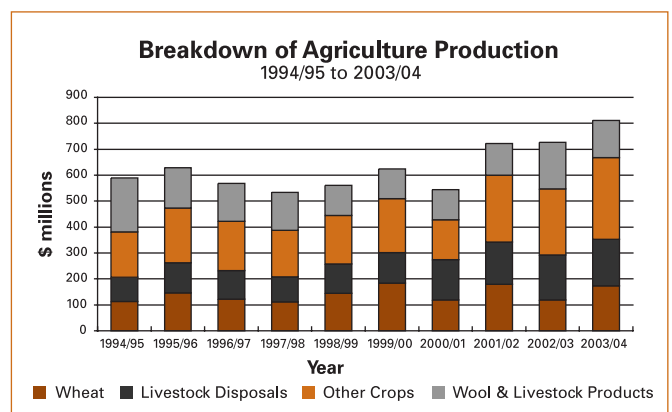
**AGRICULTURE**

Agriculture is the most prominent industry sector in the Region. There are 1,975 agricultural holdings covering 3.1 million hectares. Agricultural production in 1994/95 was valued at \$588.8 million and has progressively increased over the decade to \$810.9 million in 2003/04. The Great Southern Region continues to be the second largest producer of agriculture commodities and accounts for 12.9 per cent of the State’s agricultural wealth.



Source: Australian Bureau of Statistics.

Production consists of crops (\$488.0 million), livestock products (\$142.9 million) and livestock disposals (\$179.9 million). The Region is the premier producer of high quality fine wool and was the second largest producer of wool in Western Australia accounting for 24.2 per cent of the value for 2003/04. The Region was the State’s second largest meat producer, mainly from the slaughter of sheep (\$99.8 million in 2003/04) and cattle (\$56.8 million). The Region was also the second largest producer of wheat valued at \$172.8 million in 2003/04. Other crops include barley, canola, grapes for wine production and smaller quantities of fruit and vegetables.



Source: Australian Bureau of Statistics.



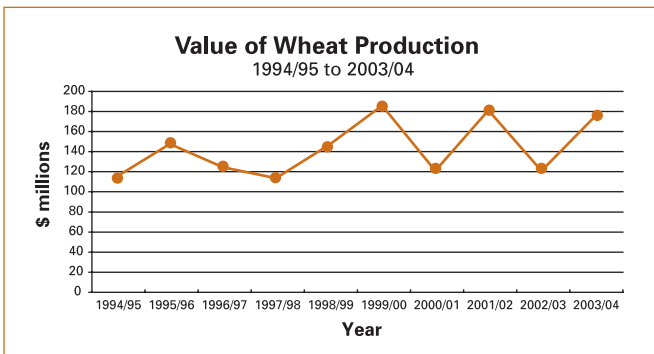
**Crops**

The value of crop production in 1994/95 was \$287.8 million, which after years of fluctuations increased to \$488.0 million in 2003/04. Crops in 2003/04 accounted for 60 per cent of agricultural production in the Region, with wheat alone accounting for 21 per cent. Crop production consists of cereal crops, mainly wheat, barley and oats (\$313.8 million), canola (\$80.9 million), lupins (\$12.3 million), fruits (\$35.9 million), vegetables (\$2.6 million), nursery products and cut flowers (\$12.0 million), pasture for hay and seed (\$10.4 million), and various other crops (\$20.1 million).

**Wheat**

Wheat is the Region's most significant grain commodity in terms of value and quantity. Production in 1994/95 was valued at \$113.3 million and despite large variations in climatic conditions, wheat production increased in value to \$172.8 million accounting for 781,071 tonnes in 2003/04. In terms of relative value, wheat alone accounted for over 21 per cent of the Region's agriculture production and for over a third of total crops.

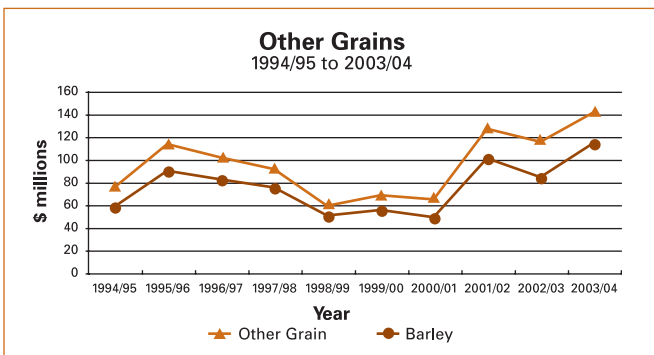
ABARE identified Western Australia as the largest wheat producing State and is forecasting a substantial increase in production through to 2005/06.



Source: Australian Bureau of Statistics.

**Other Cereals for Grains**

Barley, lupins and oats dominate other grains (coarse grains). In 1994/95, other grains amounted to \$74.5 million, which increased to \$141.1 million in 2003/04. Barley is the most significant cereal (after wheat) and accounted for 81 per cent of the value of other grains in 2003/04. Specifically, barley amounted to \$113.9 million and oats \$21.9 million.



Source: Australian Bureau of Statistics.

ABARE suggests that world barley prices will increase, in 2005/06, as global production is expected to fall. Despite an increase in the areas planted, yields are expected to be less. More specifically, dry seasonal conditions in Europe and snows in Russia will reduce the global barley crop. Adverse climatic conditions in eastern states should see production decline there as well. Western Australia, having benefited from better climatic conditions, should experience higher production.

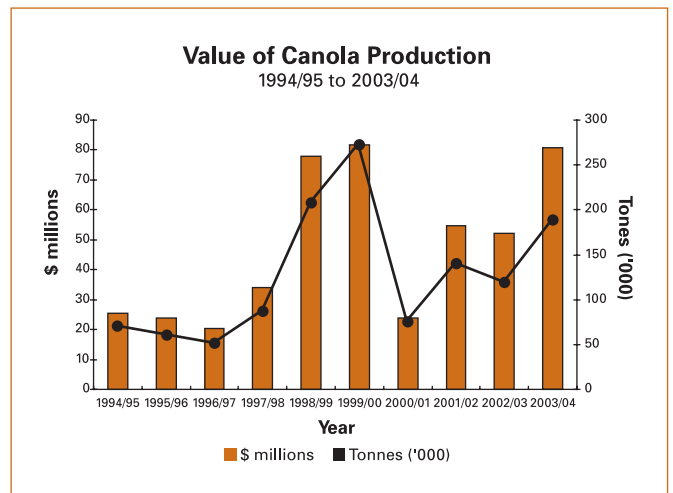
**Hay**

Hay is produced mainly as stock feed. Crops cut for hay in 2003/04 were valued at \$12.7 million and pastures cut for hay were valued at \$10.4 million.

**Oilseeds**

Canola is a lucrative crop for the Region's farmers. Canola production in the Great Southern was valued at \$80.9 million in 2003/04, which represented 35.9 per cent of the State's total, and 10.0 per cent of the crop production in the Region. Production increased from 69,912 tonnes in 1994/95 (worth \$25.5 million) to 189,092 tonnes in 2003/04 (worth \$80.9 million). Canola production fluctuated over the decade because of variations in seasonal conditions.

Smaller quantities of lupins, field peas, tick, horse and faba beans are also grown in the Region.



Source: Australian Bureau of Statistics.

ABARE forecasts that the price of Australian canola will increase in 2005/06 as global production declines. The advent of the bird flu threat is reducing the demand for oil seed meal (canola), while demand for vegetable oil is increasing. In Australia, the eastern states are reducing production of canola, whereas favourable rainfall in the West will see production increase.

**Fruit and Vegetables**

The value of fruit and vegetables increased from \$8.6 million in 1994/95 to \$38.5 million in 2003/04, of which \$35.9 million was fruit. The expansion in fruit production is largely due to the rapid growth in the value of grapes (for wine production) over the decade. Fruit production in the Great Southern accounted for 13.2 per cent of State production in 2003/04. Excluding grapes, the most significant fruit crops were strawberries (\$7.3 million) and cherries (\$1.5 million).

Vegetable production was valued at \$2.7 million in 2003/04, with the major vegetable crops being potatoes, broccoli, cauliflower and asparagus.

### Viticulture/Wine

The wine industry has an established presence in the Great Southern Region. The area of land being used for grape production has expanded over the 10 years to 2003/04. In 1994/95, total grape production covered 490 hectares, which has increased to 3,591 hectares in 2003/04. The main areas planted with grapes include Mt Barker, Porongurup, Denmark, Frankland and Albany. Grape production for 1994/95 was worth \$7.1 million, which was 13.3 per cent of the State's total. By 2003/04, the Great Southern was producing 22.4 per cent of the State's wine grapes at a value of \$26.8 million.

The Region has developed a reputation as a producer of premium quality red and white wine, both for the domestic and export markets. It is now the second largest wine grape producing region in the State and was estimated to crush 30,219 tonnes of grapes in 2005, which had an estimated value of \$40.1 million. This represented 37 per cent of the State's annual crush (tonnes) and 37 per cent of the value.

### Nurseries, flowers and turf

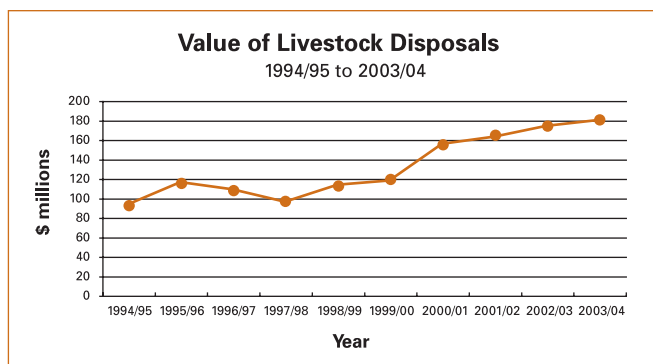
In 2003/04, the production of nursery plants, flowers and turf in the Great Southern was estimated to be worth approximately \$12.0 million, which was 12 per cent of the State production. Nursery products are dominated by cut flowers (\$5.2 million), and other nursery items (\$6.7 million).

### Essential oil crops

The cultivation of herbs and other plants for the production of essential oil is seen as an industry with considerable potential in the Region. Oil from sandalwood (*Santalum spicatum*) is extracted locally and exported to overseas markets. Other research into the properties of native Australian plants is underway, including the pharmaceutical properties of blue gums (*Eucalyptus globulus*). Other species generating commercial interest include *Agonis fragrans* and *Boronia megastigma*.

### Livestock Disposals

Livestock disposals include sheep, lambs, cattle and calves bred for meat production. The value of livestock disposals has increased from \$93.1 million in 1994/95 to \$179.9 million in 2003/04, which was 16.4 per cent of the State's total. Livestock disposals experienced a decline in value between 1995/96 and 1997/98, but subsequently increased over the last few years, benefiting from the exclusion of US beef from the Japan and Korea markets. ABARE forecasts that the USA will resume trade with Japan and Korea in 2006, which could result in a fall in demand for Australian beef in the above markets. However, this will be offset, to a certain extent, by the signing of Memorandums of Understanding with countries in the Middle East, thereby increasing live animal exports. Exports to Indonesia are also expected to increase the live animal trade.



Source: Australian Bureau of Statistics.

### Cattle and Calves

The slaughter of cattle and calves was valued at \$56.8 million in 2003/04, representing 11.6 per cent of the State's total production. This increased from 1994/95 when the value was \$41.1 million. Over the decade to 2003/04 cattle and calf numbers in the Region decreased from 223,435 in 1994/95 to 192,540.

### Sheep and lambs

In 1994/95, sheep and lamb disposals amounted to \$40.4 million. By 2003/04, sheep and lamb disposals reached \$99.8 million, which was 25 per cent of the value of the State's sheep and lamb slaughtering. Sheep and lamb numbers over the decade increased from 5.8 million in 1994/95, to 6.1 million 2003/04.

Pigs, goats and poultry are also bred for their meat in the Great Southern Region. In 2003/04 pigs and poultry were estimated at \$23.3 million and goats approximately \$44,400.

There are major export abattoirs located at Katanning and at Narrikup, near Albany, processing sheep and lambs, and a smaller export abattoir located at Beaufort River processing sheep, lambs and goats.

### Livestock Products

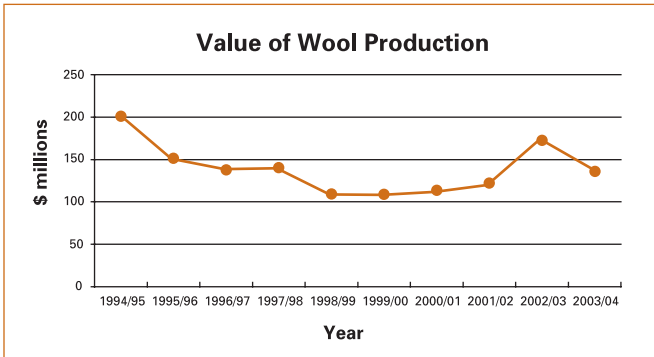
Livestock products in the Great Southern were valued at \$142.9 million in 2003/04 and consisted of eggs, milk and wool, with wool dominating the value of production.

### Wool

Australia accumulated a large stockpile of wool during the 1980s, which was liquidated over the 1990s with a ceiling placed on wool prices. In 1994/95, the value of wool production was \$200.6 million. By 2000, Australian wool prices strengthened as the last of the stockpile was sold off. The value of wool production started to recover and by 2002/03 the value of production reached \$171.2 million. However, in 2003/04 the value of production declined to \$135.7 million, a result of falling international prices for wool.

Wool is affected by changing consumer preferences. Competition from alternative fibres and the poor economic growth in key European markets has consumers seeking cheaper alternatives. However, this could be offset if oil prices increase and increase the cost of producing synthetic fibres.

In Australia, wool production is expected to decline because of the adverse climatic condition experienced in the eastern states, which in turn should see wool production in Western Australia increase moderately in 2005/06.



Source: Australian Bureau of Statistics.

**Milk**

In 1994/95, milk production in the Great Southern was valued at \$6.6 million, which increased to \$7.2 million in 2003/04, approximately seven per cent of the State's output. However, in recent years the number of dairy farmers declined in the Region as a result of deregulation of the dairy industry.

The demand for dairy produce is varied, with milk production expected to increase slightly in Europe, New Zealand and Australia. Butter is expected to decline in demand in developed markets in favour of edible oils, whereas butter consumption is expected to increase in Russia, the Middle East and Africa. Demand for milk powder and cheese is also expected to increase. On the whole dairy production is expected to grow moderately in the short-term.

The long-term outlook for the dairy industry is positive as it is well placed to satisfy increasing overseas demand. Western Australian dairy farms, including those from the Great Southern Region, have a significant advantage in milk production, as pasture grazing is a low cost method of cattle feed.

**MINING**

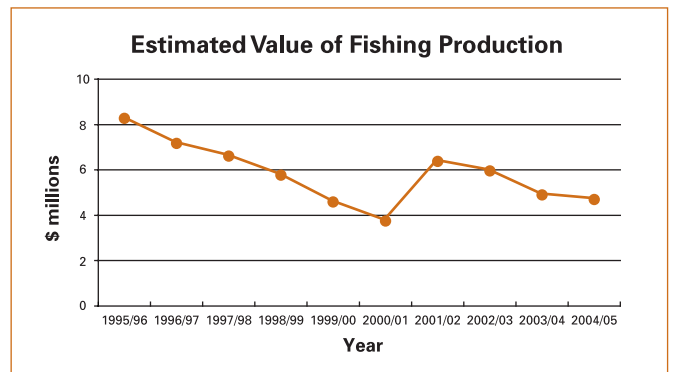
The Great Southern Region has a small mining sector, with a production value of \$4.0 million in 2004/05, producing silica sands, spongolite and a small amount of gypsum. The Region has other mineral deposits including iron ore and coal, which are not being commercially exploited at present, although the Southdown magnetite deposit near Wellstead is currently the subject of a bankable feasibility study.

Silica sand is mined at Mindijup, approximately 40 kilometres north-east of Albany. It is used in the manufacture of glass, cement and ceramics. The deposit contains about 20 million tonnes of high-grade silica sand, most of which is to be exported to Japan for the glass making and foundry industries. In 2004/05, 121,592 tonnes of silica sand valued at \$2.5 million was mined. It is anticipated that production will increase to 250,000 tonnes per annum in the future.

Spongolite is mined near Mt Barker, 50 km north of Albany. It has naturally absorbent properties with a range of uses, including industrial absorption (eg. oil and chemical spills), pet litter, and horticultural applications. The mine has a capacity to produce 30,000 tonnes of spongolite per annum. Actual output from the mine has decreased from 12,154 tonnes in 2002/03 to 9,956 tonnes in 2003/04. Production amounted to 10,943 tonnes and was valued at \$1.4 million in 2004/05.

**FISHING AND AQUACULTURE**

The Great Southern Region has an extensive seine, trawl and wetline fishing industry. In 2004/05, the catch totalled 2,570 tonnes and was valued at approximately \$4.7 million.



Source: Department of Fisheries.

The Region takes in a large number of managed fisheries, and the catch includes a range of species such as crab, lobster, abalone, cobbler, whiting, sea mullet, herring, bream, salmon, pilchard and shark.

**Finfish**

The main commercial species are pilchard, salmon, herring, and shark. The finfish catch for 2004/05 was 2,492 tonnes, which accounted for 75 per cent of the Region's catch by weight. The catch was estimated to have a value of \$3.3 million.

The King George Sound and Albany Pilchard Fisheries are two of the largest pilchard fisheries in Australia. Most of the pilchard catch is turned into angling bait or pet food.

**Other**

In 2004/05, 16 tonnes of crab, 47 tonnes of molluscs and 15 tonnes of rock lobster were caught with estimated values of \$201,000, \$829,000 and \$331,000 respectively.

The rock lobster catch was down significantly in recent years from 26 tonnes (valued at \$869,000) in 2001/02 to 3 tonnes (valued at \$77,000) in 2003/04. The crab catch also decreased, dropping from 43 tonnes 2001/02 down to 16 tonnes in 2003/04.

The mollusc catch, which was mostly abalone, has returned to average levels following the unusually high catch in 1999/00. Abalone is a valuable commodity with estimated prices ranging from \$41 to \$47 per kilogram (shell and meat).

**Aquaculture**

	Estimated Value (\$'000)		
	2002/03	2003/04	2004/05
Yabbies	416	404	448
Finfish	266	374	255
Other - Oysters	215	235	177
Marron	108	109	149
Mussels	80	103	76
<b>Total</b>	<b>1,085</b>	<b>1,225</b>	<b>1,105</b>

Source: Department of Fisheries.

The value of established aquaculture production has fluctuated over the last three years. In 2004/05, aquaculture production was estimated at \$1.1 million. The value of yabby production has increased from \$416,000 in 2002/03 to \$448,000 in 2004/05. A large number of yabbies are grown commercially in farm dams and are marketed in Australia and overseas. Finfish, oysters, marron and mussels are the other major species grown in the Region. Finfish (consists of fresh and salt-water trout) and oyster production have fluctuated in the past three years. One of the largest producers of oysters in Western Australia is located in Albany. The Albany Aquaculture Park contains two sites leased for oyster and abalone production and continues to be an important resource for the development of aquaculture in the Region.

In addition, the Department of Fisheries, the University of Western Australia and Murdoch University, are also involved in the development of abalone aquaculture at Albany. The State's first abalone hatchery was established in the Great Southern in 1998. Since then, additional land-based abalone facilities have been constructed at Bremer Bay.

Mussel production was worth \$76,000 in 2004/05. Marron production was worth \$149,000.

**TIMBER**

The Great Southern Region has a rapidly expanding pulpwood industry, which is based on blue gum plantations (*Eucalyptus globulus*) established by private investment. By 2005 there was an estimated 135,000 hectares planted with blue gums, on a rotational basis, in the shires of Plantagenet, Denmark, Cranbrook, coastal Jerramungup and within the City of Albany municipal boundaries. The approximate value of the plantations is \$500 million.

Following the 2005 planting season, the Forest Products Commission's (FPC) softwood resource totalled 8,514 hectares of pines grown specifically for posts, poles and sawlogs; 3,714 hectares of *Pinus radiata*; and 4,800 hectares of *Pinus pinaster* or maritime pine. The FPC is planning to continue pine establishment in the Great Southern, however the focus for future industry development in the Region is now leaning more towards hardwood (*Eucalypt*) sawlog. The FPC expects to commence thinning of *radiata* plantations in 2006.

In 2002, a \$21 million berth was constructed at the Port of Albany. This was a key milestone in the development of the plantation forestry industry in the Region. The wharf has the capacity to support the export of 1.5 million tonnes of woodchips, valued at \$80 million annually and developing to 2.5 million tonnes by 2008. As a result of the growth of the plantation industry, 500 full-time and over 800 casual jobs have been created in the Region. A timber-processing precinct has also been established north of Albany to cater for new timber value-adding industries proposed for the Region.

There is also a small downstream timber industry consisting of static and mobile sawmilling, processing logs from private land and a pole treatment plant utilising pine and privately owned blue gum resources. The treatment plant and sawmill aim to increase their intake as softwood thinning comes on line. Other markets and opportunities will develop with resource availability.

Soil salinity and acidity is seriously affecting rural land and water quality in the Region. Integrated farm forestry, with the establishment of deep-rooted perennials as part of the farming system, is a proven way of addressing land and water degradation. There is a concentrated effort to plant commercial hardwood timber crops in the medium rainfall zone (400 – 600 mm) of the Great Southern. In addition to diversifying commercial opportunities, these plantings will contribute to environmental rehabilitation on a large scale. The FPC is establishing a range of plantation species including maritime pine and a selection of eucalypt species. There is also an increase in plantings of *santalum spicatum* or southern sandalwood to meet the demand of the sandalwood market.

The South Coast Regional Initiative Planning Team (SCRIPT) received approximately \$50 million for 'on the ground' natural resource management projects. SCRIPT and partners will be trial planting varieties of timber species for drier rainfall zones.

**MANUFACTURING**

The manufacturing sector in the Great Southern Region is primarily based in Albany. It makes a valuable contribution to the Region's overall economic activity and is focussed primarily on supplying equipment and machinery to the agricultural sector, as well as processing agricultural commodities. Some of the major operations include joinery works, marine engineering, multiple fertiliser works and an essential oil and cosmetic factory. There are large export abattoirs in Katanning and Narrikup, near Albany. Other manufacturers in the Region include stainless steel wine vat production, wine production and the production of farm equipment in Katanning.

In 2001/02, (the most up-to-date data) there were 364 manufacturing locations in the Region, with total wages estimated at \$41.7 million and sales and service income estimated at \$279.3 million. The population census in 2001 recorded manufacturing employment in the Region at 70 per cent of the workforce.



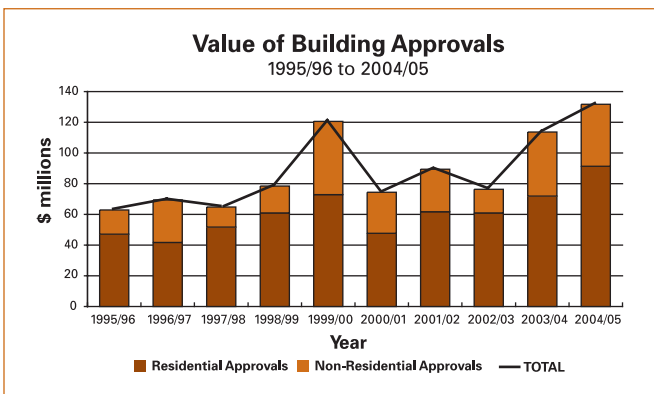
Source: Australian Bureau of Statistics, Revised Manufacturing Census 2001.

## CONSTRUCTION

Value of building approvals in the Great Southern has sustained strong growth in recent years. Approvals over the ten-year period increased from \$62.9 million in 1995/96 to \$131.8 million in 2004/05.

Building activities contracted in the period after the introduction of the GST in 2000/01, due to building activities being brought forward to 1999/00 to avoid higher building costs. As a result, the value of approvals dropped from \$120.5 million to \$74 million in 2000/01.

The value of residential approvals has generally exceeded that of non-residential approvals over the decade.

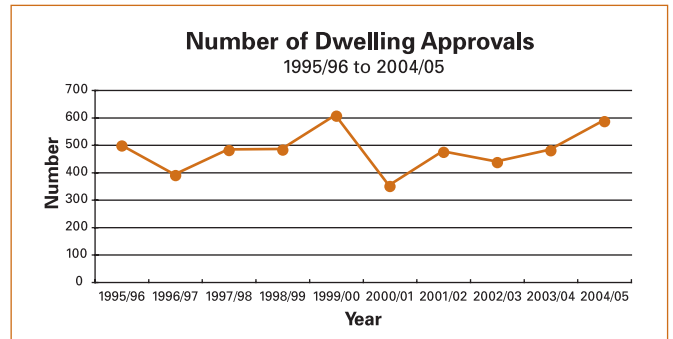


Source: Australian Bureau of Statistics.

### Residential Construction

The GST particularly influenced the residential market with the number of building approvals falling from 606 in 1999/00 (pre-tax) to 350 in 2000/01 (post-tax). Strong growth in 2003/04 and 2004/05 resulted in the number of residential dwelling approvals increasing from 480 to 586, valued at \$91.4 million. This rise was due to general optimism about the property market aided by low interest rates and the Federal Government's First Home Owner Grant, which resulted in more people buying residential property for lifestyle or investment purposes.

The average value of approved dwellings in 2004/05 was \$155,887. The bulk of the activity took place in the City of Albany (400 approvals worth \$63.8 million). Significant construction activity also took place in the Shire of Denmark (80 approvals valued at \$12.7 million) and the Shire of Plantagenet (\$4.5 million).



Source: Australian Bureau of Statistics.

### Non-residential

The value of non-residential approvals has fluctuated over the last 10 years. There are no clear trends in the value of non-residential approvals as it depends on the approval value of specific projects. Non-residential approvals peaked in 1999/00 at \$47.7 million and in 2004/05 approvals were valued at \$40.5 million, slightly lower than the \$41.7 million in 2003/04.

Some of the major projects for the Region as highlighted in the 2006/07 State Budget are:

- \$8 million for the Albany Waterfront Development.
- \$5.7 million to the Country High School Hostel's Authority for the Albany Residential College.
- \$5.1 million for Muirs Road.
- \$4 million for the replacement of the Mount Barker Primary School.
- \$4 million for the Denmark Health Multi-Purpose Centre.
- \$2.1 million for the Albany Ring Road.
- \$1.5 million for the Albany Entertainment and Convention Centre.
- \$1.5 million for the Albany Herald Regional Resource Centre.

## COMMERCE

Albany is the largest business and service centre in the Great Southern Region. A wide range of business activities including retail and wholesale trade, banking and financial services, industrial, building and home maintenance supplies, real estate, hospitality and accommodation services are established.

Retail activity for the Region has been measured in terms of turnover and was recorded at \$231.1 million in 1991, when the last retail census was carried out. Estimates have since been

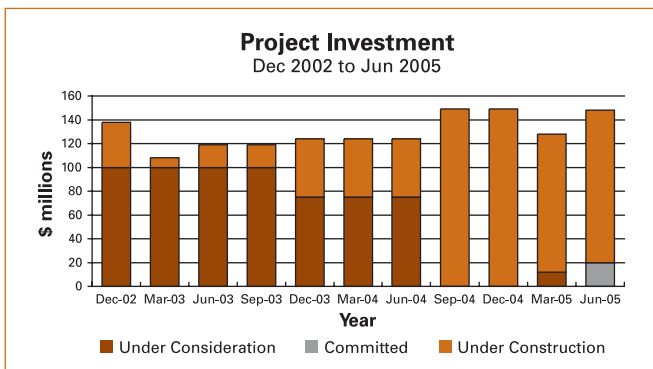
derived by the Department of Local Government and Regional Development based on annual changes in the State and the Region's population and State retail turnover figures. For 2004/05, retail turnover was estimated at \$452.5 million.



Source: 1991/92 Australian Bureau of Statistics.  
1995/96 to 2004/05 Department of Local Government and Regional Development.

### PROJECT INVESTMENT

Investment plays a vital role in the regional economic growth and development. Total project investment value in the Great Southern Region varied from \$138 million in the December quarter 2002 to \$128 million in the June quarter 2005. There were a large number of projects under consideration from June 2002 through to June 2004 and diminished in the following quarters as the projects enter the construction phase. As at June 2005, there were four projects under construction in the Great Southern Region valued at \$128 million and an additional project, committed to, worth \$20 million.



Source: Access Economic – Investment Monitor.

### INDIGENOUS ECONOMIC DEVELOPMENT

Aboriginal people constitute 3.2 per cent of the Great Southern's total population, with economic indicators showing levels of disadvantage comparable to other rural and remote regions in Western Australia. As a State Government agency, the Great Southern Development Commission (GSDC) supports the creation of Aboriginal employment opportunities and enterprises that are wholly or partially owned by Aboriginal people through a range of enterprise development services.

In conjunction with the State's Office of Aboriginal Economic Development, GSDC is currently developing projects that will bring long-term economic benefits to Aboriginal people in the Region. These projects include "The Kodja Place" in Kojonup, the "Mungart Boodja Art Centre" in Katanning, marketing assistance for the Noongar arts industry, the development of the "Gnowangerup Heritage Museum", cultural tourism and a proposed mountain discovery centre at Bluff Knoll in the Stirling Range National Park.

Through the development of regional infrastructure projects in partnership with Aboriginal stakeholders, the Commission encourages synergies between cultural tourism and the Region's Noongar arts industry. Projects supported offer opportunities for cultural expression through the production and interpretation of Noongar art and craft, music, stories and bush foods. Small retail outlets are being established in several regional towns and there are bright prospects in developing commercial joint ventures in forestry, agriculture and the arts.

In addition to its project development role, the GSDC promotes integrated service delivery through the Regional Indigenous Affairs Coordinating Committee, an interagency working group supporting Aboriginal enterprise development, employment and training initiatives in the Great Southern.

### INFRASTRUCTURE

#### Water Supply

The Water Corporation provides water supply, wastewater and drainage services in the Great Southern Region. Potable water is reticulated to towns across the Region and limited services are provided to rural properties, where supplies are used principally for agricultural purposes.

In the northern part of the Region, the water supplies are provided from local dams and/or supplemented by the Great Southern Towns Water Supply Scheme that draws from Harris Dam.

In the southern part of the Region, the Lower Great Southern Towns Water Supply Scheme supplies a combination of groundwater (approximately two-thirds) and surface water (approximately one-third) to the City of Albany and Narrikup, Kendenup and Mt Barker towns. Potable water is also provided to a number of independent towns including Denmark, Cranbrook, Frankland, Rocky Gully, Ongerup, Borden and Jerramungup.

Deep sewerage is available in a number of towns across the Region including Albany, Denmark, Bremer Bay, Cranbrook, Mt Barker, Kojonup, Tambellup, Gnowangerup and Katanning.

#### Energy

Western Power (Synergy) supplies the Region's electricity from the South West Integrated System (SWIS). Substations are situated at Kojonup, Albany, Mt Barker and Katanning to transform the power from 132 kV to 22 kV for distribution. There is also a fully operational 22 MW wind farm in Albany.

Albany has a LPG gas supply network and bottled gas is readily available throughout the Region.

### Transport Road

The Great Southern has a well-developed road system, with all highways and main roads sealed and over 80 per cent of secondary roads sealed. Highways or main roads connect all major towns in the Region.

National Highway 1 passes through the south of the Region and National Highway 95 runs north from Albany to Perth, continuing to Newman and Port Hedland. Travelling by car, the journey from Perth to Albany takes just over four hours. General freight services are provided by a number of transport companies. A daily passenger bus service operates from Albany to Perth and from Albany to Bunbury (the major city in the South West Region).

### Rail

Rail freight services are provided by Australian Western Railroads (owned by the Australian Railroad Group (ARG)) transporting bulk commodities such as grain and woodchips. An agreement to sell ARG to Babcock and Brown Limited and QR (Queensland Rail) was announced in early 2006.

### Air

Harry Riggs Albany Regional Airport is the major airport in the Region, with a 1,800 metre sealed runway capable of handling Boeing 737 sized aircraft. The airport has an instrument landing system to provide all-weather capability for passenger transport. Skywest operates a twice-daily return service to Perth during the working week and a single service on Saturday and Sunday. The journey takes about 60 minutes by Skywest's Fokker aircraft. Charter aircraft, private aircraft and agricultural contractors also use Albany and other airstrips in the Region on demand. There are small, unsealed runways at Cranbrook, Gnowangerup, Jerramungup, Bremer Bay, Kojonup and Katanning.

### Sea

The Port of Albany is located in one of the three best natural harbours in the Southern Hemisphere. Safe anchorage is available in King George Sound and land-backed berths are available in Princess Royal Harbour. Exports through the port include grain, woodchips and silica sand.

### Communications

Official Australia Post offices are located in the larger centres of Albany, Denmark, Katanning and Mt Barker, with daily mail services to Perth. Licensed post offices are located in nearly all of the smaller towns.

State, daily and weekly newspapers are available on the day of publication. There are four regional newspapers published in the Great Southern and several community newspapers.

The Region has a complete range of voice and data telecommunication products and services, with access to any part of the world, including higher end bandwidth solutions such as ISDN, ADSL and Frame Relay. Telstra also provides a dual fibre optic route to Perth for disaster protection.

Global System for Mobile communications (GSM) and Code Division Multiple Access (CDMA) mobile telephony is available with coverage to most parts of the Region. Satellite phone coverage extends over the whole Region and 200 nautical miles out to sea.

Videoconferencing services are available in Albany and Denmark and a number of regional Telecentres.

Internet access, for the cost of a local call, is available in all of the Region's towns and centres. The Region has a community-owned web portal, servicing the needs of business, community and government groups.

The Australian Broadcasting Corporation (ABC) regional television, Golden West Network (GWN), WIN Television and SBS are available, as well as AM and FM ABC and commercial radio stations. Albany also has a community radio station.

### Education

Comprehensive pre-primary, primary, secondary and some post-secondary education services are available in the Region. There are 34 government pre-schools and four private pre-schools in the Region (two in Albany and one each in Katanning and Kojonup). There are 20 government primary schools, including high schools with a primary wing, located throughout the Region, with five in Albany and two in Katanning. Five private primary schools are located in Albany and one each in Denmark, Kojonup, Kronkup and Katanning.

Government Senior High Schools are located in Albany, Mt Barker and Katanning. Four private high schools are situated in Albany. An agricultural college is located at Denmark and an agricultural school at Gnowangerup. An extensive network of school buses operates throughout the rural areas. Hostel facilities for students attending the senior high schools are available in Albany, Katanning and Mt Barker. The high schools in Albany and Mt Barker have established connections with local industry and offer comprehensive vocation, education and training programs in schools.

The Great Southern Regional College of TAFE delivers vocational training, apprenticeships, adult education programs and access bridging programs throughout the Region. The college offers the first year in a number of higher education courses that are contracted through Perth-based higher education institutions. The major campus is in Albany, with regional campuses and agents in Mt Barker and Katanning, and centres operating in Kojonup, Gnowangerup, Tambellup, Denmark, Jerramungup, Manypeaks and Cranbrook.

Significant organisational structures have been established in the Region to implement the WA Government's 15 to 19 year old strategy that promotes increased engagement of young people in education and training. Partnerships have been developed between education, training and industry to support education and training development in the Region. Currently, a number of programs are being developed that will increase the capacity of local education and training to provide for the needs of regional employers and industry.

The University of Western Australia's (UWA) Albany Centre offers units in arts, science, environmental science, agricultural science, economics, commerce, engineering and mathematical sciences, as well as three postgraduate programs. UWA has adopted state-of-the-art technology to bring the highest possible quality of post-secondary education to students in the Great Southern. The Albany Centre has enjoyed rapid growth in student numbers since it opened in 1999. In addition, UWA's Centre for Excellence in Natural Resource Management, based in Albany, provides an avenue for post-graduate research on problems facing land, estuarine and coastal marine environments in regional Western Australia.

Generally, the Region offers educational opportunities equal to anywhere in the State. The increased use of modern technologies ensures that any inequality between Albany and metropolitan centres is minimal.

### Health

The Albany Hospital has 120 beds and performs a range of services including surgery, chemotherapy, maternity, mental health, rehabilitation, paediatrics and day procedures. A comprehensive range of outpatient services is provided, including cardiac rehabilitation, continence, endoscopy and specialist wound care.

Private medical practitioners, who are resident in the city, provide an extensive range of specialist medical services at Albany Hospital. Visiting specialists supplement these services, and a full range of allied health services is available. The health service also employs medical specialists in Psychiatry.

District hospitals are located in the Shires of Denmark, Gnowangerup, Katanning, Kojonup and Plantagenet. Health Centres are located at Bremer Bay, Jerramungup and Tambellup. Emergency services are available at all hospitals and health centres in the Region.

An extensive range of screening, health promotion and preventive health programs are provided by public and community health staff. These public health services include child and school health education and services, provided out of clinics and in conjunction with the primary and high schools.

In addition to general health services and facilities, there is a mix of public and private dental services throughout the Region. Free dental treatment is available to all pre-primary and primary school children through the School Dental Service.

Aged care assessment and support services (including carer respite) are also available to people in the Lower and Central Great Southern Health Districts provided by the Aged Care Assessment Team based in Albany. A mix of public and private residential aged care services is provided throughout the Region. In addition, nursing and other home and community care services are offered in all major towns in the Region.

The Great Southern Mental Health Service provides community and hospital based mental health services, with teams working out of Albany and Katanning and visiting the smaller towns and communities in the Region.



## MORE INFORMATION

### Publications

The Great Southern Development Commission's publications can be obtained by contacting the offices or by accessing our Internet site [www.gsdc.wa.gov.au](http://www.gsdc.wa.gov.au)

### Other Relevant Publications

Department of Local Government and Regional Development (2005) – Statistical Snapshot  
[www.dlgrd.wa.gov.au/statisticInfo/overview.asp](http://www.dlgrd.wa.gov.au/statisticInfo/overview.asp)

Department of Local Government and Regional Development (2003) – Indicators of Regional Development

Department of Local Government and Regional Development (2002) – Regional Prices Index

Department of Local Government and Regional Development (1999) – Living in the Region

**NOTES**

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Cover Photos

Main Photo: Agriculture photo courtesy of CBH

Photo 1: Windfarm, courtesy of Great Southern Development Commission

Photo 2: Wine, courtesy of Ferngrove Vineyards Estate

Photo 3: Fine Wood, courtesy of Anthony Docherty

Photo 4: Patagonian Fishing, courtesy of Austral Fisheries

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