

YARRIAMBIACK SHIRE COUNCIL

A bronze statue of a dog, likely a Kelpie, is perched on a stack of several large, light-colored sacks, possibly made of burlap or canvas. The dog is facing left, looking towards a building in the background. The building is a single-story structure with large windows and a sign that reads "WHEATLANDS WAREHOUSE". The sky is a clear, vibrant blue with some wispy white clouds. The overall scene is set outdoors, likely in a rural or agricultural area.

**Economic
Development Strategy**

2023-2027

Acknowledgement of Country

Yarriambiack Sire Council acknowledges the traditional custodians of the land: the Wotjobaluk, Jaadwa, Jadawadjah, Wergaia and Jupagulk people.

We pay respect elders past, present and future and extend that respect to all other Aboriginal and Torres Strait Islander Australians within our region.

Acknowledgements

Council thanks contributors and stakeholders consulted in the development of the Yarriambiack Economic Development Strategy 2023-27.





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MAYORS MESSAGE

The Councillors and I are pleased to adopt the Economic Development Strategy and Action Plan for 2023-27. This document addresses the Council's future directions and activities in economic development to follow on from the last Economic Development and Tourism Strategy 2015-2019

The Yarriambiack Shire Council is home to 6,556 people across 7,158 square kilometers and produces an economic output of \$784.3million. There are 2,670 jobs within our Shire as well as 960 businesses.

Agriculture is our largest industry, contributing 37% of total output and also our largest employing industry with 28% of total jobs. Yarriambiack produces 11% of Victoria's gross farm value of wheat, 16% of barley, 19% of chickpeas, 45% of lentils, and 11% of other pulses.

This strategy and action plan follows a five-year period in which partnerships and collaborations have been key to the achievement of an exemplary listing of economic development achievements.

The Council believes that the Shire is on the verge of significant new economic development activity which has the potential to reverse decades of declining population. The employed workforce in Yarriambiack increased in the previous five years for the first time in more than 50 years. This is strong evidence that new economic development opportunities are already being implemented. Given this, Council has endorsed a set of population projections that are more favourable than the Wimmera Southern Mallee Regional Economic Development Strategy, projecting an average annual rate of change of -0.01% into the long term future.

There are several barriers to overcome in the short to medium term to achieve the projections. The Strategy and Action Plan identifies a number of actionable items and the role that Council will undertake to address these barriers and proposes five key themes and associated actions that indicate Council's role and timeline for delivery to achieve.

Capitalising on Growth from New Industries - Two industry sub-sectors have emerged recently in Yarriambiack, these are renewable energies and mineral sands mining. This document identifies a number of activities to maximise the opportunities from these industries, which will be pivotal to achieving the population projection.

Agricultural Diversification and Processing - good seasonal conditions have helped to support increases in the agricultural workforce and production. The strategy identifies that the challenge for the next five years, when seasonal cycles may bring less favourable conditions, is to use the solid foundation of the past half-decade to invest in either diversified enterprises or to seize on value-adding opportunities, or both.

Removing Barriers to Attracting Workers - Yarriambiack communities, businesses and government organisations are unanimous in agreement that housing is by far the most compelling barrier to attracting workers and other residents to the Shire.

Strengthening service Industries' – this strategy highlights actions to support our service industries such as healthcare and social assistance, accommodation and food services, professional, scientific and technical services. These industries are absolutely fundamental to the future of the Shire's economy and as a place to live. They are a considerable source of innovation, contribute to lifestyle and wellbeing, and cover all the industries that make up the visitor economy.

Infrastructure, Planning and a Proactive Council – the document highlights the crucial role Council has with its planning, building and advocacy functions in attracting and supporting investment and development in the shire .

The strategy and action plan have been developed through a process of consultation and review and Council endorses its direction and roadmap.



Kylie Zanker
Mayor

YARRIAMBIACK Shire Map



YARRIAMBIAICK Snap Shot



6,556 people over a diverse 7,158 km² of prime rural land.



\$784.3 million – total economic output of the Shire.



960 local businesses.



2,670 local jobs.



Agriculture is our largest industry contributing 37% of total output and our largest employing industry with 28% of total jobs.



Health Care and Social Assistance is our second largest employing industry with 20% of total jobs.



52 – the median age of Yarriambiack residents in 2021 (much greater than the Victorian median of 38 years) and 29.2% of residents were aged 65 years and over.

Tourism is another key industry. Water-based activities and the Silo Art Trail are popular activities in Yarriambiack, as well as boating and fishing on the creek to lakeside holidays. Our region and historic townships offer further opportunities to grow the visitor economy.



COUNCILS ROLE IN *Economic Development*

“Local economic development is a way to build up the economic capacity of an area in order to improve quality of life”

- World Bank

GROWING A PROSPEROUS ECONOMY

The economic development strategy is focused on growing a more diverse and sustainable economy for the Yarriambiack Shire Council, one that strengthens its vibrant local places and businesses, and nurtures new businesses servicing the locals.

It improves on already strong foundations to support an economy that can thrive in what will certainly be a vibrant and challenging future.

COUNCIL'S COMMITMENT

This Strategy documents the commitment of Council to assign resources from its staff team and annual budget to facilitate:

- Regular input from the business community via the Advisory Committee to Council.
- Attraction of new investment in innovative and sustainable businesses.
- Removal of barriers to new development and job retention and creation.
- Streamlining of Council processes and to work cooperatively with economic development stakeholders.
- Collaboration at a regional level in implementing economic initiatives which extend beyond local boundaries.



I. STRATEGY IN CONTEXT

Guided by Advice and Consultation

Yarriambiack Shire Council, businesses, community, and regional organisations have contributed to this strategy through meetings and forums, including:

- Workshops and briefing sessions with Council.
- Workshops with Council's Economic Development Advisory Committee (the Yarriambiack Chapter of WestVic Business).
- Meetings with Council staff.
- Individual discussions with relevant regional organisations, government agencies and adjoining local government areas.

The time, effort and suggestions provided through these consultation processes in helping to shape the strategy are gratefully acknowledged.

A second complementary Yarriambiack Tourism Strategy 2023-27 has also been produced by Council and it is anticipated that the two strategies, and their associated action plans, together will maximise Council's resourcing of support for growth and investment across all industry sectors in the Shire.

ALIGNED WITH THE YARRIAMBIACK SHIRE COUNCIL PLAN

The Strategy is closely aligned to the Council Plan for 2021-25. Council's plan for 2021-2025 outlines a 10-year vision for 'a connected rural community who values its land and wellbeing' which is guiding decision making. Four strategic objectives drive the achievement of Council's vision:

- A vibrant and diversified economy.
- A healthy and inclusive community.
- A robust and thriving environment.
- A Council which serves its community.

The Economic Development Strategy supports all four Council Plan strategic objectives through five themes which focus on socially and environmentally responsible economic development activities:

- Strategy Theme 1: Capitalising on Growth from New Industries.
- Strategy Theme 2: Agricultural Diversification and Processing.
- Strategy Theme 3: Removing Barriers to Attracting Workers
- Strategy Theme 4: Strengthening Service Industries
- Strategy Theme 5: Infrastructure, Planning and a Proactive Council

ALIGNED WITH THE WIMMERA SOUTHERN MALLEE REGIONAL ECONOMIC DEVELOPMENT STRATEGY

The Yarriambiack Economic Development Strategy is also well aligned with the regional economic strategy. Wimmera Southern Mallee's Regional Economic Development Strategy (REDS) defines four strategic directions for economic development in the region: One of these directions (number 2) is consistent with the complementary Yarriambiack Tourism Strategy and three (numbers 1, 3 and 4) are each directly linked to the Yarriambiack Economic Development Strategy.

The REDS strategic directions are:

1. Strengthen agriculture and food product manufacturing through diversification.
2. Promote growth and development of the visitor economy, leveraging natural assets and Aboriginal heritage.
3. Support and expand economic opportunities in growing sectors (health and social services)
4. Position the region to benefit from emerging growth opportunities in natural resources.

There is a major point of difference between this Yarriambiack Economic Development Strategy and the 2022 Wimmera Southern Mallee REDS. During the strategy development process, Yarriambiack Council agreed to adopt a much more ambitious set of population projections (with associated housing demand) than those specified in the REDS document. The agreed projections result in a Yarriambiack resident population of 6,458 persons in 2036. This effectively equates to population stability (an average annual change of just -0.01%).

The Wimmera Southern Mallee REDS acknowledges that "employment opportunities in both established and emerging industries could provide population attraction and retention opportunities in the Wimmera Southern Mallee region. The job creation expectation in the region could result in population increase in Horsham Rural City and Northern Grampians Shire and, to some extent, mitigate population decline in other local government areas (including Yarriambiack Shire). Job creation opportunities would be complemented by forward-looking planning in housing and the provision of other essential services and infrastructure."

This acknowledgement has not been articulated into more positive population projections. The difference between the REDS projected population in 2036 and the Yarriambiack agreed projections is 808 persons: More than 90% of the entire population of Murtoa (897 people), Yarriambiack's second largest town.



YARRIAMBIACK ECONOMY BACKGROUND

Yarriambiack Shire's economy remains dominated by dryland agriculture, particularly wheat, barley, lambs and wool, legumes, oilseeds and alternative livestock. Agriculture is the largest industry, employing 28% of the Shire's workers, followed by health care and social assistance, retail, and transport.

The number of farms in the municipality has steadily declined with the average farm increasing in size. Changes in farm size and numbers reflect increased efficiency; fewer people producing more in order for the grain industry to remain profitable in the face of deregulated markets and declining returns.

The Shire's towns have economies that have built their business bases to contribute to agribusiness supply chains and to provide services to farming communities. This agricultural heritage gives the region and its communities many distinctive features, strong resilience and connected communities, but it also led to decades long population decline as farms have become bigger and more automated, and as agricultural commodities have continued to be part of an increasingly competitive global environment (sometimes disrupted by pandemics, wars and trade restrictions).

The Shire's age profile is notably older than regional Victoria and Victoria averages, and the older age structure is expected to peak in the next five years, with a consequent impact on the local economy and service needs.

Although the Shire has a history of gradual population decline spanning several decades, there are good prospects for this trend to be stemmed and even

reversed if current and emerging economic development opportunities can be realised. There are new opportunities associated with:

- Value adding to the Shire's agricultural products. Pulse processing in particular is poised for new investment as part of the growing demand for plant-based foods and protein alternatives.
- Agricultural diversification, enhanced by the water security offered from the Wimmera Mallee pipeline, such as intensive livestock and some horticultural products.
- Renewable energies: Wind, in particular, and solar are already developing and this should expand when power grid infrastructure is extended to the region.
- Mineral sands mining, with mining companies actively developing plans and investment schedules which will impact Yarriambiack.
- Health and social assistance, which are essential to support the ageing population and lifestyles of the general population.
- Emerging tourism as the Shire expands its attractions and visitor services beyond the Shire's original Silo Art Trail. Tourism opportunities and strategies are the subject of a complementary document: Yarriambiack Tourism Strategy 2023-27.

Realising Yarriambiack's potentially strong economic, social and environmental future, however, is contingent on investors understanding the opportunities, infrastructure being delivered to support growth, and overcoming conspicuous barriers in the towns (including housing shortages, inappropriate housing stock, planning and regulatory disincentives, insufficient childcare and docile central activities areas).



2. TRENDS AND OUTLOOK

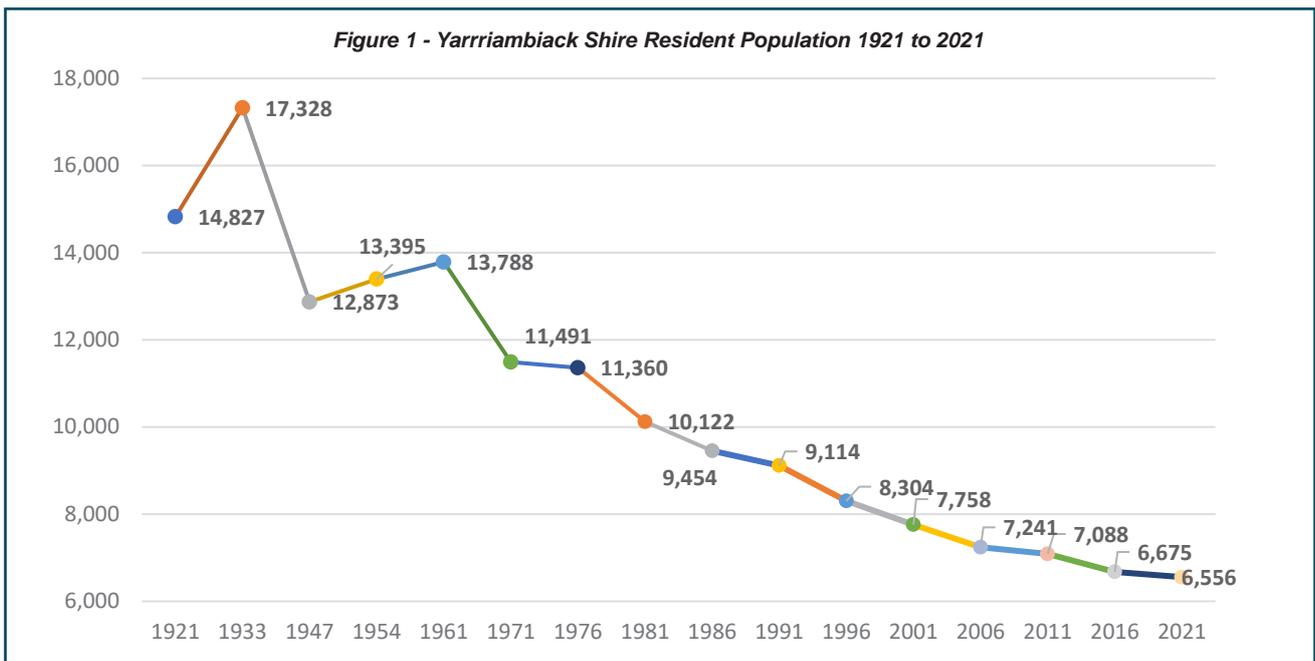
DEMOGRAPHIC CHARACTERISTICS AND PROJECTIONS

Yarriambiack Shire’s population peaked at 17,328 persons, recorded in 1933. The Victorian Central Planning Authority noted “the increase (to 1933) was due, in part to the Great Depression, which caused numbers of people to move from the metropolis into country districts”.

The population fell by 35% by the post-World War 2 year of 1947 and returned to 13,788 at the 1961 Census. Since 1961 the Shire’s population has experienced declines, reflecting increased farm sizes and agricultural automation

combined with withdrawal of services and restructuring of industries.

Figure 1 shows the population trends for Yarriambiack over the past century, and although population declines have been ubiquitous the trend curve is clearly slowing to a point nearing population stability. The resident population decreased by an annual average of 0.99% over the fifteen years 2006 to 2021. In the most recent five-year period, the rate of decrease slowed to an annual rate of just 0.36%.



Confidence that the Shire’s population is approaching stability is supported by the fact that several of the Shire’s towns, particularly those in the south, began to grow during 2016 to 2021, as shown in Appendix 1 - Table A1.

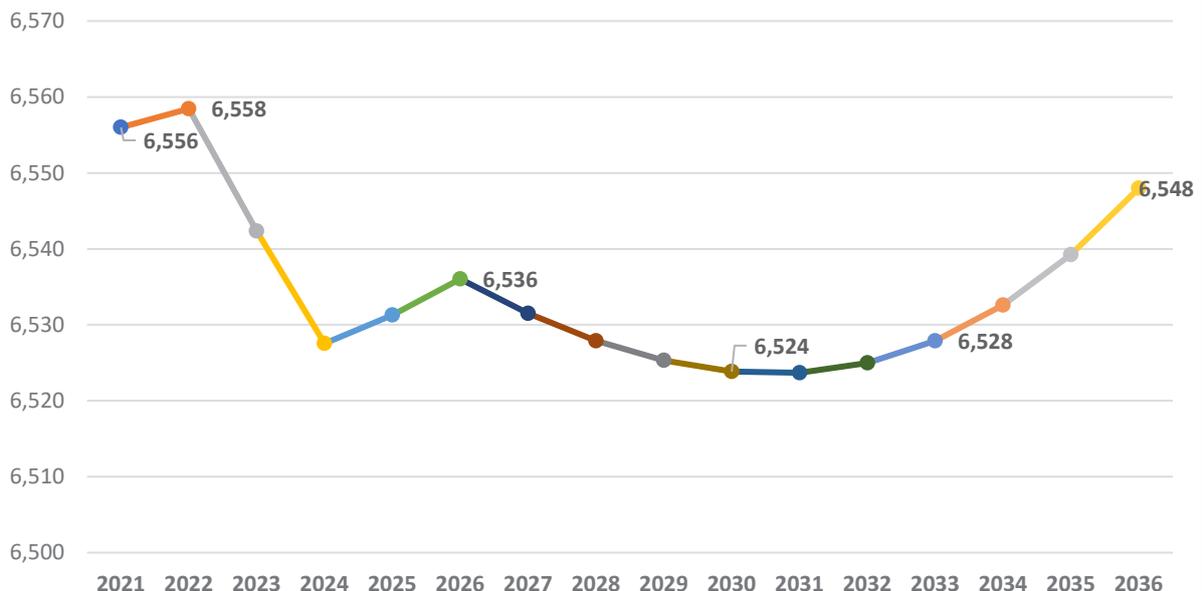
'The population of the Shire is distinctly weighted towards older age cohorts with a median age of 52 years in 2021, much greater than the Victorian median of 38 years'



Armed with the knowledge that there are several economic development opportunities which are on the cusp of implementation, Yarriambiack Shire has endorsed a set of population projections which are achievable. The projections, shown in Figure 2 are considered 'ambitious' only because they acknowledge that there are several barriers (especially housing for workers) to

overcome in the short to medium term, which are likely to limit the extent to which investment and employment opportunities can be taken up. The agreed projections are a considerable departure from those presented in the Wimmera Southern Mallee Regional Economic Development Strategy.

Figure 2 - Yarriambiack Shire Population Projections 2021 to 2036



The agreed projections result in a Yarriambiack resident population of 6,458 persons in 2036. This effectively equates to population stability (an average annual change of just -0.01%).

Figure 3 - Populations of Yarriambiack by Age Cohort, 2021-2036

AGE GROUP	2021	2026	2031	2036	% CHANGE PA
0-4	281	280	303	331	1.10%
5-9	329	302	304	323	-0.12%
10-14	412	346	320	321	-1.64%
15-19	347	373	357	347	0.00%
20-24	246	361	392	393	3.18%
25-29	277	338	393	416	2.75%
30-34	311	330	378	415	1.95%
35-39	293	322	360	401	2.11%
40-44	288	310	341	378	1.83%
45-49	313	311	329	359	0.92%
50-54	426	351	336	348	-1.34%
55-59	527	417	361	346	-2.76%
60-64	604	490	406	361	-3.37%
65-69	538	521	453	394	-2.05%
70-74	473	493	461	410	-0.95%
75-79	376	425	428	399	0.40%
80-84	243	319	348	344	2.34%
85+	293	247	255	261	-0.78%
Total	6,556	6,536	6,524	6,548	-0.01%



Population pyramids derived from the 2021 resident population and the projection for 2036 are shown in Appendix 1 - Figure A2. They indicate that the population of the Shire is distinctly weighted towards older age cohorts with a median age of 52 years in 2021, much greater than the Victorian median of 38 years, and 29.2% of residents were aged 65 years and over.

The projections suggest that 'peak ageing' will be reached around 2027 when the percentage of the population aged 65 years and over is expected to reach 30.7%. The population pyramid for 2036 shows that this older age population will remain much higher than the state average, but will fall to 27.6% of the resident population, giving the pyramid a more balanced shape.

In absolute terms, the older age population will increase to 2,005 by 2026 before falling to 1,808, while the younger cohort aged 0-19 years (creating demand for childcare and education facilities) is expected to remain relatively constant: 1,369 residents in 2021 and 1,323 in 2036. The prime workforce age cohorts (20 to 64 years) are projected to increase from 3,285 in 2021 to 3,418 by 2036.

EMPLOYMENT

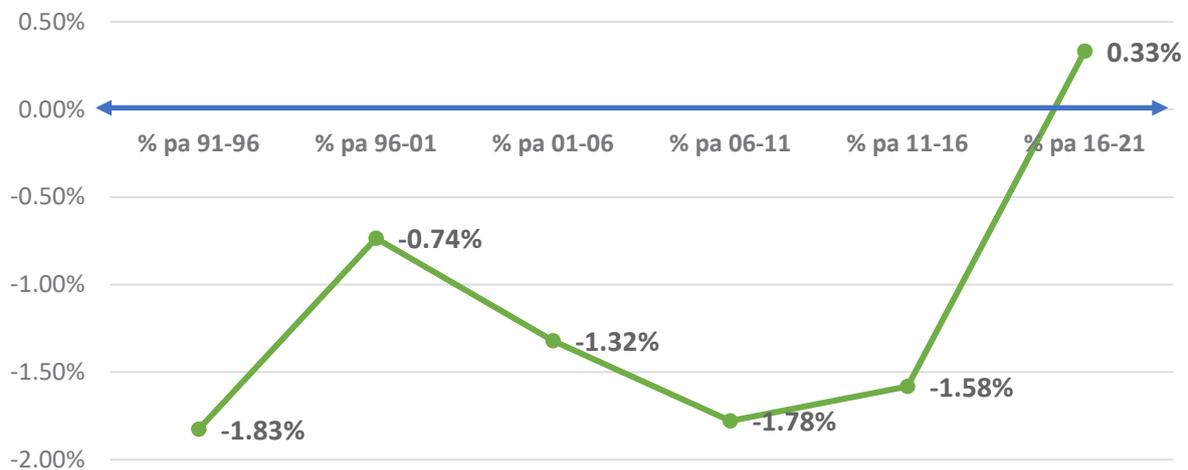
Consistent with most Australian local government areas, employment in Yarriambiack Shire has been advancing towards a majority workforce employed in service industries.

Yarriambiack's employed workforce increased, in the five years 2016 to 2021, for the first time in more than 50 years. This is strong evidence that new economic development opportunities are already being implemented and that the population projections presented in the previous section of this document, are not only achievable but are relatively conservative.

Indeed, reported pent-up demand for workers in 2022 and 2023 suggests that growth in jobs is being hampered not by lack of demand, but by barriers to attracting staff.



Figure 4 - % Yearly Change in Employed Workforce in Yarriambiack 1991 to 2021



Employment in the largest employing industry, agriculture (a product industry), has fallen from 35.9% of the employed workforce to 27.9% in the 30 years 1991 to 2021. In actual job numbers this has been a 45.3% fall, from 1,359 jobs in agriculture in 1991 to 744 in 2021.

However, as a consequence of good seasonal climatic conditions and some more intensive agricultural enterprises, the number of jobs in agriculture increased between 2016 and 2021 by 3.5%; the first time an increase has been recorded in well over half a century.

Conversely, the service industry of health and social assistance has jumped from 9.9% of the employed workforce in 1991 to 19.8% in 2021, becoming the largest employing service industry (overtaking retail trade in 2001).

Appendix 1 - Figure A3 summarises employment by industry in Yarriambiack over twenty years, 2001-21.

In achieving population growth during 2016-21 many industry sectors have reversed 20 year declines or have increased more rapidly. Excluding agriculture and health and social assistance, these include:

- Manufacturing
- Construction
- Wholesaling
- Education and training
- Public administration and safety.

Industries which need to be bolstered, having lost jobs during the 2016-21 period, at a time when most industries have increased or remained stable, are:

- Electricity, gas, water and waste services
- Accommodation and food services
- Professional, scientific and technical services.



Woomelang

At the bottom of Appendix 1 - Figure A3 and in Figure 5, the nineteen industries are grouped into just five sectors, that broadly describe the nature of the economic contribution and the work involved. These are:

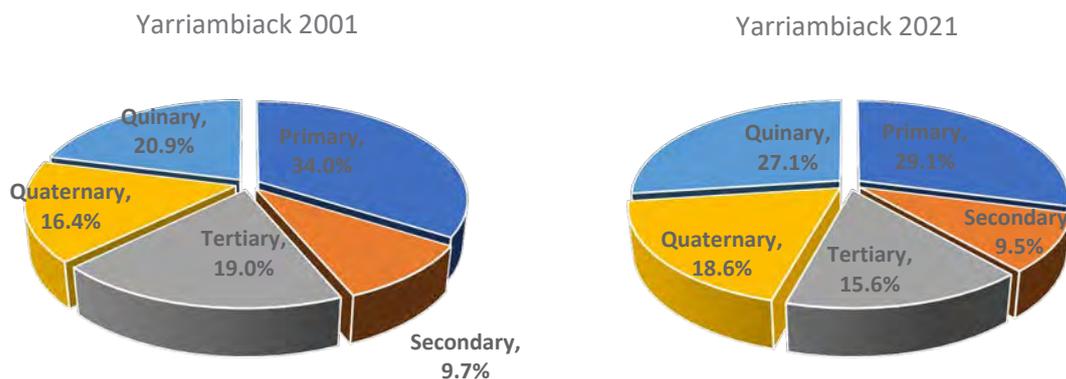
- Primary Sector (agriculture and mining industries): This sector generates products from the earth's natural resources.
- Secondary Sector (manufacturing, construction, electricity, gas, water and waste): This sector transforms and adds value to natural resource products.
- Tertiary Sector (retail trade, wholesale trade, transport, postal and warehousing): This sector provides services which deliver products to consumers.
- Quaternary Sector (finance, real estate, information/media, professional/technical/scientific, administrative, and education services): Services targeted largely to businesses, and other organisations.
- Quinary Sector (health, accommodation and food services, art and recreation, other personal services): Services targeted largely to individuals.

primary sector (agriculture and mining), secondary sector (manufacturing, construction and utilities), and tertiary sector (wholesaling, retailing and transport): In 2016 these sectors contributed 38.6% of all jobs (down from 43.7% in 2001). The quinary sector of health, hospitality, cultural and personal services has risen to 27.1% of all jobs.

This analysis and observations do not suggest that agricultural production and value adding in Yarriambiack is likely to ever be challenged by any of the service industries individually, as the economic mainstay of the Shire. However, employment in the combined quaternary and quinary sectors (45.7% of jobs) has overtaken the combined primary and secondary sectors (38.6% of jobs over the past 20 years, and the gap will inevitably widen. Yarriambiack Shire and its constituent towns must continue to diversify and build on their service industries (in both the quaternary and quinary sectors) to sustain viability and to offer healthy lifestyles and visitor experiences.

This classification helps to understand structural changes in local and national economies over time. The three 'oldest' sectors are reducing in relative terms within the economy:

Figure 5 - Employment by Major Sector



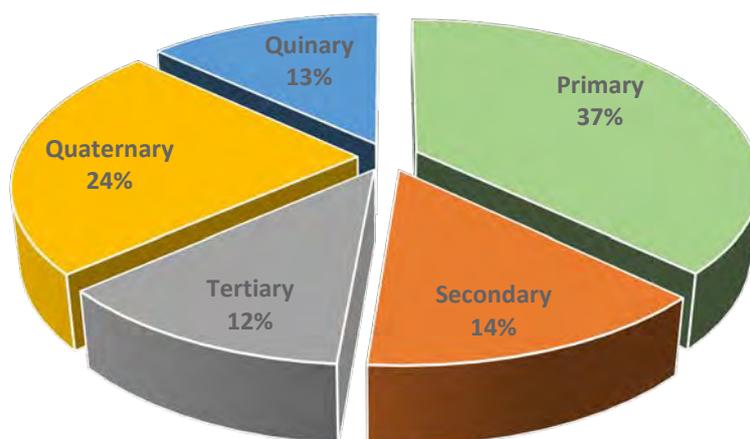
ECONOMIC OUTPUT

Unlike employment, the primary and secondary sectors continue to make the majority contribution of economic output in Yarriambiack. In 2022 the estimated output of the Shire was \$784.3 million. Figure 6 shows that 51% of this output was derived from the product sectors:

- Primary Sector industries (overwhelmingly agriculture) contribute 37% of economic output.
- Secondary Sector industries (mostly construction and food and machinery and equipment manufacturing) contribute 14% of output.

- Tertiary Sector industries contribute 12% of output.
- Quaternary Sector industries contribute 24% of output.
- Quinary Sector industries (mostly health care and social assistance) contribute 13%.

Figure 6 - Economic Output by Major Sector



HOUSING

Residential building approvals, summarised in Figure 7, have jumped by 32.6% per annum since 2018-19, with a similar rise in the value of residential building approvals of 35.9% per annum to reach \$7.5 million (an average new build cost of \$445,000 per dwelling). Despite the high rate of building approvals, the statistics do not include, nor reflect, the pent-up demand for dwellings which has been widely reported by Yarriambiack employers.

Investment in non-residential buildings (industrial, commercial, agricultural) has also jumped in 2021-22 to \$28.7 million.

Yarriambiack communities, businesses and local agencies all report that housing is in short supply in the Shire. This extends to dwellings for sale, rental premises and short-term accommodation for seasonal or project-oriented workers. In addition, a significant proportion of the existing stock is unoccupied but not available, unsuitable for most market segments, or is occupied but not fit for purpose.

Figure 7 - Building Approval Trends in Yarriambiack Shire 2018 to 2023

	New houses	Total dwellings	Value of alterations & additions	Value of total residential building	Value of non-residential building	Value of total building*
Year	Number	Number	\$'000	\$'000	\$'000	\$'000
2018-19	4	6	1,016	2,994	11,728	14,722
2019-20	8	8	1,667	3,962	6,682	10,643
2020-21	15	15	2,172	7,056	12,331	19,386
2021-22	14	14	1,288	7,517	28,736	36,252
2022-23 (estimated from Jul-Dec actuals)	12	12	3,007	7,130	3,549	10,680
Average 2018-20	6	7	1,342	3,478	9,205	12,682
Average 2018-23	11	11	1,830	5,732	12,605	18,337
Average 2020-23	14	14	2,156	7,234	14,872	22,106
% pa change 2018-19 to 2021-22	51.83%	32.64%	8.22%	35.92%	34.81%	35.04%

SOURCE: ABS Building Approvals, LGA Data Cubes 2018-Dec 2023
* includes commercial, industrial, agricultural buildings as well as residential

Projected demand for new housing, presented in Figure 8, suggests a total of 192 dwellings will be required over the next 13 years, to 2036, which is a 46% increase on the pre-2020-21 average. Achieving this level of housing provision presents a significant challenge.

Barriers to achieving the Shire's economic development potential are formidable, with rental and for-sale housing shortages, ageing infrastructure, vacancies for skilled workers, under-resourced businesses, overloaded trades and construction businesses, and volunteer workloads among the most critical.

Figure 8 - Yarriambiack Shire Housing Demand Projections

	2021	WDA Projection 2031*	WDA Projection 2036*	% p.a. 2016-31	% p.a. 2016-36
Estimated Resident Population	6,556	6,524	6,548	-0.03%	-0.01%
Occupied Private Dwellings	2,740	2,968	2,993	0.53%	0.44%
Persons in Private Dwellings	5,881	6,263	6,286	0.42%	0.33%
Vacant Dwellings and Stock Losses	655	640	640	-0.15%	-0.12%
Total Private Dwellings	3,395	3,608	3,633	0.41%	0.34%
Household Size	2.15	2.11	2.10	-0.11%	-0.11%
% in Private Dwellings	89.7%	96.0%	96.0%		
Estimated Average Annual Dwelling Demand		14	16		

SOURCE: Street Ryan (2023), Wimmera Southern Mallee Population, Jobs, and Housing Projections 2021-36, 2022 Update (Wimmera Development Association Ltd)

STRATEGIES

Five themes



The 2023-27 Yarriambiack Economic Development Strategy is structured around five themes which focus on socially and environmentally responsible economic development activities:

- STRATEGY THEME 1: CAPITALISING ON GROWTH FROM NEW INDUSTRIES.
- STRATEGY THEME 2: AGRICULTURAL DIVERSIFICATION AND PROCESSING.
- STRATEGY THEME 3: REMOVING BARRIERS TO ATTRACTING WORKERS.
- STRATEGY THEME 4: STRENGTHENING SERVICE INDUSTRIES.
- STRATEGY THEME 5: INFRASTRUCTURE, PLANNING AND A PROACTIVE COUNCIL.

These themes and the constituent strategies within each one, have been crafted to build upon and to complement the Yarriambiack Council Plan, the Wimmera Southern Mallee Regional Economic Development Strategy, and a range of existing plans and strategies already adopted by Council.

The following sections discuss the issues and rationale associated with each strategy theme and present the specific strategies within each theme. These specific strategies form the basis of Council's Economic Development Action Plan for 2023-27.

1. Capitalising on Growth from New Industries

Description and Rationale

Yarriambiack Shire has a bright economic future if new industry growth opportunities can be implemented. Two industry sub-sectors have emerged which have no real history in Yarriambiack Shire and are quite new in an Australian context. These are renewable energies (largely wind and solar power, and potentially in the longer-term bio-energies and geothermal energy) and mineral sands mining (incorporating rare earth minerals).

Renewable Energies

Renewable energy is among the Wimmera Southern Mallee's most significant, and most important, current economic development opportunities. Wind and solar power investors have recognised the natural attributes, and the broadacre environment, of the region and large-scale investment has begun (with the Murra Warra Wind Farming complex being the largest to date). Many new projects are under development.

Western Victoria is geographically and topographically suited to being part of a renewable energy revolution that is needed to achieve an Australian transition to clean energy. There is an abundance of reliable solar and wind resources with more than 19 renewable energy projects, totalling more than 10 gigawatts of capacity, under consideration in the Wimmera Southern Mallee. Additional transmission infrastructure is essential for even some of these projects to be connected. Government commitments to achieving net-zero carbon emissions in the next 2 decades are expected to radically alter the energy generation map, and Victoria's Wimmera Southern Mallee should be a major location for both:

- Improving Victoria's national share of energy generation capacity, and
- Enabling a rapid transition to net-zero.

Of the renewable energy projects being developed for implementation in the Wimmera Southern Mallee, three wind farm developments are proposed within Yarriambiack Shire and a further two are on the Shire's southern boundary with Horsham Rural City.

Implementation of these known projects would result in 1,500-2,000 megawatts of power generation, creating an estimated \$70-\$93 million in annual economic output and creating 210 direct operational jobs and 115 indirect jobs for residents of Yarriambiack Shire.

Mineral Sands and Rare Earth Minerals

Employment and economic activity in mining is currently very limited in the Shire, with only 8 jobs (in quarrying activities) and total economic output of just \$11.4 million. However, this is set to change rapidly if current mineral sands mining projects progress to implementation. Yarriambiack Shire is rich in deposits of mineral sands, encompassing a range of rare earth minerals.

Astron Corporation (trading as Donald Mineral Sands, WIM Resource Pty Ltd and Iluka Resources are three mineral sands mining companies which have been exploring and proving the resources in the region, with plans to establish large mining operations in the next few years.

Astron Corporation Limited is a publicly listed mining and processing company, domiciled in Hong Kong, with more than thirty years experience in mineral sands processing, technology and downstream product development, as well as the marketing and sale of zircon and titania (titanium dioxide) products. The 'Donald Rare Earths and Mineral Sands Project', which spans an area between Donald (in Buloke Shire) and Minyip (in Yarriambiack), and predominantly in Yarriambiack Shire, is a Tier One deposit in terms of scale, potential production longevity with an anticipated mine life of at least 40 years, and extensive mineral value, notably the rare earth and zircon content.

Astron Corporation has a Memorandum of Understanding (MoU) with Yarriambiack Shire Council which provides for Astron and YSC to work cooperatively and collaboratively on mutually beneficial community and economic outcomes from the development and operation of the Donald project. The MoU focuses on maximising the local social and economic opportunities associated with the project.

The core areas for collaboration are:

- Optimising economic and social outcomes – to work cooperatively and in good faith to facilitate as many positive outcomes from the Donald project as possible whilst also working jointly to minimise and mitigate any potential negative economic employment and social outcomes associated with the project; and
- Building relationships to support the Donald Mineral Sands project – to work cooperatively and in good faith to develop an advocacy and relationship management program which will aid the timely delivery of the project and wider community benefits.

Stages 1 and 2, the Donald Mineral Sands project, will be at a site which spans 2,784 hectares and is located between Minyip and Donald. Stage 3 of the project is planned on an area known as the Jackson Deposit which is located around Rupanyup.

Subject to final approvals and investment raising, Astron expects to commence the construction phase of Stage 1 in 2024. Stage 1 will have an estimated annual economic contribution of \$205 million and will employ 100 personnel during the construction phase and 80 people in ongoing operational roles.

WIM Resource Pty Ltd (WIM) is a heavy mineral sands resource development company, with a portfolio of projects located in Victoria's north-west. The Avonbank Mineral Sands Project is the most advanced of WIM Resource

projects with a completed feasibility study and engaged in approvals processes.

WIM Resource will mine mineral sands products such as zircon and rutile and rare earth minerals (eg xenotime and monazite) at Avonbank. It is predominantly in the Rural City of Horsham but is right on the edge of Yarriambiack's south-western boundary, just 11 kilometres (or 10 minutes drive) from the town of Murtoa.

Contingent on approvals and a final investment decision, WIM expects to commence construction by 2023-2024. The project will employ 200 personnel during construction and 200 in the operational phase. The company has a memorandum of understanding with Horsham Rural City Council to help deliver "mutual benefits for stakeholders in the region". Based on the mine's expected location, it could be expected that 5% to 10% of workers (both construction and operational) could reside in Yarriambiack Shire.

Iluka Resources has a proposed project in the pre-feasibility phase and has not released any project updates since December 2020. The Wimmera Project targets a resource deposit with significant commercial potential as it contains both mineral sands – including large amounts of zircon – and rare earths. However, the

natural qualities of this deposit, and others similar in the region, make it technically challenging to refine to the level required by the market.

Iluka has prioritised and significantly invested in addressing this challenge, which inevitably affects the project development timeline. The mine site is located approximately 40 kilometres south-west of Horsham and 7.8 km north of the locality of Toolondo, and therefore will have a very small impact on Yarriambiack Shire if it proceeds. Iluka also exploration activity in the north of Yarriambiack Shire which could result in a further mining project in the medium term.

THEME 1. Specific Strategies

STRATEGY 1.1:

Convene Council led Working Groups to provide responsive support to mineral sands mining and renewable energy companies throughout their approvals and fundraising phases.

STRATEGY 1.2:

Advocate for the greatest economic and social benefits for our local community and residents during the construction of transmission infrastructure to connect Wimmera Southern Mallee renewable energy generators to the reticulated national transmission grid.

STRATEGY 1.3:

Communicate with communities in towns affected by mineral sands mining projects to ensure the timetables and impacts of the projects are understood, and that the communities are able to derive social and economic benefits from the new industries.



STRATEGY 1.4:

Collaborate with Wimmera Development Association, town community organisations, and private developers to plan and deliver the housing needs for both construction and operational phases of mining and renewable energy projects (ensuring that the mining project leads to a legacy of permanent housing and minimising the proportion of the workforce that is drive-in/drive-out).

STRATEGY 1.5:

Consider further intervention in the housing market by gifting of land, empowering Asset Management Committees, seeking grants and loans to overcome the shortage of housing for key workers in mining and renewable energies.

2. Agricultural Diversification and Value Adding

Description and Rationale

At the 2021 Agricultural Census, Yarriambiack Shire's farmgate gross value of agricultural production totalled \$607.4 million (3.3% of Victoria's total agricultural products value), and 91.5% of this, or \$511.5 million, was in broadacre grain production:

- Lentils: \$149.7 million (44.8% of the Victorian total gross value)
- Wheat for grain: \$148.4 million (10.7% of the Victorian total gross value)
- Barley for grain/malt: \$123.7 million (17.0% of the Victorian total gross value)
- Chickpeas: \$4.5 million (19.1% of the Victorian total gross value)
- Other Pulses (including faba beans and lupins): \$20.3 million (10.9% of the Victorian gross value).

Of the remaining agricultural sectors in Yarriambiack Shire, the most significant are livestock products:

- Sheep for meat: \$21.9 million in farmgate gross value
- Pigs: \$11.0 million in farmgate gross value
- Wool: \$8.3 million in farmgate gross value
- Poultry for meat (ducks and chickens): \$7.9 million in farmgate gross value.

The gross value reported in the Agricultural Census is much greater than the gross output estimated in section two of this document, which (at 37% of total output) is \$290.19 million. The difference is assumed to be primarily due to a very large proportion of agricultural production not being sold. This includes product held in on-farm or aggregator storage and breeding and other non-traded livestock.

Good seasonal conditions have helped to support increases in the agricultural workforce. For the first period in many decades, the number of jobs in agriculture increased between 2016 and 2021 and is estimated to have further increased in 2022-23. This increase perhaps also signals the possibility that, while average farm sizes inexorably expand and agricultural technologies become every more sophisticated, there may be a floor in the level to which agricultural employment may drop.

The new technologies, the heightened focus on biosecurity, and trends towards biological and higher value production systems, may actually be helping to generate job growth. Coupled with 4-5 years of good production (including 2-3 record breaking years), the recent performance of the Shire's broadacre agriculture has been extremely positive. The challenge for the next five years, when seasonal cycles may bring less favourable conditions, is to use the solid foundation of the past half-decade to invest in

either diversified enterprises or to seize on value-adding opportunities, or both.

Yarriambiack is Victoria's heartland for pulse and barley production, and a few artisanal businesses have established in the past five years to value add to pulses and convert them to manufactured foods. Although the vast majority of both pulses and barley from the Shire are minimally processed locally (aggregated, cleaned, graded, and packed) prior to export, the opportunity for local value adding is larger.

Enterprises in the agribusiness supply chain in Yarriambiack Shire encompass:

FARM MACHINERY AND EQUIPMENT MANUFACTURERS AND DEALERS.

Machinery and equipment manufacturing is the Shire's largest manufacturing sub-sector, employing 21 people in 2021. Machinery and equipment wholesaling employs another 38 people. Key businesses in the Shire in these sub-sectors are on average these businesses are expecting annual employment growth of around 5-10% over the next decade

FARM SUPPLIES WHOLESALERS.

"Basic material wholesaling" (including fertiliser, stockfeed, seeds, etc) is the largest agricultural services sub-sector in wholesaling (excluding machinery and equipment)

AGRONOMISTS, AGRICULTURAL SCIENTISTS, OTHER FARM ADVISORS.

Yarriambiack has a tiny professional, scientific and technical services industry with just 37 people employed. This is just 1.4% of total jobs compared with a Victorian average of 8.4% in this industry. To encourage, support and guide agricultural diversification and value adding, key professional, scientific and technical personnel will be beneficial.

AGRICULTURAL CONTRACTED SERVICES (EG CONTRACT HARVESTING, FERTILISER SPREADING, SHEARING).

In Yarriambiack, this sub-sector appears to be quite small (with just 9 people employed) but it is probably bolstered by operators who also work as farmers and classify 'farming' as their main form of employment.

VETERINARY AND NUTRITION SERVICES.

Another sub-sector with a small presence in Yarriambiack.

FREIGHT AND STORAGE OPERATORS.

Road freight transport and warehousing/storage services make up the majority (71%) of Yarriambiack's Transport, Postal and Warehousing industry and almost all are engaged in servicing agricultural enterprises.

FOOD PROCESSORS AND MANUFACTURERS.

The Shire is under-represented in food manufacturing, even compared with other municipalities in the Wimmera Southern Mallee. It is the only local government area in the region where Food Manufacturing is not the largest manufacturing sub-sector. Local pulse packing and export enterprises are expecting modest growth in the next decade, so value adding enterprises are needed to expand the Shire's economic return from its large level of commodity production.

THEME 2. *Specific Strategies*

STRATEGY 2.1:

Provide concierge services (via a nominated single point of contact within Council) for new and existing agricultural businesses (including niche and artisanal producers) which are proposing to either diversify or add value to commodities.

STRATEGY 2.2:

Investigate the potential for farmer investments or outbound supply chain investment in food product manufacturing enterprises in Yarriambiack (focusing on pulse and cereal grain and hay value adding).

STRATEGY 2.3:

Collaborate with regional partners to attract and retain links in the agribusiness supply chain within the Wimmera Southern Mallee region.



3. Removing Barriers to Attracting Workers

Description and Rationale

Yarriambiack communities, businesses and government organisations are unanimous in agreement that housing is the by far the most compelling barrier to attracting workers and other residents to the Shire. A 2020 housing assessment from Wimmera Development Association concluded “the extent of agreement that housing is inhibiting liveability and economic strength of towns in the Wimmera Southern Mallee is overpowering”.

The housing barriers are multi-faceted, including:

- Limited available serviced residential land.
- Inadequate provision for zoning of residential land for future growth.
- Insufficient housing for sale.
- Insufficient rental housing and the share of private sector ‘managed’ rental housing in the region is low by any measure.
- Large proportions of existing housing stock which is no longer fit for purpose.
- Insufficient range and choice in housing options especially for key workers.
- Significant vacant residential land and housing stock is ‘locked up’ by property owners who are unwilling to sell.

At the 2021 Census of Population and Housing, Yarriambiack Shire had 2,740 occupied dwellings and with an average household size of 2.1 persons. Separate houses make up the overwhelming majority of residential dwellings (96.1%).

A large number of unoccupied dwellings were identified at the Census implying a 20.2% vacancy rate, however the majority of vacant properties are reportedly unavailable for either sale or rental (with absentee owners), are unsuitable for occupancy, are condemned, or are incomplete.

IN YARRIAMBIACK:

56.3%

of dwellings (1,543) were owned outright by the occupants.

21.7%

of dwellings (594) were owned with a mortgage.

The median mortgage payment for these households was \$672 per month (36.2% of the Victorian median).

- 16.0% of dwellings (438) were rented (1.0% rented by a Housing Authority). The median rent payment for

households was \$166 per week (44.9% of the Victorian median).

- Existing Yarriambiack dwellings accommodate just 0.7 residents for each bedroom.

While addressing housing barriers must be the top priority, there is general recognition that availability of suitable housing, and housing choices, is part of a bigger bundle of facilities and services to engender vibrant towns, attractive residential areas, and a level of growth to sustain communities and retain infrastructure and assets. The most significant of the ‘secondary barriers’ to attracting workers are:

- Childcare. Council has been successful in attracting financial support from the State Government for a dedicated childcare facility servicing the south of the Shire in Murtoa, with an expected delivery in 2025. This will reduce reliance on childcare services in Horsham and Warracknabeal from southern residents
- Town centres which lack an attractive range of services (particularly food services and some personal and health services)
- Insufficient construction and trades related businesses to build, manage and maintain building assets.



THEME 3. *Specific Strategies*

STRATEGY 3.1:

Work with Wimmera Housing Innovations Pty Ltd (a Wimmera Development Association facilitated company) to progress community and employer driven housing solutions across the Shire and to establish 'special purpose vehicle' structures to formalise investment and operations.

STRATEGY 3.2:

Assist the Yarriambiack Chapter of West Vic Business to develop an engaging program of activities and to create a formal network of businesses across the Shire

STRATEGY 3.3:

Consider further intervention in the housing market by gifting of land, empowering Asset Management Committees, facilitating awareness of grants to ensure adequate and suitable independent living housing supply for people who are downsizing or relocating to Yarriambiack towns.



4. Strengthening Service Industries

Description and Rationale

Several Yarriambiack services industries are under-represented and others have begun to slow and risk falling behind. Most service industries in the Shire lag behind those of other regional Victorian municipalities both in employment and economic output, and the shift to a 'service economy' has been less pronounced in Yarriambiack than elsewhere. These industries are absolutely fundamental to the future of the Shire's economy and as a place to live.

They:

- Are the source of considerable innovation (including rapidly changing new technologies).
- Cover all the industries that contribute to lifestyle and wellbeing.
- Cover all the industries that make up the visitor economy.

The four key service industries in Yarriambiack which must be strengthened in the next five years are:

- Health care and social assistance. This sub-sector is crucial to retaining older aged residents and to attracting new residents who expect available and accessible health care.
- Professional, scientific and technical services.

This sub-sector employs just 2.0% of the workforce in Yarriambiack, compared with 8.4% in Victoria as a whole. Professionals needed in Yarriambiack include agricultural research, food science, architectural and engineering design services, management services and veterinary services.

- Information, media and telecommunications (similar to prof, scient, technical). This sector is almost under threat of extinction in Yarriambiack having fallen from 22 jobs to just 12 (all in publishing) this century.

- Accommodation and food services. While this sub-

sector caters for visitors, the propensity for Australians to eat-out and to regularly frequent cafés, bars and takeaways has expanded dramatically in the twenty-first century.

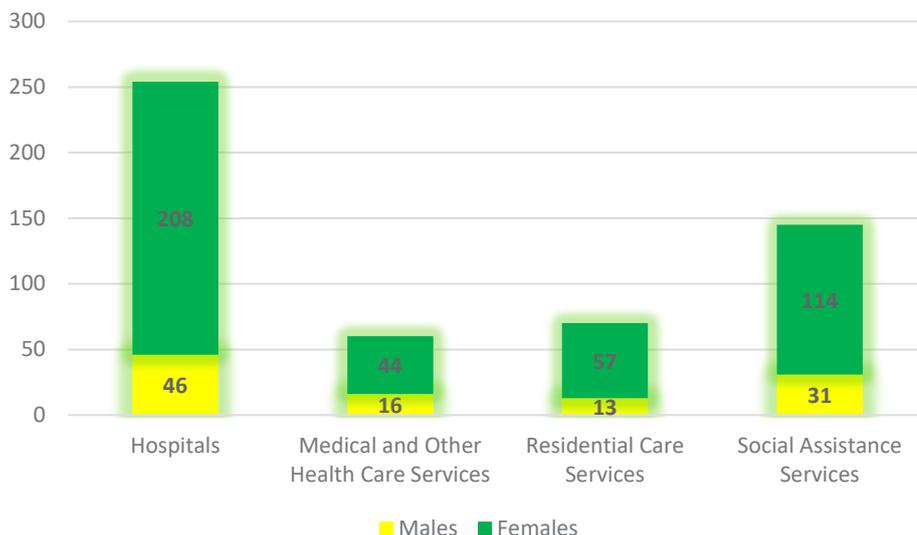
The Health and Social Assistance industry is Yarriambiack's second largest employer, after Agriculture, with 20.5% of all jobs and this is considerably higher than the Victorian average of 14.1%.

The number of health professionals servicing the region is undoubtedly even greater than the resident workforce, with several visiting doctors, medical imaging, and allied health professionals. However, a large percentage of workers in this industry are casual or part-time ; 36.7% in Yarriambiack Shire compared with 45.1% in Victoria as a whole.

It is an industry dominated by female employees (80%) including Rural Northwest Health, West Wimmera Health Service and other key health, aged care and social assistance employers in the shire.

Other key health and social assistance employers in the Shire are health centres and aged care facilities in Murtoa, Minyip and Beulah and Woodbine Inc. in Warracknabeal. Figure 9 shows the number of people employed in the health and social assistance sub-sectors.

Figure 9 - Employment by Health and Social Assistance Sub-sector



Casual and part-time workers are defined as those who work less than 35 hours per week in paid employment.

Overall employment in 2023 in Yarriambiack is estimated to be 75-100 jobs short of the demand from employers. Health and Social Assistance employers report that insufficient (or inappropriate) housing and (to a lesser extent) lack of childcare has contributed to a shortage of 25+ staff in this industry alone. This is despite the fact that some of the health provider enterprises have intervened in the housing market and acquired in excess of 30 properties to accommodate staff. Aged care, nursing and allied health staff are in increasing demand and have been very difficult to recruit.

During the 15 years 2001-2016, employment in health and social assistance in Yarriambiack had been increasing at the average annual rate of 1.2% per annum; a period in which overall employment in the Shire decreased by 1.6% per annum. The region's housing crisis and the COVID pandemic contributed to the inability to fill available health and social assistance jobs since 2016. Had the 2001-2016 job trend in this industry continued (and, with continuing population ageing, the trend rate could have been exceeded) the industry would have hosted 563 jobs in 2021, or 35 more than the number recorded in the 2021 Census, further confirming the advice received from employers.



THEME 4. *Specific Strategies*

STRATEGY 4.1:

Support and encourage innovative responses to continue to provide core services in Yarriambiack's town centres by both local communities and local business investors

STRATEGY 4.2:

Implement the outcomes of the feasibility study and business case of the former Hopetoun school facility.

STRATEGY 4.3:

Support health services to develop facilities and staff accommodation to meet workforce demands in Yarriambiack's medical and social assistance centres.

5. Infrastructure, Planning and a Proactive Council

Description and Rationale

Economic development has been a relatively recent acquisition for the local government sector as a core function. However, the importance of the function, and its relevance across most sectors of the local economy, have become clear. A review of changing dynamics in economic development reveals how the role has become more localised, and more community controlled.

Advances in the understanding of regional economic development over the past half century have required commensurate changes in the way regional economic development is facilitated.

Creation of Growth Centres, Development Corporations, and Regional Commissions cemented the concepts of “economic regions” in Australia, which defined regional spheres of influence: Quite a different concept to the management and administration of local government areas, electorates and states/territories. However, the survival of the regional organisations was too sensitive to changes in government policy.

Local and community-based approaches and responses to regional economic development have now become accepted as the most effective and most sustainable way to develop regions; in Australia and around the world. This acceptance is based on two prime factors:

(i) Most new businesses, new investment and new jobs in any region are generated by the existing community (and the supply chain connections of the existing community): Research in Australia suggests that the proportion is at least 70%.

(ii) “Top down” government initiated regional economic development programs are rarely sustained. They are shaped, funded and often concluded within just one term of government office, yet their successful implementation and maturation may have a “lead time” of more than a decade. Flexible programs which support innovation and capitalise on emerging opportunities are more likely to be successful.

More recent structures have seen the explicit acknowledgement of economic development as a local

government function, with the formation of Council Economic Development Units.

In some cases, the Economic Development function has been integrated with planning, development, community services and/or sustainability functions. In many regions, these Council Economic Development Units work in complement to separately incorporated Economic Development Organisations which are formally linked to one or more Councils.

These organisations tend to have Boards of Management which have both local government and industry participants, from private and public sectors: The public participants often represent public owned training providers, infrastructure companies (such as water and power providers), hospitals and sport and recreation bodies.



THEME 5. *Specific Strategies*

STRATEGY 5.1:

Develop an internal economic development concierge. This will include staff from the economic development, planning and building functional areas of Council. Senior executive staff may be concierges for major investment projects from time to time.

STRATEGY 5.2:

Align urban development, settlement, plans of townships across the shire with the Yarriambiack Shire Council Planning Scheme Review to highlight provision of land for future residential and, where relevant, industrial development

STRATEGY 5.3:

Instruct contractors and consultants (when new projects are commissioned) to use the Shire's agreed projections and targets when preparing strategies and plans for the Shire.

STRATEGY 5.4:

Advocate for equitable access to broadband and other contemporary communications platforms.

STRATEGY 5.5:

Advocate for increased funding to allow Yarriambiack's network of local and main roads and bridges, and rail services (both freight and passenger) to be maintained or upgraded for safe and efficient transport operations.

STRATEGY 5.6:

Allocate staff to work with the Shire's (and/or Department of Energy, Environment and Climate Action appointed) Committees of Management (encompassing Asset Management Committees and Recreation Reserve Committees) on initiatives where capital and operating improvements are proposed.

ROAD MAP

HOW WE PLAN TO GET THERE...



1. Capitalising on Growth from New Industries

Initiatives

	Year 1	Year 2	Year 3	Year 4	Year 5	Council Role
1.1 Convene Council led Working Groups to provide responsive support to mineral sands mining and renewable energy companies throughout their approvals and fundraising phases.						Facilitation
1.2 Advocate for the construction of transmission infrastructure to connect Wimmera Southern Mallee renewable energy generators to the reticulated national transmission grid.						Advocacy
1.3 Communicate with communities in towns affected by mineral sands mining projects to ensure the timetables and impacts of the projects are understood, and that the communities are able to derive social and economic benefits from the new industries.						Facilitation
1.4 Collaborate with Wimmera Development Association, town community organisations, and private developers to plan and deliver the housing needs for both construction and operational phases of mining and renewable energy projects (ensuring that the mining project leads to a legacy of permanent housing and minimising the proportion of the workforce that is drive-in/drive-out).						Representation and Delivery
1.5 Consider further intervention in the housing market by gifting of land, empowering Asset Management Committees, seeking grants and loans to overcome the shortage of housing for key workers in mining and renewable energies.						Management and Delivery

2. Agricultural Diversification and Processing

<i>Initiatives</i>	<i>Year 1</i>	<i>Year 2</i>	<i>Year 3</i>	<i>Year 4</i>	<i>Year 5</i>	<i>Council Role</i>
2.1 Provide concierge services (via a nominated single point of contact within Council) for new and existing agricultural businesses (including niche and artisanal producers) which are proposing to either diversify or add value to commodities.						Facilitation
2.2 Investigate the potential for farmer investments or outbound supply chain investment in food product manufacturing enterprises in Yarriambiack (focusing on pulse and cereal grain value adding).						Management
2.3 Collaborate with regional partners to attract and retain links in the agribusiness supply chain within the Wimmera Southern Mallee region.						Representation



3. Removing Barriers to Attracting Workers

Initiatives	Year 1	Year 2	Year 3	Year 4	Year 5	Council Role
<p>3.1 Work with Wimmera Housing Innovations Pty Ltd (a Wimmera Development Association facilitated company) to progress community and employer driven housing solutions across the shire and to establish 'special purpose vehicle' structures to formalise investment and operations.</p>						Representation
<p>3.2 Assist the Yarriambiack Chapter of West Vic Business to develop an engaging program of activities and to create a formal network of businesses across the shire.</p>						Facilitation
<p>3.3 Consider further intervention in the housing market by gifting of land, empowering Asset Management Committees, facilitating awareness of grants to ensure adequate and suitable independent living housing supply for people who are downsizing or relocating to Yarriambiack towns.</p>						Management and Delivery



4. Strengthening Service Industries

<i>Initiatives</i>	<i>Year 1</i>	<i>Year 2</i>	<i>Year 3</i>	<i>Year 4</i>	<i>Year 5</i>	<i>Council Role</i>
4.1 Continue to support and encourage innovative responses to continue to provide core town services Yarriambiack's town centres by both local communities and local business investors.						Facilitation and Delivery
4.2 Implement the outcomes of the feasibility study and business case of the former Hopetoun school facilities.						Management and Delivery
4.3 Support health services to develop facilities and staff accommodation to meet workforce demands in Yarriambiack's medical and social assistance centres.						Advocacy

5. Infrastructure, Planning and a Proactive Council

<i>Initiatives</i>	<i>Year 1</i>	<i>Year 2</i>	<i>Year 3</i>	<i>Year 4</i>	<i>Year 5</i>	<i>Council Role</i>
5.1 Develop an internal economic development concierge. This will include staff from the economic development, building and planning functional areas of Council. Senior executive staff may be concierges for major investment projects from time to time.						Facilitation
5.2 Align urban development, settlement, plans of townships across the Shire with the Yarriambiack Shire Council Planning Scheme Review to highlight provision of land for future residential and, where relevant, industrial development.	As needed					Management and Delivery
5.3 Instruct contractors and consultants to use the Shire's agreed projections and targets when preparing strategies and plans for the Shire.	As new projects arise					Management
5.4 Advocate for equitable access to broadband and other contemporary communications platforms.						Advocacy
5.5 Advocate for increased funding to allow Yarriambiack's network of local and main roads and bridges to be maintained or upgraded for safe and efficient transport operations.						Advocacy
5.6 Allocate staff to work with the Shire's (and/or DEECA appointed) Committees of Management (Asset Management Committees and Recreation Reserve Committees) on initiatives where capital and operating improvements are proposed.						Facilitation, Management and Delivery

Appendix 1.

Economic Data Tables and References

HISTORIC PERSPECTIVE

Yarriambiack Shire is in the north-east of Victoria's Wimmera Southern Mallee region. Warracknabeal is the largest township in the Shire, followed by Murtoa, Hopetoun, Minyip, Rupanyup, Woomelang and Beulah. The Shire has a range of smaller communities, all with resident populations of less than 150 people: Speed, Yaapeet, Patchewollock, Tempy, Lascelles, Brim, Lubeck, Rosebery, Lah, Turriff and Sheep Hills.

Prior to colonial intrusion, First Nations Australians managed tracts of land to sustain a population living in balance with available sources of food and water. Yarriambiack (meaning 'creek tribes') is part of the traditional lands of the Wotjobaluk, Jaadwa, Jadawadjali, Wergaia, and Jupagulk peoples, where migratory lifestyles were the norm, in dealing with cycles of droughts and floods. The Shire provided plant (such as quandong, yam daisy, saltbush and river mint) and animal (such as kangaroo, possum and game bird) foods as well as medicines and tools to support the pre-colonial economy. Lubeck, Lah, Warracknabeal, and Rupanyup were all focal points for camps, and Yarriambiack Creek was a 'highway to Lake Corrong'.

The change from Aboriginal land management to a pastoral economy in Yarriambiack was effected in the 1840s, when the greatest clashes occurred between Aboriginal communities and European settlement. Urban settlements

developed around agricultural, mineral resources, or a transport link (especially rail). In Yarriambiack:

- Pastoral sheep runs (Ashens and Longerenong stations) were quickly taken up by squatters during 1844 to 1847. Freehold selections in the 1870s saw the siting of townships.
 - Railways and the gravity fed water supply system from the Grampians were the critical pieces of infrastructure that facilitated agricultural development in the Shire.
- "The growth of the wheat industry was the most lasting ecological and economic result of the railways in rural Victoria. It remains into the twenty-first century the last rural industry still dependent on rail transport". The 19th century railways stimulated the development of the towns of Murtoa, Minyip, Rupanyup, Warracknabeal and Hopetoun, into district centres.
- National parks and reserves were created to preserve remaining natural Lowan Mallee areas from destruction.

DATA TABLES

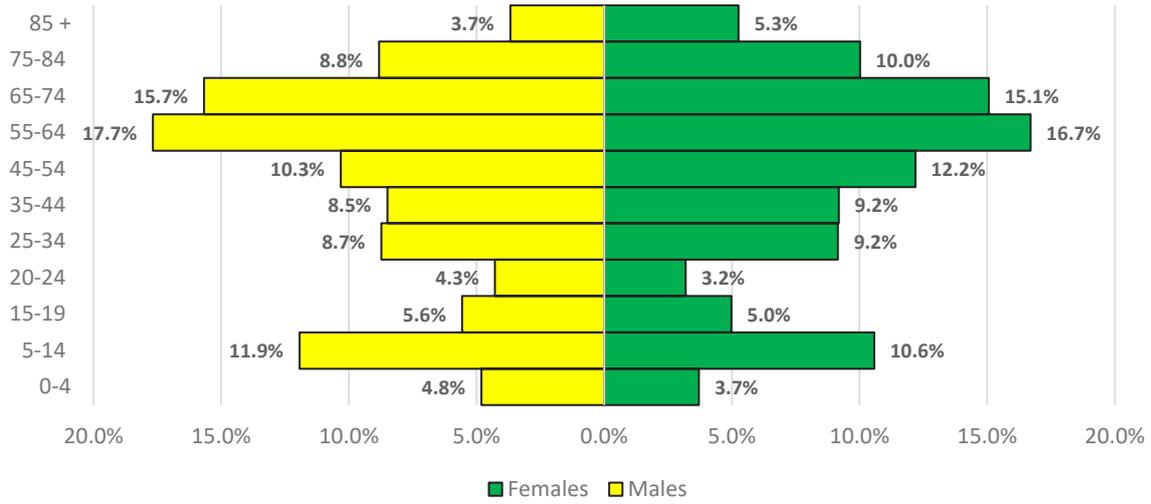
Figure A1 - Populations of Yarriambiack Towns, 2016 and 2021

	YARRIAMBIACK TOWNS	2016	2021	% PA CHANGE
Northern	Patchewollock	133	149	2.30%
	Tempy	57	62	1.70%
	Turriff	29	30	0.68%
	Woomelang	201	191	-1.02%
	Beulah	329	312	-1.06%
	Hopetoun	739	694	-1.25%
	Lascelles	93	82	-2.49%
	Yaapeet	84	75	-2.24%
	Speed	78	53	-7.44%
Central & Southern	Brim	171	181	1.14%
	Murtoa	865	897	0.73%
	Rupanyup	536	545	0.33%
	Minyip	524	525	0.04%
	Warracknabeal	2,438	2,359	-0.66%
Rural Balance		397	401	0.20%
Shire Total		6,674	6,556	-0.36%

SOURCE: ABS Censuses of Population and Housing 2016 and 2021

Figure A2 - Population Pyramids 2021 and 2036: Yarriambiack

Population Pyramid: Yarriambiack 2021



Population Pyramid: Yarriambiack 2036



Figure A3 - Employment by Industry 2001 to 2021

Industry	2001	2001 %	2011	2016	2021	2021 %	2001-21 % pa	2016-21 % pa
Agriculture, Forestry and Fishing	1,104	33.17%	805	719	744	27.87%	-1.95%	0.69%
Mining	3	0.09%	6	6	8	0.30%	5.03%	5.92%
Manufacturing	166	4.99%	117	59	88	3.30%	-3.12%	8.32%
Electricity, Gas, Water and Waste Services	42	1.26%	25	39	19	0.71%	-3.89%	-13.40%
Construction	107	3.22%	140	116	138	5.17%	1.28%	3.53%
Wholesale Trade	120	3.61%	102	74	89	3.33%	-1.48%	3.76%
Retail Trade	325	9.77%	252	201	195	7.30%	-2.52%	-0.60%
Accommodation and Food Services	126	3.79%	87	96	84	3.15%	-2.01%	-2.64%
Transport, Postal and Warehousing	172	5.17%	177	130	120	4.49%	-1.78%	-1.59%
Information Media and Telecommunications	22	0.66%	17	12	12	0.45%	-2.99%	0.00%
Financial and Insurance Services	52	1.56%	35	27	22	0.82%	-4.21%	-4.01%
Rental, Hiring and Real Estate Services	10	0.30%	8	9	10	0.37%	0.00%	2.13%
Professional, Scientific and Technical Services	47	1.41%	63	60	52	1.95%	0.51%	-2.82%
Administrative and Support Services	56	1.68%	37	43	40	1.50%	-1.67%	-1.44%
Public Administration and Safety	89	2.67%	116	97	131	4.91%	1.95%	6.19%
Education and Training	258	7.75%	209	206	214	8.01%	-0.93%	0.76%
Health Care and Social Assistance	427	12.83%	484	518	528	19.78%	1.07%	0.38%
Arts and Recreation Services	23	0.69%	10	14	11	0.41%	-3.62%	-4.71%
Other Services	104	3.13%	96	91	77	2.88%	-1.49%	-3.29%
Not stated	75	2.25%	62	111	88	3.30%	0.80%	-4.54%
Total	3,328	100%	2,848	2,628	2,670	100%	-1.10%	0.32%
Sector								
Primary	1,107	33.26%	811	725	752	28.16%	-1.91%	0.73%
Secondary	315	9.47%	282	214	245	9.18%	-1.25%	2.74%
Tertiary	617	18.54%	531	405	404	15.13%	-2.10%	-0.05%
Quaternary	534	16.05%	485	454	481	18.01%	-0.52%	1.16%
Quinary	680	20.43%	677	719	700	26.22%	0.15%	-0.53%
Not stated	75	2.25%	62	111	88	3.30%	0.80%	-4.54%
Total	3,328	100%	2,848	2,628	2,670	100%	-1.10%	0.32%

SOURCE: ABS Censuses of Population and Housing, 2001 to 2021



YARRIAMBIACK SHIRE COUNCIL

34 Lyle Street, Warracknabeal VIC 3393

T: (03) 5398 0100

F: (03) 5398 2502

www.facebook.com/yarriambiack

PO Box 243, Warracknabeal VIC 3393

E: info@yarriambiack.vic.gov.au

W: www.yarriambiack.vic.gov.au

www.twitter.com/yarriambiackshire