



The Diverse South West

Western Australia's South West:
Where natural advantage meets economic opportunity



THE SOUTH WEST OF WESTERN AUSTRALIA

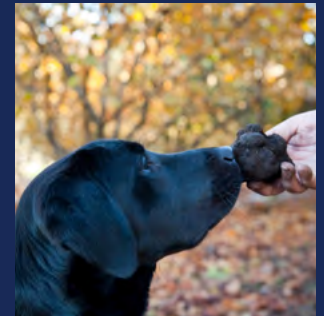
A region defined by diversity, capability and opportunity

The South West region of Western Australia is a unique part of the world.

In a world seeking resilient supply chains, sustainable growth and high-quality places to live and work, Western Australia's South West stands apart.

With established industrial capability, exceptional natural assets and a community shaped by innovation and care for Country, the region is well positioned to lead in a future shaped by low carbon technologies and sustainable development.

Extraordinary landscapes.
Amazing attractions.
Premium produce.
World-class industry.



“Ngalak kaditj kalyakoorl kaaradj boodjar-ak Kongal-Marawarwer kaditj baalap boodjar, kep wer kadadjiny-ak kalyakoorl yoodaniny.

Ngalak Birdiya-k koora wer yeyi ngalang koota-djinong yanginy.”

We acknowledge the traditional custodians of country throughout the South West and recognise their continuing connection to land, waters and culture.

We pay our respects to Elders past, present and emerging.

Credits

Photos courtesy of Tourism WA, TradeStart, Australia's South West, Edith Cowan University, South Regional TAFE, Talison Lithium, Koomal Dreaming, Southern Ports Authority, Synergy, International Graphite, Quantum Filtration, Westrac and RCR Advanced Technologies.

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Working together for a stronger region



Hon Stephen Dawson MLC

Minister for Regional Development; Ports; Science and Innovation; Medical Research; Kimberley

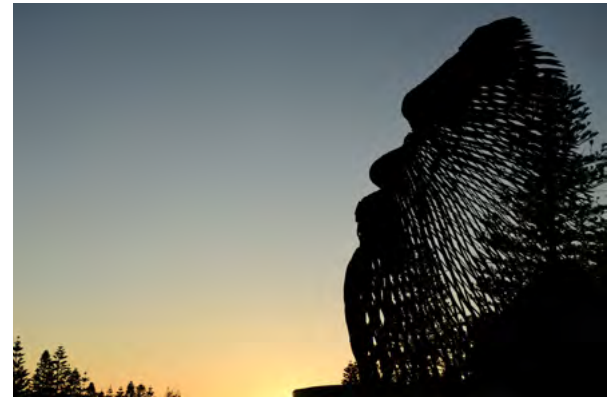
The **Minister for Regional Development** oversees Western Australia's Regional Development Portfolio, including the Department of Primary Industries and Regional Development and the State's nine Regional Development Commissions. The Portfolio works collectively to implement regional development outcomes that drive economic diversification and job creation.



Hon Don Punch MLA

Minister for Aboriginal Affairs; Water; Climate Resilience; South West

The **Minister for the South West** responds to the needs and development of the South West region of Western Australia. This includes supporting social and economic outcomes that improve quality of life for people living and working in the region.



Western Australia's regions are an economic powerhouse, each with their own unique economy and cultural identity.

The Regional Development Portfolio provides a framework for dedicated representation and focus on the unique challenges and opportunities in each region.

The South West Development Commission's (SWDC) work leading regional development in the South West is pivotal to sustainably growing the region.

SWDC's strength lies in deep regional knowledge, strong cross-government coordination and close industry relationships. This experience helps convert State Government priorities into practical, place-based outcomes.

Our work drives investment, workforce development and industry growth to support a resilient and prosperous South West.

A landscape of natural and cultural prosperity

The South West is renowned for its biodiversity, boasting unique natural ecosystems and landscapes that support a wide range of plants and animals, including endangered species.

It is also a fragile environment that relies on careful and considered planning to ensure the long-term sustainability of the environment and resources.

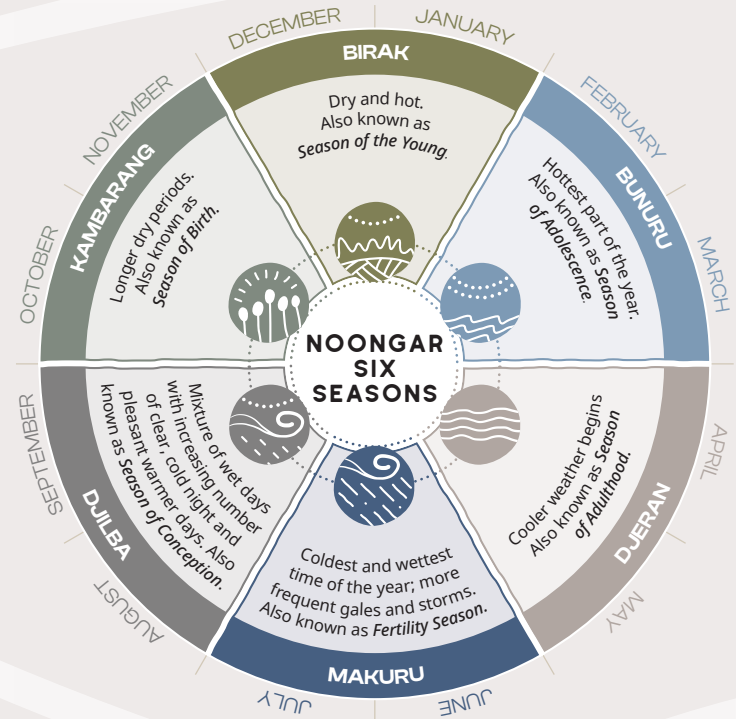
The world's oldest continuing culture

Long before European settlement, the Noongar Aboriginal people walked and cared for this land. For over 50,000 years their connection to Boodja (Country) was guided by the seasons – the six seasons of Birak, Bunuru, Djeran, Makuru, Djilba, and Kambarang – each reflecting the changing rhythm of the land and waters and its bounty.

Sharing in a rich tapestry

Today's South West is a dynamic landscape of fertile farmland, industrial development, burgeoning communities and protected natural areas set aside to preserve our valuable way of life. We recognise and value the region's Aboriginal cultural heritage and the important role that Aboriginal people played in caring for the land we enjoy today.

The region is renowned for its green credentials, supplying primary produce that lands on plates across the globe. It is regional WA's largest manufacturer of high-value premium food and beverage products. The South West produces 85 per cent of the Southern Hemisphere's black truffles, and exports other sought after produce including avocados, wine, craft beer, marron and abalone.



Source: Australia's South West

Three sub-regions, one dynamic economy

The South West region covers an area of nearly 24,000km² with some 16,000km² of forested land, 6,000km² occupied by agricultural and rural usage, and approximately 2,000km² for industrial and urban development.

It is the most populated regional area in Western Australia, with a vibrant and diverse economy across its three distinct sub-regions, each with their own unique attributes and economic drivers.



Bunbury-Geographe

Industrial, commercial and energy heartland

The Bunbury-Geographe sub-region includes the local government areas of Collie, Harvey, Dardanup, Capel, and the City of Bunbury. Population density is largely centred in the urban areas surrounding the region's capital and commercial hub, Bunbury.

The region features rich mineral deposits that supports a robust manufacturing sector and supplies global demand for alumina and mineral sands. It is also the State's energy heartland, experiencing significant transition as Collie's coal fired power stations make way for renewables. It is home to WA's largest State-owned battery, capable of powering more than 785,000 homes for up to four hours.

Key industrial areas are located at Kemerton (north of Bunbury), Coolangatta (Collie), Shotts (Collie) and Picton. Picton is located less than 10km from the Bunbury Port, and is the site of the State's future Advanced Manufacturing and Technology Hub (AMTECH).



Capes

Lifestyle, tourism and premium production

The Capes sub-region, which comprises the City of Busselton and Shire of Augusta-Margaret River, is one of the fastest growing areas in regional Australia. Pristine beaches, nature-based attractions and boutique living are just some of the reasons why an increasing number of people choose to live and work in the Margaret River wine region.

The area is internationally recognised as a premium destination for wine, food, tourism and events. Its economic base is underpinned by the visitor economy, agriculture, viticulture and creative industries. The Busselton Margaret River Airport provides regular interstate flights from Busselton to Melbourne and Sydney.



Southern Forests

Food, forests and critical minerals

The Southern Forests sub-region includes the local government areas of Manjimup, Nannup, Donnybrook-Balingup, Boyup Brook and Bridgetown-Greenbushes. The area is known as a major food bowl, supplying much of the State's horticultural production. Livestock and dairy are important economic contributors, as is a growing visitor economy.

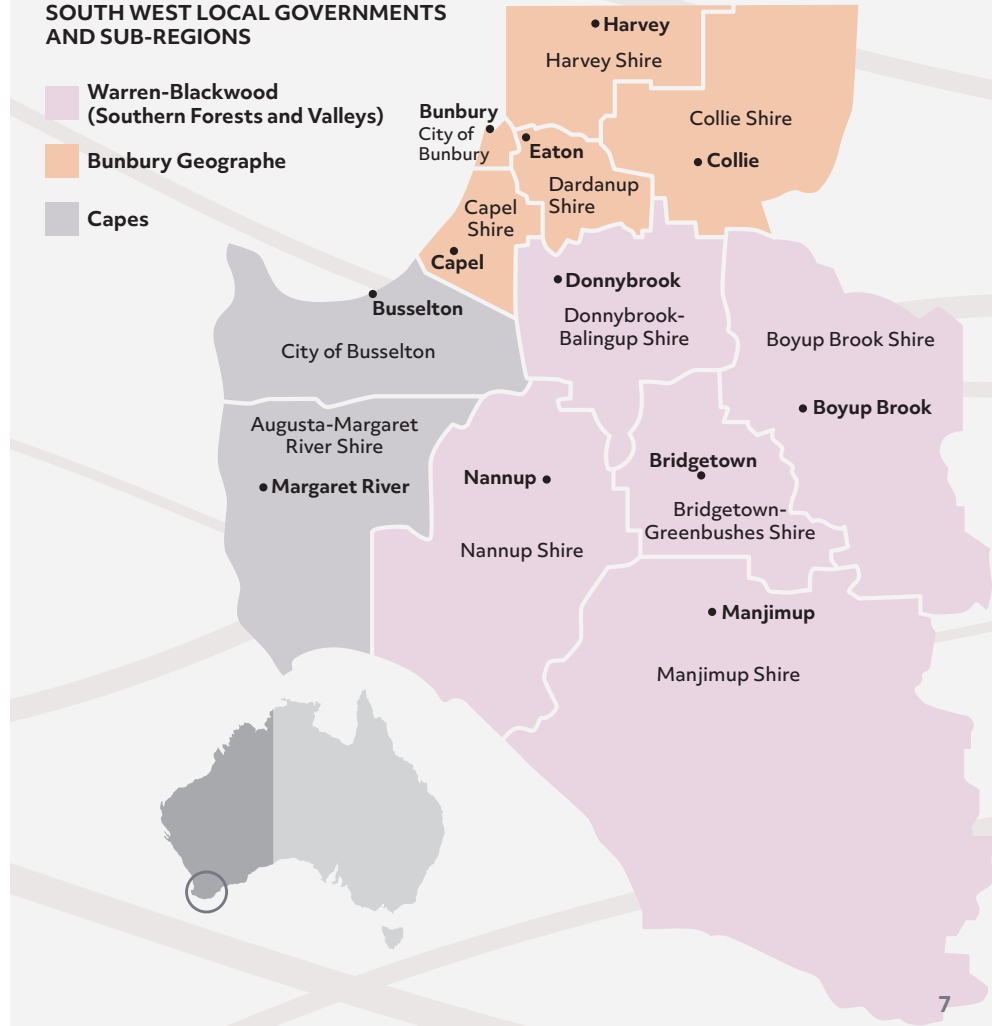
Greenbushes is home to the world's highest grade hard rock lithium resource, supplying 20% of the world's lithium for electric vehicles and battery storage. To meet global demand for minerals critical to achieving net-zero emissions targets, Talison Lithium is planning a major expansion of its mining operations. Environmental referral processes and consultation is well underway with construction expected to commence in late 2027, if approved.

SOUTH WEST LOCAL GOVERNMENTS AND SUB-REGIONS

Warren-Blackwood
(Southern Forests and Valleys)

Bunbury Geopraphe

Capes





An economy built for the future

Strategically located within close proximity to Perth and major domestic and international markets, the South West is a cornerstone of Western Australia's diversified and resilient economy.

Its strong transport connectivity, rich natural assets and liveability position the region as a forerunner to attract new and emerging industries, while continuing to support established sectors such as agribusiness, manufacturing, tourism and the creative economy.

Backed by significant investment in infrastructure, health, education and support for transitioning local economies, the South West has the capacity, capability and confidence to attract new investment – and the track record to prove it.

A skilled workforce, vibrant regional centres and strong connections between industry, government and community further enable innovation, productivity and sustainable economic development.

Key features include:

- Strategic access to domestic and global markets through integrated port, rail, road and air networks
- Proximity to Perth, supporting workforce mobility, supply chains and business connectivity
- Direct air links to Sydney and Melbourne via the Busselton Margaret River Airport
- A temperate climate with fertile soils and abundant sun, wind and rainfall, supporting agriculture, renewable energy and nature-based industries
- Strong Government investment in transport, health, education and skills development for communities transitioning to a low-carbon economy
- Availability of industrial land and infrastructure to support advanced manufacturing, processing and value-adding industries
- A skilled and adaptable workforce supported by regional education, training and research institutions
- Rich Aboriginal cultural heritage and world class natural and visitor attractions underpinning a strong tourism and creative sector
- High quality of life and liveability that attracts and retains talent, entrepreneurs and families

With exports of \$17.7 billion per year, the South West is one of regional Western Australia's most significant trading economies.



POPULATION

201,659

EXPORTS

\$17.7 billion pa

EMPLOYMENT

2.6%

GROSS REGIONAL PRODUCT

\$19.47 billion pa

WORKFORCE

80,407 jobs

TOTAL ECONOMIC OUTPUT

\$42 billion pa

Backing small business to grow and diversify

Small business is the backbone of the South West economy, underpinning local employment, innovation and resilience across towns and communities.



From manufacturing to tourism to professional services, small enterprises drive economic diversification and help retain people and skills in the region. Local ownership and deep community connections mean profits are more likely to be reinvested locally, strengthening regional supply chains and contributing to the region's long-term economic sustainability.

Chambers of Commerce play a critical role in supporting small business growth and prosperity by acting as trusted connectors, advocates and capability builders. This includes business networking, training,

mentoring and advocacy to help businesses navigate regulatory requirements, workforce challenges and changing market conditions. By fostering collaboration and sharing knowledge, Chambers help create a business environment where small enterprises can scale, innovate and compete.

The Local Content Network (LCN), delivered locally through SWDC, further strengthens the region's small to medium enterprise by identifying readiness for high-value contracting opportunities. Through targeted programs, supplier briefings and capability-building initiatives, SWDC and

the LCN network support local businesses to understand procurement pathways, meet compliance and accreditation requirements, and position themselves as competitive suppliers to major projects.

Together, Chambers of Commerce, SWDC and the Local Content Network play a key role in building a strong, capable and confident small business sector. This coordinated support ensures small businesses are well positioned to adapt, innovate and prosper as part of the South West's ongoing economic diversification.

People and skills powering the South West

Human capital is a core strength and critical driver of regional resilience, liveability and business competitiveness.

The South West region is supported by a strong education and training ecosystem, including South Regional TAFE and ECU South West in Bunbury, the State's largest regional university campus. Together with registered regional training organisations, these institutions provide pathways in vocational, higher education and research, supporting apprenticeships, professional skills development and applied learning aligned to industry needs.

Looking ahead, there is a significant opportunity to align education, training and research more closely with industry to ensure the South West is on the front foot in adopting and advancing new technologies. Education and training will play a critical role in supporting emerging industries through industry-linked research, work-integrated learning and flexible, skills-based pathways.

The imminent introduction of an Engineering course at ECU South West will strengthen local capability in areas such as energy, advanced manufacturing and infrastructure. Furthermore, Jobs and Skills Centres across the region provide an important interface between industry, workers and training providers. Together, these enablers support lifelong learning, upskilling and reskilling, ensuring the regional workforce is equipped with future skills in STEM, digital capability, problem solving and innovation as the economy becomes more complex and technology enabled.



Paddock to plate: Premium production and value-adding



The region's clean, safe and traceable production environment, combined with reliable rainfall, quality soils and prime agricultural land, provides a strong foundation for value-added agribusiness investment.

Primary production remains a backbone, with the South West producing most of the State's milk, avocados, potatoes, apples, pears and wine grapes. This scale and diversity support a critical mass of downstream activity, including dairy processing, meat processing, horticultural packing, wine making and specialty food and beverage manufacturing.



The region has an established reputation for premium wine, artisan and branded food products, supported by strong brand provenance and a growing calendar of food, wine and agritourism events.

There are significant opportunities to expand regional food and beverage manufacturing, particularly long-life products, beverages and specialty foods, leveraging point-of-origin certification. Proximity to South East Asian and Middle Eastern markets strengthen the region's export competitiveness.

Key enablers include continued investment in processing and common-user infrastructure, supply chain and cold-chain logistics, digital connectivity, water security and workforce capability.

The South West is one of Western Australia's most productive and diversified agribusiness regions, strengthened by a growing food and beverage manufacturing and distribution ecosystem.

📍 Abalone by Rare Foods, Augusta



The South West's competitive advantage lies in its access to critical minerals essential to clean energy technologies, including alumina, lithium, graphite, silicon, titanium and zircon.

📍 Port of Bunbury



From resources to high-value manufacturing



Proximity to extraction and processing, combined with established industrial capability, creates strong opportunities to move further down the value chain and capture greater economic benefit through advanced manufacturing, fabrication and component assembly.

The region has long-established strengths in mining, minerals processing and engineering, with its industrial base evolving alongside the resources sector. Established local manufacturers are major suppliers of high-quality engineered products, equipment and services to global markets.

The development of the Advanced Manufacturing and Technology Hub (AMTECH) at Picton represents a step change for the region. As the State's first dedicated advanced manufacturing, technology and renewables precinct, AMTECH will cluster industry, research, education and training to drive innovation, productivity and high-value job creation.

The South West is poised to play an increasing role in supporting WA's defence and renewable energy capabilities, drawing on established expertise to strengthen local participation in critical supply chains and accelerate the clean energy transition.



Key industrial areas at Kemerton and Collie, supported by industry-ready general industrial land, competitive development costs, reliable transport connections and proximity to the Port of Bunbury further strengthen the region's investment potential.

Experiences, culture and creative enterprise



The South West's natural landscapes, culinary delights, trails, events and wellness experiences drive strong visitation. Nationally recognised festivals, and a growing screen and creative sector add depth and year-round appeal.

Tourism and creative industries support employment across hospitality, accommodation, retail, services and manufacturing-related industry, amongst




others. There are strong opportunities to further grow and diversify the sector through Aboriginal cultural tourism, expanded trail and cycling infrastructure, creative hubs, events and digital and screen production.

Key drivers include continued investment in place-based infrastructure, diverse housing and affordable accommodation, skills development and stronger collaboration



between creative practitioners, tourism operators and industry. By building capability, resilience and more seasonal offerings, the South West can leverage its lifestyle advantages to attract talent, support industry growth and strengthen economic complexity, while maintaining the qualities that make the region highly liveable.



Tourism, arts and culture are defining strengths that underpin the region's vibrancy, liveability and global brand.

📍 Wellington Dam Mural, Collie

Innovation driving energy and circular solutions

Western Australia's renewable energy transition is dependent on upgrades to the South West Interconnected System (SWIS), one of the world's most isolated electricity grids.



The scale and pace required for the deployment of renewable generation, transmission and grid scale storage, provides opportunities for new and technologically advanced industries to take shape.

Critically, the State's approach goes beyond renewable energy generation to focus on lowering carbon emissions across industry sectors and building circular economy outcomes that make the most of the resources we have. Investment in Collie Just Transition is enabling new industry, such as green steel recycling, graphite processing, sustainable magnesium production and waste-to-fuel technologies.

These initiatives reuse materials, recover value from waste streams, and support supply chains aligned with defence, energy and advanced manufacturing.

Increasingly, innovation, skills development, technology and creativity play an important role in enabling the South West to capture higher value economic activity from this transition. Digital technologies, AI, advanced analytics and the internet of things will be critical enablers for new and emerging industries, supporting smarter energy systems, advanced manufacturing, circular supply chains and more efficient use of resources.

The South West is where strategic advantage meets liveability — creating not just opportunities for investment, but places where businesses and communities can thrive together.



A destination of choice for investment and growth

There are many compelling reasons why the South West region continues to stand out as a destination of choice for investment and business growth. The region combines strategic advantages, enabling infrastructure and an enviable lifestyle to support productivity, innovation and long-term success.

Key strengths include:

- A strategic location within close reach of major domestic and international markets
- A favourable time zone, aligned with key economic hubs in South East Asia
- Robust freight and logistics networks, including a bulk port, rail infrastructure and dual carriageway road connections
- Reliable enabling infrastructure, including power, water, gas and high-quality digital connectivity
- A range of established industrial estates supporting heavy, general and light industry
- A skilled, capable and adaptable workforce, supported by diverse training and education options across the region
- A growing and diverse population underpinning labour supply and market demand
- Highly productive agricultural land supporting food, fibre and value-adding industries
- High quality living standards and lifestyle opportunities that attract and retain talent
- Well-established education and health care facilities supporting strong and resilient communities



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