



SOUTH AUSTRALIA

Regional Blueprint 2024-2025

Edition 5

November 2024



Acknowledgement of Country

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



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Executive Chair Summary



The 2024 Regional Development South Australia Regional Blueprint reflects a record year with headline GRP growing from \$31.78B to \$35.89B - highlighting the significant economic contribution regions make to the South Australian economy.

GRP growth is led by the agricultural, forestry and fisheries sector with value added output representing 23.1% of GRP, mining 16.9% and the construction sector 11.7% (and the largest mover). We reflect on this whilst rainfall to date this year has been significantly down, in many cases close to or at record lows, which in all parts of the state will test our economy.

An analysis of 928 public and private sector projects in the Regional Development South Australia (RDSA) Regional Investment Pipeline highlights \$65.43B in Capital Expenditure (CAPEX) under contemplation in regional South Australia, up from \$62.562 last year. To be included in the pipeline, these investments must be under active contemplation, funding consideration and/or construction for commencement in the next five years.

Despite a record year we are very conscious that regional South Australia will require all its resilience, as two key factors weigh heavily. The first is the sustained cost pressure as inflation follows a slower than hoped pathway to the Reserve Bank's target range. The second- current drought conditions, with nearly all the State recording well below average rainfall, and recent frost events, meaning the agriculture industry will be severely impacted.

It is again the strongest year since Regional Development Australia (RDA) organisations began tracking forecast capital investment. Growth is incremental with the sharpest increase in CAPEX for forward projects being driven by an increase in renewable energy projects. Whilst we note that not all of these projects will come to fruition, the realisation of even 20% of these projects alone would generate up to 22,453 construction jobs (Source: REMPlan).

The ongoing, and ever pressing task, is to realise these projects. Our 5-year RDSA Infrastructure Prioritisation Report, released in January 2024, shows consistently that building enabling infrastructure and working to remove barriers (most notably releasing the workforce needed) is the pathway to delivering this forecast investment. As a state economy driven by regional success, where a quarter of its GRP is produced by regions (a substantially higher proportion than any other state), continuing to grow liveable regions with adequate housing is the most significant challenge.

As independent Executive Chair of RDSA, alongside the eight RDA Chairs, we recognise the enormous investment that all three levels of government are delivering to the regions. Our sincere thanks go to the following key stakeholders for their ongoing support:

Australian Government: Minister Catherine King MP and Minister Kristy McBain MP and the Department of Infrastructure, Transport, Regional Development, Communications and the Arts;

South Australian Government: Minister Claire Scriven MLC and the Department of Primary Industries and Regions SA;

Local Government: Mayor Dean Johnson, the Local Government Association of South Australia and all 52 regional local government partners;



RDA Staff Teams: The 57 employees who work tirelessly for our regional communities;

RDA Boards: The 76 local board members of RDAs across South Australia drawn from business and local government, who give their time for the betterment of their communities.

The ongoing commitment and passion of these collective supporters is greatly appreciated and we look forward to another year focused on long-term sustainability and economic transformation of regional South Australia.

Hon Rob Kerin

Executive Chair, Regional Development South Australia



**Regional
Development SA**

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Economic Foreword



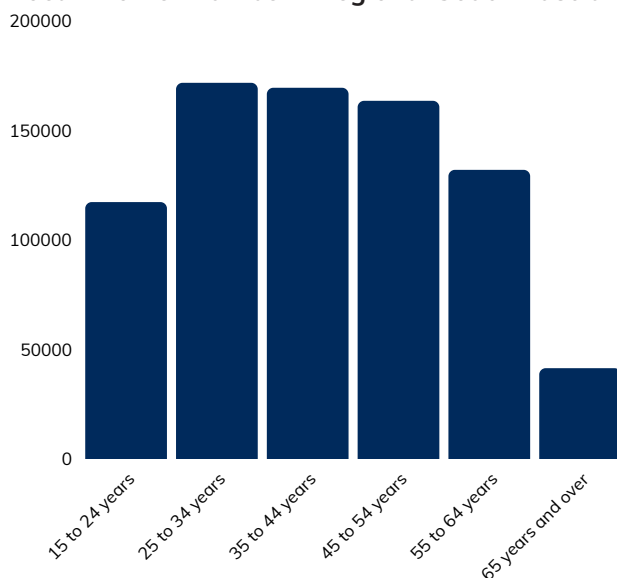
This has been a record year, exemplified by growth in Gross Regional Product and forecast regional capital investment. Delivery of future economic investment, sector and jobs growth will however be impacted by weather conditions and macro trade conditions which are rapidly evolving.

In 2024, we celebrate trends reflecting growth in economic output and population, tempered with commentary in relation to labor supply, participation and productivity.

There will be no greater challenge to regional South Australia in the next ten years than the supply of suitably qualified labor to meet existing and forecast workforce challenges. Workforce and skills shortages are being felt in regions due to both an ageing population and the significant construction and ongoing workers required to support both economic and population growth. If we are to bring new industry and capital investment to fruition, we must maintain a clear focus on creating local education and training pathways, attracting a skilled population and housing the workforce required.

RDSA has been consistent in highlighting the burgeoning issue of an ageing workforce (and associated loss of critical skills) and lack of housing required to both provide a replacement workforce as well as support growth. The RDSA *Growing our Regional Workforce Review Summary*, published in 2021 provides a comprehensive set of recommendations for growing our workforce. Please refer to [Resources - Regional Development South Australia](#) for further information.

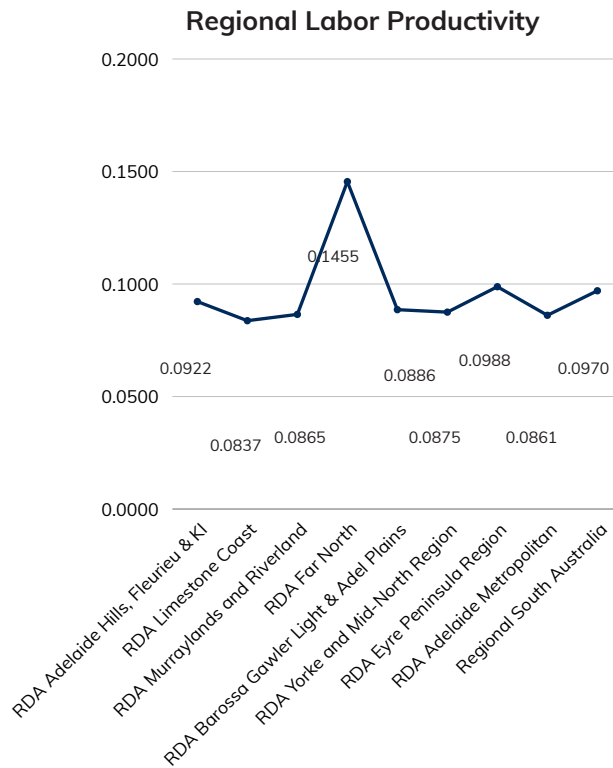
Local Worker Number - Regional South Australia



We need to train, and replace over 173,251 employees estimated to be due to exit the workforce in the next 10 years. Adding to that challenge is the need to attract additional skills and workers to deliver on our aspirations for growth (as evidenced in the forecast pipeline of investment), across all sectors. For the construction industry alone, there are an estimated 13,571 tradespeople currently aged over 55 in regional South Australia. We need collaborative action and place based solutions to ensure we not only maintain our workforce capacity, but grow capacity to support delivery of economic investment and jobs.

The second focus for growth is labor productivity. In February 2023, the Australian Government's Productivity Commission released their 5-year Productivity Inquiry: Advancing Prosperity. Since 2005, across Australia annual labour productivity growth (growth in output per hours worked) has been the best part of one percentage point below its long-term average in Australia and other developed countries.

Overall, the Australian Productivity Commission found this will lead to much-slower improvements in Australians living standards than in the past.



With the South Australian Productivity Commission undertaking an enquiry into positioning all South Australians to Share in the Benefits of Economic Growth, RDAs have undertaken an analysis at regional level. The substantially positive story is that regional South Australia is already performing above the state average for labor productivity. Please refer - [Positioning all South Australians to Share in the Benefits of Economic Growth](#).

Regional South Australia Labor Productivity measure sits at 0.097 and is higher than the 0.0861 in metropolitan Adelaide. There are regional variations and unsurprisingly the Far North with its capital deployed to mining is the most productive region. Put simply, for each hour worked, the South Australian economy gets more return than from any other region. In fact, only one region sits below metropolitan Adelaide, which is the Limestone Coast and it has seen a steady increase in productivity as the manufacturing base grows. What this means for regional South Australia is, while there is always room for improvement we are producing at the highest level in South Australia. Conversely this also means that our requirement for population growth and workers is also critical.

It is against this backdrop that RDSA’s Regional Blueprint 2024 sets out regional South Australia’s key priorities and investment pipelines. We encourage you to continue working with us as we work to realise the future economic potential for regional South Australia.

Leonie Boothby
CEO Regional Development Australia Adelaide

Regional South Australia’s Economic Performance

531,583 ↑ **6,489**
REGIONAL POPULATION

\$35.89 ↑ **4.11**
GROSS REGIONAL PRODUCT (\$B)

47,038 ↑ **572**
NUMBER OF BUSINESSES

\$65.43 ↑ **2.866**
REGIONAL INVESTMENT PIPELINE (\$B)

220,490 ↑ **3,281**
NUMBER OF JOBS

Source: Australian Bureau of Statistics Gross Regional Product and Labour compiled by .id (Informed Decisions) and Regional Investment Pipeline compiled by Regional Development Australia. Accessed June 2024.

Regional Insights & Strategic Alignment

Regional Development South Australia Priorities



RDSA is an independent and non-partisan network. We are well-placed in providing specific local intelligence to advance regional challenges and evidence-based decision making. To realise the pipeline of investment opportunities, critical infrastructure needs to be aligned and coordinated effectively across all three levels of Government.

This year we note that the number of projects in the Regional Investment Pipeline reflects the completion of significant public capital works, and the commencement of construction on a number of renewable energy, construction and other projects.

Movement in Regional Investment

Number of Total Projects	928	-153
Number of Public Projects	340	-211
Number of Private Projects	588	+58
Value of Public Projects (\$B)	15.879	+1.812
Value of Private Projects (\$B)	49.551	+1.054

The overall data also presents some emerging trends:

- Completion of major infrastructure projects.
- The growth of renewable projects which fuel the continued need for construction trades.
- The movement of agriculture projects into manufacturing as we have refined our methodology to classify projects at the four digit ANSZIC Code level which gives a more accurate assessment of where forecast capital expenditure lies.
- A more incremental growth in the investment pipeline with an increase of \$2.866B this year as opposed to \$17.928B last year. This is reflective of two factors: the movement of several large projects beyond our 5 year timeline and a slowing in new development of scale entering the Regional Investment Pipeline.

Public & Private Projects – Number

588
Number of Private Projects

340
Number of Public Projects



Public & Private Projects – \$B

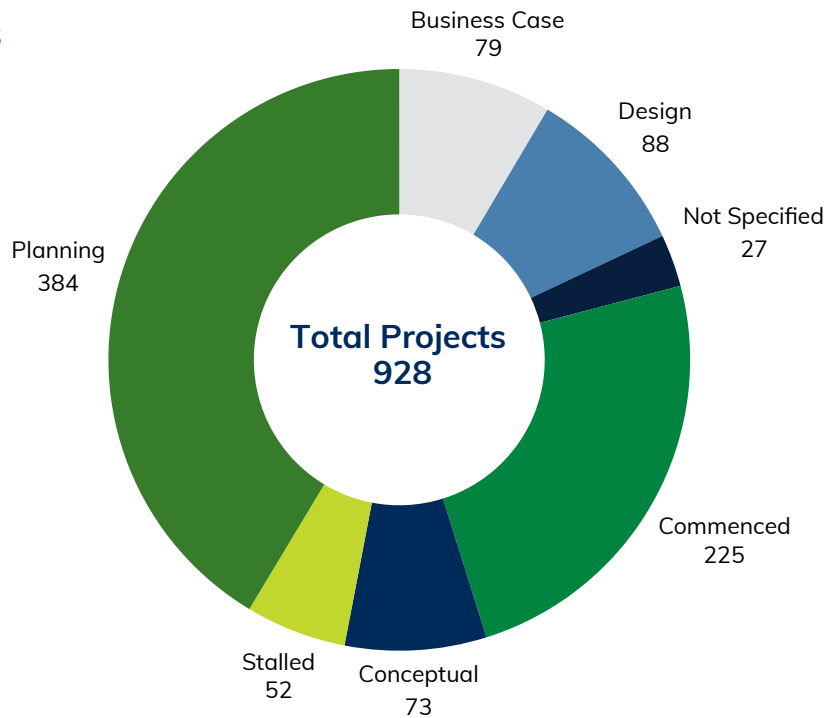
49.551
Value of Private Projects

15.879
Value of Public Projects



Regional Investment Pipeline

Project Stages



Regional Projects by Industry ANZSIC Code	Number	Value
A – Agriculture, Forestry and Fishing	32	\$462,455,722
B – Mining	13	\$4,409,000,000
C – Manufacturing	105	\$18,665,730,663
D – Electricity, Gas and Water and Waste Services	95	\$31,812,050,071
E – Construction	213	\$3,723,230,930
F – Wholesale Trade	6	\$40,278,500
G – Retail Trade	23	\$223,740,000
H – Accommodation and Food Services	141	\$1,601,830,000
I – Transport, Postal and Warehousing and Storage	45	\$1,180,128,438
J – Information Media and Telecommunications	14	\$34,676,531
K – Finance and Insurance Services	0	\$0
L – Rental, Hiring and Real Estate Services	3	\$17,700,000
M – Professional, Scientific and Technical Services	13	\$138,790,000
N – Administrative and Support Services	2	\$270,000
O – Public Administration and Safety	32	\$1,383,734,567
P – Education and Training	19	\$132,895,000
Q – Health Care and Social Assistance	55	\$705,958,647
R – Arts and Recreational Services	99	\$824,282,504
S – Other Services	9	\$9,645,000
Z – Not specified	9	\$65,048,007
TOTAL	928	\$65,431,444,581

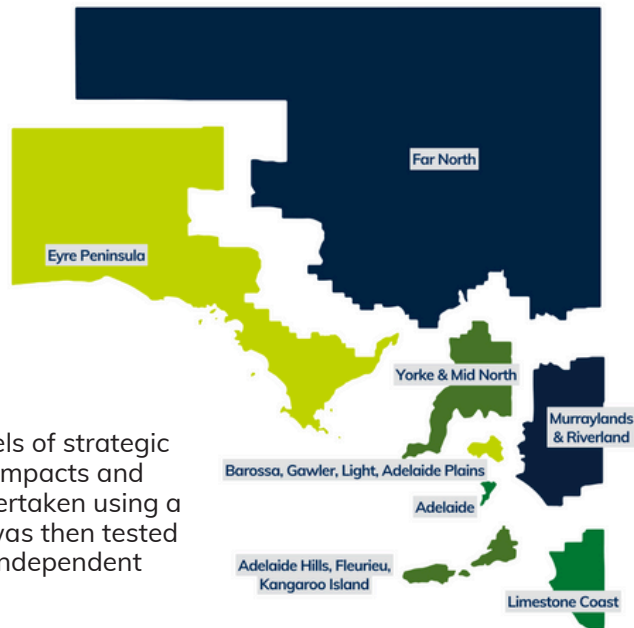
Infrastructure Prioritisation

Regional Development South Australia Priorities

In late 2023 we updated the RDSA Infrastructure Prioritisation, an exercise undertaken every 5 years. The projects listed overleaf have the potential to significantly enable regional SA economic growth. The status of each project has been identified and range from conceptual, feasibility, requiring advocacy, to investment ready.

The projects listed as high priority reflect high levels of strategic fit, expected economic, social and environmental impacts and deliverability. This prioritisation exercise was undertaken using a multi-criteria analysis (MCA) assessment which was then tested against local expertise with the assistance of an independent contractor.

In addition, we have also taken an holistic view and applied a program lens to major challenges facing South Australia's regions and provided some background on housing, childcare, telecommunications and digital infrastructure, water, freight connectivity, social and community infrastructure, tourism infrastructure and the circular economy.



Full information on each of the following projects, including economic analysis of their potential where available, is included in the full RDSA Infrastructure Prioritisation Report found at [Resources - Regional Development South Australia](#).

Highest Priority Projects in 2023 RDSA Infrastructure Prioritisation

Project	Region	Status
Mount Barker City Centre Project	Adelaide Hills Fleurieu & Kangaroo Island	Investment Ready
Mount Barker Wastewater Reuse Infrastructure	Adelaide Hills Fleurieu & Kangaroo Island	Advocacy
Critical Infrastructure to Support Phase One Establishment of Concordia Development	Barossa Gawler Light & Adelaide Plains	Advocacy
Flood Protection and Water Proofing for Gawler	Barossa Gawler Light & Adelaide Plains	Feasibility
Hydrogen Jobs Plan and Port Bonython Hydrogen Hub	Eyre Peninsula	Investment Ready
Northern Water Project	Eyre Peninsula / Far North	Feasibility
Cape Hardy Industrial Precinct and Port	Eyre Peninsula	Investment Ready
Southern Desalination Plant and Distribution Network Upgrade	Eyre Peninsula	Investment Ready
Thevenard Port Expansion and Efficiencies	Eyre Peninsula	Feasibility
Quorn Town Water Supply	Far North	Investment Ready
Multispecies Livestock Transshipping Hub	Far North	Feasibility
Regional telecommunications connectivity upgrades	Limestone Coast	Investment Ready
Mount Gambier Saleyards and Industrial Estate	Limestone Coast	Investment Ready
Upgrades to the Green Triangle road network	Limestone Coast	Advocacy
Upgrade of drainage network infrastructure in the Limestone Coast	Limestone Coast	Investment Ready
South Eastern Freeway Freight Route	Murraylands & Riverland / Adelaide Hills Fleurieu & Kangaroo Island	Investment Ready
Hydrogen and Biomethane Renewable Hubs	Murraylands & Riverland	Feasibility
Riverland Sustainable Growth Precinct	Murraylands & Riverland	Feasibility
Complete and implement master planning for Provincial Cities	Yorke & Mid North	Advocacy
Port Pirie Southwest Housing Project	Yorke & Mid North	Feasibility
Braemar Infrastructure Corridor	Yorke & Mid North / Far North	Feasibility
Barossa New Water & Clare Valley New Water	Yorke & Mid North / Barossa	Feasibility
Augusta Highway Upgrades	Yorke & Mid North	Feasibility
TOTAL VALUE OF HIGH PRIORITY INFRASTRUCTURE PROJECTS		\$12,758.30B

Two projects from the original list not included above, have been removed as they have now achieved funding required. In May 2024 the Commonwealth Government committed \$120M to upgrade the Mount Barker and Verdun Interchanges, alongside a State Government contribution of \$30M, as part of the 2024/2025 budget. In addition, regional telecommunications connectivity upgrades in the Limestone Coast valued at \$28M have been jointly funded by the Commonwealth and State Government.

ADELAIDE

Regional Development Australia Adelaide aims to capitalise on Regional South Australia's unprecedented opportunity for population and industry growth while focusing on bringing together data, policy and solutions to key challenges including workforce, housing, and infrastructure to meet industry demands.



Regional Development Australia Adelaide (RDAA) serves an integral role in facilitating economic development in all South Australian regions. We are funded by the Australian Government to assist other South Australian RDAs in increasing promotion and economic development in regional South Australia. RDAA also plays an important role in bringing together policy and capability for the Regional SA RDA's where capacity and the ability to augment place-based demands is required.

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

1. Investing in People
2. Investing in Services
3. Investing in Places
4. Investing in Industries and Local Economies

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

Regional Priorities

- 1 Building great relationships through increasing awareness of Regional SA's investment opportunities.
- 2 Increasing visibility of the work of RDA's by bringing together key initiatives and building branding and public relations activities.
- 3 Driving regional SA investment & economic growth by coordination of an investment pipeline and assisting in cross-regional investment.
- 4 Assisting in building robust data capture and sharing systems across RDAs to create efficiencies and maximise output.
- 5 Providing support in the development of Strategic Priorities for the whole of regional SA.

Adelaide Contacts



Chair:
Jan Turbill

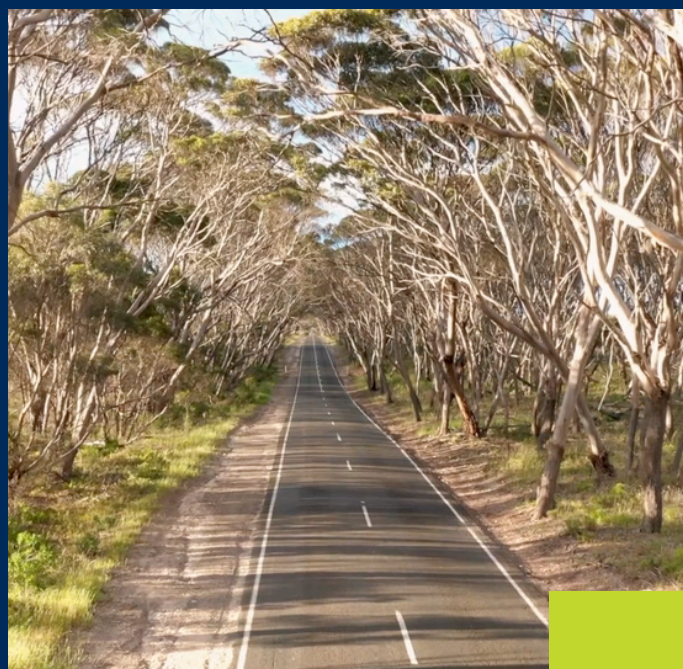


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ADELAIDE HILLS FLEURIEU & KANGAROO ISLAND

With a relatively stable investment pipeline from \$3.03B to \$2.73B this year, the Adelaide Hills Fleurieu & Kangaroo Island economy remains strong, underpinned by population growth and strong construction, manufacturing, accommodation and food services sectors.



This region is marked by incredible diversity, ranging from peri-urban to remote areas, quaint villages and rapidly growing regional cities. It spans high-intensity horticulture to broad-acre agriculture, and covers some of the wettest and driest parts of the state. With world-renowned wine regions, international tourist destinations, lakes, surf coasts, rivers, plains, and mountains, it offers a unique collection of environments.

As a result of this diversity, the region has experienced steady population growth of 1.6% per year, with GRP expected to grow 2% annually until 2027 led by agriculture, healthcare, and mining. However, job growth is forecast at just 0.4% annually, well below historic rates. To ensure continued success, the region must focus on RDA AHFKI's Regional Priorities.

Regional Priorities

1 Growing Regional Productivity: Our aim is to ensure the region's productivity and liveability are unhindered by a lack of appropriate public infrastructure.

Public infrastructure development is essential for our region's growth. It not only supports businesses by improving supply chains and market access but, also enhances liveability through better connectivity, job creation, and vibrant public spaces. RDA AHFKI partner with local governments to help develop, design, and secure funding for key community assets that promote community resilience and better quality of life.

2 Enhancing Regional Innovation and Preparedness: Our aim is to ensure the region will be more resilient to disruption brought about by: Climate Change + Demographic Change + Digitisation + Demand for Skilled Workforce.

The ability to adapt to disruption is crucial in an ever-changing world. Climate change, demographic shifts, digitisation, and the need for skilled workers are critical challenges for the region. Innovating in these areas will secure a stronger, more resilient future.

3 Strengthening our most competitive industry sectors - tourism, manufacturing & agriculture: Our aim is to ensure the region's three most competitive industries continue to grow, increasing exports and growing employment.

The region's economy thrives on its diversity, with tourism, manufacturing, and agriculture the leading drivers of value-added contributions, employment, and exports in the region. Strengthening these industries involves connecting businesses to resources, government programs, and investment opportunities. RDA AHFKI helps facilitate these core supports through direct business assistance and tailored initiatives like our Hills & Coast Business Grant that provides targeted assistance for local manufacturing growth.

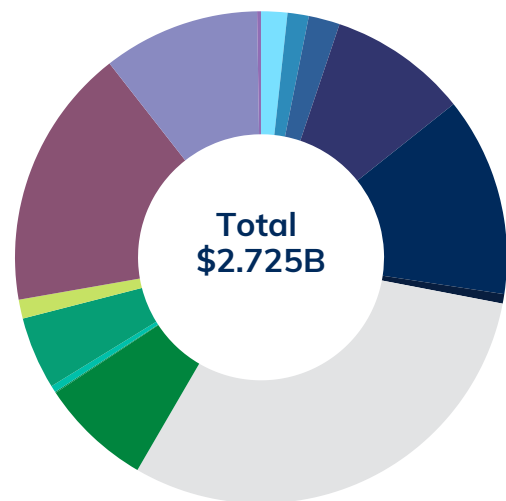
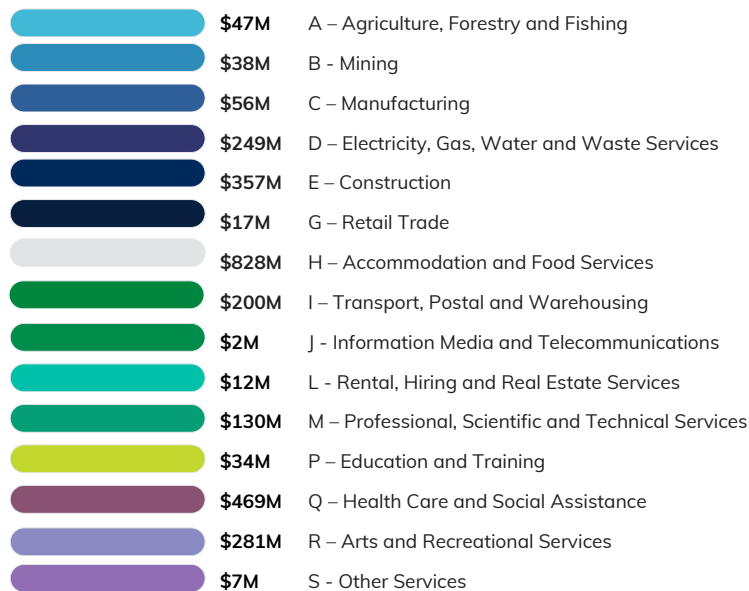
4 Connecting Region and Government: To ensure our region and government will be well connected and informed to make the most of economic development opportunities.

We endeavour to build strong connections between the region and all levels of government, industry, and communities. By sharing insights and promoting the region’s strengths, we help maximise economic opportunities. We also provide evidence-based advice to the Australian Government, advocating on key regional development issues that impact our communities.

Regional Data

	2024	2023	Difference	% Change
Population	142,556	140,089	2,467	1.76%
Number of Businesses	12,379	12,141	238	1.96%
GRP (B)	6.74	6.253	0.48	7.71%
Total Number of Jobs	48,527	46,527	2,000	4.30%
Pipeline Project Total Value (B)	2.73	3.03	-0.3	-9.9%
Tracked investment projects	165	165	0	0.00%

Regional Investment



Adelaide Hills, Fleurieu & Kangaroo Island Contacts



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RDA Adelaide Hills,
Fleurieu & Kangaroo
Island website

BAROSSA GAWLER LIGHT ADELAIDE PLAINS

Significant housing and population growth is forecast for the Barossa Gawler Light Adelaide Plains region with new greenfield housing developments approved for delivery and further land being released for future housing in several of our regional towns. This highlights the need to work on key economic enablers to facilitate this generational growth while maintaining a high quality lifestyle.



The RDA Barossa Gawler Light Adelaide Plains (RDA BGLAP) region is experiencing significant housing and population growth with further growth forecast for the next fifteen years and beyond. RDA BGLAP is focused on supporting delivery of economic investment, business sustainability and growth, job creation and local skills development to support that population growth. Advocating for delivery of infrastructure concurrently or ahead of housing development, preserving valuable primary industry land and maintaining liveability, character and amenity of the region is a key focus.

The pipeline of economic investment and business growth opportunities are aligned to our regional strengths and capitalise on our competitive advantages (including proximity to Adelaide, the port and airport). Our largest industries are manufacturing, healthcare and social assistance; and agriculture. Aligned to population growth, emerging growth sectors are healthcare, education and training; and professional, scientific and technical services; with agriculture also experiencing growth.

Our focus is on unlocking new investment, job creation, increasing economic diversity and sustainability, and unlocking latent skills, workforce, and housing capacity. Whilst significant housing growth is forecast for our region, there remains a critical shortage in rental housing required to attract and retain workforce and their families.

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

Regional Priorities

- 1 Housing:**
Advocate for initiatives to unlock latent housing supply, increase rental housing, affordable housing, and greater housing diversity (size, style, location and affordability), to increase housing supply for critical workers, families and to enable ageing in place.
- 2 Workforce, education & skills:**
Share intelligence around highest areas of need, connect employers to workers and to available support (and vice versa); and create local pathways into education and work to unlock latent workforce capacity.
- 3 Infrastructure and land use planning:**
Provide regional data and intelligence to inform land use and infrastructure planning processes by all three levels of government, and advocate for delivery of priority infrastructure to support planned growth.

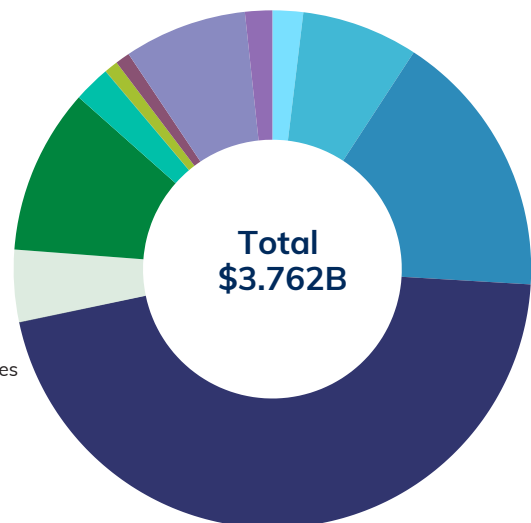
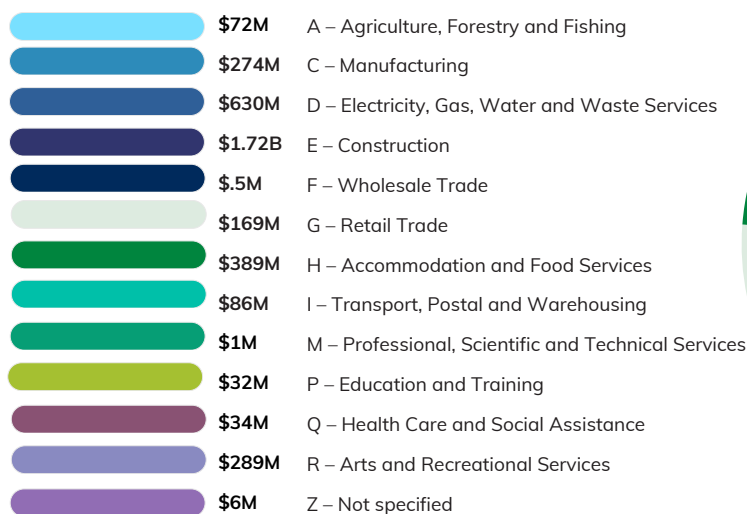
4 Water: Support stakeholder supply and demand analysis and planning that enables long-term sustainability and growth. Identify and facilitate potential partnership projects to optimise sustainable use of available water, including opportunities for water capture and reuse.

5 Sustainability: Support and advocate for priority environmental projects (climate, drought resilience, water security, circular economy), connect industry with government initiatives and programs and assist businesses to transition to net zero.

Regional Data

	2024	2023	Difference	% Change
Population	80,605	78,794	1,811	2.30%
Number of Businesses	6,064	5,986	78	1.30%
GRP (B)	4.048	3.858	0.19	4.92%
Total Number of Jobs	29,311	28,731	580	2.02%
Pipeline Project Total Value (B)	3.762	2.16	1.6	74.07%
Tracked investment projects	184	123	61	49.59%

Regional Investment



Barossa, Gawler, Light & Adelaide Plains Contacts



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RDA Barossa, Light,
Gawler & Adelaide
Plains website

EYRE PENINSULA

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



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

Regional Priorities

Our collaborative regional priorities remain focused on:

- 1 Social Capacity – Workforce attraction, retention, training and support:**
It is essential that RDA EP support and develop the foundations on which the community is built. The people of Eyre Peninsula are resilient and have a strong sense of identity. However, they need to be supported by a variety of services to grow and thrive. Retaining and attracting a strong population base and active workforce is a key goal of RDA EP and is vital to supporting economic growth and strong communities.
- 2 Infrastructure Capability – Provision of economic enabling infrastructure:**
Infrastructure plays a critical role in enabling investment in communities, services and markets. Having fit for purpose infrastructure is critical to facilitating growth and strong communities. Promoting strategic infrastructure investment is a key goal of RDA EP. The provision of adequate water, power, transportation and telecommunications infrastructure is vital to ensure business operations remain competitive and grow. The challenge of distance and connectivity remains an issue for the Eyre Peninsula. For this reason, it is critical that the region not only seek to enhance its network but also maintain existing infrastructure and services.
- 3 Economic Prosperity – Economic growth through improved business efficiencies and industry diversification:**
The Eyre Peninsula benefits from a strong economy. Rich mineral deposits form the foundation of a strong mining and manufacturing industry, while expansive plains and plentiful seas support agriculture and aquaculture. These industries are the largest sectors in terms of export value in the region. They are also significant on a state-wide scale, with the Eyre Peninsula producing approximately 80% of South Australia's seafood product and a considerable amount of its grain. However, supporting economic diversification through new and emerging industries linked to the region's natural and competitive advantage in renewable energy, hydrogen and space are high priorities.

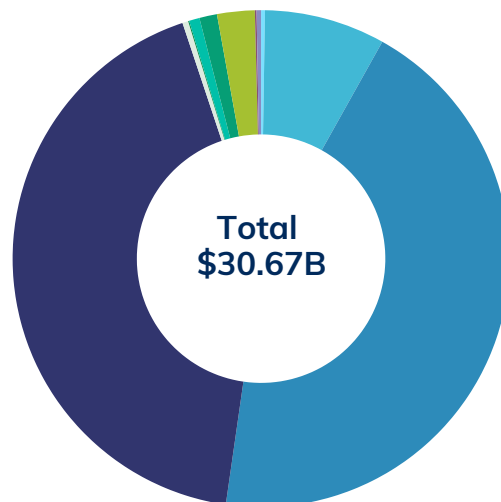
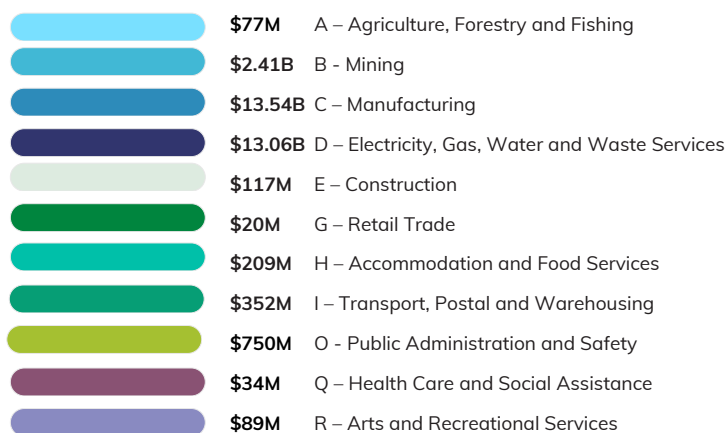
4 Environmental Sustainability- Ecologically sustainable development and natural resource management:

The Eyre Peninsula’s economy relies upon its environment. From resource extraction to agriculture, aquaculture and nature-based tourism, impacts associated with climate change will negatively affect the productivity of our existing and established industries. The future success of these industries will rely upon rapid decarbonisation as well as adapting to the effects of climate change. Stakeholders have recognised this and want to protect these assets for future generations by ensuring long term management and mitigation practices are at the forefront of decision-making processes.

Regional Data

	2024	2023	Difference	% Change
Population	59,207	58,953	254	0.43%
Number of Businesses	5,089	5,056	33	0.65%
GRP (B)	4.468	4.103	0.365	8.9%
Total Number of Jobs	26,554	25,995	559	2.2%
Pipeline Project Total Value (B)	30.67	28.49	2.18	7.6%
Tracked investment projects	112	154	-42	-27.27%

Regional Investment



Eyre Peninsula Contacts



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RDA Eyre Peninsula website

FAR NORTH

The Far North continues to grow, as does its pipeline value from \$10.65B to \$10.83B. It has experienced the highest growth of any region in headline GRP up to \$6.616B. Fuelled by record copper production by BHP, alongside the increased activity by magnetite explorers in response to State Government's Green Iron and Steel Strategy have increased interest in the region. The relative abundance of critical minerals and the upgrade of critical infrastructure remain key to continued growth.



Regional Priorities

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

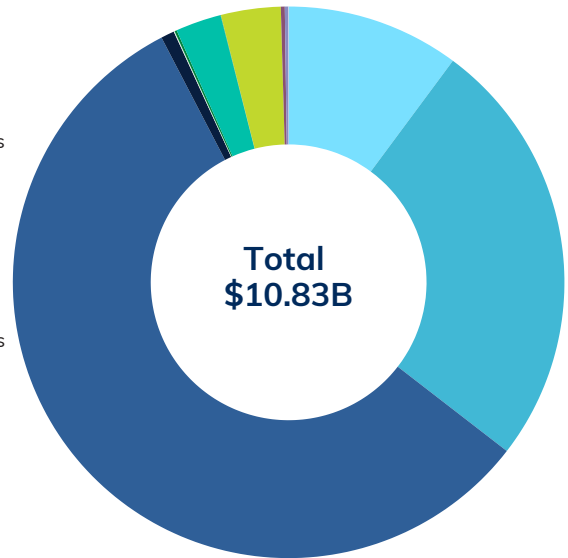
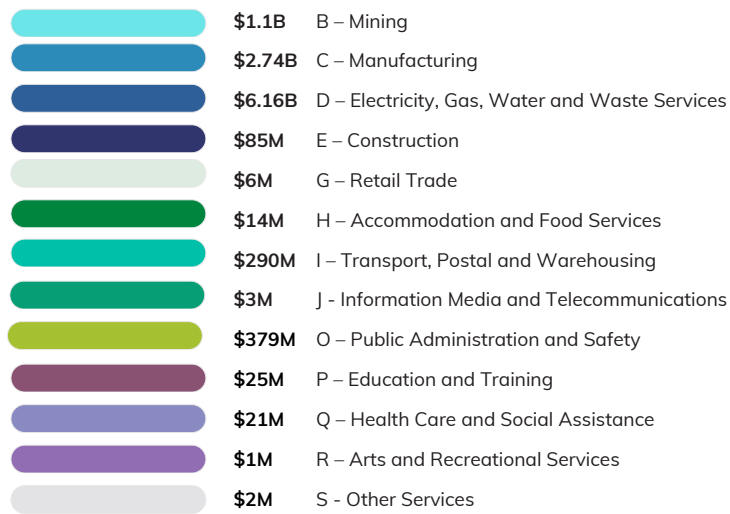
The gap in critical enabling infrastructure remains high with priority infrastructure projects including Coober Pedy Water Supply, Quorn Water Supply, a livestock hub at Port Augusta, Yorkeys Crossing and Outback water, roads, power and waste management.

Equally important is the critical need for housing to support sustainability and growth. By way of example Port Augusta is experiencing significant growth driven by the green energy and resources sector with the current investment pipeline of projects in the council region and immediate surrounding area totalling over \$6.5 billion, creating 5,360 jobs in construction and 1,987 jobs ongoing. This places significant pressure on Port Augusta's housing stock which is already under supplied. Recent investigation identified there are 18 housing development estates within Port Augusta with the ability to provide 1,085 houses, noting 148 of those are in lifestyle living villages. Most of these projects require enabling infrastructure and most particularly water supply.

Regional Data

	2024	2023	Difference	% Change
Population	27,403	26,672	731	2.74%
Number of Businesses	1,432	1,350	82	6.07%
GRP (B)	6.616	4.339	2.28	52.48%
Total Number of Jobs	20,337	19,586	751	3.83%
Pipeline Project Total Value (B)	10.83	10.65	0.18	1.73%
Tracked investment projects	72	66	6	9.09%

Regional Investment



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RDA Far North
website

LIMESTONE COAST

Home to the State's biggest regional city, the Limestone Coast is a service hub for both the South East of South Australia and Western Victoria. The region offers a diverse economic profile including primary production, value added manufacturing, as well as a strong health care and social assistance sector. Self-drive tourism is also a key contributor, with the region providing a link between the Great Ocean Road, the Grampians and Adelaide.



In 2024, agriculture, fishing and forestry continues to be the largest employer in the Limestone Coast, followed by the manufacturing sector. However, the strongest job growth has been in manufacturing, closely followed by healthcare and social assistance. Challenging seasonal conditions, combined with changes in global markets, high interest rates and increasing costs of doing business have dampened growth in primary production over the past 12 months. The flow on effects for retail and service industries have been felt across the region.

RDALC Key Focus:

- **We support businesses where they're at** - in their business journey and geographically. Whether it is grant assistance, business planning, workforce issues or marketing, we work one on one with business owners, helping them to cut through red tape and build the skills they need to grow.
- **We encourage investment** - advocating for infrastructure, being a voice for the region, and helping businesses and community groups to attract funding.
- **We grow the leaders of tomorrow** - supporting existing leaders to build skills and networks, and encouraging emerging leaders to take their first steps.

This year we created a new Regional Growth Strategy in partnership with the Limestone Coast Local Government Association and the seven regional councils. The four goal areas of Live, Work, Visit and Build reflect both the aspirations and needs of residents, industry, visitors and stakeholders across the region. The new plan adds contemporary and emerging issues, building on the current regional priorities.

Regional Priorities

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

6 Securing investment to deliver regional infrastructure priorities enabling growth.

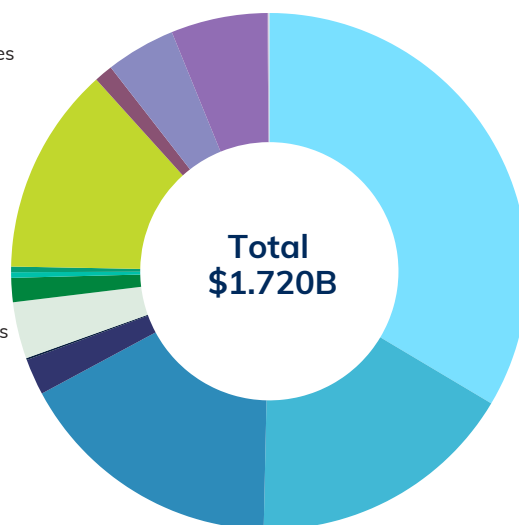
7 Support solutions to address the housing shortage across the region.

Regional Data

	2024	2023	Difference	% Change
Population	69,137	68,799	338	0.49%
Number of Businesses	7,766	7,764	2	0.03%
GRP (B)	4.704	4.612	0.09	1.99%
Total Number of Jobs	34,316	33,323	993	2.98%
Pipeline Project Total Value (B)	1.72	2.83	-1.11	-39.23%
Tracked investment projects	142	369	-227	-61.52%

The significant drop in the value of Pipeline Projects for the Limestone Coast between 2023 and 2024 is due to the removal of \$1.75B offshore wind projects following strong community dissent to the proposal. Without these projects in consideration, the value of other projects in the pipeline has grown by 59%. The drop in the number of projects is attributed to the completion of a large number of projects across the region.

Regional Investment



Limestone Coast Contacts



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MURRAYLANDS & RIVERLAND

In the Murraylands and Riverland, our vision is to be internationally recognised as a vibrant, world-leading circular economy by 2030.



Progress toward our vision is reflected in the development of circular economy precincts, like the Southern Food Energy and Water (SoFEW) Precinct being developed through a cross-sectoral partnership in the Murraylands, and private developments like the Circular Green Economy Proposal in Waikerie. The \$425 million waste-to-hydrogen Riverbend Energy Hub, being developed by Greenhill Energy in Taillem Bend, adds to our region's impressive renewable energy credentials. Small businesses like Woodlane Orchard, who dehydrate vegetables that would otherwise have gone to waste into ready-made meals, are the engine room of our regional circular ambitions.

We continue to connect our region for a resilient and sustainable future in line with the Murraylands and Riverland Plan, a Regional Drought Resilience Plan developed with over 550 locals (each contributing an average of seven hours), along with partners in community, business, and government. We are supporting communities and small businesses through our Regional Leadership Development Program (funded by PIRSA) and wellbeing programs, as well as providing support for workforce and new project development.

Across our region, we have examples of great opportunity, such as Murray Bridge and surrounds that face significant growth as a satellite suburb under the Greater Adelaide Regional Plan, including the recent announcement of the 17,000 house Gifford Hill housing development. We also have significant challenges for some of our irrigation communities as a result of poor market conditions for wine (with the Riverland being the largest wine producing region in Australia), floods, frosts and the increasing costs of production.

The Murray-Darling Basin Plan presents opportunities for our region, and in particular our Riverland communities. PIRSA are working closely with these communities to develop a water transition business case that looks into opportunities for the region to diversify and add value across the economy. We are grateful for this support and will continue to work on ways to assist these communities transition to a resilient, sustainable and prosperous future.

Regional Priorities

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

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

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

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

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

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

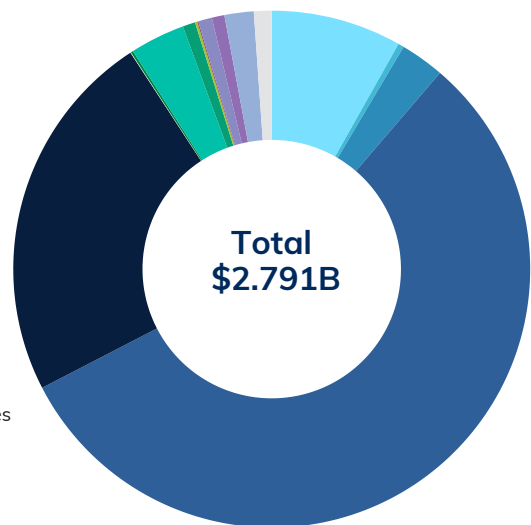
4 Together Community- Enable and Support the development of a connected and inclusive community:

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

Regional Data

	2024	2023	Difference	% Change
Population	73,771	73,264	507	0.69%
Number of Businesses	6,699	6,672	27	0.40%
GRP (B)	4.818	4.641	0.18	3.81%
Total Number of Jobs	32,137	31,137	1,000	3.21%
Pipeline Project Total Value (B)	2.79	2.98	-0.19	-6.36%
Tracked investment projects	167	140	27	19.29%

Regional Investment



Murraylands & Riverland Contacts



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RDA Murraylands & Riverland website

YORKE & MID NORTH

Our region in the Yorke and Mid North is typified by its diversity - with its landscapes ranging from high-rainfall, highly productive broadacre cropping through to marginal and pastoral lands, and communities ranging from provincial cities of more than 13,000 residents through to settlements of fewer than 50 people.



It is home to more than 78,000 people living in nearly 36,000 households, working in and on more than 7,600 businesses, providing a host of services and supporting a range of activities that make our communities desirable places to call home.

Our region has an abundance of potential opportunities, drawing on deep roots in the primary production sector and related value-adding manufacturing activities, to more recent developments in the renewable energy and tourism sectors. These strong fundamentals provide the region with a positive basis for future success. Regional Development Australia Yorke and Mid North aims to further grow the region's prosperity and enhance the liveability of our communities.

Regional Priorities

- 1 Increased economic diversity:**
Greater capability and growth in sections of the economy that are growing sustainably.
- 2 Greater economic prosperity:**
Real growth in economic prosperity for the population, with the benefits widely distributed.
- 3 Better connections between people, places and markets:**
Stronger networks via improved infrastructure- both physical and digital.
- 4 Sustainable population:**
Securing the critical population mass needed to support services and opportunities, without compromising environments.
- 5 Better access to services:**
Improving the level and consistency of access to services and amenities needed for quality of life.
- 6 Greater workforce opportunities:**
Greater capacity and higher engagement in the labour force.
- 7 Improving outcomes across communities:**
Facilitating solutions to address disadvantage experienced by different groups within the community.
- 8 Supporting the transition to net zero:**
Help stakeholders manage the transition to net zero by 2050, and manage costs of adapting to climate change.

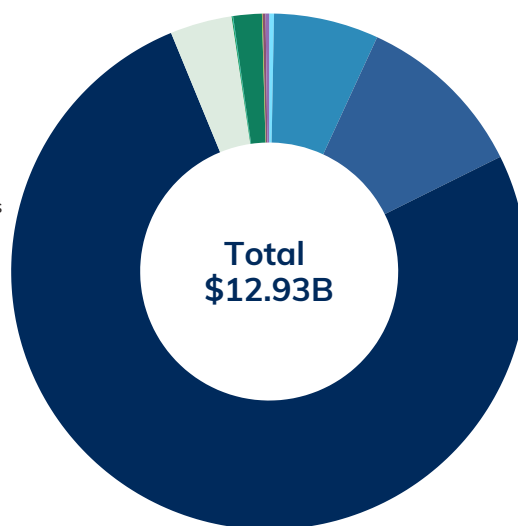
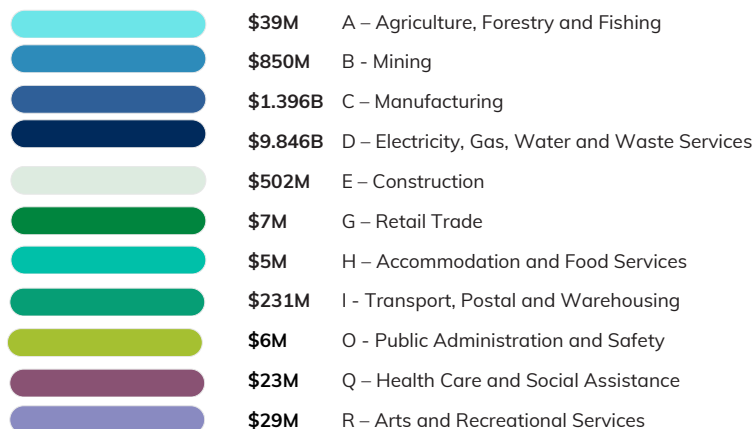
Priority Activities

- Connecting people, businesses and stakeholders with relevant peers, projects, programs and networks to enable them to succeed.
- Informing stakeholder to enable them to make better decisions by leveraging RDAYMN's knowledge, platforms and data to provide useful and insightful evidence.
- Advising stakeholders on how to proceed with their initiatives given the options, resources and constraints available to them.
- Planning (and trialling) projects, programs and initiatives with partners to maximise the chances of successful outcomes.
- Supporting partners to deliver initiatives by providing technical inputs, third-party reviews and expertise.
- Sharing examples and successes to inform stakeholders of new opportunities and to promote our partners and the region.
- Communicating the activities, outcomes, impact and value of our organisation to build engagement and understanding.
- Advocating to ensure policy settings, programs and funding resources meet the needs of our communities and stakeholders within the region.

Regional Data

	2024	2023	Difference	% Change
Population	78,904	78,529	375	0.48%
Number of Businesses	7,609	7,561	48	0.63%
GRP (B)	4.507	4.274	0.23	5.45%
Total Number of Jobs	29,308	29,361	-53	-0.18%
Pipeline Project Total Value (B)	12.93	12.16	0.77	6.37%
Tracked investment projects	86	64	22	34.38%

Regional Investment



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RDA Yorke & Mid
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An Australian Government Initiative



Referencing:

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

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



Government
of South Australia



Local Government Association
of South Australia

