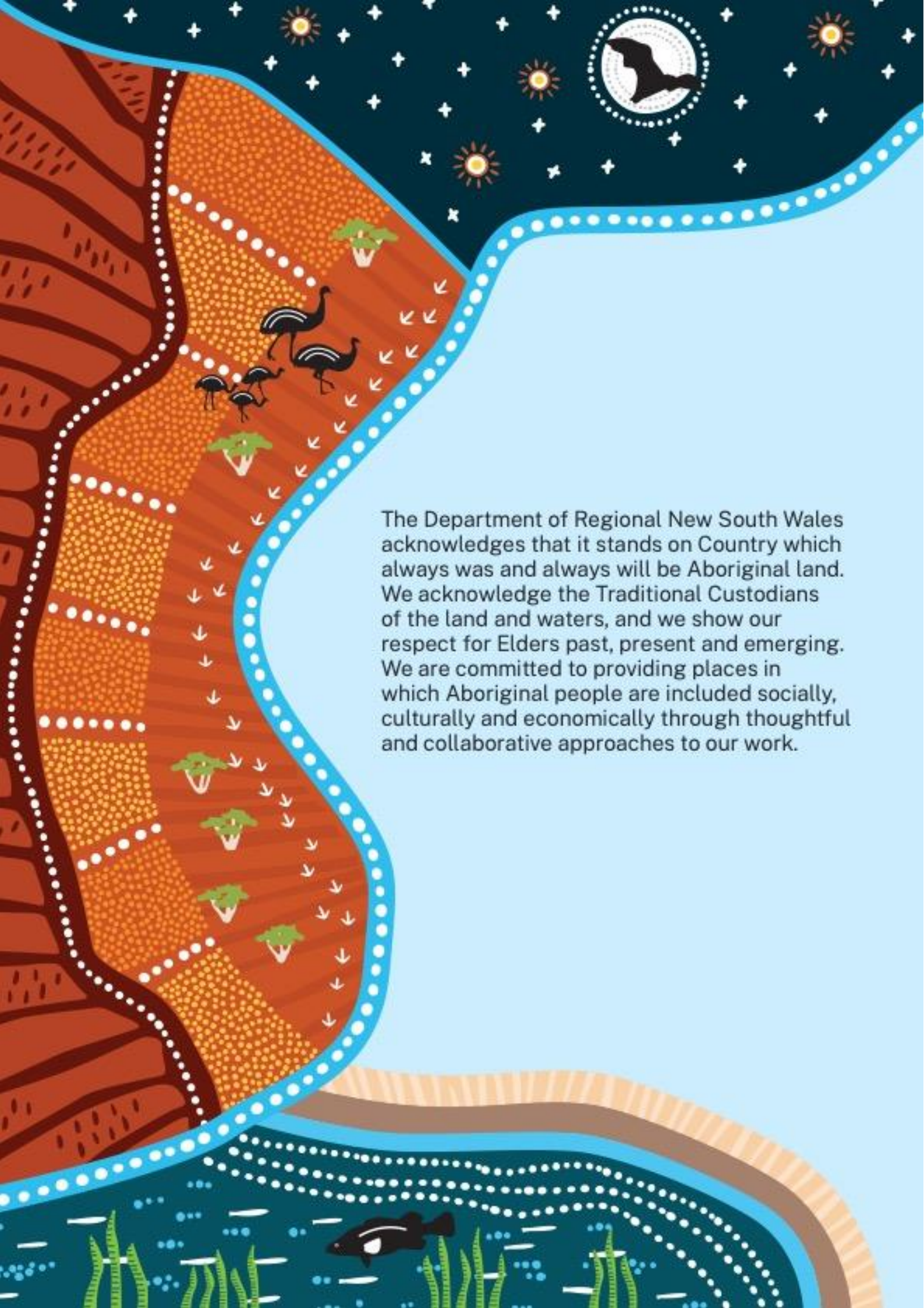


# Clarence Valley Regional Economic Development Strategy – 2023 Update





The Department of Regional New South Wales acknowledges that it stands on Country which always was and always will be Aboriginal land. We acknowledge the Traditional Custodians of the land and waters, and we show our respect for Elders past, present and emerging. We are committed to providing places in which Aboriginal people are included socially, culturally and economically through thoughtful and collaborative approaches to our work.

## **Published by the Department of Regional NSW**

Title: Clarence Valley Regional Economic Development Strategy – 2023 Update

First published: February 2023

### **Acknowledgements**

The Department of Regional NSW would like to acknowledge the significant contribution of many stakeholders in the Clarence Valley region to the development of the 2023 REDS Update, with particular thanks to staff from Clarence Valley Council. The Department of Regional NSW also acknowledges the assistance provided by PricewaterhouseCoopers and ProjectsJSA to help deliver the 2023 REDS Update project.

### **On Country – Artwork by Mumbulla Creative**

"On Country" captures the many different countries located within the Department of Regional NSW footprint. Only part of the image is shown on the Acknowledgement of Country page. The regions included in this partial image are detailed below.

The Far West region of NSW is represented by red earth plains, mallee scrubs and an abundant Emu population. Freshwater countries are referenced by the expansive network of rivers stretching through the regions. The Riverina Murray region is represented by the roots of a River Redgum on the banks of a river, and a large Murray Cod can be seen in the river. The night sky features as it plays an important navigational and story-telling role in traditional life.

Unless otherwise indicated, photographs have been provided by Clarence Valley Council. Cover image: Clarence Canoe and Kayak Trail. Photo credit: Clarence Valley Tourism

---

© State of New South Wales through the Department of Regional NSW 2023. You may copy, distribute, display, download and otherwise freely deal with this publication for any purpose, provided that you attribute the Department of Regional NSW as the owner. However, you must obtain permission if you wish to charge others for access to the publication (other than at cost); include the publication in advertising or a product for sale; modify the publication; or republish the publication on a website. You may freely link to the publication on a departmental website.

Disclaimer: The information contained in this publication is based on knowledge and understanding at the time of writing (February 2023) and may not be accurate, current or complete. The State of New South Wales (including the Department of Regional NSW), the author and the publisher take no responsibility, and will accept no liability, for the accuracy, currency, reliability or correctness of any information included in the document (including material provided by third parties). Readers should make their own enquiries and rely on their own advice when making decisions related to material contained in this publication.

---

# Table of contents

<b>Table of contents</b> .....	<b>4</b>
<b>1. Executive summary</b> .....	<b>5</b>
Changes in the Clarence Valley region since 2018.....	5
<b>2. About the 2023 REDS Update</b> .....	<b>8</b>
<b>3. About the Clarence Valley region</b> .....	<b>9</b>
<b>4. The 2018 Clarence Valley REDS and 2020 Bushfire Addendum</b> .....	<b>10</b>
<b>5. The big picture: shocks and trends impacting the Clarence Valley since 2018</b> .....	<b>12</b>
Significant events impacting major industries.....	12
Macroeconomic trends shaping the region's future .....	14
<b>6. Responding to change: initiatives and investments since 2018</b> .....	<b>16</b>
Significant investments since 2018 .....	17
<b>7. Clarence Valley 2023 economic snapshot</b> .....	<b>20</b>
Demographics.....	20
Housing.....	21
Employment .....	22
Clarence Valley 2023 engine and emerging industries .....	24
Clarence Valley 2023 endowments .....	26
<b>8. Looking ahead: Strategic opportunities for growth, resilience and liveability</b> .....	<b>27</b>
Opportunities and vulnerabilities in engine and emerging industries .....	27
Key themes in stakeholder consultation.....	31
Clarence Valley REDS - 2023 Update strategies .....	31
Key enablers of economic growth .....	32
<b>9. References</b> .....	<b>35</b>

---

# 1. Executive summary

## Changes in the Clarence Valley region since 2018

In 2018, the NSW Government developed Regional Economic Development Strategies (REDS) for 38 Functional Economic Regions (FERs) across regional NSW. Since publication, regional NSW has endured shocks including bushfires, floods, COVID-19 and the mouse plague, and significant new economic opportunities have emerged. The 2023 REDS update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW.

### The Clarence Valley region has seen significant investment delivered since 2018, with additional projects in the planning or delivery stages



**Pacific Highway upgrade and duplication** between Woolgoolga and Ballina.



**\$541 million** committed to deliver the **Grafton Public Hospital** redevelopment and the **Grafton Private Hospital**.



**\$798 million** development of the **Clarence Correctional Facility**.



**\$42 million** for timber bridge replacements through the **Fixing Country Bridges Program**.

### The region has recorded significant population growth, decreased unemployment and increasing house prices since 2018



+ **3.7%** population growth since 2018.



Housing vacancy rates sits at **1.6%**, with median house prices having risen by **52%** since 2018.



The proportion of the population over 55 years is **42.9%** of the region's total population.



**Unemployment** has decreased to **3.7%** in June 2022, while job vacancies reached an all-time high of **4,595** in August 2022 across the North Coast.

## The region's key industries including tourism, healthcare and social assistance and agriculture have remained resilient despite significant shocks



### Tourism

**+ 2.1%** Year-on-Year (YoY) growth from 2011-2020

**\$290 million** visitor spend in 2021

**4,882** jobs supported in 2021



### Healthcare and social assistance

**+ 0.6%** YoY growth from 2011-2020

**\$ 271 million** Gross Value Added (GVA) in 2020

**3,927** jobs supported in 2021



### Agriculture

**+ 4.5%** YoY growth from 2011-2020

**\$216 million** GVA in 2020

**1,191** jobs supported in 2021



### Manufacturing

**-1.6%** YoY growth from 2011-2020

**\$157 million** GVA in 2020

**997** jobs supported in 2021

## Key themes from local consultation

Stakeholders highlighted growing the visitor economy, overcoming challenges associated with housing and workforce constraints, and increasing Aboriginal economic participation as key priorities.

### Visitor economy growth



Stakeholders highlighted that despite substantial cumulative interruptions from natural disasters and the COVID-19 pandemic, recent major investments are unlocking significant new opportunities to enhance and grow the visitor economy in the region.

### Housing market challenges



Consultation input revealed concerns among stakeholders that current housing market affordability and availability challenges will act as a barrier to sustainable growth.

### Workforce constraints



While major infrastructure investment has provided significant economic opportunities, they have placed significant pressures on demand for labour in an environment where key input costs such as freight, energy and transportation costs are increasing.

### Aboriginal economic participation



Building partnerships with the local Aboriginal community to enhance economic engagement and deliver economic prosperity across the region was highlighted as a key ongoing priority by stakeholders.

## Clarence Valley REDS - 2023 Update strategies and enablers

Strategies	Enablers
<p><b>Foster innovation in ‘engines of growth’ for the region including agriculture, forestry and marine manufacturing industries.</b></p>	<ul style="list-style-type: none"> <li>Investigate new industrial uses of the region’s marine precincts and conduct a feasibility study into the infrastructure and dredging processes required to support the precinct activation.</li> </ul>
<p><b>Develop a visitor economy that takes best advantage of Clarence River and the coast, leveraging the region’s adventure and nature tourism opportunities.</b></p>	<ul style="list-style-type: none"> <li>Develop an activation strategy for water-based adventure and nature tourism from Grafton to Nymboida.</li> <li>Leverage the region’s ‘My Clarence Valley’ brand to develop and expand businesses based in riverside precincts in the region.</li> </ul>
<p><b>Utilise the Northern Rivers Reconstruction Corporation mandate and local government collaboration to plan and rebuild the region’s communities and a more climate resilient economy.</b></p>	<ul style="list-style-type: none"> <li>Adopt a regional approach to economic recovery and reconstruction to build local business and workforce capability and maximise opportunities for local employees, businesses and Aboriginal communities.</li> <li>Prioritise coordinated land use planning and overcoming planning complexities to accelerate the release and development of land for residential, commercial, and industrial uses and support the delivery of enabling infrastructure.</li> </ul>
<p><b>Activate Grafton, Maclean and Yamba as desirable destinations for residential and commercial investment.</b></p>	<ul style="list-style-type: none"> <li>Support council to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.</li> </ul>
<p><b>Protect and respect the Aboriginal culture and heritage of the Clarence Valley, while enhancing Aboriginal economic prosperity through business and social initiatives.</b></p>	<ul style="list-style-type: none"> <li>Facilitate partnerships with local Aboriginal organisations to develop new tourism offerings.</li> <li>Provide training pathways for local Aboriginal people to develop skills in project management and business administration.</li> </ul>

---

## 2. About the 2023 REDS Update

In 2018, the NSW Government and local councils developed a series of REDS for 38 Functional Economic Regions (FERs) across regional NSW. FERs are made up of one or more Local Government Areas (LGAs) that work together to create smaller economies with strong economic links.

Supporting the *20-Year Economic Vision for Regional NSW*, the REDS set out a place-based vision and framework for economic development for each FER. The REDS identify each FER's endowments, industry specialisations and key vulnerabilities and opportunities, and outline economic development strategies and actions to leverage these strengths.

Since 2018, regional NSW has endured many challenges including drought, bushfires, floods, COVID-19 and the mouse plague. At the same time a range of broader state-wide trends and actions continue to change the economic landscape across regional NSW, including digital transformation, increased remote working and the shift towards net zero. These challenges and trends have altered the landscape of economic development in many regions and created new opportunities for growth.

The 2023 REDS Update provides an updated evidence base to guide governments in making policy and investment decisions to enhance resilience and drive sustainable, long-term economic growth in regional NSW. The objectives of the update are to:

1. **Highlight progress:** reflect on significant initiatives and investments that have supported progress against the key strategies and actions in the 2018 REDS.
2. **Capture major changes:** identify and assess the impacts of major changes to regional economies since 2018, including the effect of recent 'shocks' such as bushfires, droughts, floods, mouse plagues and the COVID-19 pandemic.
3. **Identify strategic opportunities:** identify key strategic opportunities and vulnerabilities for engine and emerging industries, as well as any changes to local endowments.
4. **Set the foundation for the future:** review, affirm and/or adjust the 2018 strategies, including consideration of new strategies to meet emerging priorities, to ensure they remain relevant.
5. **Identify key enablers to guide future action:** develop a non-exhaustive list of priority enabling actions that will support the 2023 REDS Update strategies.



Figure 1: The Old Glen Innes Road through Dalmorton tunnel.



Figure 2: Jacaranda season in the Clarence Valley.



### 3. About the Clarence Valley region

The Clarence Valley FER is located in the North Coast region of New South Wales and is solely comprised of the Clarence Valley Local Government Area (LGA). The region is 570 km north of Sydney and about 240 km south of Brisbane, and Grafton sits at the junction of the Pacific and Gwydir highways. Grafton is the major regional city and key population centre in the region, while other significant settlements include Iluka, Maclean, Ulmarra, Woolli and Yamba.

Total area covered (km <sup>2</sup> )	10,441
Population (2021)	54,180
Size of the economy (2020)	\$2.659 billion
Total employment (2021)	19,421

Source: ABS (2021) Estimated Resident Population, REMPLAN (2020), ABS Census (2021)

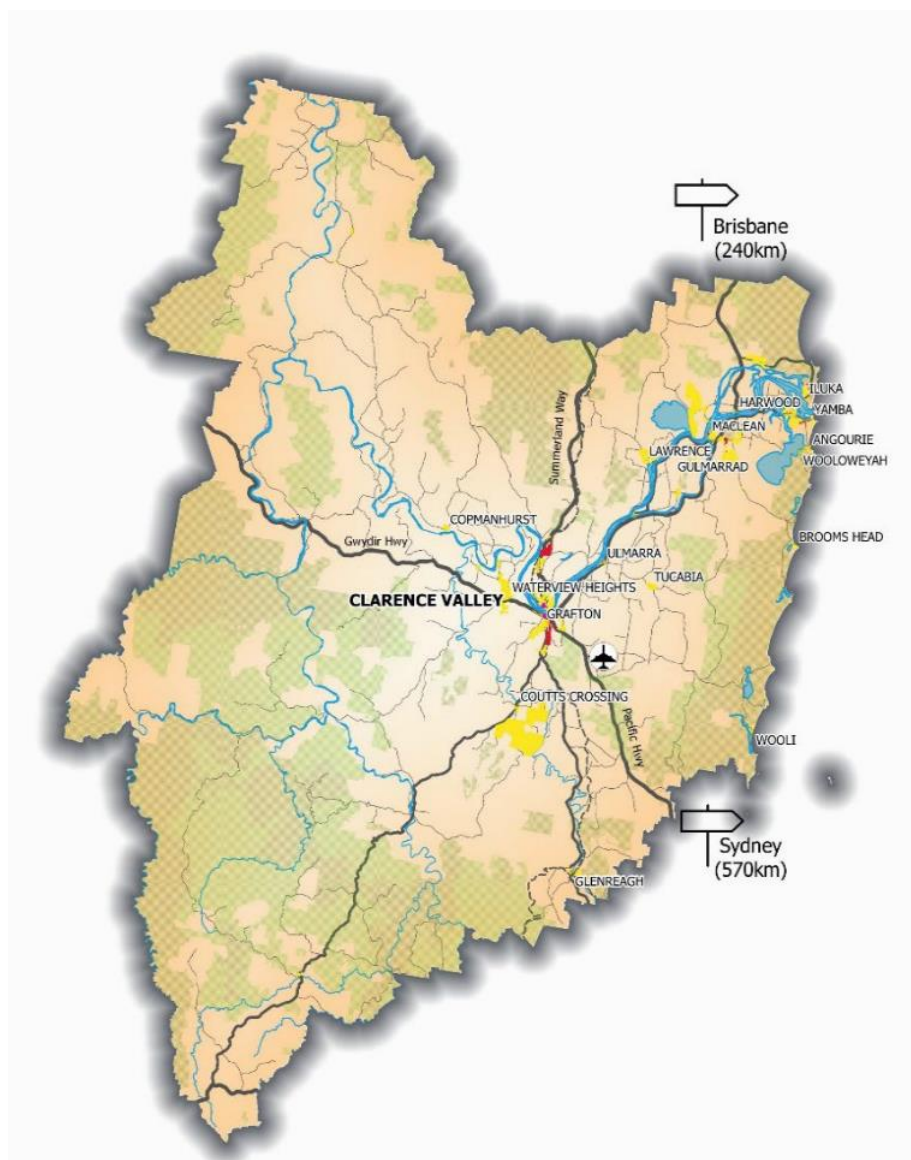






Figure 3: Map of the Clarence Valley Functional Economic Region.

## 4. The 2018 Clarence Valley REDS and 2020 Bushfire Addendum





In the Clarence Valley 2018 REDS, the region was actively pursuing growth of its key industry specialisations, particularly agriculture, forestry and fishing and tourism. Endowments recognised its regional strengths lie in its coastal, riverine and hinterland amenity, driving the strategic approach to enabling economic development for the region.

### 2018 Clarence Valley strategies

	Further expand the 'engines of growth'
	Develop the region's key tourism attractions and precincts
	Grow the population and internal markets of the region
	<p>In addition to the core strategies articulated in the 2018 REDS, the 2020 Clarence Valley Bushfire Impact Addendum outlined a series of 18 additional short, medium, and long-term priorities focused on:</p> <ul style="list-style-type: none"> <li>• <b>Recovery</b> - overcoming direct and indirect damage sustained by the agriculture, forestry and tourism sectors.</li> <li>• <b>Resilience</b> – Improving community and infrastructure resilience to future natural disasters and supporting new industry development to diversify local economy and strengthen workforce capacity.</li> </ul>















### 2018 Clarence Valley specialisations

The industry specialisations below were identified as comparative advantages for the Clarence Valley region in the 2018 REDS based on employment concentrations in industry sectors.

	Agriculture, forestry and fishing
	Tourism
	Healthcare and social assistance
	Manufacturing

## 2018 Clarence Valley endowments

The Clarence Valley is home to many geographic, built endowments, human and institutional endowments including Australia’s largest white-water trail and well-connected agricultural and industrial land. These endowments play a key role in enabling success and growth across its industry specialisations.

Endowment	Relevant 2018 specialisation
Riverine and hinterland amenity	
Coastal amenity	
Access to South East Queensland markets	
Arable Land	
Industrial Land	
New Grafton Bridge	
Summerland Way	
Private capital investment	
Pacific Highway	
Gwydir Highway	
Aboriginal culture and history	
Diverse specialised skillsets	
Collaboration among private investors and operators	
Clarence Valley Council	

---

## 5. The big picture: shocks and trends impacting the Clarence Valley since 2018



Figure 4: Harwood Marine Shipyard. Photo credit: Harwood Marine.

### Significant events impacting major industries

A sustained period of drought, followed by major bushfires and flooding had severe environmental and economic implications for the region. The COVID-19 pandemic further challenged the region, with local businesses, particularly those in the visitor economy, suffering from the impacts of movement and operating restrictions. For the period 2018 to 2022, the region had 10 disaster declarations<sup>[1]</sup> and received \$42.55 million in disaster recovery grants.<sup>[2]</sup> Recovering from these events and developing both industry and community resilience has been a key priority for the region since 2018.

#### Drought

Drought from 2018 severely impacted the Clarence Valley region, with water restrictions required from December 2019 to May 2021. These restrictions were targeted at households, who were restricted in watering gardens between 9am and 4pm. No sprinklers or unattended hoses were allowed, and the use of handheld hoses was limited to 1 hour every 2 days.<sup>[3]</sup> There were substantial impacts on businesses throughout the region from the extended drought, in particular in the agriculture sector. The significant increases in costs faced by some producers and low output, particularly in the livestock sector, led to the closure or sale of longstanding local farms.<sup>[4]</sup>

#### COVID-19

The COVID-19 pandemic had a significant impact on business activity with 43% of businesses reporting that the pandemic has negatively affected their business.<sup>[5]</sup> In the acute phase of the pandemic, there was also an impact on the labour market, with increases in income support recipients. Since March

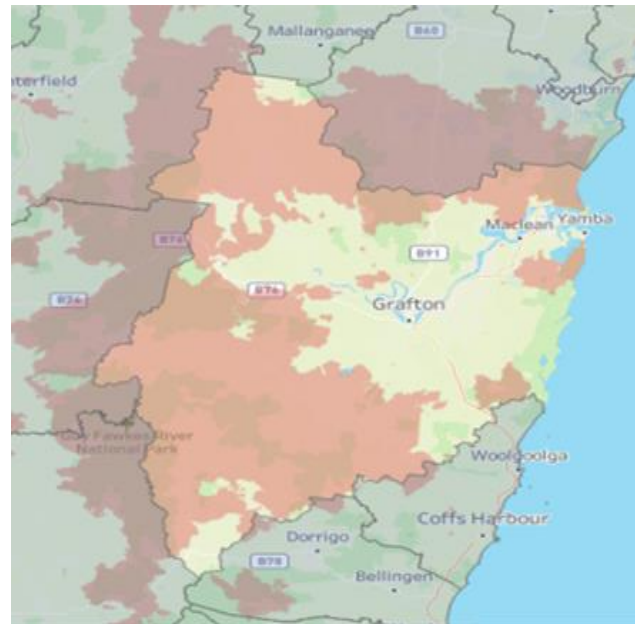
2020, Jobseeker recipients rose by 46% while healthcare card recipients rose by 28% between March and June 2020.<sup>[6]</sup> There was also a significant impact on tourism in the region with restrictions on travel, with visitation and visitor spend down by 53% and 36% respectively between 2019 and 2020.<sup>[7]</sup>

## Bushfires

The 2019-20 bushfires had a significant impact on the Clarence Valley economy and community, with severe economic and physical impacts across the region.

It is estimated the bushfires caused more than \$177 million in damage to the region's economy, with key impacts including:<sup>[8][9]</sup>

- 6,154 square kilometres of land burnt (59% of the total FER area).
- 848 properties damaged, including an estimated 168 destroyed.
- Direct impact on agriculture, with 365 head of cattle reported lost.
- 81% of forestry land affected by bushfires.
- A significant downturn in tourism expenditure, down 50% in December 2019 and 25% in January and February 2020.



■ Fire affected

Figure 5: Fire affected areas within the Clarence Valley region.

## Floods

Flooding events comprised seven of the ten natural disaster declarations in the region since 2018, five of which occurred since the beginning of 2020. The most significant floods were those which occurred in February 2022, which devastated large parts of the North Coast region, including significant flooding across the Clarence Valley region.<sup>[10]</sup>




During this flood event, it is estimated that 9% of all agricultural land and 7% of residential land was flooded across the region.<sup>[9]</sup> Approximately 32% of all claims for support associated with the February and March 2022 floods came from the North Coast and Clarence Valley.<sup>[11]</sup>

Beyond the direct impacts of flooding on residents, there was also widespread impacts on businesses, with 38% reporting to be directly impacted by the floods. The average cost of direct damage per business in the Clarence Valley FER was estimated at \$34,000, making it one of the most impacted areas in the State.<sup>[11]</sup>

Substantial damage was also incurred by a range of essential public infrastructure in the region, in particular key assets such as roads, bridges and water and sewerage infrastructure. Clarence Valley Council continues to deliver repairs in the region, supported by funding provided under the joint Commonwealth and State government funded Disaster Recovery Funding Arrangements.<sup>[12]</sup>

## Macroeconomic trends shaping the region's future

Macroeconomic trends related to climate and migration have played a significant role in the development of the Clarence Valley region since 2018 and are likely to continue to have a strong influence on its future. With a growing population, recovery from the impacts of successive natural disasters and the shift towards net zero, the region faces both opportunities and risks to build resilience and leverage its competitive advantages.

Trend		Opportunities and risks
 <p>Digital transformation</p>	<p>The COVID-19 pandemic has bolstered remote workers who are taking advantage of the regional lifestyle offering while maintaining metro-based employment. This is evident in the population shift in 2020-21, with regional NSW gaining an additional 26,800 residents while Sydney declined by 5,200.<sup>[13]</sup></p> <p>Investment in improved telecommunications infrastructure since 2018 through the Connecting Country Communities program, including the rollout of 5 new mobile phone towers across the Clarence Valley region to address connectivity challenges support the shift towards greater remote working, alongside broader digital transformation underway in many industries.</p>	<p>Accelerated digital transformation opens up online opportunities for businesses to scale up their e-commerce capability to take advantage of new markets.</p> <p>The surge in demand for data puts increased pressure on existing telecommunications infrastructure, highlighting the need for ongoing investment.</p>
 <p>Changing migration patterns</p>	<p>Increased COVID-19 related migration to the region was noted by local stakeholders as being a contributing factor in increasing demand on infrastructure, especially housing. The competitive nature of COVID-19 related migration and increased remote working means that population growth does not automatically lead to local employment, as residents can live in the region while working remotely in jobs elsewhere.</p> <p>Retaining young workers, especially in hospitality and other population serving roles typically requires high-quality placemaking and amenity, as well as a need for employment opportunities competitive with out of region offerings.<sup>[14]</sup></p>	<p>Ongoing boosts in population have the ability to boost local economic activity and attract new businesses and industries to the region.</p> <p>Population increases place upward pressure on existing infrastructure and services, especially housing and care economy services.</p>
 <p>Towards net zero</p>	<p>In 2021, Clarence Valley Council released an updated Community Energy and Emissions Reduction Strategy aiming to fast track the region's path to net zero, committing to net zero emissions by 2040.<sup>[15]</sup></p> <p>As part of this strategy, the region can look to leverage its endowments to support growth in the renewable energy sector, which can help it play a leading role in assisting with emissions reduction and the pursuit of net zero.</p>	<p>Opportunity for the region to drive investment in new renewable energy generation.</p> <p>Clarence Valley Council can be a leader in the local government sector in the shift towards net zero.</p>

Trend	Opportunities and risks
<div data-bbox="92 250 172 331" data-label="Image"> </div> <p data-bbox="92 344 255 416">Rising uncertainty</p> <p data-bbox="365 250 1066 495">With the frequency and intensity of natural disasters anticipated to increase,<sup>[16]</sup> there is a need to enhance environmental and economic resilience in the region. A key focus is needed on building community resilience alongside that of physical infrastructure, as part of achieving sustainable growth for the region.</p> <p data-bbox="365 510 1054 712">Major projects bring significant investment and employment opportunities to the region, however, as highlighted this can put pressure on local amenities and enabling infrastructure when accompanied by population growth through an influx of workers.</p> <p data-bbox="365 730 1050 902">Given rising uncertainty, there is a need to ensure a future focused lens is applied when considering planning and delivery approaches for major projects, with a key priority being the delivery of long-term benefits to the region.</p>	<p data-bbox="1125 250 1497 495">Rising uncertainty presents an opportunity to improve supply chain resilience in key sectors, which can also support growth in local supply chain capacity.</p> <p data-bbox="1125 510 1481 683">Rising uncertainty places upward pressure on inflation, driving up input costs for business and industry.</p>



Figure 6: Fig Tree Avenue on Breimba St, Grafton.

## 6. Responding to change: initiatives and investments since 2018

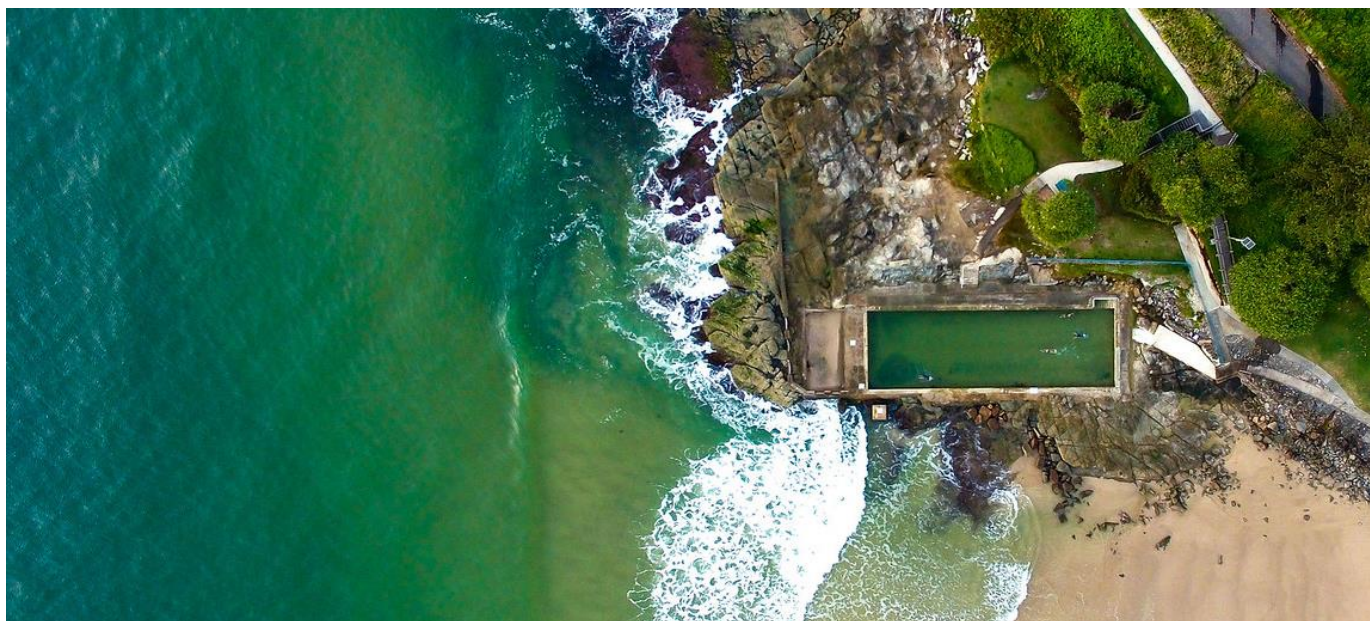


Figure 7: Aerial view of Yamba Ocean Pool.

Since 2018, local councils, the NSW Government and other key organisations have delivered new and updated key strategic documents and plans that help guide economic and community development in the region. These documents support the development of local enabling actions that contribute towards progress against key REDS priorities and strategies.

Strategies and plans	Relevant 2018 strategies
<p>The <b>North Coast Regional Plan 2041</b> identifies Grafton as one of two strategic centres of NSW's North Coast, flagging the region for growth given its commercial composition and high quality services. Grafton, Maclean, Yamba, Junction Hill, South Grafton, Lanitza, Townsend and the Harwood Marine Precinct are identified as focus areas for employment.</p>	
<p>The Clarence Valley <b>Local Strategic Planning Statement</b> aligns with the Regional Plan and the Council's <b>Community Strategic Plan – The Clarence 2032</b>, which identifies resilience, improved Aboriginal relationships, improved industrial and commercial land zoning, and an increased focus on CBD placemaking in Grafton and other centres as priorities for land use in the region.</p>	
<p>The Clarence Valley <b>Employment Lands Strategy</b> and the <b>Rural Lands Strategy</b> set out the long-term strategic direction for employment and rural land uses to inform future planning decisions, policies and supporting infrastructure.</p>	
<p>The <b>Clarence Regional Airport Master Plan 2018-2033</b> presents the economic scope for expansion of the region's airport operations, with forecast growth in aircraft movement into 2030 and a pathway for supporting increased freight use driven by engines of growth in industrial production and public administration.</p>	



The **North Coast Aboriginal Development Alliance Community Report 2020** identifies key issues for Aboriginal communities in the region highlighted during community consultations including housing, health and wellbeing, youth, social justice, criminal justice, training and employment, education and transport.



The **North Coast Destination Management Plan** prioritises waterfront precincts and activations as a strategic priority for the North Coast while also recognising the natural endowments that make the region a popular nature tourism and agritourism destination.



The **North Coast Regional Water Strategy** uses the best and latest climate evidence, along with a wide range of tools and solutions to chart a progressive journey for the region's water needs for the next 20 years and beyond.



## Significant investments since 2018

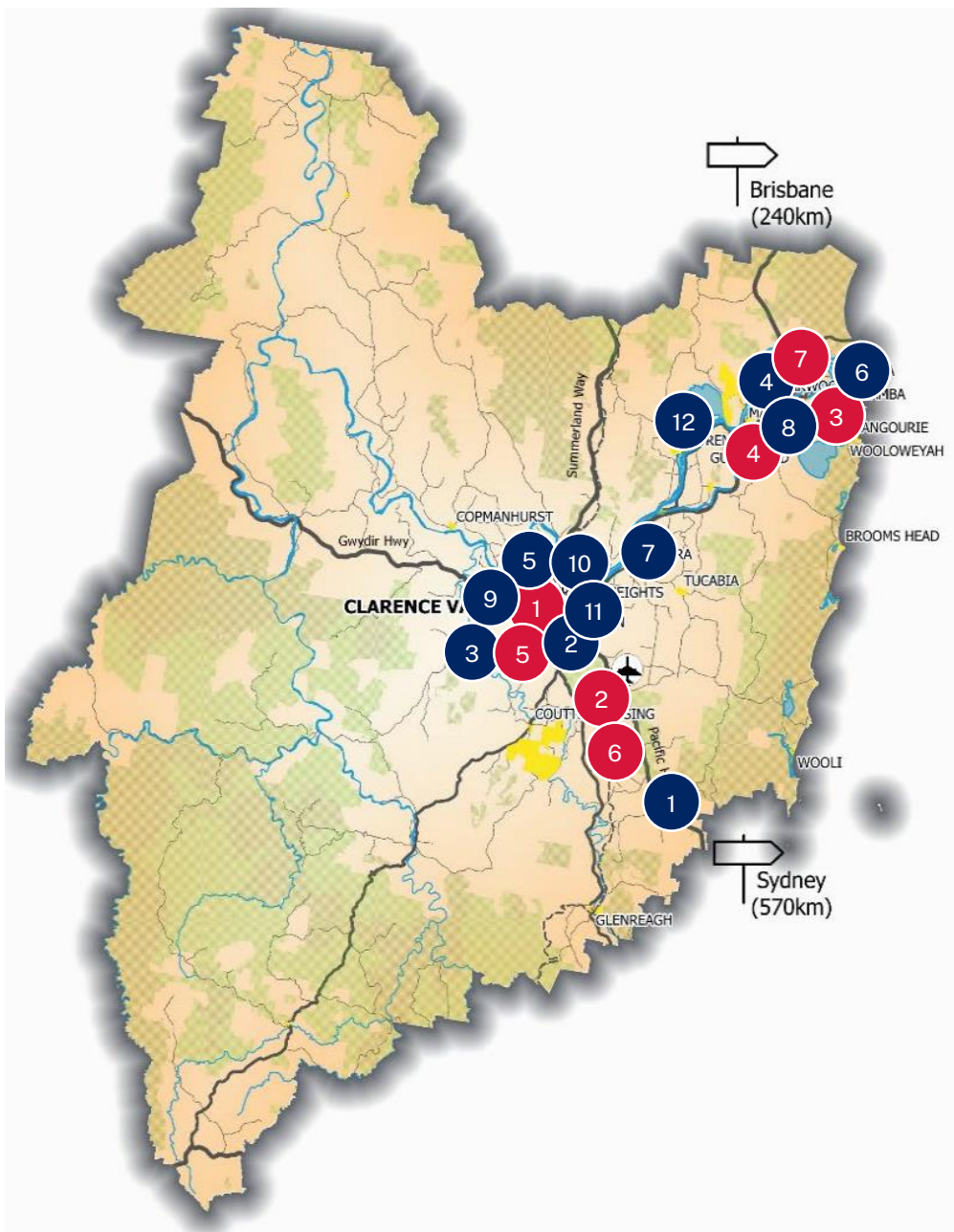














Figure 8: Map of significant investments in the Clarence Valley region since 2018.

As shown in Figure 8, since 2018 the region has seen significant local, state and federal funding, as well as private investment. These investments are at varying stages of progress, with some delivered, some underway, and some investments still in the planning stage. Public investments have focused on major transport infrastructure, health infrastructure and a range of community and sporting infrastructure. Grants have played a key role in delivery of many of these projects.

### Major private investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Grafton Private Hospital	\$278 million	
2 Clarence Correctional Facility <sup>1</sup>	\$798 million	
3 Major residential subdivisions in Yamba and Maclean	Not available	
4 Maclean Highway Service Centre	Not available	
5 Grafton Busways depot upgrade	\$2.5 million	
6 Provenance Propagation glasshouse <sup>2</sup>	\$4.5 million	
7 Harwood Marine travel lift <sup>2</sup>	\$3 million	

### Major public investment since 2018

Investment	Estimated total project value	Relevant 2018 strategies
1 Pacific Highway duplication	\$4.9 billion	
2 New Grafton Bridge	\$240 million	
3 Fixing Country Bridges Program	\$42.1 million	
4 Harwood Marine Precinct Pacific Highway connection	\$3.8 million	
5 Grafton Base Hospital redevelopment	\$263.8 million	

<sup>1</sup> A public-private partnership project between the NSW Government and the Northern Pathways Consortium.

<sup>2</sup>Supported by a grant through the NSW Government Regional Job Creation Fund.

6	TAFE Connected Learning Centre Yamba	\$5.88 million	
7	Ulmarra Precinct - Bailey Park redevelopment	\$2.3 million	 
8	Maclean Waterfront Precinct	\$2.98 million	 
9	Grafton Waterfront Precinct	\$6.5 million	 
10	Grafton Regional Gallery redevelopment	\$7.6 million	 
11	Grafton Aquatic Centre	>\$20 million	 
12	Lawrence Reservoir replacement	\$1.95 million	  

### Regional grants programs

The region has received \$77.45 million in grant funding since 2018. Key programs have included the Bushfire Local Economic Recovery Fund and Bushfire Industry Recovery Package, with a combined \$38.16 million committed for projects focused on improving the resilience of community infrastructure, building community amenity and providing support to the region's forestry sector.

Grant category	Approved funding
Community	\$15.4 million
Economic	\$19.5 million
Disaster recovery	\$42.55 million

Note: Total grant funding outlined above only includes programs managed by the Department of Regional NSW, accurate as at January 2023.



Figure 9: The McFarlane Bridge over the Clarence River at Maclean.

## 7. Clarence Valley 2023 economic snapshot

Clarence Valley’s population is growing, however, a high proportion of residents in older age groups presents a challenge in maintaining a strong workforce base.

The region has seen consistent population growth since 2011, which has accelerated dramatically since the commencement of the COVID-19 pandemic. A key focus will be needed on developing social infrastructure to attract and retain people within the prime working age bracket to the region.

### Population growth

The region experienced an average population growth rate of **0.55% between 2011-2021** (see Figure 10). However, the period of 2018-2021 saw growth of 1.2% annually, translating to a nominal gain of 1,941 residents over a 3 year window.

The rate of population growth in the region increased substantially following the commencement of the COVID-19 pandemic, reaching 2.65% in 2021.

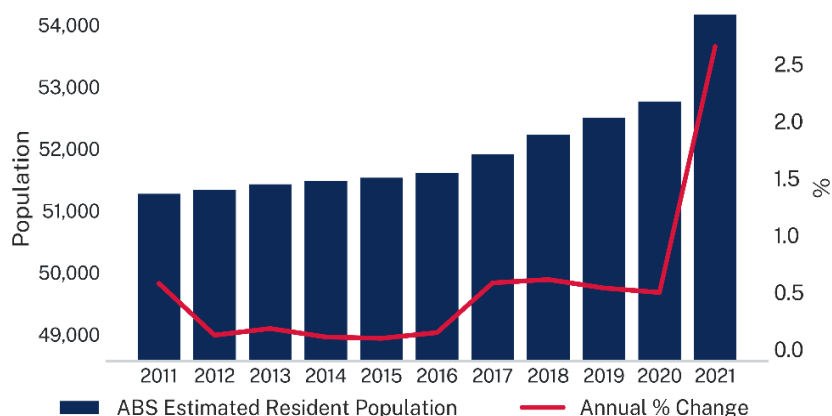


Figure 10: Clarence Valley FER population growth, 2011-2021 (ABS ERP, July 2022)

### Demographic Profile

In 2021, the proportion of the region’s population aged over 55 was 13.3% higher than the NSW average, while for the primary working age cohort (20-49) is 10.6% lower than the state-wide average (see Figure 11). It is important to note this reflects a significant change from the 2016 census, when 19.3% of the population was over 55, but still highlights the challenges the region faces to ensure it has access to a sufficient sized workforce to meet the needs of key population serving sectors, as well as the broader needs of business and industry in the region.

A continuing focus on worker attraction and retention, alongside initiatives to maximise labour force participation in the region can help alleviate this challenge, and will be required to help meet current very high levels of demand for labour, as demonstrated by record job vacancies.

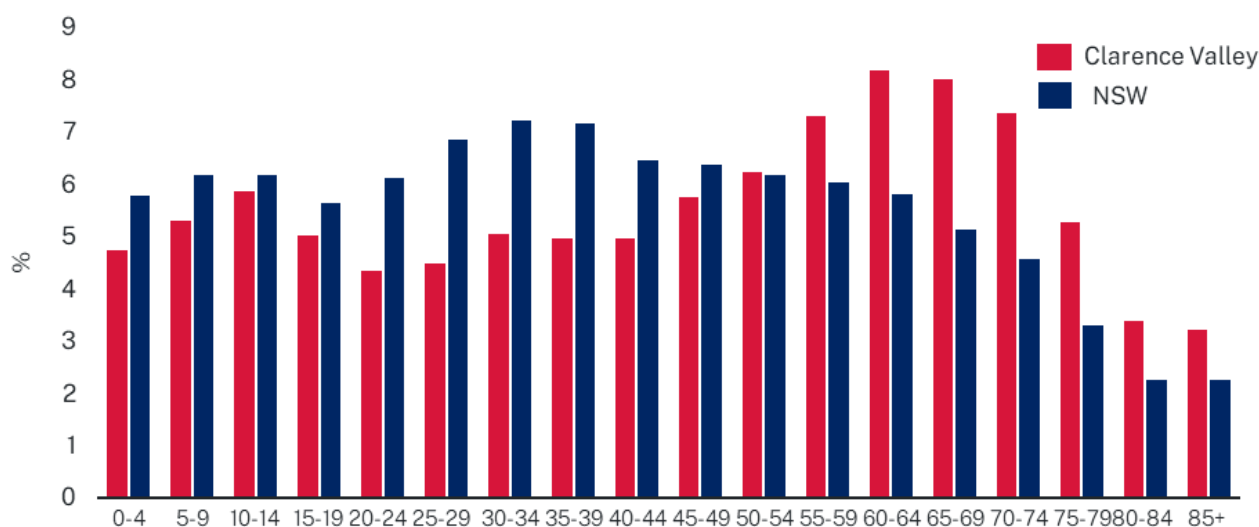


Figure 11: Clarence Valley FER population by age, 2021 (ABS ERP, July 2022).

Strong population growth in the region has tightened housing supply and placed significant upward pressure on prices.

The region has experienced a decline in housing availability and affordability since 2018, with pressure exacerbated by heightened population growth since the start of the COVID-19 pandemic.

### Housing availability

Residential vacancy rates in the region have dropped from a peak of 5.4% in February 2020 to 1.6% in August 2022, with COVID-19 related migration of remote workers to the region likely a key factor. Vacancy rates hit their lowest at just 0.5% from the third quarter of 2020 to the first quarter of 2021, mirroring the strong population growth the Clarence Valley region experienced once the acute phase of the pandemic had passed. The vacancy rate has shifted upwards across the first half of 2022, but still remains historically low.

There were a large number of residential building approvals over the past 12 months (compared to historical numbers), indicating potential new supply coming online in coming years. Accompanied by major developments underway or planned in the region, there are signs that supply can increase to meet with demand over the medium to longer term. Ensuring adequate and accessible housing supply will be critical in enabling the delivery and long term success of economic development in the region.

### Housing affordability

Between June 2018 and June 2022, median house prices in the Clarence Valley region increased by 52% to \$575,000. The impacts of the tightening housing market during the COVID-19 pandemic is demonstrated by prices growing by 44% since March 2020<sup>[17]</sup>.

With the strong surge in property values, the price to income ratio for the Clarence Valley FER was 8.79, above the NSW average of 8.12 in July 2021,<sup>[18]</sup> highlighting affordability challenges associated with strong property price growth. This reduction in affordability may constrain the region in attracting and retaining key workers, which can have implications for major project delivery, industry development and overall economic growth.

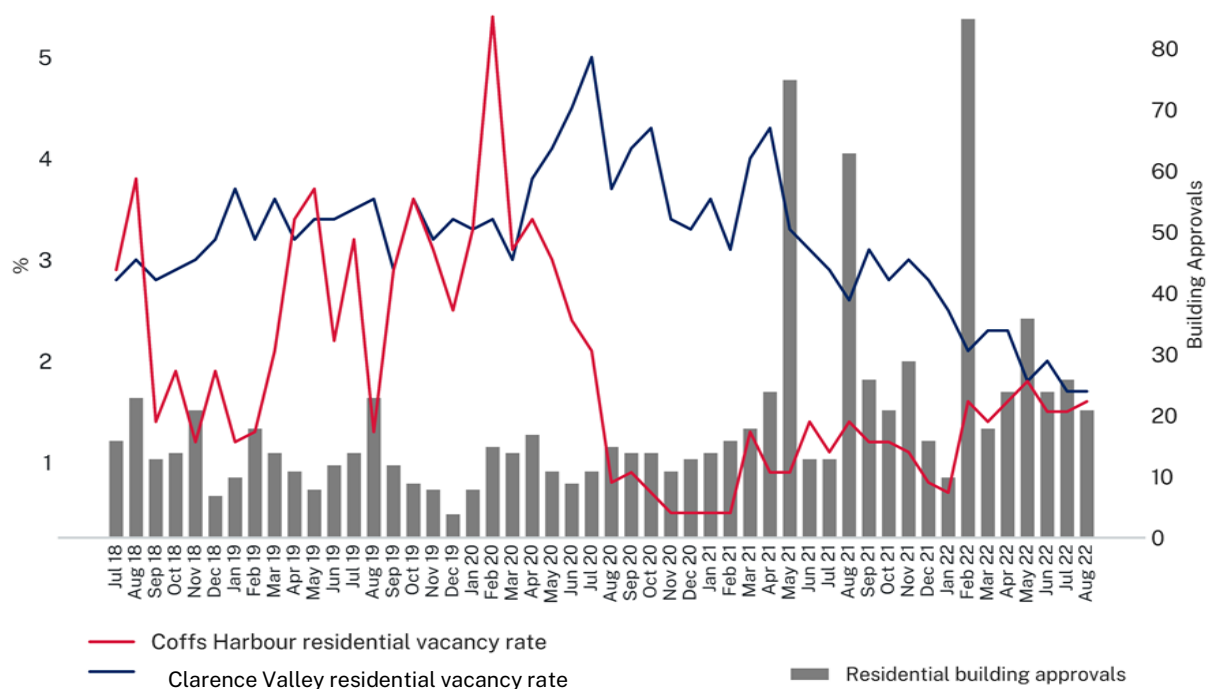


Figure 12: Clarence Valley FER vacancy rate and building approvals, 2018-2022 (REINSW, 2022).

Note: REINSW vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. These results are therefore intended to provide an indication of housing vacancies in the region.

## The Clarence Valley region’s labour market has tightened significantly since 2018

Since 2018, unemployment in the Clarence Valley region has fallen sharply, with the proportion of residents unemployed more than halving, while demand for labour is at a historic high. Meanwhile, strong recovery from the acute phase of the pandemic has placed strong pressure on the demand for population-serving roles, especially in healthcare and social assistance.

### Employment

As at June 2022, Clarence Valley had an unemployment rate of 3.7%, only a little above the NSW benchmark at 3.3% (see Figure 13). This is a significant improvement on the peak pandemic rate of 9.2% in September 2020, with the local unemployment rate falling throughout 2021, and the downwards trend continuing in the first half of 2022.

Job vacancy data in the broader North Coast region, as shown in Figure 14, aligns with the lower unemployment rate in the Clarence Valley, having climbed from a low of 1,529 in May 2020 to a record high of 4,595 in August 2022. While vacancies were wide-ranging, service-based sectors are in high demand, with medical practitioners and nurses (383 vacancies), carers and aides (449) and retail trade representatives (352) being the most sought-after occupations.

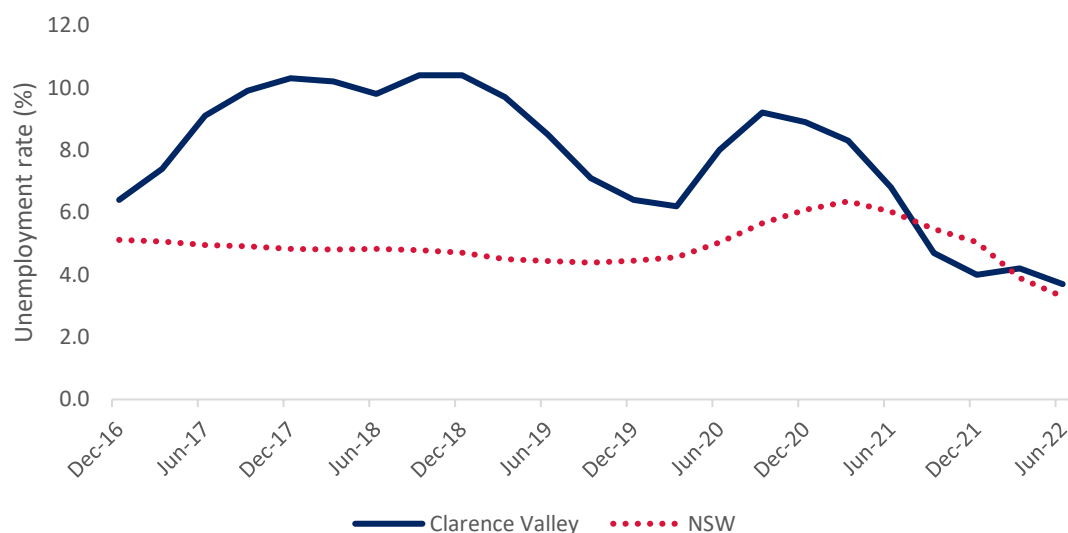


Figure 13: Clarence Valley unemployment rate (%), 2016-2022 (National Skills Commission, 2022; ABS Labour Force, 2022).



Figure 14: Job vacancies, NSW North Coast region (2018-2022) (Regional IVI, National Skills Commission, 2022).

Note: The regional IVI – National Skills Commission job vacancy data collection is not aligned with the FER boundary map, resulting in an overlap with other FERs. Job vacancy data only includes online job vacancies. These results are therefore intended to provide an indication of job vacancies in the region.

## Aboriginal economic development

The Aboriginal unemployment rate in the Clarence Valley was 13.5% in 2021, a significant improvement from 24.5% recorded in 2016. However, the rate remains above the NSW Aboriginal unemployment rate of 9.8% and the NSW unemployment rate of 4.9%.

Aboriginal unemployment rate: Clarence Valley region	2011	21.3%
	2016	24.5%
	2021	13.5%
NSW Aboriginal unemployment rate	2021	9.8%
NSW unemployment rate	2021	4.9%

Source: ABS Census 2021

Clarence Valley stakeholders highlighted that local Aboriginal community economic engagement and the pursuit of economic prosperity for the region is a high priority in the region. Local Aboriginal Land Councils (LALCs) are leading major projects associated with new housing supply, as well as supporting development of commercial tourism infrastructure and cultural tourism products that can enhance economic opportunity for the Aboriginal community.

Continued close engagement that places a focus on partnerships between LALCs, traditional owners, businesses and government can play a central role in supporting increased economic participation and development for the Aboriginal community, which can deliver substantial long term benefits to the region. The commitment to Aboriginal economic development is demonstrated by the inclusion of a dedicated strategy in the 2023 update focused on enhancing Aboriginal economic prosperity.



Figure 15: Aerial view of the Clarence River and surrounds.

## Clarence Valley 2023 engine and emerging industries

Despite a sequence of major shocks since 2018, the \$2.65 billion economy in the Clarence Valley region has continued to see economic growth driven by its key engine industries. The relative strength of industries in the region is highlighted through Location Quotient (LQ) analysis<sup>1</sup> displayed in Figure 16, in which bubble size correlates with industry size.

### Engine industries

**Agriculture** (LQ of 4.15) is the region's most significant specialisation, generating \$216 million in GVA to the local economy in 2020, having grown on average by 4.5% per year since 2011, despite significant impacts from flood, drought and bushfires. This specialisation is broad based, with fishing, hunting and trapping (LQ of 21), aquaculture (LQ of 18.4) and forestry and logging (LQ of 17.5) representing significant subsectors.

Closely linked to the region's agriculture, forestry and fishing industry specialisation is the **manufacturing** industry (LQ of 1.50). The industry contributed \$157 million to GVA in 2020, with specialisations in sawmill product (LQ of 22.4), sugar and confectionary (LQ of 10.2), processed seafood (LQ of 6.3) and ships and boats (LQ of 5.8).

**Healthcare** (LQ of 1.43) is the largest industry in the region as measured by GVA, adding \$271 million in 2020 to the local economy. This specialisation is facilitated by a strong sub-industry in residential care and social assistance services (LQ of 1.8). Future growth prospects for the sector are strong, given the major investments underway to deliver major new health facilities in Grafton.

The **tourism** industry (LQ of 1.52) continues to be an engine industry for the Clarence Valley region. In 2021, despite the impacts of the COVID-19 pandemic off the back of the drought and bushfires, visitors to the region are estimated to have spent \$400 million.<sup>[19]</sup> Accommodation (LQ of 2.2) and food and beverage services (LQ of 1.3) specialisations reflect the region's significant visitor economy.

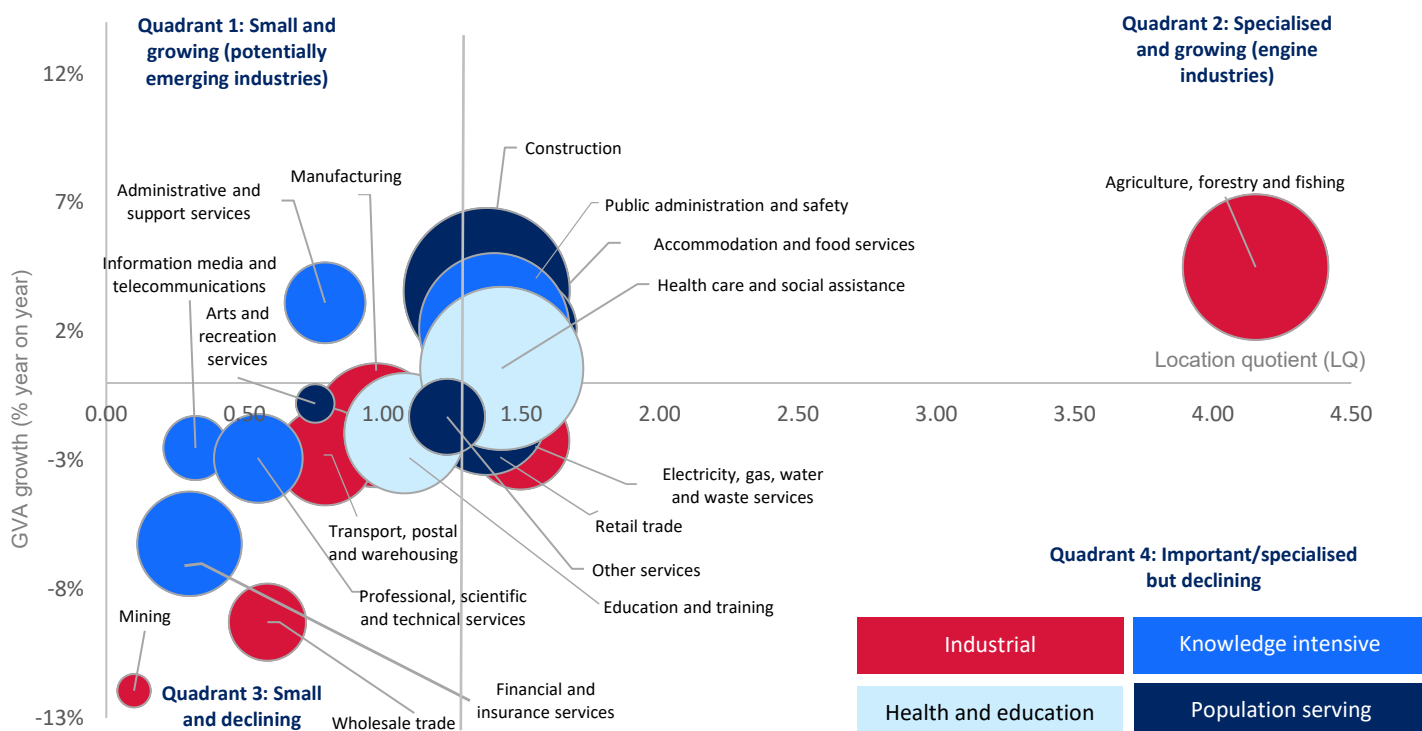


Figure 16: Location Quotient (LQ) Analysis by GVA, 2011-2020 (REMPLAN, 2020).

Note: While the 2018 REDS used employment data as the basis for LQ analysis, the 2023 Update has used GVA data. This allows for a clear demonstration of the changing economic impact of both engine and emerging industries across the regions.

<sup>1</sup> LQ analysis is used to measure industry specialisation by comparing the relative size of an industry in the region versus the whole of NSW.



## Emerging industries

**Construction** (LQ of 1.37) is a key enabling industry for the Clarence Valley region, experiencing the second fastest growth rate across the region, averaging 4.5% growth per year between 2011 and 2020. Major construction projects in the region such as Pacific Highway upgrades and Clarence Correctional Centre are reflected by a significant sub-sector specialisation in heavy and civil engineering construction (LQ of 3.7).

With the delivery of two new hospitals (Grafton Base Hospital and Grafton Private Hospital) and a significant pipeline of major housing developments in the region, this specialisation can be leveraged to ensure the workforce development that occurs on major public works can also support sustainable growth of the industry going forward and the retention of workers in the region.

The **Public administration and safety** industry has also grown over the past decade, averaging 2.1% growth since 2011. Public administration and regulatory services, as well as public order and safety have been the strongest sub-sector performers, contributing \$175 million and \$53 million respectively to GVA to the region in 2020.

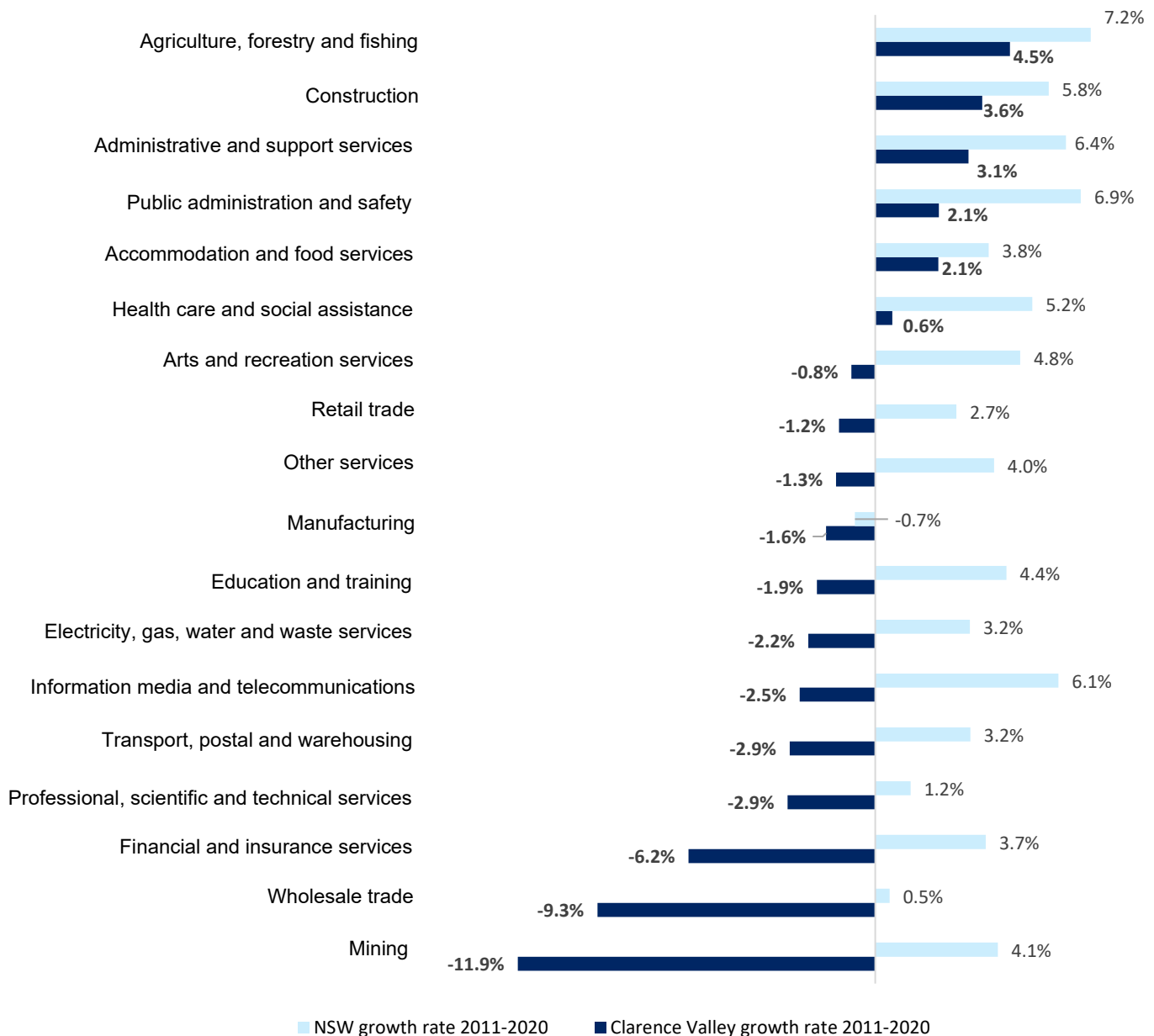


Figure 17: Change in GVA by Industry (% YoY), 2011-2020 (REMPPLAN, 2020).

# Clarence Valley 2023 endowments

## Review of the 2018 endowments

The 2018 REDS identified a diverse range of endowments underpinning Clarence Valley’s economy and regional competitiveness (see page 11). Despite recent shocks impacting many of these, consultation confirmed the following key endowments:

- Access to South East Queensland markets
- Arable Land
- Industrial Land
- New Grafton Bridge
- Summerland Way, Gwydir Highway and Pacific Highway
- Private capital investment
- Aboriginal culture and history



Figure 18: Fishing from a jetty near Maclean.

## New endowments

While not yet reflected in the employment and industry specialisation (LQ) analysis, recent investments and policy efforts have led to the creation of new endowments that can underpin new economic opportunities and future specialisations in the Clarence Valley.

+ Clarence Canoe and Kayak Trail	This is the longest mapped whitewater trail in Australia, covering more than 195km of river between the Nymboi-Binderay National Park and the township of Copmanhurst.
+ Waterfront activation	Major waterfront precinct developments in Grafton, Ulmarra and Maclean have improved riverine and coastal amenity for visitors and enhanced liveability for local residents
+ Northern Rivers Reconstruction Corporation (NRRC)	The NRRC will help the collaborative capacity of the region to support industry growth and rebuild after the floods, by working closely with local councils and key government agencies.

---

## 8. Looking ahead: Strategic opportunities for growth, resilience and liveability

Opportunities and vulnerabilities in engine and emerging industries

### Healthcare and social assistance

GVA (2020, \$m)	271
Employment (2021)	3,927
LQ score (2020)	43
LQ residential care and social assistance (2020)	1.8
LQ healthcare services (2020)	1.1

#### Strengths

- The region's health network includes allied health services and hospitals in Grafton and Maclean offering emergency and specialised health services.
- The Clarence Valley region is home to a network of retirement and aged care homes, in conjunction with a strong cluster of social assistance services in Grafton. Further investments to deliver additional housing targeted at older residents is planned in parts of the region including Yamba.

#### Vulnerabilities

- A growing and ageing population will continue to increase demand for key health services, which will create ongoing challenges for the region's health system as it seeks to meet that demand.
- A shortage of medical professionals, nurses, carers and aides is also impacting the Clarence Valley region, with long wait times to access specialists and ongoing challenges being faced by the sector to meet current service capacity needs.
- Challenges associated with housing affordability and availability are exacerbating challenges associated with workforce attraction and retention. The relatively high prices in the region and low availability of housing are impacting the ability of the region to attract and retain the skilled health workers needed to meet healthcare demands.

#### Opportunities

- The 2021-22 NSW Budget allocated \$263.8 million to redevelop the Grafton Base Hospital, providing an opportunity to significantly improve the quality of facilities and services offered at the facility.
- Significant private investment into Grafton Private Hospital provides the opportunity for the development of a wider health precinct in the city, with plans also including a new specialist medical centre and purpose-built medical facility.<sup>[20]</sup>

## Agriculture, forestry and fishing

GVA (2020, \$m)	216
Employment (2021)	1,191
LQ score (2020)	4.15
LQ fishing, hunting and trapping (2020)	21
LQ forestry and logging (2020)	17.5
LQ aquaculture (2020)	18.4

### Strengths

- The agriculture, fishing and forestry industry represents a broad-based strength for the region, with sub-sector specialisations including sheep, grain, beef and dairy farming, fishing, hunting and trapping, poultry and other livestock, aquaculture and forestry and logging.
- Natural endowments include a significant supply of good quality arable agricultural land, extensive coastline, river access and large forested areas. High quality transport infrastructure links the region to major markets both north and south with the upgraded Pacific Highway.
- Rural land values increased by 22.9% in the Clarence Valley region over the past year, with high commodity prices, low interest rates and favourable seasonal conditions powering the strong growth.<sup>[21]</sup>

### Vulnerabilities

- External events have significantly impacted the industry since 2018, evident by the multiple environmental shocks in the form of bushfires, floods, drought, floods and COVID-19.
- The forestry sector in particular was significantly impacted by the 2019-2020 bushfires, with 81% of forestry land impacted and major damage done to a range of key infrastructure.<sup>[8]</sup>
- Recent inflationary pressures and supply chain challenges have placed upward pressure on key input costs such as production and freight transport costs (4.7% jump in service price in 2021-22). Freight costs represent a significant share of Gross Value of Farm Production (GVFP), with grains (27.4%) and beef (6.4%) both representing high-cost sectors.<sup>[22]</sup>

### Opportunities

- Development of the region's marine precincts can provide increased capability to expand domestic and international operations in key local agriculture, forestry and fishing specialisations.
- A continued focus on supporting the forestry industry's recovery from the long-term impacts of the bushfires and securing ongoing supply will help ensure the sector and related manufacturing industries can continue to be significant contributors to the regional economy.
- Supporting producers to explore opportunities to develop agritourism offerings can help enhance the region's visitor economy offering and provide additional income streams to producers.
- Opportunities exist to value add to the agriculture sector. These include opportunities associated with circular economy processing, as demonstrated by the project to use sugarcane biomass to develop mushroom bags at the Harwood Sugar Mill.<sup>[23]</sup>

## Manufacturing

GVA (2020, \$m)	157
Employment (2021)	997
LQ score (2020)	0.98
LQ sawmill products (2020)	22.4
LQ sugar and confectionary manufacturing (2020)	10.2

### Strengths

- The Clarence Valley's manufacturing specialisations are closely linked to the region's strength in agriculture, forestry and fishing.
- High quality transport connections, driven by the upgraded Pacific Highway, alongside access to the deep water Clarence River and a zoned working waterfront, including the Port of Yamba, ensures strong connections to a range of markets for manufacturers in the region.
- The region has a diversified manufacturing industry, with value-add activities including sugar and confectionary manufacturing (sugar cane), sawmill manufacturing (forestry and logging), grain and cereal products (grain and fruit tree farming), ship and boat manufacturing (fishing, hunting and trapping and aquaculture).

### Vulnerabilities

- Manufacturing in the region has experienced a decline in output greater than the NSW average over the period 2011 to 2020, with -1.6% average growth per year recorded. This reflects the broader declining in manufacturing across Australia.
- The significant impact of bushfires on the forestry sector created a medium- to longer-term challenge in ensuring sufficient supply is available for sawmill manufacturing in the region.

### Opportunities

- As a result of major disruptions to supply chains as part of the COVID-19 pandemic, an increased emphasis on sovereign capability and onshoring of value-add components of the supply chain, is providing significant opportunity for a return to growth within the region's manufacturing industry.
- The Harwood Marine Precinct provides a significant opportunity for growth to be consolidated in value-add activities pertaining to ships and boat manufacturing. Key endowments could also be leveraged for significant regional comparative advantage in this sector.<sup>[24]</sup>
- Investment to improve transport infrastructure connections to the Port of Yamba can help support growth in commercial and industrial activity associated with manufacturing across the region.

## Tourism

Visitor spend (2021, \$m) <sup>[19]</sup>	290
Employment (2021) <sup>a</sup>	4,882
LQ score (2020) <sup>b</sup>	1.52
LQ accommodation (2020)	2.2
LQ food services (2020)	1.3

<sup>a</sup> Summation of ANZSIC 1 digit Retail trade, Accommodation and food services, Arts and recreation services

<sup>b</sup> LQ score is for the Accommodation and food services industry.

### Strengths

- The Clarence Valley region benefits from a range of natural endowments including 100km of coastline with 36 beaches, the 195km long Clarence Canoe & Canoe Kayak Trail, Angourie Surfing Reserve, the Yuraygir Coastal Walk and over 5,000 square km of national and state parks.
- The regions substantial Aboriginal culture and history also represents a key human endowment for the visitor economy.
- The region has a wide range of significant annual events including the Grafton Jacaranda Festival, the Maclean Highland Gathering and July Racing Carnival.

### Vulnerabilities

- Externalities strongly influence industry performance. This has been demonstrated since 2018, with COVID-19 pandemic restrictions coming off the back of the bushfires resulting in a 53% drop in visitor numbers and 36% drop in visitor spend between 2019 and 2020.<sup>[19]</sup>
- An increase in the frequency of natural disaster events may negatively impact key natural endowments of the region, which underpin a large part of the region's visitor economy offering.

### Opportunities

- Large-scale investments in waterfront activation through the Grafton, Maclean and Ulmarra Riverside Precincts will support both increased local amenity and a more diverse visitor economy offering.
- There is potential to diversify the region's visitor economy offering through a focus on developing agritourism and experiential offerings that leverage the significant natural beauty of the region.
- Prioritising investments in wayfinding infrastructure to support the visitor economy can aid industry development and enable multi-day experiences in the region, which can support growth in spending by visitors in the region.
- A focus on facilitating partnerships with the local Aboriginal community can help leverage the significant cultural heritage of the region to support growth in cultural tourism.

## Key themes in stakeholder consultation

Stakeholders noted that natural disasters and the COVID-19 pandemic have challenged individual and community wellbeing in the region since 2018. However, sustained population growth and the region's increased desirability as both a tourism and residential destination have created opportunities for future growth, as long as key constraints associated with workforce and housing can be overcome.

### Visitor economy growth

Stakeholders highlighted that despite substantial interruptions from natural disasters and COVID-19 in the region, there has been a significant shift in the visitor economy with a range of significant new opportunities in the region.

The upgrades to the Pacific Highway have created a new economic environment, with the Grafton bypass enabling revitalisation and activation of the city centre, and Maclean emerging as a key Pacific Highway stopover destination. Stakeholders highlighted significant opportunity to grow the visitor economy, focussing on developing adventure, eco, agri and cultural tourism.

### Housing market challenges

Stakeholders highlighted key concerns around low levels of housing availability and significant house price increases in recent years, which may act as a key barrier to sustainable economic growth. Analysis of the region's housing market (see page 21) showed a price-to-income ratio above the NSW average, supporting the need to focus on actions to support increased housing supply in the region.

### Workforce constraints

While consultation participants acknowledged the economic opportunities provided by investments in major infrastructure and precinct based developments in the region, they also noted this has placed significant pressures on demand for labour across many sectors of the economy. Given a broader context of workforce shortages, and increased costs for key inputs such as freight, energy and transportation, these challenges are placing significant upward pressures on the cost of doing business.

### Aboriginal economic participation

Stakeholders identified local Aboriginal community economic engagement as a key priority for the region. Stakeholders outlined that LALCs are leading the development of new housing, supporting investment in commercial tourism infrastructure, and developing cultural tourism products. Stakeholders outlined that a key focus is on developing partnerships between government, business and the Aboriginal community to deliver long term economic benefits across the region.

## Clarence Valley REDS - 2023 Update strategies

Regional stakeholders noted that many of the 2018 strategies remained relevant to the Clarence Valley region but expressed a strong desire to update the strategies to reflect the current economic context faced by the region. Changes to the strategies have been made to:

- create a focus on fostering innovation in agriculture, forestry and manufacturing
- leverage natural endowments to support development of the visitor economy
- refocus the strategy around growing the population to focus on activating Grafton, Yamba and Maclean as key destinations for residential and commercial investment
- introduce a new strategy focused on building a more climate resilient region leveraging the mandate of the Northern Rivers Reconstruction Authority
- include a new strategy focused on protecting the Aboriginal culture of the region and enhancing Aboriginal economic prosperity through action to support business and social initiatives.

Reflecting the changes outlined above, the 2023 REDS Update strategies for the Clarence Valley region are listed below (amendments are highlighted in **bold**):

Amended	<b>Foster innovation</b> in ‘engines of growth’ for the region including agriculture, forestry and manufacturing industries.
Amended	Develop a visitor economy that takes advantage of <b>Clarence River</b> and the coast, <b>leveraging</b> the region’s adventure and nature tourism opportunities.
New	<b>Utilise the Northern Rivers Reconstruction Corporation mandate and local government collaboration to develop a more climate resilient economy and provide for future population growth and economic growth across the region.</b>
New	<b>Activate Grafton, Maclean and Yamba as desirable destinations for residential and commercial investment.</b>
New	<b>Protect and respect the Aboriginal culture and heritage of the Clarence Valley, while enhancing Aboriginal economic prosperity through business and social initiatives.</b>

## Key enablers of economic growth

A number of key enablers have been identified to assist with delivering each of the strategies. This list is non-exhaustive, with a focus on identifying priority short- to medium-term enablers. Responsibility for implementation of these enablers sits with various levels of government, and in some cases may also include business, industry or non-government bodies. Collaboration across these entities at a local level will be key to achieving results.

Strategy	New enablers		Lead and support	Rationale
<b>Foster innovation in ‘engines of growth’ for the region including agriculture, forestry and marine manufacturing industries.</b>	Government, regulation & information	Investigate new industrial uses of the region’s marine precincts and conduct a feasibility study into the infrastructure and dredging processes required to support the precinct activation.	<b>Clarence Valley Council,</b> Clarence Chamber of Commerce, Port Authority of NSW	Maximise value-add capture from the Clarence Marine Precincts.



Strategy	New enablers		Lead and support	Rationale
<p><b>Develop a visitor economy that takes best advantage of the Clarence River and the coast, leveraging the region's adventure and nature tourism opportunities.</b></p>	<p>Government, regulation &amp; information</p>	<p>Develop an activation strategy for water based adventure and nature tourism from Grafton to Nymboida.</p>	<p><b>Clarence Valley Council,</b> Destination North Coast, Department of Regional NSW (DRNSW), Business chambers, Destination NSW</p>	<p>Grow and diversify the region's visitor economy by growing clusters around adventure and nature-based tourism.</p>
	<p>People and skills</p>	<p>Leverage the region's 'My Clarence Valley' brand to develop and expand businesses based in riverside precincts in the region.</p>	<p><b>Clarence Valley Council,</b> Destination North Coast, DRNSW, Investment NSW, Destination NSW</p>	<p>Given the region's strength in attracting private investment, a strategy should centre around strong investment in waterfront activation.</p>
<p><b>Utilise the Northern Rivers Reconstruction Corporation mandate and local government collaboration to develop a more climate resilient economy and provide for future population and economic growth across the region.</b></p>	<p>Government regulation and information</p>	<p>Adopt a regional approach to economic recovery and reconstruction to build local business and workforce capability and maximise opportunities for local employees, businesses and Aboriginal communities.</p>	<p><b>Northern Rivers Reconstruction Corporation,</b> Clarence Valley Council, DRNSW</p>	<p>Leverage region-wide opportunities to support sustainable economic growth and recovery.</p>
	<p>Land use</p>	<p>Prioritise coordinated land use planning and overcoming planning complexities to accelerate the release and development of land for residential, commercial, and industrial uses and support the delivery of enabling infrastructure.</p>	<p><b>Northern Rivers Reconstruction Corporation,</b> Clarence Valley Council, Department of Planning and Environment (DPE) Planning</p>	<p>Find productivity gains in housing approval process.</p>

Strategy	New enablers		Lead and support	Rationale
<p><b>Activate Grafton, Maclean and Yamba as desirable destinations for residential and commercial investment.</b></p>	<p>Infrastructure</p>	<p>Support council to use the Connectivity Index Tool following its 2023 release to review existing coverage and identify the areas of greatest need in the region for upgrades to telecommunications infrastructure.</p>	<p><b>NSW Telco Authority,</b> Clarence Valley Council, DRNSW</p>	<p>Improve the region’s capability to meet growing demand for a growing population including remote workers, which climbed during the COVID-19 pandemic.</p>
<p><b>Protect and respect the Aboriginal culture and heritage of the Clarence Valley, while enhancing Aboriginal economic prosperity through business and social initiatives.</b></p>	<p>Government, regulation &amp; information</p>	<p>Facilitate partnerships with local Aboriginal organisations to develop new tourism offerings.</p>	<p><b>Clarence Valley Council,</b> Local Aboriginal Land Councils (LALCs), Traditional Owners Aboriginal Corporations (TOACs), Clarence Chamber of Commerce, DRNSW, Destination North Coast, Destination NSW</p>	<p>Improve economic outcomes for local Aboriginal communities, leveraging region’s tourism specialisation.</p>
	<p>People and skills</p>	<p>Provide training pathways for local Aboriginal people to develop skills in project management and business administration.</p>	<p><b>Training Services NSW,</b> Clarence Valley Council, LALCs, TOACs, TAFE NSW</p>	<p>Grow entrepreneurship and employment prospects for Aboriginal youth in the region, leveraging major projects to build industry-ready skills.</p>

---

## 9. References

1. NSW Government (2022), *National disaster declarations*, <https://www.nsw.gov.au/disaster-recovery/natural-disaster-declarations>
2. DRNSW (Department of Regional NSW) (2022), Grants Data.
3. CVC (Clarence Valley Council) (2021), *Water Restrictions Policy*, [www.clarence.nsw.gov.au/Council/Governance-and-transparency/Policies/Water-restrictions-policy](http://www.clarence.nsw.gov.au/Council/Governance-and-transparency/Policies/Water-restrictions-policy)
4. Rubbo, L et al. (2022), *Big River Milk the latest dairy farm to shut its gates amid price and drought pressure*, ABC News, <https://www.abc.net.au/news/rural/2019-12-02/big-river-milk-shuts-down-amid-drought-pressure/11756724>
5. Department of Customer Service (2022), Outcomes of Business Sentiment Survey
6. DSS (Department of Social Services) (2022), *DSS Payment Demographic Data*, <https://data.gov.au/data/dataset/dss-payment-demographic-data>
7. Destination NSW (2021), *NSW State Tourism Statistics – North Coast Region*, <https://www.destinationnsw.com.au/tourism/facts-and-figures/regional-tourism-statistics/north-coast-region>
8. DRNSW (2020), REDS Bushfire Impact Addendum – Clarence Valley
9. National Emergency Management Agency (2022), *LGA Profiles*, <https://nema.gov.au/data#/map>
10. Rachwani, M and Kelly, C (2022), *NSW Floods: destructive weather moves south*, The Guardian, <https://www.theguardian.com/australia-news/2022/mar/31/nsw-floods-destructive-weather-moves-south-as-water-begins-to-recede-in-lismore>
11. PricewaterhouseCoopers (2022), Flood Impacts Business Survey
12. CVC (2022), *The coordinated effort to fix flood-damaged roads*, <https://www.clarence.nsw.gov.au/News-articles/The-coordinated-effort-to-fix-flood-damaged-roads>
13. ABS (Australian Bureau of Statistics) (2022), *More growth in the regions during the pandemic*, <https://www.abs.gov.au/media-centre/media-releases/more-growth-regions-during-pandemic>
14. Nissen, S et al. (2020), *Young people and environmental affordances in urban sustainable development: insights into transport and green and public space in seven cities*, Sustainable Earth Review 3(17) <https://sustainableearth.biomedcentral.com/articles/10.1186/s42055-020-00039-w>
15. CVC (2021), *Clarence Valley Community Energy and Emissions Reduction Strategy*, <https://www.clarence.nsw.gov.au/Council/Our-performance/Plans-and-strategies/Renewable-Energy-and-Emissions-Reduction-Strategies>
16. AdaptNSW (2022), *Climate change will exacerbate natural disasters including flooding*, <https://www.climatechange.environment.nsw.gov.au/climate-change-will-exacerbate-natural-disasters-including-flooding>
17. Department of Communities and Justice (2022), *Rent and Sales Report – interactive dashboard*, <https://www.facs.nsw.gov.au/resources/statistics/rent-and-sales/dashboard>
18. Analysis using ABS census and CoreLogic median dwelling price data

19. Tourism Research Australia (2022), *Visitor and Expenditure data*, [www.tra.gov.au/data-and-research](http://www.tra.gov.au/data-and-research)
20. Health Project Services (2022), *New Grafton Private Hospital and Specialist Centre*, <https://www.healthprojectservices.com.au/latest-projects/grafton>
21. NSW Valuer General (2022), *Report on NSW land values as at 1 July 2021*, [https://www.valuergeneral.nsw.gov.au/\\_data/assets/pdf\\_file/0018/230274/Valuer\\_Generals\\_Report\\_on\\_NSW\\_Land\\_Values\\_at\\_1\\_July\\_2021.pdf](https://www.valuergeneral.nsw.gov.au/_data/assets/pdf_file/0018/230274/Valuer_Generals_Report_on_NSW_Land_Values_at_1_July_2021.pdf)
22. IBISWorld (2022), *Road freight service price June 2022*.
23. Clarence Valley Independent (2021), *The sweet business of mushroom grow bags*, *Australian Rural and Regional News*, <https://arr.news/2021/08/11/the-sweet-business-of-mushroom-grow-bags/>
24. Invest Regional NSW(2022), *Harwood Marine Precinct*, <https://www.investregional.nsw.gov.au/harwood-marine-precinct/>



Figure 19: Jacaranda season in the Clarence Valley region.