

Wimmera Southern Mallee

Regional Economic Development Strategy (REDS) 2026

Regional Economic Development Strategies (REDS)

▶ **Victoria's Regional Economic Development Strategies (REDS) were released in 2022 and identified strategic directions to further drive growth and prosperity in regional Victoria**



RDV's REDS are prepared for each Regional Partnership region

(9 in total)

Role of the REDS

- The REDS play a foundational, place-based role in Victoria’s economic policy landscape by translating whole-of-government priorities into region-specific economic reform and investment agendas.
- The REDS provide a consistent evidence-based framework for understanding Victoria's regional economies.

How to use the REDS

- The REDS can be used by all levels of government, regional communities, and businesses to work together, innovate, tackle challenges and make targeted investments to achieve stronger outcomes for their region.
- Regional communities and businesses can use the REDS to:
 - communicate innovative capacity in their region, now and in the future
 - collaborate with government to better understand regional strengths, challenges and opportunities
 - attract investment to the region based on clearly identified strategic priorities.

REDS interactive data dashboards

9 interactive data dashboards—one for each Regional Partnership—complement the REDS, providing deeper insights into economic performance and regional trends.

Explore the region’s dashboard:

[View Wimmera Southern Mallee Dashboard](#)

<https://www.rdv.vic.gov.au/priorities/reds>

Refreshing the REDS in 2026

▶ The 2026 REDS translate Victoria’s current strategic policy directions into place-based economic opportunities

Why REDS Refresh in 2026?



- Time has passed since the original 2022 REDS.
- The 2022 REDS established a strong, evidence-based foundation, but underlying data, economic conditions and forecasts have evolved significantly.
- The refresh incorporates major policy developments since 2022—particularly Victoria’s Economic Growth Statement and Victorian Industry Policy—ensuring regional priorities remain aligned with whole-of-government direction.
- New economic opportunities, sector shifts and investment priorities have emerged across regions, requiring an updated, place-based lens.
- The 2026 refresh does not replace the 2022 REDS. It selectively updates data, insights and priorities where change has occurred, while retaining the core strategic intent.
- The 2022 REDS remain a valid and standalone product. The refresh builds on this foundation, ensuring continuity while strengthening relevance for current decision-making.

Why REDS Refresh in 2026?



- **Boosting productivity is central** to Victoria’s long-term economic growth, workforce capability and prosperity. Achieving this will require coordinated economy-wide, sectoral and place-based initiatives.
- **Priority sectors underpinning growth** include advanced manufacturing and defence, health technologies, circular economy (including renewable energy), digital technologies, agribusiness and critical minerals.
- Many of these **knowledge-intensive, export-oriented sectors are regionally concentrated**, presenting significant opportunities to drive regional growth and prosperity.

Wimmera Southern Mallee REDS 2026

▶ **The Wimmera Southern Mallee REDS Refresh revisits the strategic directions for the region, reflecting place-based opportunities under Victoria’s Economic Growth Statement and key economic development policies that were released since 2022**

2022 REDS Strategic Directions

In 2022, RDV delivered the Wimmera Southern Mallee REDS which identified place-based strategic directions to drive economic growth.

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

[Click here to read the 2022 REDS](#)

2026 REDS Refresh Opportunities & Priorities

Since 2022, new opportunities and priorities have emerged that are shaping economic development across the region.

- 5 **Harness the maturing critical minerals sector to drive sustained regional investment**
Wimmera Southern Mallee sits above one of Australia's most significant critical minerals deposits, with several major projects progressing through approvals and investment decisions. As global demand for critical minerals accelerates, the region is well positioned to emerge as a nationally significant production hub, attracting investment.
- 6 **Grow food manufacturing to add value to regional land use**
Wimmera Southern Mallee has a strong agricultural base, contributing 47.5% of the region’s GVA.¹ A growing pipeline of food processing investment presents an opportunity to expand local value-adding, transforming primary produce into higher-value products before export – while creating skilled manufacturing jobs and boosting regional productivity and growth.

See pages 5, 6, 21-23 for further detail on these emerging opportunities and priorities, as well as how existing strategic directions have developed in the region since the 2022 REDS.

Enablers and investments supporting REDS strategic directions

2022 REDS Strategic Directions *(See appendix for extended analysis)*

	Development since the REDS	Alignment with state and local priorities since the REDS
Strengthen agriculture and food product manufacturing through diversification	▪ Strengthening higher-value, diversified agricultural production and increasing regional capture of supply chain and export value ▪ Enhancing innovation, productivity, and commercialisation in advanced and intensive agriculture ▪ Expanding logistics and cold chain infrastructure, improving efficiency, market access, and global competitiveness	▪ Victorian Innovation Statement ▪ Victorian Investment Fund ▪ Economic Growth Statement ▪ Trunk Infrastructure Fund ▪ Victorian Industry Policy
Promote growth and development of the visitor economy, leveraging natural assets and Aboriginal heritage	▪ Strengthening regional branding and visitation appeal, supporting local business activity through cultural tourism ▪ Enhancing and diversifying tourism offerings, attracting new visitor segments and increasing engagement ▪ Expanding destination networks and dispersing visitor spend across the region, supporting smaller communities	▪ Regional Worker Accommodation Fund ▪ First Peoples Tourism Plan for Victoria
Support and expand economic opportunities in growing sectors (health and social services)	▪ Addressing critical workforce shortages by improving housing availability for health care workers	▪ Regional Worker Accommodation Fund ▪ Victorian Skills Plan ▪ Victorian Health Workforce Strategy ▪ Victorian Health Services Plan
Position the region to benefit from emerging growth opportunities in natural resources.	▪ Unlocking investment and job creation, positioning the region within global critical minerals and clean energy supply chains ▪ Strengthening renewable energy generation and storage, supporting energy security and enabling industrial growth aligned with decarbonisation ▪ Building a strong pipeline of energy and mineral projects, attracting capital, boosting investor confidence, and supporting sustained regional employment	▪ Victorian Critical Minerals Roadmap ▪ Renewable Energy Zones (REZ) Program ▪ Victoria's Climate Change Strategy

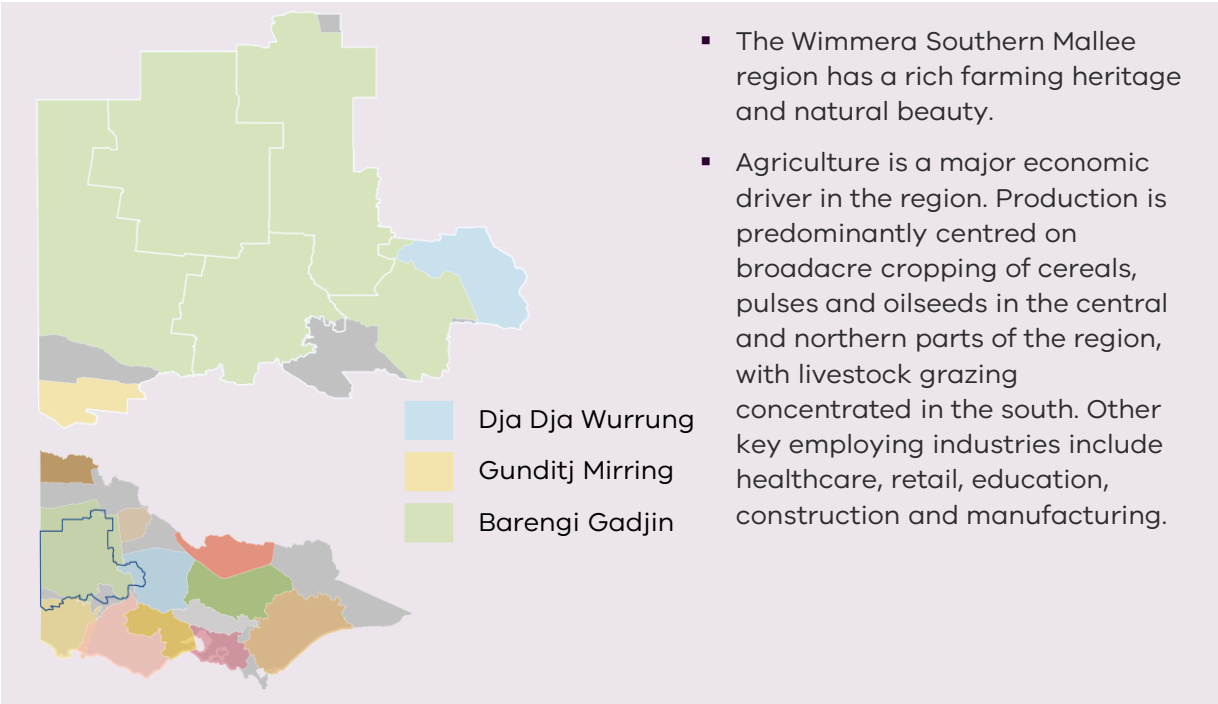
Enablers and investments supporting REDS strategic directions

2026 REDS Refresh Opportunities & Priorities

(See appendix for extended analysis)

	Significance	Supporting projects and catalysts to support future growth	
Harness the maturing critical minerals sector to drive sustained regional investment	With multiple major projects now moving through approvals and investment decisions, Wimmera Southern Mallee is positioned to become a nationally significant critical minerals production hub, attracting long-term industrial investment as global demand accelerates.	Supporting projects - Astron Donald Mineral Sands Mine - Iluka WIM100 rare earths project progressed - WIM Resources Avonbank mining licence approved - Northwest Mining Collaboration established - Resource Ready framework	Catalysts to support future growth - Critical Minerals Roadmap 2.0 - Localised supply chain mapping to grow regional business capture - Business capacity uplift - Maroona to Portland rail freight upgrades
Grow food manufacturing to add value to regional land use	A growing pipeline of food processing investment is capturing more value from the region's world-class agricultural output locally, creating skilled manufacturing jobs and further driving economic growth and productivity.	Supporting projects - Farm Frites potato processing facility - Thomas Foods Cold Storage expansion - Peng Cheng wheat starch processing facility	Catalysts to support future growth - Trunk infrastructure investment in wastewater - Electricity grid upgrades - Biogas infrastructure

Wimmera Southern Mallee Regional Profile



Key Economic Statistics

Metric	Wimmera Southern Mallee	Regional Victoria	Metropolitan Melbourne
Population ¹ (2025)	48k	1.7m	5.3m
Population Growth ¹ (2020 – 2025)	-1.6%	6.1%	7.2%
GRP ² (2025)	\$4.1b	\$115.8b	\$494.7b
GRP Growth ² (2020 – 2025)	29.7%	12.5%	11.9%
Unemployment Rate ³ (Mar 2026)	1.9%	3.7%	4.8%
Unemployment Rate Change ³ (Mar 2021 – Mar 2026)	-1.2% pts	-1.1% pts	-2.4% pts
Employment Growth ² (2020 – 2025)	3.1%	9.7%	13.0%

Wimmera Southern Mallee Top Employing Industries²

1.		Agriculture, Forestry and Fishing	4,100	4.		Education and Training	2,200
2.		Health Care and Social Assistance	3,800	5.		Construction	1,900
3.		Retail Trade	2,400	6.		Manufacturing	1,400

Wimmera Southern Mallee's growth is driven by strong economic gains underpinned by strong agricultural production

Population

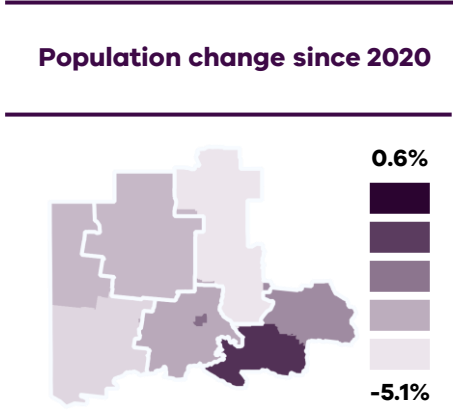
48k

Population
(2025)¹

 **-1.6%**
Since 2020

Population growth in Wimmera Southern Mallee is behind regional and metropolitan averages

- Wimmera Southern Mallee is home to 47,700 people, with population contracting by 1.6% over the past 5 years, contrasting increases in both regional Victoria (6.1%) and metropolitan Melbourne (7.2%).¹
- Over the past year, the population within Northern Grampians increased by 0.7%.¹



Gross Regional Product

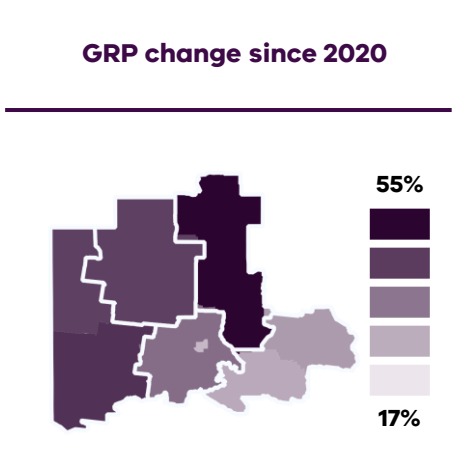
\$4.1b

GRP
(2025)²

 **+29.7%**
Since 2020

Growth in Wimmera Southern Mallee's economy has outpaced both metropolitan and regional averages

- Agriculture, Forestry & Fishing remains a key economic driver, with its share of gross value add (47%) exceeding its share of employment (17%), indicating strong productivity.²
- Economic growth is driven by Agriculture, Forestry & Fishing. The sector's GVA grew by 73% since 2020 and accounted for almost 92% of the region's total GVA growth over that period.²



Employment

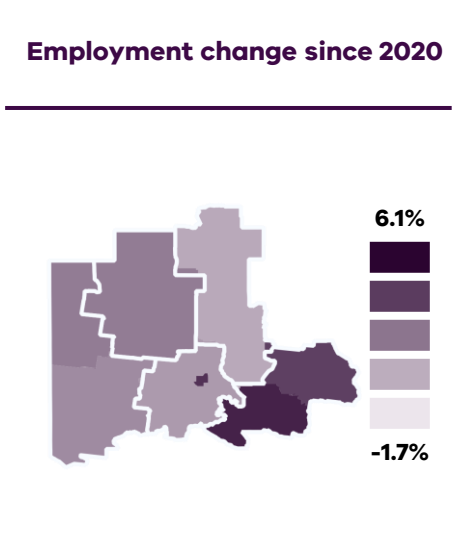
23k

Employed
(2025)²

 **+3.1%**
Since 2020

Wimmera Southern Mallee's employment growth is underpinned by the care economy

- Service-based sectors are driving employment growth, with Education & Training, Retail Trade and Professional, Scientific & Technical Services are amongst the industries observing largest increase in number of workers.
- Demand for Health Care & Social Assistance workers is expected to remain strong, with 2,300 new roles by 2035 (35% of new workers), significantly above its current 20% share and higher than regional and metropolitan benchmarks.³



Unemployment Rate

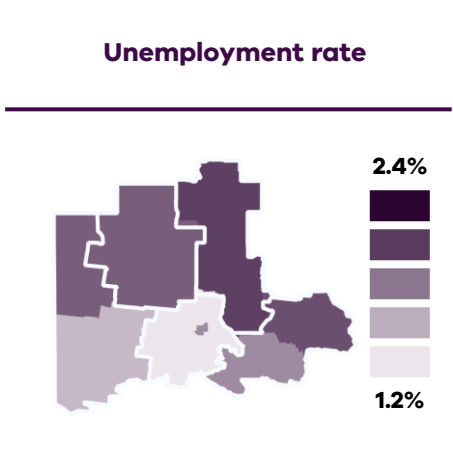
1.9%

Unemployment Rate
(Mar Qtr 2026)⁴

 **-1.2% pts**
Since Mar Qtr 2021

The Wimmera has a tight labour market, with an unemployment almost half the regional Victorian average

- The region's labour market has tightened over the past 5 years, with unemployment falling by 1.2 percentage points to 1.9%, well below both regional Victoria (3.7%) and Melbourne (4.8%).⁴
- The low unemployment rate within the Wimmera is an indication of skills shortages in the region. Attracting and retaining key workers to the regional is a key component of economic growth.



Key industry strengths driving Wimmera Southern Mallee's economy



Primary Agriculture Production

With **77% of the land** in Wimmera Southern Mallee **used for primary production**,¹ the region has a strong comparative advantage in agriculture. **Wheat, sheep meat and barley** are its **highest-value agricultural commodities**.² Reflecting this strength, the Agriculture sector generates **\$1.6 billion in GVA** and supports **3,700 jobs**.³



Mineral Resource Endowments

Wimmera Southern Mallee holds **75% of Victoria's mineral sands deposits**,⁴ giving the region a significant natural advantage for future mining development, jobs and growth. **The Donald Sands and Avonbank Mineral Sands projects** will harvest critical minerals such as **titanium, zinc, and rare-earth resources**. The Donald project is estimated to add **\$205 million annually to GRP**,⁵ and the Avonbank project will create nearly **600 jobs**.⁶ The region's significant gold reserves also present further opportunities for future development.



Renewable Energy

Wimmera Southern Mallee is at the forefront of the Victoria's transition to renewable energy, supported by major projects such as the **SEC Horsham Solar Farm, Wimmera Plains Energy Facility** and the **West Wind Energy Park**. The region is also home to the **Western Renewable Energy Zone (REZ)**, covering the corridors between Stawell and Donald, and Dooen and Hopetoun. The region accounts for **29% of the state's operating wind energy projects**.⁷



Visitor Economy & Creative Industries

The region's diverse natural assets and cultural heritage are strengths for the visitor economy, with attractions including the **Grampians National Park**, the **Silo Art Trail**, the **Wimmera River** and a range of **agritourism events**. Tourism contributed **\$465 million in visitor spending** in year ending June 2026.⁸ The Wimmera's creative and performing arts activities have also grown by **59% since 2020**,³ driven by the Cultural Assets of First Peoples groups and the Brambuk Cultural Centre.

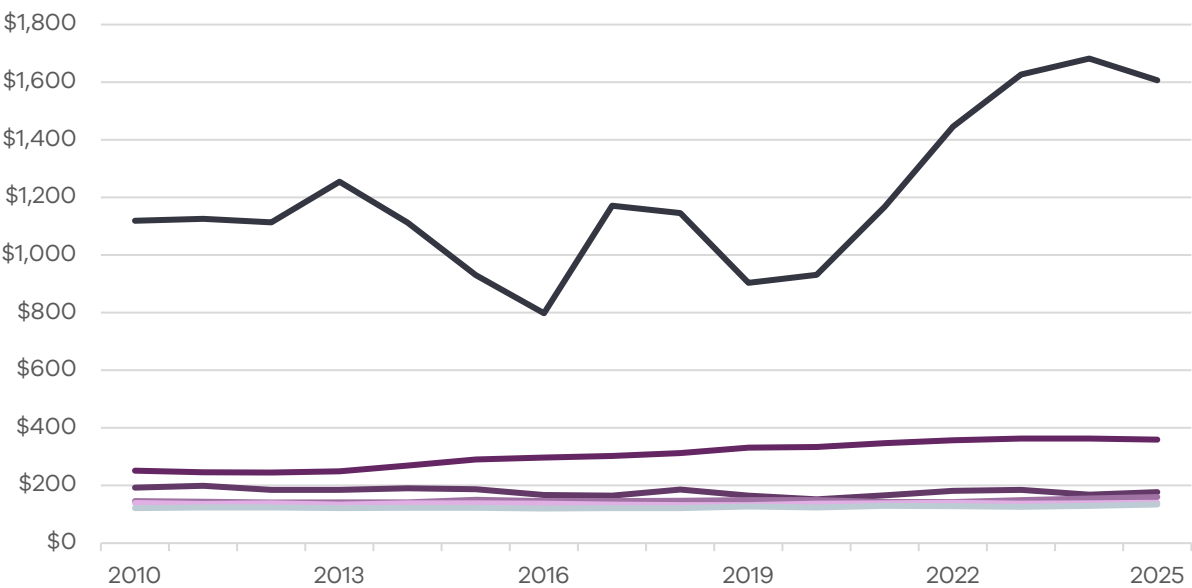
Key industry strengths driving Wimmera Southern Mallee’s economy

Agriculture, Forestry and Fishing was the largest and fastest growing industry in Wimmera Southern Mallee in 2025, accounting for almost half (47%) of total GVA in the region.³

- Wimmera Southern Mallee’s economy is driven by the strength of its primary production base. Since 2020, Agriculture, Forestry & Fishing increased in value by 73% and now accounts for almost half of the region’s GVA.³
- Agriculture’s share of GVA relative to employment underscores the sector’s strong productive capacity.
- Services-based and population-driven industries have also grown strongly, with Health Care & Social Assistance, Construction, Retail Trade, Education & Training and Professional Scientific & Technical Services expanding by a combined \$85 million since 2020.³

Wimmera Southern Mallee gross value added for key industries

National Institute of Economic and Industry Research (NIEIR)



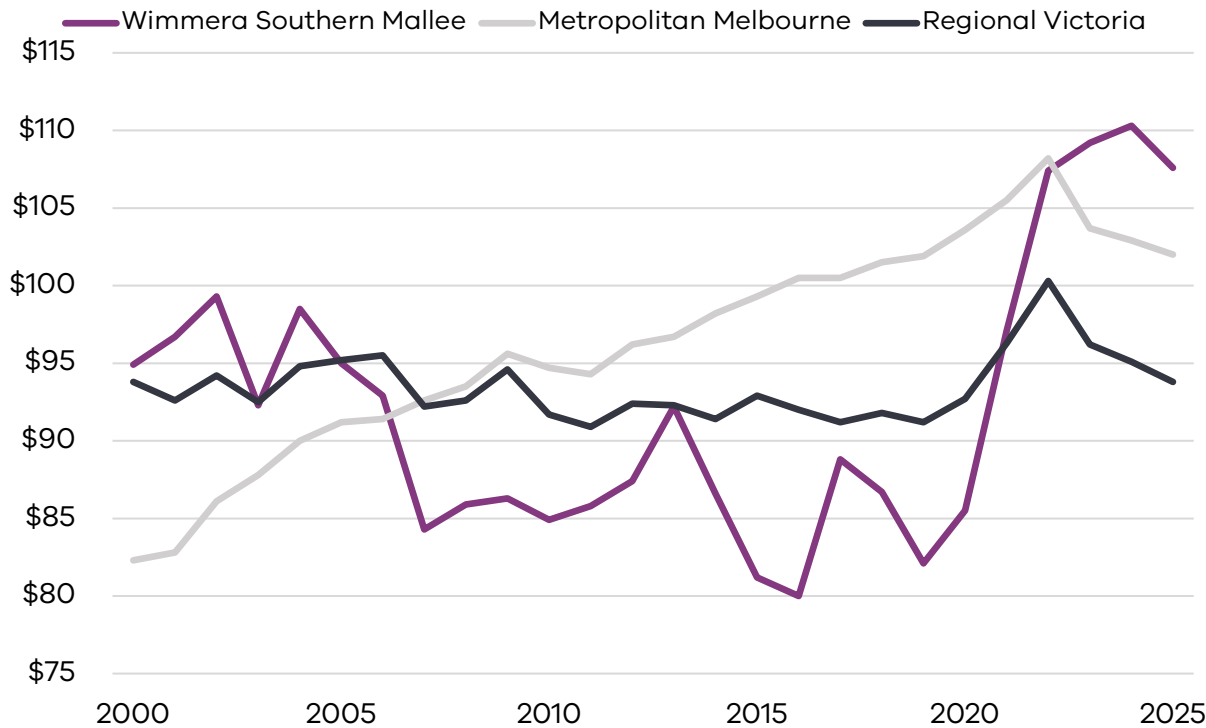
Top sectors by GVA¹

	Industry 1-digit ANZSIC	GVA (\$M)	5-Year Change
—	Agriculture, Forestry and Fishing	\$1,607	72.7%
—	Health Care and Social Assistance	\$359	7.6%
—	Construction	\$177	16.7%
—	Retail Trade	\$160	7.5%
—	Public Administration and Safety	\$140	1.9%
—	Manufacturing	\$134	7.9%

Boosting productivity and growing high-value industries is critical to the region’s economic future

Labour Productivity (GRP per hour Worked)

Dollars, NIEIR, 2000-2025



Over the short-term, productivity growth in the region has been strong, driven by the performance of its key economic driver – agriculture

- Wimmera Southern Mallee’s labour productivity has risen sharply since 2020, reflecting strong commodity prices, supply chain and export recovery, and capital deepening.
- Growing productivity remains a key opportunity to lift incomes, competitiveness and long-term economic growth.

High-value industries provide the strongest pathway to productivity growth

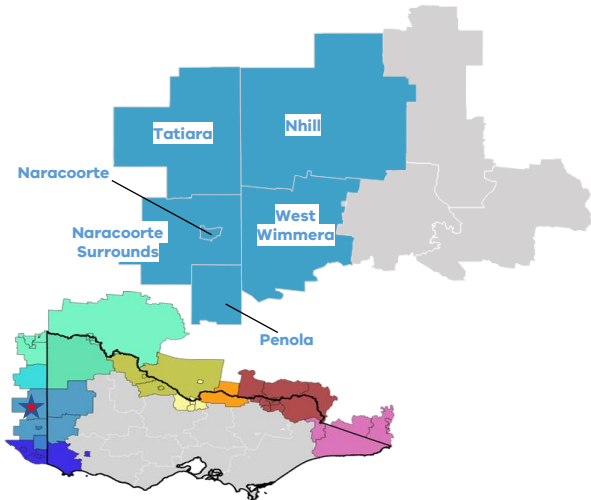
- Several priority sectors identified through the Wimmera Southern Mallee REDS, including Agri-Food, are among the region's most productive industries.
- Since 2020, the region has experienced strong GVA growth in highly-productive sectors with a skilled workforce, including: Agriculture, Forestry & Fishing (73%) and Information Media & Telecommunications (90%).¹
- Continued growth in these sectors will increase the share of economic activity occurring in higher-value, higher-productivity industries.

Skills and innovation are critical enablers of future productivity

- The region's research and education assets such as Federation University TAFE (Nhil Campus) and Longerenong College provide a strong foundation for workforce capability and innovation.
- The Grains Innovation Park in Horsham is the major site of research and development for the grains industry. This hub focused Wimmera Southern Mallee’s most significant industry will continue to have a significant impact on productivity and economic growth within the region.
- Labour productivity exceeds both regional Victoria and metropolitan benchmarks. Continued investment in value-adding industries and workforce skills will compound productivity gains and diversify the region's economic base.

Key assets in the West Wimmera Cross Border Economic Region are fundamental to realising economic growth in the region

West Wimmera Cross Border Economic Region (CBER)



West Wimmera

* Note: each colour in the map above denotes a CBER, the West Wimmera CBER is defined by the SA2 boundaries of West Wimmera, Tatiara, Penola, Nhill Region, Naracoorte Surrounds, and Naracoorte.

Opportunities for Economic Growth

- The West Wimmera CBER is primarily agricultural, contributing 56% of GVA and 32% of employment,² with strengths in grain, sheep and wool, and scope to **expand agri-food processing**.
- The region has a strong tourism base (264,400 overnight trips and 346,900 day trips annually)⁵ and can further leverage assets such as the world heritage listed Naracoorte Caves in South Australia, Little Desert National Park and the Coonawarra wine region to **further grow tourism in the region** through cross-border collaboration and promotion.
- Intensive animal farming is a key industry, with **large scale production of livestock, and poultry operations**, including broiler farms, pig farms and cattle feedlots.
- The region is well positioned to **benefit from high-grade critical minerals deposits** within and nearby, creating opportunities for growth.
- Proximity to Horsham’s titanium, zirconium, and rare earth deposits presents **supply-chain expansion opportunities across transport, logistics, maintenance, and specialised manufacturing**, while supporting employment diversification in Nhill and the wider West Wimmera.



Key Population Centres/ Service Hubs

Nhill (Vic), Kaniva (Vic), Bordertown (SA), Naracoorte (SA)



Key Tertiary Education Providers

Federation TAFE (Nhill campus), TAFE SA (Naracoorte campus)



Transport Corridors & Strategic Assets

Western Highway, Wimmera Highway, Naracoorte Airport, Bordertown Aerodrome, Nhill Aerodrome



Largest Industries and Related Assets

Agriculture, Forestry and Fishing:

Naracoorte Regional Livestock Exchange, JBC Border Town Abattoir

Manufacturing

Teys (Naracoorte), The Union Dairy Company (Penola), Luv-a-Duck (Nhill), Edenhope Abattoir (Edenhope)

Tourism

Silo art trail Vic, Coonawarra wine region SA and Nature based tourism: (world heritage listed Naracoorte Caves in SA, and Little Desert National Park, Lakes Hindmarsh and Wallace and Mount Arapiles in Vic)

Health Care & Social Assistance

West Wimmera Health Service (Nhill), Keith & District Hospital, Naracoorte Hospital



Journey to work flows

More than 200 workers cross the border between Victoria and South Australia. 59% were outflows from Victoria into South Australia.⁴



Other Activity Flows

Food processing, rare earth and mineral sands, tourism, sport and health service centres

Key economic indicators show improvement in socio-economic outcomes.

Metric	West Wimmera
Population ¹ (2025)	28.6k
Population Growth ¹ (2020 – 2025)	-0.5%
GRP ² (2025)	\$2.4b
GRP Growth ² (2020 – 2025)	22.0%
Unemployment Rate ³ (Mar 2026)	2.1%
Unemployment Rate Change ³ (Mar 2021 – Mar 2026)	-1.1% pts
Employment Growth ² (2020 – 2025)	2.9%

First Peoples-led economic development in the Wimmera Southern Mallee

The 2022 Wimmera Southern Mallee REDS highlighted six priority opportunities that may contribute to First Peoples’ economic aspirations and support self-determined economic opportunities



Natural Resources & Traditional Practices
Identify opportunities to leverage natural resources for economic benefit, including through adopting traditional hunting and agricultural techniques and practices.



First Peoples Land Ownership & Resource Management
Pursue greater First Peoples ownership of land and water to sustainably manage resources.



Cultural Significance, Recognition & Healing
Promote recognition of the land, its waters and its cultural significance to ensure economic activities generate benefits where degradation can be avoided and existing damage healed.



Cultural Practices, Places & Traditions
Encourage the use of cultural places and practices as a mechanism for telling stories, maintaining traditions and creating economic opportunities.



First Peoples Participation across Industries
Enhance First Peoples participation across industries with a particular focus on occupations which serve the local indigenous population and the environment.



First Peoples Economic Participation
Pursue opportunities for greater First Peoples participation in economic activities, including enterprise development and investment, which creates employment opportunities.

First Peoples-led economic development in action

First Peoples-led strategies and investments are building economic capability and creating pathways across the region.

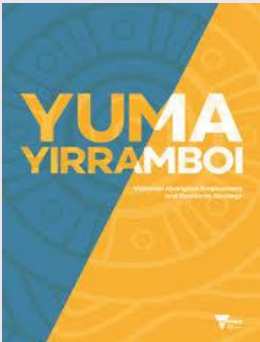


Barengi Gadjin Land Council - Wimmera Community Services



Dalki Garringa Native Nursery

Evidence of momentum



Key economic indicators show improvement in socio-economic outcomes between 2016 and 2021.



First Peoples participation rate increased by 7.2% points¹



First Peoples unemployment rate decreased by 4.5%¹ points



First Peoples 15-24 year olds not in work or study decreased by 0.4% points¹



First Peoples households earning below \$650 per week decreased by 13.9% points¹

Opportunities to strengthen inclusive growth in the Wimmera Southern Mallee

Build on First Peoples Economic Strengths

Almost half of all First Peoples workers in the region (47%) are employed in service-based sectors, including Health Care & Social Assistance, Education & Training, Retail Trade and Construction.¹ First Peoples workers are underrepresented in Agriculture, Forestry & Fishing, accounting for under 1 in 10 of the First Peoples workforce compared to approximately 1 in 5 (18%) for the broader community.¹ Closing this gap in one of the region’s strongest industries presents an opportunity to drive more inclusive economic growth.

Focus Investment Across Communities

Horsham, Nhill Region, St Arnaud, Stawell, West Wimmera and Yarriambiack all rank within the bottom 30% statewide on the The Index of Relative Socio-economic Disadvantage (IRSD)³, while Horsham Surrounds ranks in the top 30% statewide.³ Over the past 5 years, rankings have improved in the Northern Grampians, Horsham and Yarriambiack, declined in Hindmarsh, and remained stable in West Wimmera.³ Ensuring that economic growth benefits all communities will be critical to achieving inclusive regional prosperity.

Boosting Female Participation

The female participation rate in the North West is 58%, an increase of 2.3% pts over the last 5 years, a growth greater than regional Victoria (1.9% pts) but below metropolitan Melbourne (2.5% pts).⁴ The female participation rate remains below male participation in the region (66%) and below that of the female participation in metropolitan Melbourne (65%) and regional Victoria (59%).⁴ Female employment in the North West experienced growth over the past 5 years (3.4%).⁴ However, this growth is below both metropolitan (18%) and regional Victorian (9.2%) averages.⁴ Boosting female participation in the workforce can further enhance economic growth.

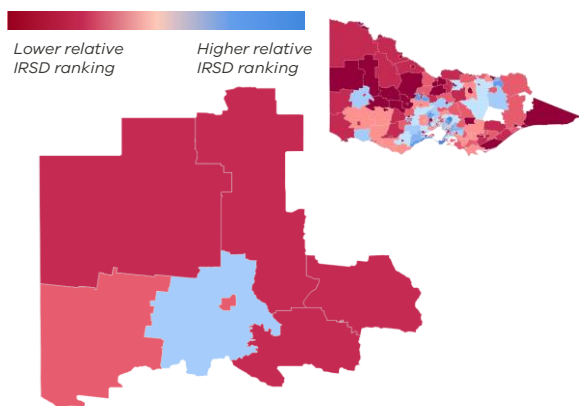
Expand Pathways for Young People into the Workforce

The youth (15-24) unemployment rate in Victoria’s North West is currently 9.2%, more than twice the unemployment rate of all age cohorts within the region (3.6%). The North West youth unemployment rate has also increased by 1.5% pts over the past 5 years, faster than the growth rate observed for all cohorts in the region (0.4% pts).⁴ Almost half (49%) of the region’s First People's residents are aged under 25, with First People's residents in the region aged under 25 increasing by 21% over the last 5 years.² Supporting the youth workforce can increase labour supply capacity and help to further stimulate economic growth in the region.

Socio-economic conditions vary across the Wimmera Southern Mallee, highlighting opportunities for targeted investment

Index of Relative Socio-Economic Disadvantage (IRSD)

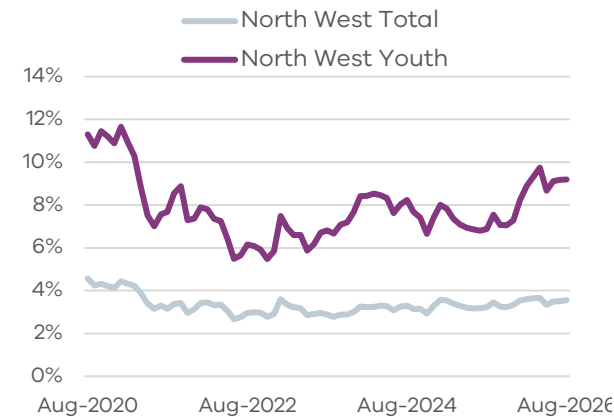
SEIFA, ABS Census (2021), SA2



There is an opportunity to close the gap between the youth unemployment rate in the Wimmera Southern Mallee with the overall rate

Unemployment Rate (%), Youth (15-24) & Total

ABS (Aug-26), North West SA4



Unlocking affordable housing supply to enable economic growth in Wimmera Southern Mallee

On a per capita basis, Wimmera Southern Mallee’s availability of 1-2 bedroom rentals is around a fifth of metropolitan Melbourne⁵

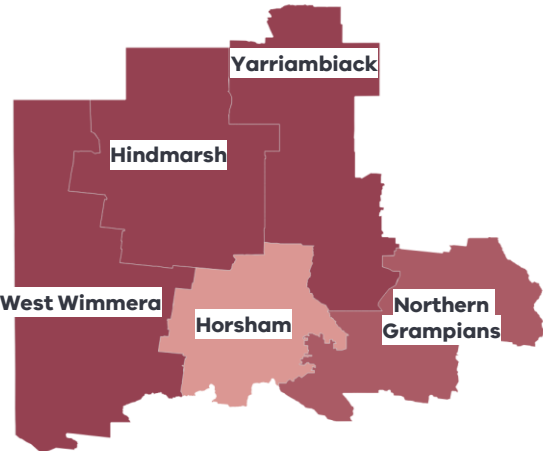
Limited rental supply has driven strong price growth, with rents in the Grampians rising by 33% between 2020 and 2025 – approximately double the rise recorded in Victorian wages (17%) over the same time period.⁶

1-2 Bedroom Dwellings to Rent per Capita

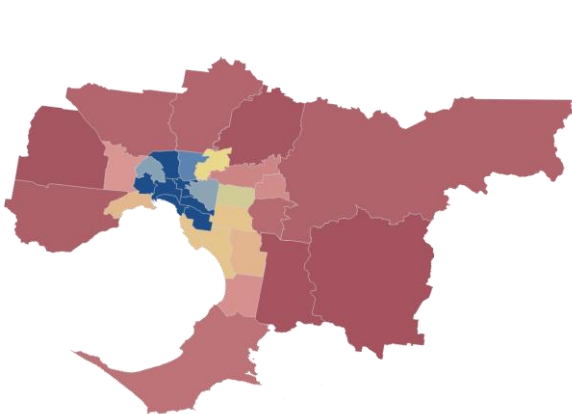
DFFH Rental Report, ABS Regional Population



Wimmera Southern Mallee



Metropolitan Melbourne



Housing supply constraints are limiting the Wimmera Southern Mallee’s capacity for economic growth

- Limited availability of worker housing forces some employees to live outside local communities, often traveling long distances, reducing their ability to participate in the local economy and community life.
- A widening gap between housing costs and wage growth is constraining workforce attraction and retention, particularly for essential and lower-paid jobs.

There are signs that housing supply is improving

- Over the past two years, building approvals in Wimmera Southern Mallee have increased by 43%, outpacing both metropolitan Melbourne (5.3%) and regional Victorian (14.6%) averages.¹
- Horsham has the highest building approvals per capita in the region, also observing a 35% increase in building approvals over the past year.²
- However, higher enabling infrastructure costs and cost of building in regional areas can constrain private development, making incentives to build, including infrastructure co-funding, critical to sustaining building momentum.

Government initiatives are supporting additional housing supply

- The Victorian Government’s \$150 million Regional Worker Accommodation Fund supports delivery of key worker housing, improving workforce attraction and easing local shortages.³
- The Victorian government’s housing targets for Wimmera Southern Mallee aim to deliver more than 4,800 homes by 2051, close to jobs, services and public transport, representing a significant growth opportunity.⁴
- VicSmart reforms aim to speed up the approval process for eligible residential projects to accelerate housing supply.

A skilled and productive workforce is key to further drive economic activity in the region

An ageing population is reducing workforce availability, despite a growing and more skilled population

- Between 2025 and 2036, the working age population (15-64) in Wimmera Southern Mallee is expected to contract by 2,200 residents.¹ The working age share is also expected to decrease from 57% to 53% over the same time period.²
- With 27% of residents aged 65+ (compared to 15% in Melbourne), the region is ageing faster than the state average,² increasing pressure on healthcare and aged care alongside a tightening labour market.

Demand for skilled workers is accelerating in the region's fastest-growing sectors

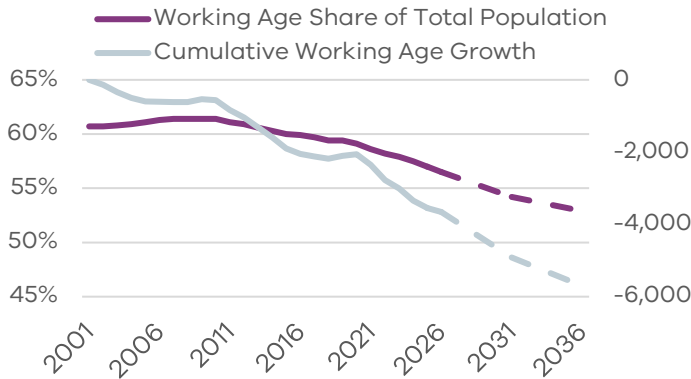
- Female participation (58%) trails both male participation (66%) and metropolitan female rates (65%), representing a significant untapped labour source.⁴
- This is particularly important given the region's industry outlook: employment in the Health Care & Social Assistance industry is expected to grow by almost 1,000 jobs³ (an industry typically female-dominated).³ Improving access to childcare can help unlock participation in growing sectors such as Health Care & Social Assistance.
- The region's education and research ecosystem is a major strength that can support future workforce and skills development. Education precincts with a local presence such as Federation University TAFE and Longerenong College provide higher education and vocational pathways aligned to growing and economically significant sectors within the region.

Government initiatives are supporting workforce growth and skills development

- Free TAFE and the Victorian Skills Plan are helping build the skilled workforce required by regional industries.
- Efforts are focused on aligning training with industry demand, strengthening vocational and higher education pathways, and accelerating skills recognition.
- Support is available for skilled migrants to live and work in regional Victoria through a state-nominated visa program.
- Increasing workforce participation, particularly among women and underrepresented groups, remains a key opportunity to support long-term economic growth.

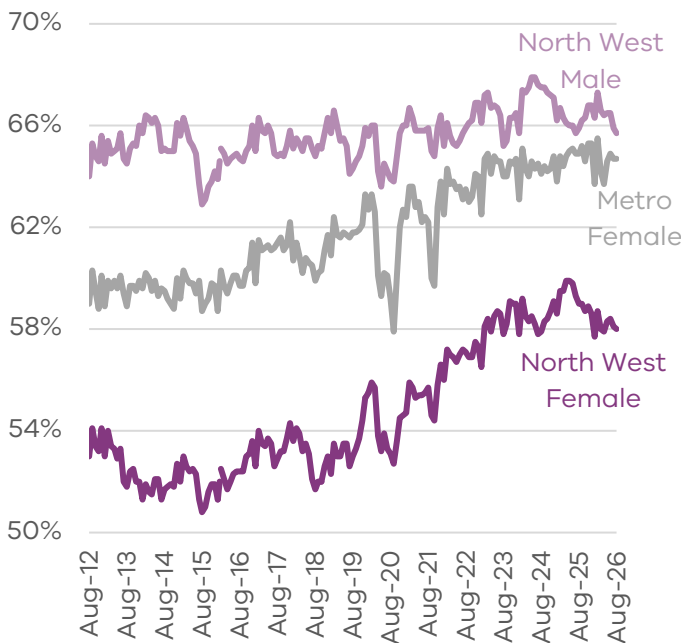
Working Age Population (15-64): Share and Cumulative Growth, Actual and Projected

ABS Regional Population by Age and Sex 2024-25, VIF, Wimmera Southern Mallee



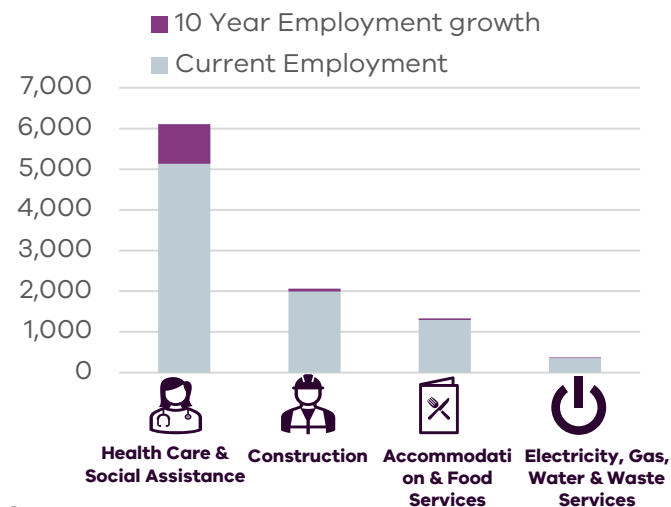
Labour force participation rate

ABS Aug-26, North West SA4



Largest projected employment growth

VSA 2025-2035, Industry, Wimmera Southern Mallee



'A 10-year plan for industrial land' positions state-significant regional industrial land as a key growth enabler



Trunk Infrastructure Fund



Enabling infrastructure is a growing constraint but also a major lever for Wimmera Southern Mallee's future economic growth.

Targeted infrastructure upgrades in industrial precincts can unlock private investment in high productivity industries, particularly in the agri-food sector, and emerging critical minerals industry, and its supply chains

Industrial precincts are productivity and investment enablers for Wimmera Southern Mallee

- Industrial precincts are key drivers of productivity and investment in the region, connecting the agri-food sector to domestic and export markets.
- The availability of industrial land underpins value-adding opportunities, particularly in the food manufacturing sector.

Horsham: Wimmera Agriculture and Logistics (WAL) Hub

- The project builds on investment in the Doon intermodal freight hub to support agricultural value-adding and food processing initiatives, with potential to over 300 jobs.¹
- The precinct offers potential for a circular economy precinct to support water needs for mineral sands projects, including the proposed WIM Avonbank.

Investment opportunities exist in several further significant industrial precincts in the region including:

- Enterprise Estate (Horsham) is located 2.5km south west of the city centre with 50 hectares of Industrial 1 zoned land.²
- Burnt Creek Industrial Estate offers around 182 hectares of industrial land located on Burnt Creek Drive, Bungallally nearby the Horsham Regional Livestock Exchange, one of regional Victoria's main sheep and lamb selling centres.
- High Street / Western Highway Industrial Estate project (Dimboola) offers strong regional freight and logistics advantages and is well positioned to support future industrial and commercial growth. The precinct offers potential to develop around 7.7 hectares of industry, within its broader footprint.

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Wimmera Southern Mallee is leveraging policy and investment to accelerate growth in key industries

- The **Economic Growth Statement (2024)** set out an ambition to achieve higher productivity, improve living standards, wages and competitiveness in a more contested global environment.
- The **Victorian Industry Policy (2025)** provides the framework to deliver on Victoria's economic growth and productivity ambitions.
- The \$150m **Victorian Investment Fund** provides a \$50 million regional stream, and access to the broader fund.¹

Strategic industry development opportunities exist in the region's critical minerals, agriculture, and renewable energy sectors and supply chains.

- Wimmera Southern Mallee region has a **strong comparative advantage in agri-food production**, creating significant potential to expand into higher-value food manufacturing, by strengthening local processing capabilities and capturing more value within the region.

The region can play a key role in Victoria's energy transition commitments, with emerging strengths in solar and wind generation, and transmission infrastructure.

- Projects such as the Western Renewables Link and VNI West will underpin **western Victoria's Renewable Energy Zone (REZ)**, supplying renewable electricity across Victoria and into the National Electricity Market.
- There is an opportunity to develop renewable energy precincts that co-locate with advanced manufacturing and circular economy activities. This could strengthen supply chains and building on existing growth in professional and technical services, including engineering and environmental consulting.

Domestic visitors drive the region's tourism industry which is home to the Grampians (Gariwerd) National Park, the iconic Silo Art Trail, and the Horsham Agricultural Show.

- The recent \$33 million state and federal government investment into the **Grampians Peaks Trail**² attracts opportunities to the region as an important economic and tourism development for the local community, the wider region, and for Victoria. as a key nature-based tourism destination.
- Further investment in the Grampians Wellness Resort Development will deliver a Nordic spa resort in Halls Gap, attracting visitors to the Grampians National Park to experience its unique landscapes.

Critical Minerals represent a significant industry opportunity for the region, with 75% of Victoria's mineral sand deposits located in north west Victoria,³ and 3 world scale mines set to constructed by 2030.

- **Mineral sands reserves** in Northwest Victoria could add up to \$11.4 billion to Victoria's GSP, and an average of 2,400 jobs per year until 2050.⁴
- **Horsham's high-grade titanium, zirconium, and rare earth deposits** offer opportunities to supply high value markets including aerospace and defence, automotive and EV supply chains, advanced manufacturing processes and renewable and (overseas) nuclear energy sectors.
- These critical mineral deposits can drive supply-chain opportunities in the region by supporting growth in transport, logistics, maintenance, and specialised manufacturing.
- **Significant gold resources** have also been identified in the Stawell Corridor for potential future mining development.

The Wimmera Southern Mallee REDS 2026 sets out strategic economic development priorities to be delivered across government

REDS 2026 priorities continue to be implemented through RDV's regional network, and facilitated through Victoria's investment and trade agencies, business program delivery, and policy advocacy across all levels of government.



Wimmera Southern Mallee regional businesses and investors can pursue economic development opportunities through several Victorian Government agencies and initiatives

- RDV's Grampians team (Horsham office) are the main point of contact in the region for facilitating and coordinating regional development outcomes: **Contacts and Assistance - Regional Development Victoria**
- A range of **grants and program support** is available to enable economic opportunities across regional Victoria.
- Victoria's **Investment Front Door** provides a single access point to the Victorian government for investors.
- Support for Victorian Businesses is also available through the **Business Victoria** website including guidance, services and skills you need to successfully start, run and transform your business.
- **REDS data dashboards are available online** providing deeper economic and community analysis and insights into each region.

RDV works across all levels of government to promote place-based policy considerations that strengthen government investments in regions.

- The REDS 2026 guides RDV's ongoing work with the Regional Partnerships, Regional Development Australia committees, and in policy making across the Victorian Government.
- Place-based regional opportunities and challenges identified in the REDS Refresh continue to inform the delivery of major energy projects and housing supply initiatives across Victorian Government.
- RDV works closely with Victoria's economic development agencies, including Invest Victoria, Global Victoria and Business Victoria, to advocate for regional economic development opportunities, and ensure that they are informed by place-based regional insights.
- Ongoing work across government towards the delivery of regionally located major projects will maximise opportunities for regional jobs, investment and supply chain businesses.

Appendix

Wimmera Southern Mallee’s strategic directions, progress since the inception of the REDS and alignment with refreshed policy settings

Strategic Direction	Significance	Development since the REDS	Alignment with government initiatives since the REDS
Strengthen agriculture & food manufacturing through diversification	With 77% of the land used in Wimmera Southern Mallee used for primary production, ¹ the region possesses a comparative advantage in agriculture. The region utilizes this strength by generating over \$1.6 billion in GVA and 4,100 jobs through the Agriculture, Forestry & Fishing sector.	▪ Horsham SmartFarm Plant Protein Hub: Establishes capability in emerging plant-based protein markets, supporting higher-value agricultural diversification and positioning the region within global alternative protein supply chains. ▪ Farm Frites potato processing facility (Doen): Enables local value-add processing of agricultural outputs, increasing regional capture of supply chain value and supporting export-oriented manufacturing growth. ▪ State-of-the-art glasshouse and incubation hub (Horsham SmartFarm): Supports innovation, research, and commercialisation in intensive agriculture, improving productivity and facilitating new high-value crop opportunities. ▪ Thomas Foods cold storage expansion (Stawell): Strengthens logistics and supply chain infrastructure, enabling scale and efficiency in food manufacturing and improving market access for regional producers.	▪ Victorian Innovation Statement: Supports workforce attraction in agriculture and processing by addressing acute housing shortages in rural areas, enabling seasonal and skilled workers to remain in-region and stabilising supply chains. ▪ Victorian Investment Fund: Facilitates capital investment into food processing, logistics and value-adding infrastructure, strengthening the region’s manufacturing base linked to agriculture. ▪ Economic Growth Statement: Reinforces agriculture and food as priority sectors, supporting export growth, productivity uplift and diversification aligned with regional strengths. ▪ Trunk Infrastructure Fund: Improves enabling infrastructure (water, transport, industrial land), unlocking expansion of food processing hubs and agricultural logistics. ▪ Victorian Industry Policy: Supports advanced manufacturing and food processing competitiveness, aligning with the region’s specialisation in food product manufacturing.
Promote growth of the visitor economy (nature & Aboriginal heritage)	Wimmera Southern Mallee has a strong tourism sector which is an important contributor to the economy, with domestic expenditure generating an annual spend of \$465 million in the year ending June 2026. ²	▪ Horsham Silo Art (BGLC & HRCC): Enhances regional branding and visitation appeal that further supports local business activity through place-based cultural tourism. ▪ Brambuk Visitor Information Centre: Strengthens Aboriginal cultural tourism offering, deepening visitor engagement and supporting economic participation of Traditional Owners. ▪ WAMA (Wimmera Art Museum of Australia): Diversifies the tourism offering through arts and culture and attracting new visitor segments in the process. ▪ Rainbow Silo Art: Expands the silo art trail network, reinforcing the region as a destination and dispersing visitor spend across smaller communities.	▪ Regional Worker Accommodation Fund: Improves accommodation availability for tourism workers, a key constraint on hospitality and visitor services growth in regional areas. ▪ First Peoples Tourism Plan for Victoria: Supports development of authentic Aboriginal tourism experiences, strengthening cultural tourism assets, increasing visitation and driving regional dispersal

Wimmera Southern Mallee’s strategic directions, progress since the inception of the REDS and alignment with refreshed policy settings

Strategic Direction	Significance	Development since the REDS	Alignment with government initiatives since the REDS
Expand health & social services sector opportunities	Over the next ten years, 35% of new jobs within the Wimmera Southern Mallee are expected to be within the Health Care & Social Assistance sector. This is significantly higher than the current share of workers in this industry (20.3%). ¹	▪ Hopetoun worker accommodation: Delivered through the Regional Worker Accommodation Fund, this project addresses critical workforce shortages by improving housing availability for health care workers, enabling expansion of essential services including health and social care in smaller communities.	▪ Regional Worker Accommodation Fund: Supports attraction and retention of health workers through improved housing availability. ▪ Victorian Skills Plan: Addresses workforce shortages through targeted training pipelines. ▪ Victorian Health Workforce Strategy: Aims to expand workforce capacity, skills pathways and job creation in the health care and social assistance sector. ▪ Victorian Health Services Plan: This plan will assist in developing Wimmera Southern Mallee’s care economy by reforming health service networks to improve efficiency, coordination and access, ensuring regional health services scale sustainably.
Position region for natural resources & emerging opportunities	Wimmera Southern Mallee is home to 75% of Victoria’s mineral sand deposits.² These natural endowments will provide future ongoing benefits to the region, helping to stimulate economic activity and jobs growth. The Western Renewable Energy Zone is positioned as the primary hub for large-scale, onshore wind and solar energy development.	▪ Astron Donald Mineral Sands Mine: Unlocks significant investment and job creation, positioning the region within global critical minerals supply chains and driving long-term economic growth. ▪ SEC Horsham Solar Farm and BESS: Strengthens renewable energy generation and storage capacity, supporting energy security and enabling industrial growth aligned with decarbonisation. ▪ Iluka Wimmera Critical Minerals Project: A project that reinforces the region’s strategic role in supplying materials essential for clean energy technologies. ▪ BayWa r.e. Wimmera Plains Energy Facility: Demonstrates continued momentum in renewable energy investment, attracting capital and supporting regional transition to a renewable economy. ▪ WIM Resources Avonbank: Development of pipeline in mineral sands which strengthens investor confidence and contributing to sustained employment opportunities for locals. ▪ West Wind Energy Park: Progresses large-scale wind generation, contributing to Victoria’s renewable energy targets and has the potential to generate local economic benefits through construction and operations.	▪ Victorian Critical Minerals Roadmap: Provides a framework for developing mineral sands and critical minerals, positioning the Wimmera Southern Mallee as a key location for this development. ▪ Renewable Energy Zones Program: Designates the Wimmera Southern Mallee as a priority Renewable Energy Zone, facilitating grid upgrades and accelerating large-scale renewable investment. ▪ Victoria’s Climate Change Strategy: Underpins transition to a low-emissions economy, directly supporting renewable energy expansion and sustainable resource use.

Emerging opportunities and priorities in the Wimmera Southern Mallee Region

Opportunity / Priority	Significance	Supporting projects and catalysts to support future growth
Harness the maturing critical minerals sector to drive sustained regional investment	The Wimmera Southern Mallee sits above one of the most significant concentrations of critical minerals in Australia, including mineral sands, rare earth elements and zircon. With global demand for critical minerals accelerating, the region is exceptionally well-placed to attract long-term industrial investment.	Supporting projects (current and since the inception of the REDS) - The Astron Donald Mineral Sands Mine has received all statutory approvals and a Final Investment Decision, representing one of the most advanced mineral sands projects in Victoria and a landmark step in converting the region's resource endowment into economic activity. - The Iluka Wimmera Critical Minerals Project (WIM100) has progressed to the Environment Effects Statement (EES) stage, advancing one of the world's largest known rare earth deposits toward development and potential refining activity in the region. WIM Resources' Avonbank project has received its mining licence approval, adding further momentum to the critical minerals pipeline and increasing investor confidence in the region's regulatory and approvals environment. - The Northwest Mining Collaboration has been established to coordinate industry, government and community engagement across the critical minerals sector, building the governance and partnership structures needed to support long-term investment. Resource Ready has been adopted by nine northwest LGAs, signalling a coordinated regional approach to attracting and supporting mining investment and demonstrating the region's readiness for large-scale resource development. Catalysts to support future growth - The release of Critical Minerals Roadmap 2.0 provides a strengthened state-level policy framework to attract investment, support approvals and develop supply chains that connect the Wimmera Southern Mallee's resource base to domestic and export markets. Localised supply chain mapping will identify opportunities for regional businesses to capture a greater share of procurement spend from mining projects, building local capability and multiplying the economic benefit of investment within the region. Business capacity uplift initiatives to help local enterprises respond to mining procurement opportunities, including training, tendering support and industry-readiness programs. Expansion of rail freight logistics, including the Maroona to Portland rail upgrades, will improve the region's capacity to move bulk minerals to port efficiently, reducing transport costs and strengthening the commercial viability of mining operations.
Grow food manufacturing to add value to regional land use	Wimmera Southern Mallee is one of Australia's most productive dryland farming regions, generating significant volumes of grains, oilseeds, legumes and potatoes. Growing investment in food and agricultural processing represents an opportunity to further drive economic growth and productivity in the region, creating skilled manufacturing employment.	Supporting projects (current and since the inception of the REDS) - The Farm Frites potato processing facility at Dooen has been established, bringing large-scale vegetable processing to the region and creating a significant new market for local potato growers while generating processing and logistics employment. Thomas Foods Cold Storage growth in Stawell has expanded the region's cold chain logistics capability, supporting the movement and preservation of agricultural products and strengthening the region's attractiveness to further food manufacturing investment. - The Peng Cheng wheat starch processing facility at Dooen is under development, which will add a major new wheat processing capability to the region, converting a commodity crop into higher-value industrial and food-grade starch products. Catalysts to support future growth Trunk infrastructure investment in wastewater treatment will increase the capacity of regional industrial precincts to accommodate water-intensive food processing operations, removing a key constraint on further manufacturing growth. Improved electricity grid reliability through grid upgrades will support energy-intensive food manufacturing operations and reduce operating costs, improving the commercial competitiveness of processing investment in the region. Biogas infrastructure for heating and treatment options will enable food processors to recover energy from organic waste streams, reducing input costs and supporting the circular economy ambitions of the region's agrifood sector.

Glossary

Gross Regional Product (GRP)	An estimate of the total market value of all final goods and services produced in a specific region within a given period. The major components of GRP are consumption, government spending, net exports and investment. GRP often measures the economic output of a region and is the regional equivalent of Gross Domestic Product (GDP).
Gross Value Added (GVA)	The value of gross output minus intermediate consumption within a given period. GVA estimates enable analysis of industry contributions to the economy. GVA is an important measure to determine GRP. It is calculated by taking GDP, adding subsidies on products and taking away taxes products.
Visitor Economy	The visitor economy comprises the wide range of industries that provide goods and services to visitors who travel to a destination for a variety of purposes, including leisure, education, business and employment.
Productivity	The productivity measure used in this report is labour productivity, which is output on a per hour worked basis. It is calculated by dividing total GRP in a region by the number of hours worked in said region. For an industry analysis, GVA per hour worked was used, which is calculated by dividing the GVA by the number of hours worked in an industry. Hours worked used were for those in Journey-to-Work employment (see below).
Labour Force Participation Rate	The labour force participation rate shows the proportion of people in the labour force, relative to those who are deemed outside of it. The participation rate is calculated by summing the number of employed and unemployed persons and dividing that by the population aged 15 and above.
Index of Relative Socio-Economic Disadvantage (IRSD)	A general socio-economic index that summarises a range of information about the economic and social conditions of people and households within an area. The IRSD only includes relative disadvantage. A low score indicates relatively greater disadvantage, and a high score indicates a lack of disadvantage.
Employment	Residents of working age who were engaged in any activity to produce goods and services for pay or profit. Employment can be divided up into part-time (less than 35 hours worked per week) and full-time employment (35 or more hours worked per week), as well as Journey-to-Work (where employed persons work) and Usual Residence (where employed persons live).
Occupational Skill Level	Describes the skill level of a person's occupation, where level one is the highest level of skill and level five is the lowest. The skill level is determined from the characteristics of a person's occupation as defined under the Australian and New Zealand Classification of Occupations. Skilled occupations are defined as level one (bachelor degree or higher qualification) to three (Certificate III with at least two years of on-the-job training and Certificate IV), whilst low-skilled occupations are defined as levels four (Certificate II and III) and five (no formal qualification up to Certificate I).
Working Age Population	The working age population is generally defined as between the ages of 15 and 64 years old. This does not mean people outside this age bracket cannot be employed but rather reflects the age profile of the majority of workers.
Agri-Food Sector	The Agri-Food Sector is defined as the ANZSIC Level 2 Industries Agriculture and Food Product Manufacturing.

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