INVEST IN DUBBO

TIME TO INVEST . GROW . LIVE . SMILE
Location > Access to national and international markets > New and emerging sectors > Thriving business environment > Strong supply chains > Diversity > Robust economy > Population growth > Sound City planning > Key infrastructure investment > Stable and skilled workforce

Disclaimer: This investment guide is intended to be an aid to the public. It presents information about the Dubbo Local Government Area (LGA), sourced from various entities. Dubbo City Council is not responsible for the accuracy of the information presented in this package, and is not liable where information is incorrect or out of date. Information and statistics in the Dubbo City Investment Guide were predominantly obtained from the Dubbo Local Government Area (LGA) Economic and Demographic Profiling software Remplan – unless stated otherwise.

© Dubbo City Council 2015, PO Box 81, Church St, Dubbo, New South Wales, Australia 2830, Phone: (02) 6801 4000, Email: dcc@dubbo.nsw.gov.au
Produced July 2013, Updated December 2014 – details correct at time of printing.
For over 160 years, Dubbo has remained at the forefront of regional growth, investment and opportunity. This strategically-located frontier city continues to be driven by a diverse, resilient and vibrant economy, boasting a catchment area one third the size of NSW.

From humble beginnings as a village in 1849, Dubbo has progressively transformed into a vibrant regional City with the facilities and infrastructure to match.

Villages grow into towns and towns grow into cities because the community is visionary, strategic and proactive.

Located in central NSW, Dubbo is ideally located at the intersection of major road, rail and air transport routes. This location has established, and continues to strengthen, the City’s firm position as a transport logistics hub.

The City’s economic strength is largely supported by its role as the premier service centre to the broader Orana Region and north western areas of New South Wales. Dubbo services a vast geographical area – one third of NSW – with a retail catchment population of some 200,000 people, plus visitors. Dubbo City’s own population exceeds 40,000 people.

Home to over 3,700 businesses, the City is the chief provider of cultural and recreational facilities and activities for several Local Government Areas. These towns rely on Dubbo for retail, entertainment and recreational products and experiences.

Dubbo also provides essential services including health, education and access to government departments to service a population of 120,000.

A well-connected ‘City of opportunities’ with a large customer base and affordable regional overheads, Dubbo provides a perfect environment for business to establish, develop, thrive and grow.
### Key Figures

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resident population (est May 2013)</td>
<td>40,882</td>
</tr>
<tr>
<td>Retail catchment population</td>
<td>200,000</td>
</tr>
<tr>
<td>Service population</td>
<td>120,000</td>
</tr>
<tr>
<td>Hectares Industrial space</td>
<td>2,078</td>
</tr>
<tr>
<td>Hectares Commercial land</td>
<td>229.39</td>
</tr>
<tr>
<td>Total labour force</td>
<td>19,342</td>
</tr>
<tr>
<td>Gross Regional Product</td>
<td>$2.15B</td>
</tr>
<tr>
<td>Businesses</td>
<td>3,710</td>
</tr>
<tr>
<td>LGA area (km²)</td>
<td>3,425</td>
</tr>
<tr>
<td>Occupied Commercial space</td>
<td>86,360 m²</td>
</tr>
<tr>
<td>Annual visitation</td>
<td>789,000</td>
</tr>
<tr>
<td>Average winter / summer temperatures</td>
<td>14° - 31°</td>
</tr>
<tr>
<td>Residential development (2012/13)</td>
<td>$67.2M</td>
</tr>
<tr>
<td>Non-residential development (2012/13)</td>
<td>$112.7M</td>
</tr>
<tr>
<td>Flights per week</td>
<td>152</td>
</tr>
<tr>
<td>Daily XPT rail service</td>
<td></td>
</tr>
<tr>
<td>Daily coach services</td>
<td></td>
</tr>
</tbody>
</table>

12.57PM CONTRACTS SIGNED. TIME TO INVEST. HOME TO OVER 3500 BUSINESSES, THE CITY IS THE CHIEF PROVIDER OF CULTURAL AND RECREATIONAL FACILITIES AND ACTIVITIES FOR SEVERAL LOCAL GOVERNMENT AREAS. 9.01AM OPEN FOR BUSINESS. TIME TO SMILE.
Economic growth indicators

Population growth, strong labour force, investment opportunities and a diverse economy... invest in Dubbo, the sky's the limit.

Gross Regional Product
Dubbo has averaged 4.5% annual growth over the past six years. This growth, driven by the expansion in Dubbo’s leading service and industrial sectors, is well above the performance of the Orana Region and New South Wales over the same period.

The Dubbo economy recorded a Gross Regional Product (GRP) of $2.156 billion in 2011/2012 representing a 1.5% increase on the previous year.

Population
The estimated resident population of Dubbo at May 2013 was 40,882 persons, representing an annual growth rate of 1.44%.

Based on current and historic trends, the City has a moderate population estimate of 51,550 by 2036.

Source: KPMG Property & Demographic Advisory: Population Outlook for Dubbo City Council Report, February 2012. (Note: these projections are only an extracted summary of KPMG’s findings and should be viewed in the context of the full KPMG report, which is available from Dubbo City Council. The KPMG report was not prepared for the ‘Invest in Dubbo’ initiative and should not be used as the basis for any investment decision)
Property Investment

Dubbo has attracted over $259.1 million in non-residential investment in the past four years to June 2013.

Total residential investment for the past five years was $322.8 million (2012/13). Commercial development lodgements, such as Masters, Aldi and the Orana Mall redevelopment in 2012/13 have seen a significant boost in the value of approvals from 2011/12.

Employment

Growth in the local labour force combined with declining unemployment rates is further evidence of the strong employment opportunities in the region.

An estimated 18,397 people living in Dubbo are employed (2011), a 7.4% increase from 2006.

Unemployment in the City remains low (4.7%) compared to the Orana Region (6.3%) and NSW (5.1%). Dubbo maintains a strong labour force to support the local economy.
Key sectors

Dubbo has a robust economy that is not wholly dependent on any one sector for its wealth.

Dubbo has a strong, stable economy supported by a number of sectors. This distribution of value through many sectors of the economy makes Dubbo a resilient city. Through significant drought and the national and global financial downturns, Dubbo has retained a strong, driving economy.

The major sectors driving the economic growth in Dubbo are:

- Public Administration and Safety
- Health Care and Social Assistance
- Manufacturing
- Electricity, Gas, Water and Waste Services

The below table indicates the key drivers for Dubbo’s economy, based on the top 14 broad local industries. The industries are measured on their contribution to economic activity to the City.

<table>
<thead>
<tr>
<th>Industry Sectors</th>
<th>Backward Linkages</th>
<th>Exports</th>
<th>Employment</th>
<th>Value-Added</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public Administration &amp; Safety</td>
<td>⚫</td>
<td>⚫</td>
<td>⚫</td>
<td></td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>⚫</td>
<td>⚫</td>
<td>⚫</td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td>⚫</td>
<td>⚫</td>
<td>⚫</td>
<td></td>
</tr>
<tr>
<td>Electricity, Gas, Water &amp; Waste Services</td>
<td>⚫</td>
<td>⚫</td>
<td>⚫</td>
<td></td>
</tr>
<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>⚫</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td>⚫</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail Trade</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transport, Postal &amp; Warehousing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial &amp; Insurance Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rental, Hiring &amp; Real Estate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional, Scientific &amp;</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education &amp; Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Arts &amp; Recreation Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Economic indicators

**Backward linkages**

Industry sectors with local well-developed and utilised supply chains. These sectors spend the most money on locally sourced goods and services per dollar of output.

**Exports**

The value of goods and services exported outside Dubbo that have been generated by local businesses/organisations or industries that bring an inflow of money into the region from outside.

**Employment**

Number of people employed by the sector.

**Value – Added**

Marginal economic value that is added to the GRP by each industry sector, calculated by subtracting local expenditure and expenditure on imports from the output generated by an industry sector.
Construction
Dubbo is home to a number of national construction companies. Local construction activity has mainly consisted of non-residential, infrastructure and commercial upgrades. The strength of the sector in the local economy is evident. The sector is worth $418M to the City's GRP and makes up 10% of overall industry output. This includes the development of infrastructure and non-residential building and through the presence of successful construction companies that are headquartered in Dubbo and operate Australia-wide.

Government services
Numerous government departments and agencies are located in Dubbo (currently seven Federal and 45 State government agencies). These agencies provide support services across a range of areas such as agriculture, business development, health, social assistance, environmental, aged care and recreational services.

Commerce and retail
Dubbo is the retail, commercial and service hub for a vast area of NSW. The City's strong retail centre employs 13% of Dubbo's workforce and contributes $131.2 million to the City's Gross Value Add (GVA). The commerce sector provides a diverse range of goods and services. Dubbo's retail centre includes six shopping centres, including Orana Mall Marketplace (with 55 speciality stores and currently undertaking a $22M expansion).

Healthcare
Healthcare and social assistance/services employ over 16% of Dubbo’s workforce. Dubbo is a strategically placed healthcare provider to the broader Orana and North Western regions, providing major public and private hospitals and allied health services. The sector produces an estimated $215M in Gross Value Add for the City.

Manufacturing
A strong local industry sector, the manufacturing industry contributes an estimated $159.8 million in Gross Value Add (Feb 2013). Dubbo has a solid existing capability in food and beverage manufacturing, metal product manufacturing and specialised machinery and equipment manufacturing. Food and beverage manufacturing are the leading manufacturing sectors due to the presence of Dubbo's international meat exporter – Fletcher International Exports, a number of wineries, flour milling and pet food manufacturers.

Agriculture
Despite being the centre of a traditional agricultural area (grain, sheep/wool and cattle production), Dubbo has a lower reliance on agriculture than the wider Orana Region*. The City acts as the region’s agricultural industry service centre through the provision of a wide range of agricultural services, livestock markets, processing facilities and supply chain businesses.

*2.3% GVA for Dubbo versus 7.8% GVA for the Orana.

Destination Dubbo
Dubbo, home of the world-famous Taronga Western Plains Zoo, has a strong and established visitor economy which supports over 1000 local jobs, and contributes over $80M (4.01%) in Value Add to the overall Dubbo economy.

The City attracts a visitor spend of over $175M annually, and annual visitation is estimated at 797,000*, with the Zoo attracting over eight million visitors to the Region since it opened its gates.

*Tourism Research Australia September 2012
New and emerging sectors

As a major service centre, Dubbo is well positioned to capitalise on the wealth of natural resources in the Orana Region and Central West that form a solid foundation for a number of expanding industries.

Development of the surrounding regions’ mining, resources and energy projects will significantly boost Dubbo’s role in supporting and benefiting from regional mining activity. Potential opportunities are already present for mining supply chain businesses to operate out of Dubbo.

Local industry data demonstrates strong backward linkages in the Exploration and Mining Support Services Industry in the City. This means that the sector spends significantly on locally sourced goods and services per dollar of output. Although the mining sector does not make a large contribution to the Dubbo economy directly at present, due to a well-developed local supply chain already operating, the sector has the capacity to deliver broad based economic benefits as mining further expands throughout the region.

Investment in the emerging mining and resource sector within the Dubbo locality will provide many opportunities for business development in this industry. This emerging sector also has the potential to encourage the establishment and expansion of supply chain businesses based on Dubbo’s existing industry and logistics capabilities.
**Mining hub**

Dubbo is well-positioned as ‘the new mining hub’ with mining and exploration projects, both established and emerging, flourishing across surrounding regions. Coal, copper, rare earths and gold mining are rapidly developing industries in the Orana and Central West regions.

Dubbo, with its strong manufacturing and construction industries, has long been servicing the mining sector throughout the Orana Region. Mining is now worth over $2,415M annually to the region. As one of the most heavily prospected regions in Australia, new opportunities are constantly being identified. In addition, established mines – such as the Northparkes, Lake Cowal and Cadia Valley gold and copper mines – are undergoing further expansion.

Mining is the largest contributor to the Orana Region’s gross regional product value (33.6%). Current mining activities – which range from silver, lead, zinc, gold and copper in the Nyngan and Cobar areas, coal in the Mudgee area and opals in the Lightning Ridge area – are experiencing new investment based on the commodities’ boom.

New gold and rare earth mines are at advanced stages of planning and construction in the region.

As a response to this rapidly developing sector, Dubbo is introducing appropriate strategies to ensure that mining projects bring more than their own direct employment to the City and the region.

**Renewable energy**

Dubbo has a unique combination of climate and infrastructure assets to support the development of renewable energy sector investment including solar, biofuels, wind and waste management.

Dubbo’s ideal climate and geography for solar energy has seen the City previously acknowledged as Australia’s solar capital. There are currently plans by a private company to construct a solar farm in the Orana Region that could potentially be the largest in the Southern Hemisphere upon completion.

**New and emerging sectors – at a glance**

- Mining and resources
- Renewable energies R&D
- Consumables warehousing, distribution and logistics
- Assembly and manufacturing plants
- Eco and cultural tourism
- Expanded regional air services to major ports
- Conventions, events and conferences
- Intermodal transport/freight expansion
- Digital network development (NBN roll-out)
Dubbo’s economic strength is driven by the broad range of industries that reinforce its role as a regional centre.
Dubbo is home to a thriving business environment, servicing local, regional, national and international markets. The local market supports and encourages business growth and expansion.

In 2013 the Dubbo economy recorded a Gross Regional Product (GRP) of $2.156 billion.

There are 3710 businesses registered in Dubbo, with the highest output from these sectors:
- Manufacturing (16.4%)
- Construction (10.0%)
- Rental, hiring and real estate services (9.1%)
- Healthcare and social assistance (7.6%)

### Business turnover

<table>
<thead>
<tr>
<th>Business type</th>
<th>Total turnover ($M)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufacturing</td>
<td>$688.23</td>
<td>16.4%</td>
</tr>
<tr>
<td>Construction</td>
<td>$418.61</td>
<td>10.0%</td>
</tr>
<tr>
<td>Rental, Hiring &amp; Real Estate Services</td>
<td>$381.01</td>
<td>9.1%</td>
</tr>
<tr>
<td>Health Care &amp; Social Assistance</td>
<td>$317.13</td>
<td>7.6%</td>
</tr>
<tr>
<td>Financial &amp; Insurance Services</td>
<td>$249.89</td>
<td>6.0%</td>
</tr>
<tr>
<td>Public Administration &amp; Safety</td>
<td>$248.54</td>
<td>5.9%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>$248.25</td>
<td>5.9%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>$219.38</td>
<td>5.2%</td>
</tr>
<tr>
<td>Transport, Postal &amp; Warehousing</td>
<td>$210.97</td>
<td>5.0%</td>
</tr>
<tr>
<td>Professional, Scientific &amp; Technical Services</td>
<td>$200.74</td>
<td>4.8%</td>
</tr>
<tr>
<td>Education &amp; Training</td>
<td>$187.18</td>
<td>4.5%</td>
</tr>
<tr>
<td>Electricity, Gas, Water &amp; Waste Services</td>
<td>$177.57</td>
<td>4.2%</td>
</tr>
<tr>
<td>Accommodation &amp; Food Services</td>
<td>$162.58</td>
<td>3.9%</td>
</tr>
<tr>
<td>Agriculture, Forestry &amp; Fishing</td>
<td>$110.95</td>
<td>2.6%</td>
</tr>
<tr>
<td>Other Services</td>
<td>$105.35</td>
<td>2.5%</td>
</tr>
<tr>
<td>Information Media &amp; Telecommunications</td>
<td>$96.47</td>
<td>2.3%</td>
</tr>
<tr>
<td>Administrative &amp; Support Services</td>
<td>$83.60</td>
<td>2.0%</td>
</tr>
<tr>
<td>Mining</td>
<td>$44.44</td>
<td>1.1%</td>
</tr>
<tr>
<td>Arts &amp; Recreation Services</td>
<td>$36.70</td>
<td>0.9%</td>
</tr>
</tbody>
</table>

Remplan 2013, ABS 2012.

A supportive business environment

Dubbo has established networks designed to assist new and existing businesses to grow, increase skills and expand business capabilities.

Dubbo’s Economic Strategy – “10 Steps to Economic Success” – was developed with extensive community and industry input. The strategy includes executing a business attraction, expansion and retention program by:

- Promoting the City as a destination, through extensive marketing to assist with business expansion and retention.
- Engaging with local businesses to better understand challenges.
- Providing events and seminars for local business to assist communication and promote collaborative opportunities and partnership development.
- Ensuring that industrial/commercial land planning and regulation are streamlined to facilitate and promote business expansion and investment.

Dubbo City Council offers a free Development Application pre-lodgement advice service for proponents of development within the Dubbo Local Government Area. This service allows advice to be given relating to planning, building, engineering and environmental health matters, ensuring applicants are fully aware of the issues that need to be addressed prior to lodgement of a Development Application. This advice service aims to minimise delays to developments by ensuring all applications have the required information and developers are aware of all issues that need to be addressed in an application. Council’s Planning and Building officers are available to provide this service 1pm-5pm daily or by appointment by phoning (02) 6801 4000.

Council also provides a express assessment service for Construction Certificates.

There is a range of stakeholders including Council and the Dubbo Chamber of Commerce that advocate on behalf of business to support major infrastructure improvements and other government policies, both internal to Council and external (State and Federal Government).

Refer to contacts and resources on page 26.
Dubbo has a strong and diverse infrastructure base, including frontline services, transport and community services. This network will be maintained and grown to provide for a projected 55,000 resident population and a market population of 140,000 in the next 10 years.

Utilities

**Water and waste water:** The City sources its potable water supply from the Macquarie River (contributing around 70%) and a total of seven bores within the South Dubbo Borefield (contributing around 30%). The City maintains a secure water supply, bolstered by a $23 million investment in the John Gilbert Water Treatment Plant in 2006 to increase capacity from 50 megalitres/day to 80 megalitres/day. This will enable the servicing of Dubbo beyond the next 20 years.

The City is undertaking a $20 million plus upgrade of sewage treatment capacity at the Dubbo Sewage Treatment Plant and associated effluent irrigation capacity to cater for growth of the City for a population of 55,000 people and environmental sustainability beyond the immediate future.

**Telecommunications:** Dubbo has ADSL internet coverage in the City area. Rollout of the National Broadband Network (NBN) commenced in the City in June 2013.

**Electricity:** Essential Energy is the main electricity supplier to Dubbo and the Orana Region, however other energy providers including renewables are continuing to enter this competitive market.

**Natural gas:** Dubbo is well-supplied by natural gas for residents and industry and acts as the main inception point for the recently constructed pipeline from Dubbo to Tamworth which supplies over 7,000 homes and businesses. Coal seam gas developments in the Pilliga (immediately north of Dubbo) have the potential to provide additional investment opportunities for businesses in the City.
Vital transport linkages

Dubbo’s geographic location and strong infrastructure have established the City as a transport logistics hub. Located on the intersection of three major highways, Dubbo is also serviced by rail networks, providing transport to passengers and bulky goods, as well as air freight passenger services.

Dubbo’s central location – with its vital transport linkages to Sydney, Melbourne, Brisbane, Newcastle and Adelaide – is a major advantage for investors.

Road: Dubbo is centrally located on the Newell Highway which is emerging as an important freight corridor in NSW. The Mitchell-Barrier Highway provides an east-west link across NSW and the Golden Highway provides a direct link to Newcastle.

Rail: Lines extend into western NSW through Dubbo, as well as Sydney and Newcastle. The proposed western inland rail link from Melbourne to Brisbane will open up regional Australia, including Dubbo, to the rest of the world.

Air: Dubbo City Regional Airport has been the focus of major development over the past decade. The Airport manages 131 flights per week to Sydney and 21 flights per week to Broken Hill, with annual passenger numbers exceeding 172,000.

Sea ports: Dubbo has access to three deep sea ports and capitalises on its role as the eastern termination in NSW for road trains and B-doubles. This transport network fosters opportunity for service industries and competitive advantages for businesses with interstate links.

Intermodal connection: Dubbo is home to the only intermodal connection in the Region. The privately run facility transports product by rail through to the major Botany Bay Port in Sydney. The rail line supports local and regional exporting businesses, providing transport links for approximately 10,000 tonne equalling approximately $15 million, worth of mixed product every week. The intermodal also acts as an inland container terminal.

The Dubbo City Regional Airport is owned and operated by Dubbo City Council which has invested significantly in the facility by providing a modern terminal and enabling infrastructure that supports future airline activity including the introduction of security screening. The Airport has experienced significant growth in the past 10 years.

To cater for increasing demand for air services across the region, the Airport has experienced significant investment since 2006. This has included the re-development of the terminal building to increase handling capability to 250,000 passengers each year. The Airport is also home to an Air Services Australia Workshop and a Royal Flying Doctors Service facility.

Refer to page 25 for transport links.
COMMUNITY AND CULTURAL INFRASTRUCTURE

There are a high number of significant community assets that support the quality of life in Dubbo. Dubbo has three major hospitals including Dubbo Base Hospital and Health Service, Dubbo Private Hospital and Lourdes Hospital. There are also a number of quality aged care facilities and five major nursing homes. Redevelopment of the Dubbo Base Hospital is expected to occur over the next four years. Over $22 million in funding has been committed for the current stage by the State Government.

Education services include 18 public and private schools, 17 pre-school/childcare facilities, a Charles Sturt University campus, the Rural School of Clinical Health (University of Sydney Campus) and the New South Wales Western Institute of TAFE. The City is home to School of the Air (distance education) and University of the Third Age.

The City’s sporting and recreational amenities include numerous sporting clubs and fields, an Aquatic Leisure Centre, BMX track and a Regional Action Sports Precinct featuring a world-class skate park facility. Cultural and tourism attractions include Dubbo Regional Theatre and Convention Centre, Western Plains Cultural Centre, Taronga Western Plains Zoo and the Old Dubbo Gaol.

Dubbo’s retail scene features six community shopping precincts, including the sub regional shopping precinct of Orana Mall Marketplace (with 55 speciality stores and expanding) and regional CBD which includes specialty shops and shopping malls. Dubbo is also home to over 100 eateries including 20 licensed hotels and clubs, 39 restaurants and 17 cafes.

Dubbo has 145 hectares of city parkland, including the Dubbo Regional Botanic Garden. The Garden is still in development and currently comprises of four distinctive garden spaces including Shoyoen (Japanese Garden), Biodiversity Garden, Sensory Garden and the Oasis Valley.
Dubbo’s workforce represents a strong cross-section of occupations. The estimated number of employed persons in Dubbo is 18,091. Dubbo’s median individual gross weekly income is $600–$799 across all industries (Feb 2013).

Dubbo has a relatively young working-aged population compared to the Region and also has significant education and training infrastructure based locally to support the up-skilling and development of its growing workforce.

Dubbo’s unemployment rate remains well below those recorded for the Orana Region and the State, highlighting the relative strength of Dubbo’s economy.

The City has around 3,700 businesses. The largest industry employer is the Healthcare and Social Assistance sector, followed by Retail, Education and Training, and Public Administration and Safety.

Dubbo has a high self-containment rate of its workforce with 8.32% of resident workers living in the Dubbo LGA. Of those residents who travel out of the LGA for work, most are employed in Construction, Healthcare and Social Assistance, and Transport industries.

Dubbo has a growing tertiary qualified workforce. In 2013 it is estimated that almost 60% of Dubbo workers had some form of qualification, with over 25% of people holding a Bachelor Degree or higher.

Dubbo’s skilled, qualified workforce is supported by an expanding high quality education network. With three tertiary education institutions, the City is well-equipped to service the higher education and training needs of the local market.

These institutions also provide ready access to qualified and skilled labour. There are several training, apprenticeship and pathways programs available through private and public organisations.
Land and property investment

The City offers a range of residential, industrial and commercial property opportunities.

Residential

Dubbo has long-term land use strategies in place to accommodate the strong projected population growth in the City. House prices in Dubbo (10 years to March 2012) have experienced 6.9% average growth. The City experiences regular median growth in residential property investment, reflecting Dubbo’s strength as a regional city.

The City also has a very strong rental market with a current vacancy rate of less than 1% (June 2013).

The current median sale price for a home in Dubbo is $264,000 while median unit prices are $199,500 (Residex April 2013). The City generally records a lower median house and median unit/townhouse prices compared to other similar regional cities such as Bathurst, Orange, Tamworth and Armidale.

Dubbo’s housing affordability and general ‘liveability’ is also a competitive advantage for attracting both families and businesses. Expansion of growth sectors such as mining is expected to result in solid returns for property investment across the City.
**Industrial**

Industrial zonings are generally located on the fringe of the City and strategically located in terms of transport infrastructure. Features of these areas include good road and/or rail access, flat land for ease of construction, reticulated water and sewerage services, stormwater and electrical reticulation, kerb and guttering and bitumen roads. These areas can offer significant exposure and exposure to a network of main roads and highways. Industrial zonings cater for everything from depots, freight transport facilities and storage establishments to warehouse or distribution centres; light or heavy industries.

The City has a number of industrial areas including: Dubbo Industrial Park on the western edge of the City; Blue Ridge Business Park on the City’s eastern fringe; Moffat Estate in the north and Pilons’ subdivision at the City’s western industrial gateway near Dubbo City Regional Airport.

In addition, there are four main industrial areas in the Dubbo LGA that have been zoned (or developed) for development in and around Dubbo. These include:

- The Mitchell/Eulomogo Industrial Area located on the Mitchell Highway southeast of Dubbo;
- The Mitchell/Rosedale Industrial Area located to the northwest of Dubbo on either side of the Mitchell Highway;
- The Mendooran/Talbragar Industrial Area located to the north of Dubbo City on the Newell Highway. Suitable for new ‘wet industries’ that require broadacre irrigation capability for effluent irrigation.
- The Yarrandale/Boothenga Industrial Area located to the north of Dubbo adjacent to existing industrial lands on Boothenga Road.

**Commercial**

Dubbo has a range of commercial property offerings for lease or sale including industrial, office and retail. Dubbo is home to three major retail centres and is supported by numerous neighbourhood retail precincts. There are also areas for bulky goods retailers on the Mitchell, Golden and Newell highways.

There is a total of 299.39 hectares of commercial land in Dubbo, making up almost 10% of all land within the Dubbo City boundaries.

Dubbo CBD represents the largest precinct in the LGA with a total 73,900sqm. The Orana Mall Marketplace is currently undergoing a $22 million redevelopment which will add an additional 3,600sqm of retail space to the City.
Planning an exciting future

Dubbo continues to focus on developing and implementing long-term strategies that support and nurture future growth.

**Strategic planning for growth**

The creation of a 25-year vision for Dubbo – by the Dubbo community – integrates social, environmental, economic, infrastructure and civic leadership priorities into one overarching community strategic plan.

From July 2012, Dubbo 2036 is the City’s highest level plan. It is at the heart of Dubbo City Council’s operations; all plans and subsequent decisions made by Council are aligned to Dubbo 2036.

Building upon the strategies identified in Dubbo 2036, a new Local Environmental Plan (LEP) for Dubbo was developed and gazetted in 2011.

Following on from this, in 2013 a comprehensive Development Control Plan (DCP) was finalised. Taken together these two documents represent the core of the strategic urban planning scheme for Dubbo. The plans are built upon population projections that have Dubbo growing at a steady rate over the next 25 years and are focused on assisting and encouraging growth and sustainable development across the City.

They provide clear guidance on the management of urban growth areas, land use zoning and the types of development suitable for various parts of the City. They are structured to be easily accessible and useable for business and members of the general public alike.

In addition, Dubbo City Council has established a City Strategy Services Branch. The Branch is staffed by a team of strategic land use planners and urban development professionals with experience in both local government and the private sector. The Branch is developing new and innovative approaches to land use planning and urban development to assist in the orderly and efficient growth and development of Dubbo as a major regional city.

The aim is to place Dubbo at the forefront of the implementation of the new NSW planning system and provide the strategic framework to support and promote growth and sustainable development of the City over the next 20 years.
A City on the go

Dubbo City Council has invested close to $140 million in community infrastructure over the past decade as it continues to improve city lifestyle. In addition, Dubbo City Council has approved close to $1 billion in development during the past 10 years.

Examples of recent, current and planned major City developments include:

**RECENT DEVELOPMENTS**
- $9.85M – seniors housing development.
- $5.5M – Taronga Western Plains Zoo, redevelopment of the Zoo’s entire front entry precinct and new children’s playground.
- $36.1M – sewerage infrastructure upgrades.
- $4.6M – creation of Dubbo’s eastern and western industrial gateways.
- $11.5M – Lourdes Hospital redevelopment including a solar-heated hydrotherapy pool and gym.
- Council’s Keswick Estate residential land development (1,200 residential allotments).
- $11.5M – Stormwater harvesting at East Dubbo Sporting Complex, including installation of international football standard quality sand based playing surface.
- $9.8M – Upgrade of the Western Institute of TAFE – Dubbo Campus.
- $10.85M – Dubbo City Regional Airport runway extensions.
- $1M – Taronga Western Plains Zoo, Billabong Camp accommodation development.

**CURRENT / PLANNED DEVELOPMENTS (CONT.)**
- $1.25M – Wiradjuri Park.
- $5M – Dubbo Regional Livestock Markets redevelopment.
- $4.2M – Aldi development.
- $5M – Barden Park, Regional Centre of Excellence for Athletics development.
- $2.4M – Taronga Western Plains Zoo, Zoofari accommodation redevelopment.
- National Broadband Network (NBN) rollout – ongoing.
- $22M – Orana Mall Marketplace redevelopment/expansion.
- Alkane Dubbo zirconia mine project.
- $79.8M – Dubbo Base Hospital re-development.
- New residential release areas.
- $5.5M – Dubbo Aquatic Leisure Centre redevelopment.

**CURRENT / PLANNED DEVELOPMENTS**
- $5M – Masters Home Improvement development.
- $2.78M – Dubbo City Regional Airport – extension of terminal including the installation of security screening.
- $1M – Dubbo Regional Theatre and Convention Centre kitchen upgrade.
- $4.4M – CBD beautification and development – including ‘Park Street’.
- $4M – Flood protection in the CBD.
- $700,000 – Sporting field improvements.

**PRIORITY DEVELOPMENTS**
Infrastructure projects identified by the community as priorities requiring State and Federal government investment to support Dubbo’s growth as a major regional centre include:
- Acceleration of urban drainage improvements ($10.5M);
- Re-development of Dubbo Base Hospital ($79.8M);
- A third bridge over the Macquarie River ($10M);
- Dubbo Regional Livestock Markets upgrade ($13M).
EXAMPLES OF RECENT, CURRENT AND PLANNED MAJOR CITY DEVELOPMENTS INCLUDE:

- **$2.78M**
  - DUBBO CITY REGIONAL AIRPORT EXTENSION
  - approved

- **$5M**
  - MASTERS HOME IMPROVEMENT COMPLEX
  - approved

- **$5M**
  - BARDEN PARK REGIONAL CENTRE OF EXCELLENCE
  - proposed

- **$1M**
  - DUBBO REGIONAL THEATRE & CONVENTION CENTRE KITCHEN UPGRADE

- **$9.8M**
  - WESTERN INSTITUTE OF TAFE

- **NBN FIBRE ROLL OUT & WIRELESS TOWERS**
  - in construction

- **TOMINGLEY GOLD PROJECT – ALKANE**
  - 60kms

- **NEW RESIDENTIAL RELEASE AREAS**
$11.5M  STORM WATER HARVESTING AT EAST DUBBO SPORTS COMPLEX

$5M  DUBBO REGIONAL LIVESTOCK MARKETS REDEVELOPMENT – approved

$1.9M  DUBBO REGIONAL BOTANIC GARDEN – in development

$4.2M  ALDI DEVELOPMENT – approved

$79.8M  DUBBO BASE HOSPITAL – in construction

$9.85M  SENIORS HOUSING COMPLEX – in construction

$22M  ORANA MALL EXPANSION – in construction

$8M  TARONGA WESTERN PLAINS ZOO – in development

WILPINJONG COAL MINE
Mudgee (150kms)

MAJOR PROJECTS AND PROPOSALS IN THE ORANA REGION AND NEIGHBOURING LGAS

Www.investindubbo.com.au | 22
Grow your business, grow your life

Spend your day doing business with the world – and still be home in seven minutes.

The City of Dubbo is not just an exciting investment destination. It’s a popular place to live, work and play for the 40,822 people who call Dubbo home.

Fantastic weather, well connected transport, a clean environment, affordable housing and most importantly, time to do the things that make you happy. What more could you ask for?

Extensive medical, health, welfare, educational, recreational, cultural and shopping facilities are available in Dubbo. The City also accommodates tertiary education institutions, namely Charles Sturt University and the Western Institute of TAFE. It is the headquarters of the Western NSW Local Health District which stretches from Lithgow in the east to Broken Hill in the west and The University of Sydney School of Rural Health.

Whilst Dubbo is known for being a city of economic opportunity, it prides itself on being a warm and friendly community – a city of smiles. Affordable housing and access to City services, Dubbo offers potential investors business and lifestyle opportunities.

The City boasts the ‘seven-minute commute’ where most City residents can access the central business district in under seven minutes!

For more information about living in Dubbo, visit www.dubbo.com.au
## Regional comparison

<table>
<thead>
<tr>
<th>Description</th>
<th>Dubbo</th>
<th>Orana</th>
<th>NSW</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Population</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population</td>
<td>40,822</td>
<td>115,652</td>
<td>6,917,656</td>
</tr>
<tr>
<td>% average annual growth 2011/10</td>
<td>0.25%</td>
<td>0.07%</td>
<td>0.93%</td>
</tr>
<tr>
<td><strong>Employment</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workforce</td>
<td>19,342</td>
<td>52,706</td>
<td>3,886,600</td>
</tr>
<tr>
<td>Employed persons</td>
<td>18,091</td>
<td>48,471</td>
<td>3,677,800</td>
</tr>
<tr>
<td>Median wage bracket</td>
<td>$600–$799</td>
<td>$600–$799</td>
<td>$600–$799</td>
</tr>
<tr>
<td>Unemployment September 2012</td>
<td>4.70%</td>
<td>6.30%</td>
<td>5.10%</td>
</tr>
<tr>
<td><strong>Business Activity</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gross Regional Product</td>
<td>$2,155.671M</td>
<td>$7,656.279M</td>
<td>$455,275,000M</td>
</tr>
<tr>
<td>Per Capita GRP</td>
<td>$55,547</td>
<td>$66,201</td>
<td>$65,813</td>
</tr>
<tr>
<td>Per Worker GRP</td>
<td>$127,111</td>
<td>$174,133</td>
<td>$151,959</td>
</tr>
<tr>
<td>Gross Industry Value Add</td>
<td>$1,994.523M</td>
<td>$7,188.666M</td>
<td>$426,884,005M</td>
</tr>
<tr>
<td>Business Counts (June 2011)</td>
<td>3,710</td>
<td>12,942</td>
<td>707,244</td>
</tr>
<tr>
<td><strong>Building &amp; Construction</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building approvals – residential</td>
<td>$48.50</td>
<td>$97.92</td>
<td>$10,757.70</td>
</tr>
<tr>
<td>Change 2011/12 (%)</td>
<td>0.73%</td>
<td>0.08%</td>
<td>0.28%</td>
</tr>
<tr>
<td>Building approvals – non residential</td>
<td>$20.29</td>
<td>$54.42</td>
<td>$6,796.50</td>
</tr>
<tr>
<td>Change 2011/12 (%)</td>
<td>52.09%</td>
<td>34.12%</td>
<td>3.34%</td>
</tr>
<tr>
<td><strong>Tourism Statistics</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tourism Employment Numbers</td>
<td>1,024</td>
<td>2,101</td>
<td>156,829</td>
</tr>
<tr>
<td>Tourism Value Add</td>
<td>$76.639M</td>
<td>$156.809M</td>
<td>$12,830,402M</td>
</tr>
<tr>
<td><strong>Visitor Expenditure Profile</strong> (Domestic overnight)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average stay (nights)</td>
<td>2.3</td>
<td>3</td>
<td>3.5</td>
</tr>
<tr>
<td>Average spend per visitor ($)</td>
<td>$305</td>
<td>$409</td>
<td>$532</td>
</tr>
<tr>
<td>Average spend per night ($)</td>
<td>$132</td>
<td>$136</td>
<td>$156</td>
</tr>
<tr>
<td><strong>Median Property Prices</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Residential*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>House</td>
<td>$264,000</td>
<td>-</td>
<td>594,000</td>
</tr>
<tr>
<td>Unit</td>
<td>$199,500</td>
<td>-</td>
<td>477,500</td>
</tr>
<tr>
<td>Vacancy rate</td>
<td>0.08%</td>
<td>1.84%</td>
<td>1.90%</td>
</tr>
</tbody>
</table>

* Source: REI NSW March 2013.

^ TRA Visitor Survey September 2011. Orana column based on Central NSW figures from Tourism Profile 2011/12.
City location

- **Sydney**: 414 km, 5 hours
- **Brisbane**: 895 km, 10 hours
- **Canberra**: 415 km, 4.5 hours
- **Melbourne**: 856 km, 10 hours
- **Adelaide**: 1212 km, 13 hours
- **Newcastle**: 400 km, 4.5 hours

>12

www.investindubbo.com.au
Contacts

Dubbo City Council
Economic development strategy and research
w www.dubbo.nsw.gov.au
p (02) 6801 4000
e dcc@dubbo.nsw.gov.au

Planning and development
w www.dubbo.nsw.gov.au
p (02) 6801 4000
e planning@dubbo.nsw.gov.au

New resident enquiries
w www.liveindubbo.com.au
p (02) 6801 4450
e relocate@dubbo.nsw.gov.au

City promotions and events
w www.dubbo.com.au
p (02) 6801 4450
e citypromotions@dubbo.nsw.gov.au

Dubbo Chamber of Commerce
p (02) 6884 4883
w www.dubbochamber.com.au
e executiveofficer@dubbochamber.com.au

Regional Development Australia Orana
p (02) 6885 1488
w www.rdaorana.org.au
e admin@rdaorana.org.au

NSW Trade and Investment – Office of Regional Development
p (02) 6883 3100
w www.business.nsw.gov.au
e business@business.nsw.gov.au

Screen Central
p (02) 6331 9246
e kate.barker@centroc.com.au

Business Enterprise Connect
Small Biz Connect
p 1300 134 359
w www.smallbusiness.nsw.gov.au
e SmallBizConnect@bec.net.au

RESOURCES
Dubbo City Council
www.investindubbo.com.au
Dubbo City Council supports the ongoing growth and development of industry in the City through a number of services including:

Planning and Development Services
- Development application pre-lodgement advice
- Access to Duty Planner or Building Surveyor through Council’s Customer Service centre each work day from 1pm – 5pm
- Zoning enquiries
- Implementation of the Local Environmental Plan

Economic Development Services
- Detailed statistical information and data on Dubbo and the Region
- Detailed information on business planning
- Referrals to assistance packages and organisations
- City investment tours for relocating businesses
- Dubbo’s online Business Resource Centre
- Destination marketing and promotion
- Event attraction
- Visitor, new resident and professional skills attraction programs

NSW Trade and Investment
Provides contacts, statistics and information for those looking to grow a business or investment in regional NSW. The site provides links to regional offices and assistance programs.

Department of Resources, Energy and Tourism
www.ret.gov.au
Provides up-to-date regional tourism research, profiles, visitor survey results and tourism supply and demand data for all of Australia’s tourism regions, states and territories.
This Invest in Dubbo Prospectus has been designed to give potential investors in the City a broad overview of Dubbo. For a more detailed economic community profile go online to www.economicprofile.com.au/dubbo

If you require more detailed information or statistics on a particular sector of Dubbo’s economy please contact Dubbo City Council.

TIME TO SMILE
INVESTINDUBBO.COM.AU