WHEATBELT:
a region in profile
2011

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Wheatbelt: a region in profile was prepared by the Department of Regional Development and Lands in conjunction with the Wheatbelt Development Commission to provide a snapshot of the region’s economy.

The rapid economic growth occurring in regional Western Australia is creating increased demand for housing and services. The State Government is acting to ensure the social and economic needs in the regions are addressed as a priority. The Royalties for Regions Scheme is an important Government initiative that will allocate an estimated $896.8 million for regional projects in 2010-11, including more than $56 million in the Wheatbelt Region.

The Wheatbelt, as the name implies, is the premium agricultural region. Almost half of the value of Western Australia’s agricultural commodities are produced there. Broad acre crops, such as wheat, barley, oats, hay and oil seed (canola) account for 80 per cent of the value of this region’s commodities. Mining, retail, manufacturing, and fishing help to diversify the regional economy. The Wheatbelt Region also contains a number of distinctive tourist attractions, such as the Pinnacles, Wave Rock, the New Norcia monastery and the turquoise waters of the coral coast to name a few.

This publication is easy to read and contains the latest information available on the economic development of the Wheatbelt Region, at the time of printing. It is one of a series of nine economic summary documents, each covering a non-metropolitan region.

As Minister for Regional Development I invite you to read Wheatbelt: a region in profile and trust you will find it interesting and informative.

Hon Brendon Grylls MLA
Minister for Regional Development; Lands
The State’s Regional Development Commissions were established by the Western Australian Parliament following the enactment of the *Regional Development Commissions Act 1993*.

The role of each commission is to:

- maximise job creation and improve career opportunities in the region
- develop and broaden the regional economy
- identify infrastructure services to promote economic and social development of the region
- provide information and advice to promote business development within the region
- seek to ensure that the standard of, and access to, government services in the regions is comparable to the Perth metropolitan area
- generally takes steps to encourage, promote, facilitate and monitor the economic development of the region.

For the purposes of achieving those objects a commission is to:

- promote the region
- facilitate coordination between relevant statutory bodies and state government agencies
- cooperate with representatives of industry and commerce, employer and employee organisations, education and training institutions and other sections of the community within the region
- identify the opportunities for investment in the region and encourage that investment
- identify the infrastructure needs of the region and encourage the provision of that infrastructure in the region
- cooperate with departments and agencies of the state and Commonwealth public service in order to promote equitable delivery of services within the region
- cooperate with local governments in order to promote equitable delivery of services within the region.
WHEATBELT REGION

KEY FEATURES

- Population more than 5000
- 500 - 5000
- less than 500
- Aboriginal communities
- Perth Airport
- Airfields
- River
- Lakes
- National Parks
- Fishing
- Horticulture

Important Resource Projects
- Operating shown in blue
- Proposed shown in red
- Under care and maintenance or closed shown in purple
- Gas field
- Gold
- Heavy mineral sands
- Iron ore
- Kaolin clay
- Major power station
- Nickel
- Titanium pigments

This map is a product of the Department of Water, Department of Environment, Planning and Sustainable Development, and the Department of Land and Mineral Resources. It shows the Wheatbelt Region of Western Australia. The map includes important features such as urban centers, localities, water bodies, and resource projects. The map is updated as of 19/03/2009.

The Department of Water has made all reasonable efforts to ensure the accuracy of this data; however, it is used at the viewer's own risk. The map is intended for display purposes at the scale of 1:2850000 when printed at A4 size.
OVERVIEW

The Wheatbelt Region comprises an area of 154,862 square kilometres and abuts the northern and eastern boundaries of the metropolitan area. The 43 local government authorities take in coastal districts in the west, mining and pastoral districts in the east and encompasses a significant area of productive agricultural land.

The Wheatbelt is home to approximately 75,000 people, making it the third most populous region in the state, with the population widely dispersed. The main service centres are in the shires of Northam, Narrogin, Merredin and Moora.

The economy of the Wheatbelt is varied. It is Western Australia’s most significant agricultural region. The coastal area, north of Perth, is home to a lucrative fishing industry, including rock lobsters for export. Aquaculture activities are expanding and tourism development is increasingly important. Gold, nickel and iron ore are mined in the eastern parts and mineral sands and other minerals in the west. Other industries include aviation, construction and renewable energy. The Department of Regional Development and Lands estimates the Gross Regional Product to be $5.7 billion for 2009-10, which is 3.1 per cent of Gross State Product.

The local governments in close proximity to Perth are managing significant development activity. The continued demand for land at the Avon Industrial Park demonstrates the interest in investing in the region. Proximity to Perth airports is an additional advantage encouraging population and industry growth.

The Wheatbelt has extensive educational, health, recreational and cultural services. It also offers affordable housing and business premises, including established industrial precincts ideal for manufacturing and new industry.
Population

The Wheatbelt had an estimated resident population of 74,899 people at June 2009, which is 3.3 per cent of the total population of Western Australia. The population is spread throughout the 43 local government areas in the region. The Shire of Northam has the largest population of 11,044 residents (14.7 per cent). In contrast, the shire with the smallest population is Westonia with 208 residents.

The Wheatbelt itself has four sub-regions; Avon, Central East, Central Midlands and Central South. Of these sub-regions, the largest is Avon with 35.8 per cent of the region’s population.

In the 10 years to June 2009, the Wheatbelt population remained stable, growing by an annual average of 0.4 per cent. However, over the last five years the region grew by twice that rate at 0.8 per cent per year and increased by 1.6 per cent in the last 12 months, suggesting faster growth.

Indigenous residents account for 4.9 per cent of the Wheatbelt’s population. The shires of Tammin, Quairading and Brookton recorded the greatest percentage of Indigenous residents in 2006. In 2004, the Western Australian Planning Commission forecast the population of the Wheatbelt to increase to 89,900 by 2031. However, these projections may prove to be conservative.
Labour Force

The labour force of the Wheatbelt increased marginally over the past decade from 37 788 in 1999-00 to 42 351 persons in 2009-10. In 2009-10, labour force included 40 644 workers and 1708 unemployed persons. This represents an unemployment rate of 4.0 per cent, which is below the state rate of 4.9 per cent.

The workforce in the Wheatbelt increased from 36 428 persons in 1999-00 to 40 644 persons in 2009-10, an increase of 12 per cent. Unemployment fluctuated reaching a peak of 4.8 per cent in 2001-02 before falling to 2.6 per cent in 2006-07. Subsequently unemployment increased to 4.0 per cent in 2009-10.

The 2006 Census of Population and Housing reports agriculture, forestry and fishing as the region’s largest employer, accounting for 30.2 per cent of the total workforce. These figures are indicative of the importance of these primary industries to the region. The second largest employer is retail trade, with 8.6 per cent, followed closely by education and training at 7.6 per cent.

Employment by Industry Breakdown

<table>
<thead>
<tr>
<th>Industry</th>
<th>% of total workforce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Forestry and Fishing</td>
<td>30.2% 33.6%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>8.6% 10.8%</td>
</tr>
<tr>
<td>Education and Training</td>
<td>7.6% 7.2%</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>7.2% 6.6%</td>
</tr>
<tr>
<td>Public Administration and Safety</td>
<td>6.1% 4.2%</td>
</tr>
<tr>
<td>Construction</td>
<td>5.9% 5.4%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>5.3% 4.8%</td>
</tr>
<tr>
<td>Transport, Postal and Warehousing</td>
<td>4.7% 3.7%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>4.1% 3.7%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>3.8% 4.3%</td>
</tr>
<tr>
<td>Other Services</td>
<td>3.0% 2.7%</td>
</tr>
<tr>
<td>Mining</td>
<td>2.8% 2.2%</td>
</tr>
<tr>
<td>Inadequately described/Not stated</td>
<td>2.5% 2.6%</td>
</tr>
<tr>
<td>Professional, Scientific and Technical Services</td>
<td>2.1% n/a</td>
</tr>
<tr>
<td>Administrative and Support Services</td>
<td>1.6% n/a</td>
</tr>
<tr>
<td>Financial and Insurance Services</td>
<td>1.5% 1.4%</td>
</tr>
<tr>
<td>Electricity, Gas, Water and Waste Services</td>
<td>1.1% 0.8%</td>
</tr>
<tr>
<td>Rental, Hiring and Real Estate Services</td>
<td>0.9% 4.0%</td>
</tr>
<tr>
<td>Arts and Recreation Services</td>
<td>0.5% 0.8%</td>
</tr>
<tr>
<td>Information Media and Telecommunications</td>
<td>0.5% 1.1%</td>
</tr>
</tbody>
</table>

Source: ABS 2006 & 2001 Census of Population and Housing; usual residence
Tourism’s contribution to the region’s economy remained steady over the past decade. The Wheatbelt Region’s proximity to Perth ensures it receives a large number of regular and stopover visitors. These tourists enjoy a variety of activities and attractions including New Norcia, the Avon Valley, the Pinnacles, Wave Rock and the popular wildflower season.

According to data released by Tourism Western Australia, the number of visitors to the Wheatbelt Region was 733,000 in 2001, fluctuating to 557,000 in 2009. Domestic visitors totalled 519,000 in 2009, and international visitors amounted to 38,000. In 2001, the total value of tourism expenditure in the Wheatbelt was $195 million and after fluctuating over a 10-year period, expenditure was valued at $200 million in 2009. Domestic tourism expenditure totalled $161 million in 2009 compared with $39 million in international tourism.

Tourism development is being encouraged within the Wheatbelt Region, with initiatives such as the Jurien Bay foreshore redevelopment. This includes the construction of a new jetty, soundshell and stage area, and redeveloped foreshore park.
**Retail Turnover**

The Western Australian economy was robust over the last decade with the international demand for exports creating positive consumer confidence, which is reflected in retail turnover.

Retail activity for the region was recorded at $336 million for the financial year 1998-99. Retail trade steadily increased to reach $533 million by 2008-09, an annual average growth rate of 4.7 per cent over the decade. Narrogin, Northam, Merredin and Moora are the larger population and service centres within the region and are the focus for retail outlets, mainly servicing the agriculture, manufacturing and tourism industries.

**Mean Taxable Income**

The Wheatbelt Region followed an overall upward trend with an estimated mean taxable income of $50 318 for 2007-08. This was an increase from $30 449 in 1997-98 and represents an average growth rate over 10 years of 5.2 per cent, per year.

The Shire of Yilgarn had the highest mean taxable income for 2007-08 with $61 366.
Agriculture

Agriculture is the dominant industry in the Wheatbelt Region and was valued at $3.2 billion in 2008-09, accounting for 44 per cent of the value of state production. There were 4210 agricultural establishments in the region, covering a total of 11.2 million hectares.

Total value of agricultural production fluctuated over the decade to 2008-09 with a notable drop in total value for the region occurring in 2002-03. This slump was due to the decline in broadacre crop production caused by drought. Subsequently, better growing conditions resulted in crop recovery.

Value of Agriculture

Crops account for approximately 80 per cent of the total value of agricultural production in 2008-09, valued at $2.5 billion. The Wheatbelt’s value of crop production accounted for almost half (48 per cent) of the total value of crop production in the state. The main crops include wheat ($1.5 billion), barley ($334 million) and canola ($268 million).
In addition, livestock disposals totalled $422 million, with sheep and lambs accounting for $273 million, pigs and poultry $77.3 million, cattle $71.3 million and goats completing the balance. Wool accounted for $211 million, almost 90 per cent of livestock products ($235 million), with milk and eggs accounting for $24 million.
The coastline of the Wheatbelt Region supports part of the West Coast Rock Lobster Fishery and other marine fishing activities. The region’s total value of the live weight catch in 2008-09 is estimated at $59 million. This figure was relatively stable over the last three years.

The rock lobster industry dominates the region’s fishing (99 per cent of the value) and in 2008-09 recorded a catch of 2335 tonnes valued at more than $58 million. The Wheatbelt’s lobster catch accounted for 31 per cent of Western Australia’s total lobster catch.

The total fish catch was valued at $230 000 in 2008-09, down from $238 000 in 2007-08. The actual weight of the catch dropped over the 12 months to 2008-09 from 49 tonnes to 42 tonnes.

The aquaculture industry within the Wheatbelt Region fluctuated over the past four years, decreasing 18 per cent from $849 200 in 2007-08 to $696 700 in 2008-09. The Wheatbelt aquaculture industry primarily consists of finfish and yabbies. Potential also exists for the
cultivation of abalone. A license was issued for an offshore site at Green Islands, near Cervantes for farming beta-carotene.

### Timber

Forestry production in the Wheatbelt is a minor industry comprised of only hardwood. In 2009, 700 tonnes of timber were harvested at a value of $10 000. The industry production declined over the past decade. However, it increased 20 per cent in value between 2008 and 2009.

The top three tree crops currently grown in the region are sandalwood, brushwood and oil mallees. Sandalwood is a long-term product and is a valuable export to Asian markets. Oil mallee trees are harvested and their leaves used to produce Eucalyptus Oil for export.

Tree farming has the potential to provide sustainable solutions to environmental and farm management issues, particularly salt damaged land, water logging and wind erosion, whilst delivering socio-economic benefits. Ongoing research exists to expand the range of commercial species and to provide significant tree crop diversification for farmers.
The Wheatbelt’s mining industry expanded significantly over the past five years, increasing in value by more than 200 per cent. In particular, the iron ore, gold, silver, gypsum and mineral sands production in the Wheatbelt significantly increased over the past few years, with the value of production reaching more than $1.4 billion in 2009-10.

Iron ore, gold and silver valued at $937.4 million collectively, make up 65.1 per cent of mining production.

Iron ore is mined at Koolyanobbing, 50 kilometres north-east of Southern Cross. The ore is sent by rail to the Port of Esperance for export. The Marvel Loch underground-gold mine produced 156,105 ounces of gold ore with 4.0 grams of gold per tonne in 2009-10. Capital expenditure in 2010 will refurbish the processing plant.
Gypsum and heavy mineral sands make up 16.5 per cent of the total value of mining production in the Wheatbelt, amounting to $238.3 million in 2009-10. The major mineral sands mine in the Wheatbelt is located at Cooljarloo site, where zircon is mined and titanium dioxide is manufactured from synthetic rutile. Most of the mineral sands produced in the region are exported overseas.

Nickel, copper and salt totalled $260.2 million, representing 18.1 per cent of the total mining production in the Wheatbelt.

Source: Department of Mines and Petroleum with estimates by the Department of Regional Development and Lands
The manufacturing sector accounts for a modest proportion of the Wheatbelt’s economy with the Manufacturing Census of 2006-07 reporting sales of goods and services at an estimated $519 million, with 288 business establishments. The Wheatbelt’s economy has well-developed transport links, low cost industrial land and designated industrial precincts to cater to the processing of the mining and agricultural products. It is well-placed to access the metropolitan market.

Fabricated metal products, machinery and equipment and food processing industries have the greatest representation in the Wheatbelt with 54, 47 and 45 business establishments respectively. Operations include flour milling, engineering and metal fabrication works, cabinet making and furniture products, mineral sands processing, brick making, fibreglass production, abattoir operations and seafood processing.

<table>
<thead>
<tr>
<th>Total manufacturing locations</th>
<th>Estimated Number of Locations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fabricated metal product mfg</td>
<td>54</td>
</tr>
<tr>
<td>Machinery and equipment mfg</td>
<td>47</td>
</tr>
<tr>
<td>Food product mfg</td>
<td>45</td>
</tr>
<tr>
<td>Furniture and other mfg</td>
<td>30</td>
</tr>
<tr>
<td>Other manufacturing nec</td>
<td>28</td>
</tr>
<tr>
<td>Non-metallic mineral product mfg</td>
<td>13</td>
</tr>
<tr>
<td>Wood product mfg</td>
<td>12</td>
</tr>
<tr>
<td>Primary metal and metal product mfg</td>
<td>12</td>
</tr>
<tr>
<td>Beverage and tobacco product mfg</td>
<td>11</td>
</tr>
<tr>
<td>Basic chemical and chemical product mfg</td>
<td>11</td>
</tr>
<tr>
<td>Textile, leather, clothing and footwear mfg</td>
<td>10</td>
</tr>
<tr>
<td>Printing (including the reproduction of recorded media)</td>
<td>9</td>
</tr>
<tr>
<td>Polymer product and rubber product mfg</td>
<td>6</td>
</tr>
</tbody>
</table>

Source: ABS with additional estimates derived by Regional Development and Lands
BUILDING APPROVALS

The value of building approvals for the Wheatbelt sustained strong growth over the past decade. Approvals for the year 2000-01 were valued at $77 million increasing to $285 million in 2009-10.

The value of residential approvals increased from $52 million in 2000-01 to $157 million in 2009-10 reflecting increases in population, the increasing value of housing and of housing construction. The total number of residential dwelling approvals was 580 for 2009-10, up 16 per cent from 499, the previous year. The indicative average price per unit value for residential approvals was $118 000 in 2000-01, which increased in nominal value to $269 000 by 2009-10. The majority of residential approvals were in the Shire of Chittering with 83 projects valued at $25 million. Additionally, the shires of Gingin and Northam approved 80 and 100 projects, both valued at $23 million.

The value of non-residential construction increased over the last decade. Non-residential approvals reached a peak value of $129 million in 2009-10, rising from $63 million the previous year.

Value of Building Approvals

Source: Australian Bureau of Statistics
Project Investment

Project investment is divided across three stages: under consideration; committed; and under construction. Under consideration is where the project idea is being scoped for further development. Once the projects are approved and funding secured, they are categorised as committed and recognised as under construction once building commences.

Investment in the Wheatbelt fluctuated over the last eight years, and is valued at approximately $1.2 billion for 2009-10. Major investment in the region is in transport, electricity, gas and water industries.

Source: Access Economics - Investment Monitor
Note: The graph represents an average investment total over 4 quarters for each financial year

Upgrades to road infrastructure and wind farm construction were important projects. Funding was committed by the manufacturing and mining industries in 2009-10 for the construction of a nickel processing plant. The investment trend shows a fewer number of larger valued projects in the region.
INDIGENOUS PARTICIPATION

At the 2006 census, Indigenous people made up 4.9 per cent of the population, amounting to 3544 persons.

The industries with the largest Indigenous participation include tourism, arts and crafts. Small numbers of Indigenous people are also employed in government, semi-government agencies and community service organisations.

With the demise of Community Development Employment Programs, new initiatives are being explored to increase the employment rate of the Indigenous residents in the Wheatbelt region. These new initiatives plan to generate employment opportunities in land-based activities (farm, forestry and land management), tourism, arts, and cultural education.

Royalties for Regions funds had significant impact in supporting programs involved in Indigenous arts. The Community Arts Network WA project at Narrogin received funding, which uses art as an individual and social/community healing and development tool.

The Wheatbelt Indigenous Services Assessment (WISA) resulted from extensive engagement with Noongar people. Surveys and interviews occurred with responses received from 40 service deliverers and five local governments. The WISA report recommends that collaboration and engagement between service providers and the Aboriginal and non-Aboriginal community, should continue to enhance the development of culturally sensitive and sustainable employment models.

The Indigenous Labour Hire model developed by the Wheatbelt Development Commission aims to increase Aboriginal employment opportunities by partnering with stakeholders to implement pilot schemes in the region.
Social and Economic Infrastructure

Water is one of the highest priority infrastructure requirements in the Wheatbelt. There are large ground water reserves throughout the region’s coastal area, while inland areas are serviced by a number of schemes, including the Goldfields and Agricultural Water Supply Scheme and the Great Southern Towns Water Supply Scheme among others.

The Wheatbelt’s electricity demand is serviced largely by the South West Interconnected System. There is also a growing interest in alternative energy generation, which resulted in the establishment of two wind generation projects and the commencement of solar energy research in the region. Gas is reticulated from the Dampier to Bunbury pipeline.

There are 42 Community Resource Centres located across the Wheatbelt forming a telecommunications network for the benefit of regional communities.
INVEST IN THE WHEATBELT REGION

TOURISM

The Wheatbelt’s central location and its proximity to Perth create the ideal opportunity for investors to capitalise on both the domestic and international tourist market. The region is home to a variety of landscapes, from the tourist-friendly coast in the north-west, fertile countryside in the southern and central Wheatbelt, to the vast wildflower meadows in the east.

Major development is underway in the popular tourist town of Jurien Bay. The Jurien Bay Foreshore Development includes the construction of a new jetty soundshell and stage area and redevelopment of the surrounding foreshore park.

Other potential mid to long term investment opportunities exist in the development of:

- rural excursions and organised tours, including day trips to wildflower spots and lesser-known rural towns
- Aboriginal cultural tourism experiences
- eco-style accommodation
- adventure tourism alternatives, including aviation, hiking, four-wheel drive adventures and water sports.

AGRICULTURE

The Wheatbelt is ideal for agricultural activity due to its warm climate.

The horticulture industry is showing signs of rapid growth in the northern areas of the Wheatbelt such as Gingin, Chittering, Moora and Dandaragan. There have been a number of successful new crops, including citrus, olives, market gardening (vegetables and herbs) and mushrooms. Additionally, there are also opportunities for wildflower (native flora) cultivation for export. Plant nursery investment prospects also exist.

The Department of Agriculture and Food Western Australia has developed an extensive information network called ‘Find your Farm’. The aim of the network is to assist potential investors to find the right area, make business contacts and view agricultural statistics and information.
MINING AND MANUFACTURING

With recent developments in the iron ore, gold and nickel industries and with more resource projects currently under consideration, the Wheatbelt holds great potential for future investment in the mining industry.

The region’s close proximity to Boddington Gold Mine in the Peel Region allows benefits to spill over the border to the Wheatbelt, contributing to both local workforce employment and establishing new service industries and training to broaden the local skills pool.

Investment opportunities in the Wheatbelt include:

• expansion of support services, in both engineering and logistical support
• investing in mining opportunities in the region.

RENEWABLE ENERGY

The Wheatbelt holds great potential for renewable energy developments. There are a number of successful wind farms across the region with Emu Downs and Badgingarra wind farms in the Shire of Dandaragan, on the north coast of the region, and Collgar wind farm in the Shire of Merredin.

Further renewable energy experiments in the Wheatbelt include the Narrogin bio-energy project where electricity and eucalyptus oil is produced from oil mallee feedstock.

The State Government’s Office of Energy has published a Renewable Energy Handbook, a practical guide with important information for developing commercial renewable energy projects in the state. The Renewable Energy Handbook is available from the Office of Energy on CD by phoning the Energy Smart Line on 1300 658 158.

FURTHER INFORMATION

For more details regarding these industries please contact the Wheatbelt Development Commission or visit the following websites:

Wheatbelt Development Commission: (see back cover)
Tourism Western Australia: www.tourism.wa.gov.au
Department of Agriculture and Food: www.agric.wa.gov.au
Department of State Development: www.dsd.wa.gov.au
Department of Mines and Petroleum: www.dmp.wa.gov.au
Office of Energy: www.clean.energy.wa.gov.au
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