e-brief

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The New England-North West Region: An Economic Profile

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1 INTRODUCTION

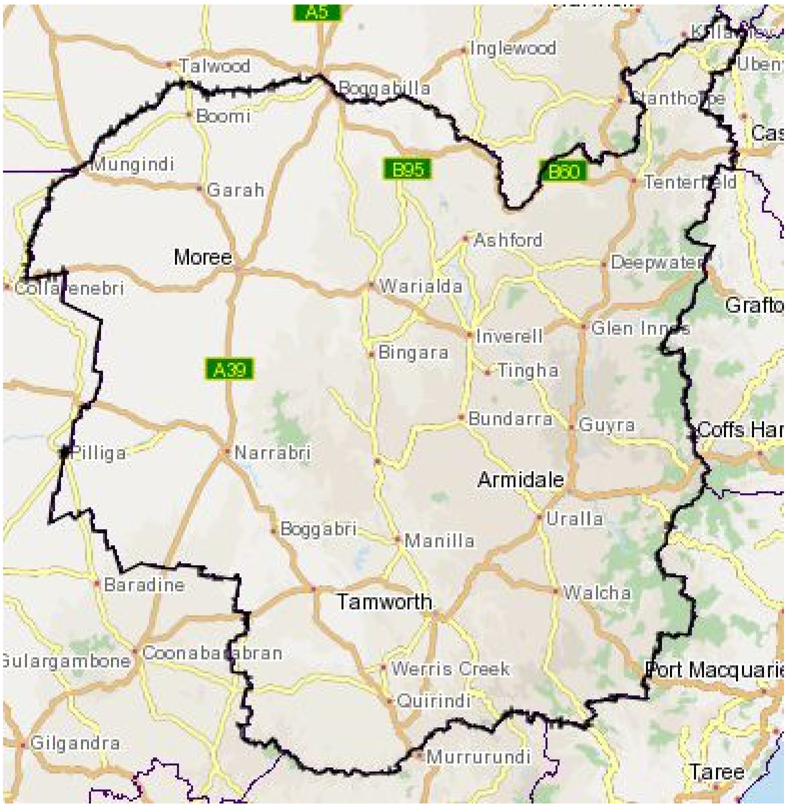
The New England-North West region (also known as the Northern Inland) has experienced substantial changes. During the nineteenth century the driving forces in production and employment were primary production and mining. During the twentieth century the predominant area of employment became the services sector. This e-brief examines the region, looking at its administrative and productive structure and the influences that currently bear on it.

In this e-brief the name "New England-North West" is used primarily because that is the nomenclature adopted by the Australian Bureau of Statistics (ABS) in its new regional geography, which is relied on here for labour force data. Geographically, this region is very nearly identical to the Regional Development Australia (RDA) Northern Inland region and therefore the two names can be used more or less interchangeably.[1]

Within the New England-North West, the two geographical components of the region are essentially characterised by their different forms of primary production. The contrast between the two was summarised by Alison Kingsland:

> [The New England area] of the state consists of large areas of rugged country as well as extensive plateaux. Thus only a relatively small area is suitable for cultivation. . .Farming on. . . .[these] tablelands of the Great Dividing Range is based mainly on sheep and cattle grazing. . .The undulating nature of the [NSW North West] slopes. . .makes the area ideally suited to agricultural pursuits. The slopes comprise. . .what is known as the 'wheat belt'. . .[2]

New England-North West Statistical Area 4



2 URBAN AND REGIONAL PROFILES

2.1 Urban Local Government Areas (LGAs)

Amongst the 13 Local Government Areas (LGAs) that constitute the region, only 2 are urban: Tamworth Regional and Armidale-Dumaresq. In 2013, Tamworth had an estimated 59,743 inhabitants and Armidale had an estimated 25,343. Their populations, as a percentage of the entire region, are as follows:

Tamworth Regional and Armidale-Dumaresq: Populations as % New England-North West (2013 est.)[3]

Tamworth Regional	59,743 (32.2%)
Armidale-Dumaresq	25,343 (13.7%)

2.2 Rural LGAs

The rural LGAs in the Northern Inland, and their populations as a percentage of the region, are detailed below:

Rural LGA Populations in the New England-North West Region: 2013 (est.)[4]	Population	% of Region
Inverell	16,727	9.0%
Moree	14,250	7.7%
Narrabri	13,685	7.4%
Gunnedah	12,688	6.8%
Glen Ines	8,905	4.8%
Liverpool Plains	7,763	4.2%
Tenterfield	6,973	3.8%
Uralla	6,370	3.4%
Gwydir	5,104	2.8%
Guyra	4,645	2.4%
Walcha	3,087	1.6%

2.3 Geographical and Commercial Features

The geographical and commercial features of the region's LGAs are listed in descending population order, as follows:

Tamworth Regional LGA spans an area of 9,892 square kilometres. It was formed (during the term of the Carr Government) through the amalgamation of the city of Tamworth with the LGAs of Barraba, Manilla, Nundle and Parry.[5] Major employers include BAE; Cargill; NSW Health; and Thomas Foods.[6]

Armidale-Dumaresq LGA covers an area of 4,236 square kilometres.[7] Education is a major employing industry in Armidale. In 2012 the University of New England (UNE) employed 462 full-time equivalent (FTE) academic staff and 634 FTE general staff.[8]

Inverell LGA spans an area of 8,606 square kilometres.[9] The largest company, in the LGA, is Bindaree Beef: employing over 600 people. Other prominent employers include BOSS Engineering; Inverell Truck and Diesel Repairs; Inverell Freighters; Best Employment; and the McLean Memorial Retirement Village.[10]

Moree Plains LGA occupies an area of 17,930 square kilometres.[11] Significant employers include Auscott; Australian Food and Fibre; GrainCorp; and Seery Partnership.[12]

Narrabri LGA spans an area of 13,028 square kilometres.[13] Companies operating in the Narrabri area include Auscott; Cargill; Glencore; GrainCorp; Idemitsu; Santos; and Whitehaven Coal.[14]

Gunnedah LGA spans an area of 4,994 square kilometres.[15] Significant employers include Fourways Haulage; Gunnedah Leather Processors; Gunnedah Timbers; NSW TAFE; Pryde's Easifeed; and Whitehaven Coal.[16]

Glen Innes Severn LGA occupies an area of 5,487 square kilometres.[17] Sizeable companies, in the LGA, include Eastmon Photo; Rangers Valley Feedlot; and Roseneath retirement village.[18]

Liverpool Plains LGA covers an area of 5,087 square kilometres.[19] It was formed (during the term of the Carr Government) through alterations to the boundaries of the previous Gunnedah, Murrurundi, Parry and Quirindi local government areas. The LGA administration is based in Quirindi. Larger employers include Bayliss Trading; Case; John Deere; North West Farm Machinery; Pursehouse Rural; and Whitehaven Coal.[20]

Tenterfield LGA occupies an area of 7,322 square kilometres.[21] Most employment is provided by small operators. Some of the more sizeable are Bro'Neills Electrical Contractors and Darryl McCarthy Contractors. The Haddington and Millrace homes provide employment in aged care.[22]

Uralla LGA spans an area of 3,229 square kilometres.[23] Employers are small in nature. Amongst the more prominent are the Phoenix Foundry and McMaugh Gardens retirement village.[24]

Gwydir LGA occupies an area of 9,274 square kilometres. It was formed in 2004 from an amalgamation of Bingara and Yallaroi shire councils as well as an incorporation of 40% of Barraba shire council.[25] Businesses are small in size. The council offices are in Bingara, but Warialda has almost an equal population. A significant degree of employment is provided by the Naroo and Touriandi aged care facilities.[26]

Guyra LGA covers an area of 4,394 square kilometres.[27] The biggest individual employer is the Costa Group (employing around 200 people).[28]

Walcha LGA covers an area of 6,266 square kilometres.[29] All businesses are of a smaller nature. Some of the more prominent include Betts Transport and Brian Smith Timber Transport. Apsley Riverview Hostel provides employment in aged care.[30]

The 13 LGAs, in terms of their individual gross regional product (GRP), their number of businesses and their unemployment rates, are as follows:

LGAs in the New England-North West Region: Gross Regional Product/Number of Businesses/Unemployment Rate (2011-12 est.)[31]

	GRP	Businesses	Unemployment Rate (%)
Tamworth	$2.4 bn	5,603	6.3
Armidale	$1 bn	2,314	5.9
Narrabri	$846m	1,512	5.2
Moree	$745m	1,657	8.4
Gunnedah	$608m	1,250	6.5
Inverell	$582m	1,588	7.9
L'Pool Plains	$359m	971	6.6
Glen Innes	$295m	1,145	8.3
Tenterfield	$197m	906	7.3
Gwydir	$166m	713	4.5
Uralla	$162m	720	5.2
Guyra	$157m	642	8.1
Walcha	$145m	709	3.8

3. ECONOMIC HISTORY

3.1 The Nineteenth Century

Sparse Settlement on Large Holdings (Woolgrowing). Woolgrowing was the principal activity in the New England-North West from the 1820s to the end of the nineteenth century and brought prosperity to the region: but drew only a comparatively small number of people to the area. Woolgrowers thrived as the colony became integrated into the world economy. In a space of ten years, from the 1820s to the 1830s, exports from NSW and Tasmania formed 12% of Britain's wool imports.[32] Woolgrowing employed relatively few people. While in the shearing season 20 or 30 shearers (and ancillary workers) might work on a station, during the 1850s (for instance) an average of between 6 to 7 shepherds were employed full-time on each run.[33] Fred Gruen pointed to the relatively small number of woolgrowers in NSW with flocks of more than 20,000 sheep each (only 750 in total) who dominated the industry at the beginning of the 1890s: accounting for "over 38.5 million sheep" out of a total flock of 62 million.[34] At the end of the 1890s, wool exports constituted 50% (by value) of all the colony's exports. New England at this point in time, as R.B Walker later commented, "was still overwhelmingly a region of fine-woolled merinos."[35]

Beef cattle production began about at the same time as woolgrowing. Around the Liverpool Plains alone, by 1861, there were 200,000 cattle (as against 746,000 sheep).[36]

More Intensive Settlement on Smaller Holdings (Wheatgrowing). As land became available to small-scale primary producers, wheat growing expanded. Bruce Davidson wrote that in the 1890s "A selector on a 640-acre cleared holding, carrying one sheep per acre, could only expect a net return of £72 per annum. The same selector growing 200 acres of wheat could expect a net return of £205 per annum."[37] Wheat production (largely in the districts around Tamworth) expanded slowly during the mid-1800s and then gradually accelerated. Between 1881 and 1891, wheat output, from the Tamworth sector of the New England-North West, rose more than seven fold: from 3,088 tonnes to 29,700 tonnes.[38] By 1898 New South Wales became a net exporter of wheat. Eventually, during the twentieth century, NSW would rank second (amongst the states) in wheat production.[39]

Population Acceleration via Mining. Rapid population growth only truly occurred with the discovery of minerals: a development, however, that was mainly short-term. Between the 1840s and the 1850s, around 4,500 miners arrived in the vicinity of Uralla when gold was discovered near the Rocky River. In the 1870s, thousands of miners once more arrived when tin was discovered at Tingha (south of Inverell); at Elsmore (east of Inverell); and then at Emmaville (between Glen Innes and Tenterfield). Over 20 years, the population in this locality increased to 4,000 (amongst whom were 900 Chinese miners). In 1883 production reached its maximum (9,125 tons extracted during the year): making New England, momentarily, the largest tin producing location in the world. In 1895 the Gunnedah Colliery Company opened a small coal mine just outside the town.[40] The mineral deposits that brought people to the region largely petered out by the end of the nineteenth century. The Uralla gold seam was essentially dug out by the 1890s. A global slump in the 1890s caused the price of tin to crash, effectively destroying the New England tin fields.[41]

Emergence of Manufacturing. Basic manufacturing of consumption items emerged, in both Tamworth and Armidale, during the second half of the 1800s. One manufacturer, however, expanded dramatically (in tandem with the expanding production of wheat) to become the pre-eminent concern in Tamworth. Two flour mills were established in the town during the late 1860s: at one, of which, the renowned miller George Fielder began his career. In the early 1890s Fielder acquired control of a mill of his own, naming the firm Fielder and Son.[42]

Emergence of a Services Sector. Activity in what is currently classified as the "services sector" emerged during the 1850s.[43] By 1850 the colonial government had completed a road from Muswellbrook through Tamworth on to Armidale and Tenterfield.[44] Banks opened in Tamworth during the 1850s and in Armidale between the 1860s and the 1880s.[45] In 1878 the railway, from Newcastle, was extended to Tamworth (and then to Armidale in 1883). Between 1867 and 1879, 26 public schools were established in the area between Armidale and Tenterfield. The first school in Tamworth was established in 1856 (rebuilt and expanded in 1877). Between the 1870s and the 1880s over 20 Catholic girls schools were opened in the New England North West.[46] The first hospital in Armidale was established in 1853; the first hospital in Tamworth was opened three years later.[47] In 1885 a gas works was established in Tamworth and, three years later, the same town became the first municipality amongst all the colonies to install electric street lighting: using water, from the Peel River, for a powerhouse.[48]

At the end of the 1800s, Tamworth was slowly emerging as the leading town (by population) in the New England-North West. In 1901 Tamworth had a population of 5,799 (compared to Armidale's population of 4,200).[49]

3.2 Emergence/Decline of the New State Separation Movement in the Twentieth Century

In the first half of the twentieth century, the New England-North West became part of a separation movement, in northern NSW. In 1915, while war raged in Europe, a dispute erupted between Grafton Council and Holman's ALP NSW Government over who should maintain a ferry service across the Clarence River. In response a Grafton alderman (and surgeon), Dr. Earle Page, founded a Northern NSW Separation League. Page's departure for the war contributed to the issue momentarily subsiding, but agitation revived after the war and grew with the support of the Country Party (formed in 1920) of which Page was a founding member. In 1933 (a year after the dismissal of Jack Lang), Premier Bertram Stevens appointed Harold Nicholas MLC to head a Royal Commission into the possible boundaries for new states (although he was not empowered to pass judgment on the desirability of their formation). In his report, delivered in 1935, he suggested boundaries for 3 new states, with one boundary containing a northern area including Newcastle. Nicholas's suggestions, however, were not taken up. Three years after the end of the Second World War, a conference was held in Armidale to examine decentralisation and, a year later, another meeting was held (addressed by Page) which launched the New England New State Movement. In 1967, two years after gaining office in NSW, Sir Robert Askin's Liberal Party-Country Government held a referendum amongst those people living inside the boundary that Nicholas had suggested might form a new northern state. The majority voted “no” and the separation movement died away.[50]

3.3 Government Assistance in the Twentieth Century – Countering Downturns

Between the 1920s and the 1970s, state and federal governments introduced marketing boards to uphold prices received by producers. Boards (and similar organisations) established, over the fifty-year period, included the Egg Marketing Board (1928), the Australian Wheat Board (1948) and the Australian Wool Corporation (1970). During the second half of the twentieth century, and into the early years of the twenty-first century, these (and many other boards) were abolished: the NSW Egg Corporation (the successor to the Egg Marketing Board) in 1989; the Australian Wool Corporation in 1991; and the Australian Wheat Board (losing its control over domestic prices in 1989, and its control over export prices in 2008).[51]

The thrust of this policy of deregulation, as discussed in this e-brief, was to restructure agriculture from primary production undertaken by individual producers towards agribusiness (integrated production driven by companies).

Government assistance has also been provided to individual firms: particularly during downturns in activity. As Roy Powell has pointed out,

> In the decades to 2001. . .[in] the Namoi [area]. . .There was restructuring of coal mining, meat processing, electricity distribution, transport and communications and banking that resulted in job losses.[52]

Assistance has been relatively small (and sometimes ineffectual). A year after gaining office, the Askin state government obtained passage of the *State Development and Country Industries Assistance Fund Act 1966* and the *Country Industry Payroll Tax Rebate Act 1966*. Under this legislation, amongst the costs necessary for a firm to relocate to a regional centre, the state government would lend 60% and the relevant local government would lend 30%. Qualified rebates, on payroll tax, were also available to firms relocating to regional areas. The amounts of money lent were modest. In 1965-66 the Country Industries Assistance Fund (CIAF) lent $1.7 million; in financial year 1970-71 the fund lent $5 million. In the late 1970s, Neville Wran’s government obtained passage of the *Country Industries (Payroll Tax Rebate) Act 1977* which provided for payroll tax rebates for manufacturing or processing firms outside Sydney.[53]

During the early 1980s there was a global recession in the midst of which there was a downturn in the Australian beef industry. In 1981 the Pict frozen vegetable factory at Glen Innes and the Tancred Brother meatworks in Tenterfield (each of which employed several hundred staff) ceased operations.[54] Assistance to small firms, as a means to stimulate regional employment, intensified. On an overall level, between the late 1960s and the late 1980s, the CIAF lent $45 million to a substantial number of small companies.[55] In 1989 the Greiner Government replaced the CIAF with the Regional Business Development Scheme (RBDS). An original recipient of RBDS assistance was the Tamworth Flying School (which received over $6 million). In the early 1990s there was another global recession and, in the mid-1990s, abattoirs in Gunnedah and Guyra closed: the meat works, in both towns, being major employers with several hundred staff.[56] The downturns led to high rates of unemployment in the region, as demonstrated below:

Unemployment Rates: New England-North West (1986-1996)[57]

1986	11.5%
1991	11.9%
1996	10.4%

The RBDS was maintained by the Carr Government which, at the beginning of the twenty-first century, was contributing about $7.5 million a year.[58]

In more recent years, assistance (both at a federal and a state level) has been relatively small-scale and predominantly targeted at stimulating productive employment. In 2011, just under three years after the onset of the global financial crisis (GFC), the Gillard Government launched the Regional Development Australia Fund (RDAF): providing approximately $200 million a year, over 5 years, for projects (nominated by RDA committees) which would contribute to the economic development of a region. Through the RDAF, RDA Northern Inland has obtained the following amounts of federal funding for the following projects: $3.8 million for an upgrade to the Thunderbolt's Way tourist road between Uralla and Gloucester; $500,000 for an upgrade to Glen Innes Airport (in preparation for an aviation school); and $500,000 towards the redevelopment of the Varley Oval in Inverell.[59]

On a state level, in the early twenty-first century, Ramage Engineering (Guyra) and G and C Engineering (Uralla), amongst other small firms, were both provided assistance (by the NSW Department of State and Regional Development) sufficient to create 3 more jobs per firm.[60] In 2011 the O'Farrell Government established the Regional Industries Investment Fund (RIIF). In 2012-13 the RIIF provided $4.8 million to 51 projects. Last year, through the RIIF, the state contributed $1.6 million towards the Glen Innes Airport aviation school.[61]

Contrasting results have emerged from the CIAF and the RBDS. On the one hand, there are firms (or undertakings) that have been assisted by the RBDS and continue in operation: including the Tamworth Flying School, Gunnedah Timbers, G and C Engineering, Nundle Woollen Mill and Ramage Engineering. On the other hand, there are a number that have been assisted by the RBDS and have since closed or relocated: including Jakab Industries Pty Ltd (manufacturing buses and industrial caravans, in Tamworth, and employing over forty workers in the 1970s) closing in 2002; Ritec (a manufacturer of outdoor camping equipment which relocated to Tamworth in 1974 eventually employing over 60 staff) but, in 2005, was listed as a deregistered company; and Supercoat Petcare which was assisted by the RBDS, in the late 1990s, to move from Sydney to Inverell but, in 2008 (a year after its acquisition by Nestle), relocated to Blayney.[62]

3.4 The Twentieth Century and into the Twenty-First Century

Regional Hubs. The outstanding feature of the New England-North West, in the twentieth century, is the coalescence of the region into 2 services-based hubs (Tamworth and Armidale) and complementary rural hinterlands. This is a manifestation of a general tendency in regional economies, as described by David Kay and his colleagues:

> in the regional economy. . .[there is a] shift. . .to service industries involving food, health, recreation. . .along with retail and business services. These service industries exhibit a strong combination of forward and backward linkages and play a strong role in supporting economic activity. . .[63]

The development of services in Tamworth, through its interaction with its hinterland, has been described by Roger Epps as follows:

> [for] Gunnedah, Moree and Narrabri. . .services, including electronics and electrical maintenance. . .equipment hire. . . accounting and financial services are located at Tamworth and cover the whole region.[64]

Tamworth, by the mid-1960s, already had an employment base composed predominantly of services workers:

Tamworth Municipality: Employment in Services and Manufacturing (1966)[65]

Services	7,000
Manufacturing	1,200

The Hunter Valley Research Service outlined the areas of services employment in Tamworth, in 1966, as follows:

Federal Government. Federal government departments represented included army, civil aviation, labour and national service, post-master general (PMG), works, bureau of meteorology.[66]

State Government. State government departments represented included agriculture, child welfare, education, labour and industry, lands, main roads, motor transport, public health, public works, police, railways, technical education, valuer general and weights and measures.[67]

Retail and Personal Services. 1,500 people were employed in this sector in 1966.[68]

Transport. During the early years of the Second World War, the RAAF established a flying school in Tamworth. In 1947, East West Airlines (EWA) was established in Tamworth. By 1966, EWA was operating 5 aircraft and flying regular services to 31 towns in NSW and Queensland.[69]

Communications. In 1966, telephone communications where provided, from Tamworth, by the PMG. Channel 9 had a regional station in Tamworth, broadcasting to 30,000 homes. Tamworth's main newspaper, the *Northern Daily Leader*, had a circulation of 12,000.[70]

Finance and Insurance. 11 branches of the major banks collectively existed in Tamworth in 1966, with 189 employees. 25 concerns dealt with insurance, employing 177 staff.[71]

Armidale, similarly, functions as the regional hub of the New England area. Planning Workshop Australia noted in 2008 that Armidale is the:

> principal focus for retail, commercial, education and research facilities. It also houses 65% of the. . .[New England] population.[72]

As will be detailed in section 4 of this paper, services continue to dominate regional employment in the 21st century.

Large Domestic and International Companies in Manufacturing. A key feature of regional production, in the twentieth century, was the entry of large domestic and international companies into manufacturing. A major instance of domestic consolidation in the New England-North West is Baiada. Small scale poultry production began, in the Tamworth area, during the 1920s. By the 1950s, hundreds of small farmers, around Tamworth, were producing 10% of the state's poultry and 16% of the state's eggs.[73] In 1964 the Baiada company established a processing plant in Tamworth. As Epps and Henderson have pointed out, "During the 1960s the chicken meat industry underwent a period of rapid growth. . .[in the course of which] the Australian poultry industry has undergone a long run shift towards fewer but larger poultry farms".[74] At the same time, according to David Darvall and Zoe de Saram, "Throughout the 1960s hundreds of growers. . .left the industry as a consequence of intense competition and price cutting."[75] Many (formerly) independent poultry farmers became contract growers. Epps and Henderson wrote in 2000 that,

> Chickens are commonly raised by contract. . .farmers. In exchange for receiving day old chicks, feed, medicine, and a growers' fee, farmers supply their labour, land and capital in the form of sheds. . . at no stage of production does the farmer own the bird. It is for this reason that they are known as 'growers' rather than 'farmers'. . .[76]

Through acquisitions, in the twenty-first century, Baiada has emerged as the second-largest poultry processor in Australia and the pre-eminent poultry processor in the New England-North West.[77] In 2009, Baiada acquired Bartter Chickens (which itself had acquired Steggles in 1999). Baiada is a supplier to Kentucky Fried and provides Coles and Woolworths with chicken products (under the Steggles and Lilydale brands).[78] In 2010-11 the New England-North West was responsible for 19.2% of NSW poultry meat production.[79] Between 1986 and 2012-13, Baiada Tamworth's weekly production of poultry meat increased by 1,280%:

Baida (Tamworth): Weekly Poultry Meat Production (1986 – 2012/13)[80]

1986	91.35 tonnes
2012/13	1,170 tonnes

In 2013, Baiada, according to PSA Consulting, "directly employs 750 full time, part time, casual and contract employees. . .[an] estimated. . .85% [637] of these are employed within the Tamworth LGA".[81] To sustain its operations, Baiada has established a stock feed mill (Tangaratta Stockfeeds) which, in 2002, was intending to produce up to 520,000 tonnes of stockfeed a year.[82]

A second large domestic company that has grown in the New England-North West is Bindaree Beef. The company was founded in 1981 by John McDonald and is based in Inverell. In 2013, Bindaree Beef processed 1,300 cattle a day and employed 600 people. The company is a major supplier of beef to Aldi.[83] A third instance, of a large domestic company in the region, is Thomas Foods International or TFI (headquartered in Murray Bridge). TFI entered meat processing in Tamworth in 2010 by acquiring Peel Valley Exporters (PVE): a lamb processing works. PVE was a major supplier to Woolworths and, in 2004, employed 300 staff. TFI operates 4 meatworks (in Queensland, NSW and South Australia) and is the third-biggest meat processor in Australia. As well as being a large domestic company, Thomas Foods has expanded overseas - taking a 50% interest in Foodcomm International (a North American importer of Australian meat).[84]

A prominent example of consolidation in regional manufacturing by overseas companies is provided by Cargill (the world's largest food processor and manufacturer, and the largest privately owned company in the USA, with 97,000 employees globally).[85] In 1967, Cargill established a cotton oilseed crushing plant in Narrabri, supplying oil for commercial deep frying.[86] In 1998 Cargill purchased (what had been) the Tamworth municipal abattoir. John Lawrence wrote that:

> the Cargill plant at Tamworth represents part of the supply chain to Woolworths. . .Currently, 75 per cent of Tamworth product goes to Woolworths, and Tamworth supplies 90 per cent of Woolworths beef in New South Wales.[87]

Cargill's meat processing operations are allied to beef cattle grazing in the region. In 2010 nearly a quarter of the state's beef cattle (1 million out of 4 million) were on properties in the New England-North West.[88]

In 2002, Cargill expanded further, forming a partnership with GrainCorp (originally the Grain Elevators Board of NSW) which acquired Goodman Fielder's flour milling operations (known as Allied Mills including the Fielder mill in Tamworth). Allied Mills immediately concluded a contract to supply Goodman Fielder with flour for its bread and biscuits. The Tamworth mill (which had employed hundreds of staff in the twentieth century) is currently a smaller operation than its predecessor: processing, in 2004, 70,000 tonnes of wheat (2.8% of an Australian total of just over 2.5 million tonnes) and employing between 50 and 75 FTE staff.[89] In 2009, Cargill moved into a dominant position in Australian grain trading when it gained control of the former Australian Wheat Board (AWB).[90] In the same year that it acquired AWB, Cargill formed a partnership with Teys Brothers under which Teys would operate the Cargill abattoir in Tamworth. As Brian Moir pointed out in 2011, "The second-largest group in Australian meat processing is Teys Australia – a Cargill joint venture. . .[that now accounts] for 16 per cent of Australia's red meat slaughter."[91] In 2013 the Tamworth operation of Joe White Maltings or JWM (previously owned by ABB, the former Australian Barley Board) was bought by Cargill from Glencore (after the latter acquired the Canadian agribusiness Viterra which had previously purchased ABB in

2009). JWM's Tamworth plant, in 2008, produced 45,000 tonnes of malt (9% of Australia's output).[92]

Domestic and Multinational Companies in Regional Agricultural and Mining Activity. A prominent example of a regional domestic company, engaged in agriculture-based activity, is (as referred to above) GrainCorp. In 1989 (when Bob Hawke's federal government deregulated domestic prices for wheat), Nick Greiner's NSW Government sold off the (formerly) government-owned Grain Handling Authority or GHA (the former Grain Elevators Board). GHA was acquired by the wheat grower group Prime Wheat Association and (two years later) renamed GrainCorp: listing on the stock exchange in 1998.[93] GrainCorp was a project of at least one large-scale wheat grower in the New England North West. Ronald Greentree (considered the biggest wheat farmer in Australia, with a 47,000 hectare property north-west of Moree) was founding chair of GrainCorp and remained in that position until 2005. In 2010 (through acquiring the privatised Victorian Bulk Handling Authority and the privatised Queensland State Wheat Board) GrainCorp had 270 storage facilities and, in that same year, purchased 3 million tonnes of wheat from farmers.[94] As an adjunct to its receival business, GrainCorp ventured into facilities at ports. Damon Kitney and Sarah-Jane Tasker wrote that in 2014, as far as this area was concerned,

> Three large. . .companies dominate. . .CBH Group in Western Australia, the Glencore Xstrata-owned Viterra in South Australia and GrainCorp along the east coast of Australia. GrainCorp itself owns seven of the 10 grain port terminals in NSW.[95]

Another significant instance of a domestic company, entering large-scale regional agricultural activity, is the Costa Group (CG). In 2005, CG (based in Geelong) began production in Guyra of truss tomatoes in the largest glasshouse in Australia (covering 5 hectares under one roof). Costa Group invested $60 million in the operation which, by 2010, employed 250 people and produced around 11 million kilograms of truss tomatoes per annum.[96]

Multinational engagement, in regional primary production, has emerged particularly in cotton growing. In the second half of twentieth century, the use of wool in textile production continued to decline through the rise in use of synthetics.[97] As returns from wool diminished and the number of woolgrowers contracted,[98] cotton growing was inaugurated in the New England-North West, assisted by successive state governments' construction of two major dams: the Keepit Dam (opened in 1960) and the Copeton Dam (opened in 1976). In 1961 the NSW Department of Agriculture persuaded two American cotton farmers to embark on cotton growing near Wee Waa. In 1963 another two American producers acquired 7,500 acres near Narrabri: forming a company (Auscott) which, in turn, sub-leased to 20 Australian cotton farmers. A year later, Auscott was purchased by the American company J.G. Boswell. By 1967, 27 out of 60 cotton growers, in the Narrabri area were American. As Brian Moir has pointed out, "These growers had brought with them the technology of producing cotton on a large scale, highly mechanised". The opening of the Copeton Dam inaugurated cotton production in the area around Moree. The storage capacity was 1.36 million megalitres of water, capable of irrigating 50,000 hectares and in 1977 the first cotton crop was harvested in the Gwydir Valley.[99] In the 1980s, the American company Dunavant (then the world's largest cotton merchant) built a gin at Moree with capacity of between 50,000 and 100,000 bales of cotton annually (one bale of cotton equalling 227 kilograms). Over the five decades since commercial cotton production began in the state, NSW has become the national leader in cotton production. In 2011-12, amongst NSW and Queensland (the only 2 states that produce cotton), NSW produced a harvest of 581,000 tonnes compared to Queensland's 362,000 tonnes.[100] In 2013 the output from the Gwydir cotton growing district (west of Moree), and the Namoi district (Tamworth westwards to Walgett), was as follows:

Gwydir and Namoi Cotton Production: 2013 (approx.)[101]

	Volume	% NSW Production	% NSW-QLD Production
Gwydir	188,421 tonnes	29%	19%
Namoi	144,593 tonnes	22%	15%

In 2013 the Boswell operations covered 35,220 hectares and the company owned cotton gins at Narrabri and Moree. As Simon de Garis has observed, "The large-scale of these foreign owned properties is evidence of the large capital outlays of the owners". Like wool growing in the nineteenth century, cotton growing is integrated into the world economy. NSW and Queensland are, combined, the fourth largest exporting locality in the world. 30% of NSW/Queensland cotton goes to Indonesia and 20% is exported to Japan.[102]

Investment, from Japan, has been significant in cattle production. In 1988 Marubeni acquired what (had been) the 12,000 hectares Rangers Valley sheep property north of Glen Innes. Between then and 2012, Marubeni has developed the undertaking into a beef cattle feedlot carrying 32,000 head: the fourth largest feedlot in Australia, employing 45 staff.[103]

In recent years, cotton has become (by far) the most valuable item of primary production in the New England-North West: followed by cattle grazing and wheat growing. In financial year 2010-11 the value of these three commodities, on a regional basis, was as follows:

New England-North West : Main Agricultural Commodities by Value (2010-11)[104]

Cotton	$800 million
Cattle	$438 million
Wheat	$398 million

Mining has also received substantial Japanese investment. Regional coal mining continued during the twentieth century, concentrated in the Gunnedah Basin, though on a relatively small scale. The Gunnedah Colliery Company continued production during the twentieth century: mining coal for the NSW railways and for the Tamworth power station. In 1917 the Preston Colliery was opened. During the 1970s the NSW Department of Mineral Resources undertook the Boggabri - Maules Creek Drilling Program, which first revealed the extensive potential of the Gunnedah coalfield.[105] In 1986, Conzinc RioTinto of Australia (CRA) began underground operations at the Vickery mine to produce coal for power stations. Four years later, CRA commenced open cut operations at Vickery. During the 1990s there was a downturn in the coal industry. The Preston and Vickery collieries closed in 1998 and the Gunnedah colliery closed in 2000 as the coal in the mines became exhausted.[106]

In 2006, however, the Japanese company Idemitsu opened the Boggabri Coal Mine which, by 2012, employed 400 FTE staff and produced 3.7 million tonnes of coal.[107]

Innovation. To a limited extent, activity has emerged based on new technology. In 1961, Howard Eastwood established Eastmon Group as a small black-and-white photo developing business in Glen Innes. Over the years, the business expanded into digital photography. During the 1990s, Howard's son (Hugh) took over management of the Rabbit Photo business. In 2006 the Eastmon Group established Photo Create to service Australian and New Zealand retailers such as Harvey Norman and Big W. By 2008 the Eastmon Group serviced 5,000 digital printing centres. Eastmon currently employs around 150 staff. By 2011, Eastmon became the largest digital wholesale laboratory in the southern hemisphere.[108]

4. KEY FACTS AND FIGURES

4.1 Value of Gross Regional Product

In 2011/12 the value of the New England-North West gross regional product (the combined GRPs of the region's 13 LGAs) was $7.7 billion: approximately 1.7% of the state's gross state product (GSP).[109]

4.2 Businesses (including) Entries and Exits

In 2011 there were 19,796 businesses in the New England-North West. There has been a slight a decline in the figures for firms operating in the region, as indicated below:

Businesses in the New England-North West : 2007 - 2011[110]

2007	19,878
2008	19,785
2009	19,701
2010	19,916
2011	19,796

There is a high prevalence of owner-operated firms, in the New England – North West, as highlighted in the table below:

Businesses in the New England-North West (by Size): 2011[111]

Owner-Operated	12,215 (62%)
Small Businesses (1-4 Employees)	4,464 (22%)
Medium/Large Businesses (5 or More Employees)	3,117 (16%)

Comparing 2008 with 2011 the number of business exits has exceeded the number of business entries:

Business Entries in the New England-North West: 2008 – 2011[112]		
	2008	**2011**
Owner-Operated	1,459	1,230
Small Businesses	558	495
Medium/Large Businesses	182	163
TOTAL	**2,199**	**1,888**

Business Exits in the New England-North West: 2008 – 2011[113]		
	2008	**2011**
Owner-Operated	1,688	1,516
Small Businesses	385	331
Medium/Large Businesses	219	161
TOTAL	**2,292**	**2,008**

4.3 Employment and Unemployment

During 2012 the following numbers of people, on a 12-month average, were employed and unemployed in the New England-North West:

Employed/Unemployed: New England-North West (Average 2012)[114]

Employed	94,785
Unemployed	6,166

As shown in the table below, the unemployment rate in the New England-North West has steadily increased since the onset of the GFC. The average unemployment rate in the region has been higher than corresponding rates in both the state and across the nation:

Unemployment Rate (%): New England-North West/NSW/Australia: 2008-2013[115]

Month/Year	New England-NW	NSW	Australia
September 2008	5.3%	4.9%	4.3%
September 2009	5.8%	5.4%	5.7%
September 2010	6.3%	5.2%	5.0%
September 2011	6.5%	5.4%	5.2%
September 2012	6.4%	5.9%	5.7%
September 2013	7.6%	5.6%	5.7%

On a long term-term basis, however, it appears that there has been a gradual decline in unemployment in the New England North-West:

Unemployment Rates: New England-North West (1996 - 2006)[116]	
1996	10.4%
2001	8.6%
2006	7.2%

The Brotherhood of St. Laurence, in a report issued this year, has estimated the current unemployment rate amongst youth (15-24 year olds), in the New England-North West, at 13.8%.[117]

4.4 Employment by Sector

Set out in the table below is the breakdown of employment by industry for the New England-North West. The figures are from the Australian Bureau of Statistics 2011 Census. The following table shows the individual significance of agriculture for the New England-North West, relative to the State as a whole:

Employment by Industry: % New England-North West (NE-NW) and % NSW Employment (2011)[118]

	Number	% NE-NW	% NSW
Agriculture, Forestry and Fishing	11,189	14.6	2.2
Health Care and Social Assistance	8,970	11.9	11.6
Retail	8,193	10.8	10.4
Education and Training	7,401	9.8	7.9
Accommodation and Food Services	5,043	6.7	6.7
Manufacturing	5,006	6.6	8.4
Building and Construction	4,947	6.5	7.3
Public Administration and Safety	4,316	5.7	6.1
Transport, Postal and Warehousing	3,342	4.5	4.9
Other Services	3,052	4.0	3.8
Professional, Scientific and Technical Services	2,857	3.8	7.9
Wholesale	2,313	3.1	4.4
Administrative and Support Services	1,661	2.2	3.3
Financial and Insurance Services	1,460	1.9	5.1
Mining	1,129	1.5	1.0
Rental, Hiring and Real Estate Services	885	1.2	1.6
Electricity, Gas, Water and Waste Services	810	1.1	1.1
Arts and Recreation Services	642	1.0	1.5
Information Media and Telecommunications	627	0.8	2.3
Inadequately Described/Not Stated	1,696	2.3	2.5

4.6 Employment Growth Sectors

For comparison purposes, the source of figures employed in this e-brief is the Australian Bureau of Statistics (ABS) *2011 Census of Population and Housing*: NSW New England and North West Region (Table 33 Industry of Employment by Sex). Table 33 contains figures for industry of employment in 2001 as well as in 2011, thus allowing for a 10-year comparison.

Ranked in terms of absolute increase in employment, the biggest growth sectors, in the decade from 2001 to 2011, are set out below. Growth in employment is also expressed as a percentage. As well as identifying the areas of employment growth over the last decade, this section points to the key players and developments in several industries.

Health Care and Social Assistance. Between 2001 and 2011, health care and social assistance experienced the biggest numerical increase of any industry in the New England and North West:

Employment in Health Care and Social Assistance: 2001 - 2011[119]	
2001	6,743
2011	8,970
Increase	**+2,227 (33%)**

Between 2007 and 2011 there has been a 9% increase in the number of establishments, in the New England-North West, operating in health care and social assistance:

Health Care and Social Assistance (Establishments) in the New England-North West: 2007 - 2011[120]	
2007	599
2008	612
2009	622
2010	649
2011	652

Health services in the New England-North West are provided by the Hunter New England Local Health District (known as Hunter New England Health or HNE Health). Within the New England-North West zone of HNE Health there are 2 referral hospitals (Tamworth and Armidale); 6 district health services (Glen Innes, Gunnedah, Inverell, Moree, Narrabri and Quirindi); 12 community hospitals (Barraba, Boggabri, Bingara, Emmaville, Guyra, Manilla, Tenterfield, Tingha, Walcha, Warialda, Wee Waa and Werris Creek); and 29 community health services.[121]

In 2008 there were 4,671 people working in the health sector in the New England North-West.[122] During 2008-09 (the last year of publication of the *NSW Health Services Comparison Data Book*) there were 756 FTE staff at Tamworth Base Hospital and 260 FTE staff at Armidale and New England Hospital. There were the following FTE Staff at the other hospitals in the region: Inverell (111); Moree (108); Gunnedah (75); Narrabri (75); Glen Innes (56); Quirindi (34), Manilla (33); Warialda (26); Wee Waa (24); Bingara (24); Guyra (13); Walcha (16); and Werris Creek (15).[123] The Keneally and O'Farrell governments have contributed to the health care industry in the region, with the Keneally Government pledging $41.7 million for a regional cancer centre at Tamworth hospital and the O'Farrell Government overseeing the completion of the centre in 2013.[124]

There are approximately 48 aged care centres in the region: including Tamworth (14); Narrabri (7); Moree (4); Uralla (4); Armidale (3); Inverell (3); Gunnedah (3); Glen Innes (3); Guyra (3); Walcha (2); Tenterfield (1); and Quirindi (1).[125] Challenger Disability Services, based in Tamworth, employs 247 full-time equivalent staff.[126]

Building and Construction. Between 2001 and 2011, the second highest increase in employment occurred in building and construction:

Employment in Building and Construction: 2001 – 2011[127]	
2001	3,655
2011	4,947
Increase	**+1,292 (35%)**

Despite the increase in employment in building and construction, there has been a 1% decrease in the number of construction firms:

Building and Construction (Establishments) in the New England-North West: 2007 - 2011[128]	
2007	2,417
2008	2,408
2009	2,391
2010	2,411
2011	2,382

In the period 2007 – 2011 there was an initial decline in the approvals for commercially-provided houses but then a significant increase in 2010:

Building Approvals (Commercially-Provided Houses) in the New England-North West: 2007 - 2011[129]

	Number of Houses	Value of Houses
2007	638	$130.9 million
2008	663	$144.9 million
2009	568	$129.9 million
2010	661	$157.7 million
2011	528	$132.8 million

In respect of non-residential construction, the record (between the 2007 and 2011) is mixed:

Building Approvals (Non-Residential) in the New England-North West: 2007 - 2011[130]

	Value of Non-Residential Construction
2007	$177.4 million
2008	$95.2 million
2009	$104.6 million
2010	$309.2 million
2011	$107.4 million

Education and Training. Between 2001 and 2011, education and training experienced the third-highest increase of any industry in the Northern Inland:

Employment in Education and Training: 2001 – 2011[131]	
2001	6,378
2011	7,401
Increase	**+1,023 (16%)**

The region hosts (as mentioned above) 1 university (UNE) which currently has 4,000 full-time students and 16,000 external students. There are 20,000 students enrolled at TAFE campuses at Armidale; Glen Innes; Inverell; Moree; Narrabri; Quirindi; Tamworth; and Tenterfield. A total of 37 secondary schools serve the region: 27 government secondary schools; five non-Catholic secondary schools; and five Catholic secondary schools. There are 109 primary schools in the region: 80 government primary schools; 20 Catholic primary schools; and 9 non-Catholic primary schools.[132] According to the Tamworth Regional Council, in 2013 there were 961 NSW Department of Education FTE staff in Tamworth alone.[133]

The flying college at Tamworth has continued to expand. In 1999 the Howard Government designated the college the service provider for the Australian Defence Force Basic Flying School. Following the collapse of Ansett (in 2001) the operation has been solely run by BAE Flight Training Tamworth and it conducts training both for the RAAF and the Singapore Air Force.[134]

Mining. Although the number of people engaged in mining in the New England-North West is relatively small, nevertheless between 2001 and 2011 the sector recorded the fourth-largest increase in regional employment:

Employment in Mining: 2001 - 2011[135]	
2001	294
2011	1,129
Increase	**+835 (284%)**

Despite the closure of the Preston, Vickery and Gunnedah collieries (between 1998 and 2000), on the basis of the exploration carried out by the Department of Mineral Resources, new ventures came into existence in the twenty-first century. In 1999 former managers of Namoi Coal (the company that had operated the Gunnedah Colliery) established Whitehaven Coal.[136] Between 2000 and 2013, Whitehaven has become the biggest coal producer in the Gunnedah basin: opening mines at Gunnedah, Maules Creek, Narrabri, Rocglen, Tarrawonga, Vickery and Werris Creek. In 2013 the company employed 513 FTE staff and produced 6.6 million tonnes of saleable coal.[137] As outlined above, Idemitsu's operations at Boggabri have similarly contributed to employment in mining.

Public Administration and Safety. Between 2001 and 2011, public administration and safety experienced the fifth-highest increase in employment:

Employment in Public Administration and Safety: 2001– 2011[138]	
2001	3,570
2013/14	4,316
Increase	**+746 (21%)**

Retail. Between 2001 and 2011, retail recorded the sixth-highest increase in employment:

Employment in Retail: 2001 – 2011[139]	
2001	7,573
2011	8,193
Increase	**620 (8%)**

Manufacturing. Between 2001 and 2011, manufacturing experienced the seventh-highest increase in employment:

Employment in Manufacturing: 2001 – 2011[140]	
2001	4,766
2011	5,075
Increase	**+309 (6%)**

While there has only been an average increase of around 30 jobs a year in manufacturing, in the New England-North West, the sector remains resilient. Manufacturing, as outlined above, is integrated with the region's primary production. Tamworth Regional Council reported (in 2008) that:

> Food manufacturing is the main type of manufacturing in Tamworth and accounts for almost half of manufacturing jobs.[141]

Manufacturing (linked to primary production) is also present in the smaller towns in the hinterland outside Tamworth. The Manildra Group operates a flour mill in Gunnedah (with a capacity to mill 234,000 tonnes of wheat a year) employing 35 FTE staff.[142] A.I. Topper operates a leather tannery, also in Gunnedah.[143]

Electricity, Gas, Water and Waste Services. Between 2001 and 2011, electricity, gas, water and waste services recorded the eighth-highest increase in employment:

Employment in Electricity, Gas, Water and Waste Services: 2001 - 2011[144]	
2001	522
2011	823
Increase	**+301 (59%)**

Transport, Postal and Warehousing. Between 2001 and 2011, electricity, gas, water and waste services experienced the ninth-highest increase in employment:

Employment in Transport, Postal and Warehousing: 2001 - 2011[145]	
2001	3,081
2011	3,380
Increase	**+299 (10%)**

There has been a 32% increase in passengers travelling through Tamworth airport between 2006-07 and 2009-10:

Passengers Travelling through Tamworth Airport: 2006/07 – 2009/10[146]	
2006/07	102,355
2009/10	135, 837

A significant number of road haulage companies also operate out of Tamworth. SGS Economics and Planning has written that while “Tamworth is a centre for large transport firms” it also hosts a “high proportion of owner operators with small transport firms”.[147]

Accommodation and Food Services. Between 2001 and 2011, accommodation and food services recorded the tenth-highest increase in employment:

Employment in Accommodation and Food Services: 2001 - 2011[148]	
2001	4,782
2011	5,001
Increase	**+273 (6%)**

On an absolute level, tourism activity in the New England-North West is only a small proportion of the state’s total. As outlined by the *Gunnedah Economic Development Strategy*, in the year ending March 2013:

> the Northern Inland region attracted 1.394 million domestic visitors who spent 4.258 million nights in the region. This represents 5.6% of total domestic overnight visits made in NSW. . .[149]

The Tamworth Country Music Festival is a core component of tourism in the New England-North West. Chris Gibson and John Connell have written that,

> By 2011 the festival had a 10-day program, 2,400 events, 116 venues and nearly 1,000 artists with around 60,00 daily visitors. Easily exceeding the capacity of local hotels and motels, visitors stay up to a hundred kilometres away in regional towns, and 5,000 stay in residents’ spare bedrooms. . .[150]

Although there has been a slight decline in visitors to Tamworth, between 2006 and 2010, there has been an increase in takings from accommodation:

Guest Arrivals and Takings from Accommodation: Tamworth (2006 – 2010)[151]		
	Guest Arrivals	**Takings from Accommodation**
2006	209,858	$18.6 million
2007	205,953	$19.2 million
2008	204,126	$20.4 million
2009	202,968	$22.8 million
2011	203,108	$23.4 million

Other Services. Between 2001 and 2011, other services recorded the sixth-lowest increase in employment:

Employment in Other Services: 2001 - 2011[152]	
2001	2,785
2011	3,050
Increase	**+265 (10%)**

According to the ABS, “Other Services” includes:

> Automotive repair and maintenance. . .machinery repair and maintenance. . .hairdressing. . .funeral, crematorium and cemetery services. . .photographic film processing. . .[153]

Part of the increase in “other services” employment would consequently be attributable to the Eastmon Group’s expansion in Glen Innes.

Rental, Hiring and Real Estate Services. Between 2001 and 2011, rental, hiring and real estate services recorded the fifth-lowest increase in employment:

Employment in Rental, Hiring and Real Estate Services: 2001 - 2011[154]	
2001	744
2011	897
Increase	**+153 (21%)**

Professional, Scientific and Technical Services. Between 2001 and 2011, professional, scientific and technical services recorded the fourth-lowest increase in employment:

Employment in Professional, Scientific and Technical Services: 2001 - 2011[155]	
2001	2,772
2011	2,889
Increase	**+117 (4%)**

Financial and Insurance Services. Between 2001 and 2011, financial and insurance services recorded the third-lowest increase in employment:

Employment in Financial and Insurance Services: 2001 - 2011[156]	
2001	1,349
2011	1,444
Increase	**+95 (7%)**

The slow growth in employment, in financial and insurance service, may partly be attributed to a rationalisation of banking services. The NSW Department of Infrastructure, Planning and Natural Resources noted that,

> In May 2002 the National Australia Bank decided to close 56 rural branches across Australia. . .Between June and July of 2002, Barradine, Boggabri, Manilla and Warialda lost their NAB branches.[157]

Arts and Recreation Services. Between 2001 and 2011, arts and recreation services recorded the second-lowest increase in employment:

Employment in Arts and Recreation Services: 2001 - 2011[158]	
2001	532
2011	627
Increase	**+95 (18%)**

Administrative and Support Services. Between 2001 and 2011, administrative and support services recorded the lowest increase in employment:

Employment in Administrative and Support Services: 2001 - 2011[159]	
2001	1,067
2011	1,675
Increase	**+68 (4%)**

4.6 Sectors of Declining Employment

Agriculture, Forestry and Fishing. Between 2001 and 2011, agriculture, forestry and fishing recorded the highest loss in employment:

Employment in Agriculture, Forestry and Fishing: 2001 - 2011[160]	
2001	13,767
2011	11,061
Increase	**-2,706 (-20%)**

Between 2007 and 2011, 145 businesses were lost in agriculture, forestry and fishing:

Businesses in Agriculture, Forestry and Fishing: 2007 - 2011[161]	
2007	7,621
2011	7,476
Decrease	**-145**

Wholesale. Between 2001 and 2011, the wholesale trade recorded the second-highest loss in employment:

Employment in Wholesale: 2001 - 2011[162]	
2001	3,459
2011	2,370
Increase	**-1,089 (-31%)**

Within the wholesale sector, there has been a considerable rationalisation of operations. Woolworths for instance, in 2005, opened a large regional distribution (RDC) centre at Wyong, and now supplies the major towns in the region from the RDC.[163]

Information Media and Telecommunications. Between 2001 and 2011, information media and telecommunications recorded the third-highest loss in employment:

Employment in Information Media and Telecommunications: 2001 - 2011[164]	
2001	878
2011	632
Increase	**-246 (-28%)**

During 2007 and 2011, 5 businesses were closed in information media and telecommunications:

Businesses in Information Media and Telecommunications: 2007 - 2011[165]	
2007	65
2011	60
Decrease	**-5**

Since the 1990s there has been a considerable amount of rationalisation in regional media. In the area of regional radio, the Keating government deregulated the radio industry by amending the *Broadcast Services Act 1942*: lifting restrictions on the ownership of radio stations. Further deregulation was introduced by the Howard government. In the particular case of the New England North-West, this has allowed the Broadcast Operations Group (owned by Bill Coralis) to acquire licences across the region (in Tamworth, Armidale, Moree, Inverell and Gunnedah). On a number of occasions, according to Harry Criticos, content for the stations has been networked from Sydney.[166] Television in the region has also been rationalised with Channel 7's Prime TV (in Tamworth) announcing in 2012 that Prime's weather announcer in Canberra would also deliver the news bulletin for Tamworth.[167]

5. CONCLUSION

The New England-North West region has experienced profound change between the nineteenth, twentieth and twenty-first centuries. Agriculture, which has been (and still was in 2011) the biggest individual employing industry, has gone through a fundamental transformation. Farmers originally practised agriculture as a stand-alone activity: with government (in the first half of the twentieth century) contributing to their independence through marketing boards. As price reinforcement was removed, agriculture transitioned into agribusiness in which production became integrated into processing and retailing. Moreover, whereas agribusiness initially tended to be the preserve of domestic companies, recent times have witnessed the entry of large overseas companies. Agriculture across the region, in the future, may become the preserve of overseas agribusinesses. In the second half of 2012, Archer Daniels Midland (USA) firstly acquired a 14.9% interest in GrainCorp and then increased its stake to 19.9%. The following year, ADM made an outright takeover bid and was only deterred through the intervention of government. Even now, in 2014, ADM has re-declared its interest in fully acquiring GrainCorp.[168]

Furthermore, as the region's single biggest industry was undergoing a significant transformation, the entire region experienced two major downturns during the 1980s and the 1990s: causing unemployment to rise to 11.5% in 1986 and then to 11.9% in 1991.

In its regional plan for 2013-2016, the RDA Northern Inland identified 6 priorities for the region:

- regional community regeneration and sustainable population growth
- industry diversification, business growth and job creation
- integrated and improved health care

- investment in regional infrastructure, education and skills
- social inclusion and engaging indigenous communities
- environmental achievement and resource efficiency[169]

Amongst all these priorities, the most fundamental would seem to be that of industry diversification. According to Stephen Mason, within research on regional development, there is a consensus that "a diverse regional economy will enjoy a stable employment growth rate, with the diversity acting to shield the regional economy".[170] The decline in the unemployment rate since the mid-1980s, to 7.6% in September 2013, appears to be a outcome of the diversification of the regional economy: encapsulated in the consolidation of the services sector. Stephen Mason has written that in 2001, according to his research, the major NSW regional urban centre, "with the greatest measured level of industrial diversity was Tamworth".[171]

Activity in the region appears set to continue on the basis of the consolidation of the services sector (incorporating the majority of employing industries) in the region's largest hub. In Tamworth the percentage of people employed in the services sector in 2011, according to the research group .id, was approximately 82%.[172] As in other regions of NSW the health sector can be expected to grow with the ageing of the population. A key challenge is to provide adequate and appropriate employment for young people in the New England-North West as in many other regions.

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[1] According to the University of Sydney's Workplace Research Centre, in a report produced for the Council of Australian Governments (COAG) Standing Committee on Tertiary Education, Skills and Employment, "For the purposes of workplace analysis and planning, regions are predominantly defined according to the [new] ABS Statistical Area Level 4 regions for New South Wales. This is because the SA4 level regions are used across a vast range of statistical publications (including labour force data publications)". See Workplace Research Centre, University of Sydney, *National Regional Workforce Planning and Development Report* (2013), p.64. For the SA4s in New South Wales see ABS, *Australian Statistical Geography Standard (ASGS): Volume 1 – Main Structure and Greater Capital City Statistical Areas*, ABS Catalogue 1270.0.55.001. See also NSW Department Premier and Cabinet (DPC), *New England – North West Regional Action Plan* (2012), p.4. In 2009 the Rudd Government launched a network of 55 Regional Development Australia (RDA) Committees. See Kim Adams, Jeremy Buultjens and Brian Dollery, "Enhancing Australian Regional Policy: A Conceptual Framework for Assessing the Role of Regional Development Australia" in *Space and Polity*, vol.15, no.3, 2011, p.243. The committee dealing with the area covering the New England-North West has adopted the name "RDA Northern Inland" (RDANI). NSW Department of Trade and Investment and Regional Infrastructure Services (DTIRIS) uses both "New England-North West" and "Northern Inland". See the "Regional Profiles" section of the DTIRIS website.

[2] Alison Kingsland, "The Distribution of Farming in New South Wales" in the *Review of Marketing and Agricultural Economics*, vol.18, no.2, 1950, pp.164-165.

[3] ABS, *Regional Population Growth: Australia*, ABS Catalogue 3218.0. Data Cube: *Population Estimates by Local Government Area (ASGS 2013), 2003 to 2013*. Table 1. Estimated Resident Population, Local Government Areas, New South Wales. For the 13 Local Government Areas (LGAs) in the ABS SA4 "New England – North West" see ABS, *Australian Statistical Geography Standard (ASGS): Correspondences*, Catalogue No. 1270.0.55.006: Local Government Area to Statistical Area Level 4 (Table 3).

[4] ABS, n.3.

[5] NSW Treasury Corporation (TCorp), *Tamworth Regional Council: Financial Assessment and Benchmarking Report* (2012), p.8; SGS Economics and Planning, *Research Report for the NSW Independent Local Government Review Panel*, volume II, part 2, *Supporting Information* (Sydney, 2012), p.419.

[6] AEC Group, *Tamworth Region Key Industry SWOT Analysis* (Sydney, 2008), appendix D.
[7] NSW TCorp, *Armidale-Dumaresq Council: Financial Sustainability Assessment and Benchmarking Report* (2013), p.8; SGS Economics and Planning, n.5, p.414.
[8] NSW Auditor General, *Report to Parliament*, vol.II, *University of New England* (2013), pp.115, 121.
[9] NSW TCorp, *Inverell Shire Council: Financial Assessment and Benchmarking Report* (2013), p.8.
[10] For employees at Bindaree Beef see the company's website. For other, selected employers, see the *Inverell Business and Retail Guide: 2013*.
[11] NSW TCorp, *Moree Plains Shire Council: Financial Assessment, Sustainability and Benchmarking Report* (2013), p.9.
[12] Information provided by Moree Plains Shire Council.
[13] NSW TCorp, *Narrabri Shire Council: Financial Assessment and Benchmarking Report* (2013), p.8.
[14] See Narrabri Shire Council, Narrabri Shire Economic Zone.
[15] NSW TCorp, *Gunnedah Shire Council: Financial Assessment, Sustainability and Benchmarking Report* (2013), p.10.
[16] For selected employers see Gunnedah Business and Organisations Directory.
[17] NSW TCorp, *Glen Innes Severn Council: Financial Assessment and Benchmarking Report* (2013), p.8.
[18] For selected employers see the Glen Innes Local Business Directory.
[19] NSW TCorp, *Liverpool Plains Shire Council: Financial Assessment, Sustainability and Benchmarking Report* (2013), p.8.
[20] Information provided by Liverpool Plains Shire Council.
[21] NSW TCorp, *Tenterfield Shire Council: Financial Assessment, Sustainability and Benchmarking Report* (2013), p.8.
[22] Information provided by Tenterfield Council. See also Regional Australia Development (RDA) Northern Inland, *RDANI Regional Plan 2010-2013*, appendix 5 (Tenterfield).
[23] NSW TCorp, *Uralla Shire Council: Financial Assessment, Sustainability and Benchmarking Report* (2013), p.10.
[24] Information provided by Uralla Shire Council.
[25] NSW TCorp, *Gwydir Shire Council: Financial Assessment, Sustainability and Benchmarking Report* (2013), p.8; Gwydir Shire Council, *A Gwydir Snapshot* (2004), p.8.
[26] Information provided by Gwydir Shire Council.
[27] NSW TCorp, *Guyra Shire Council: Financial Assessment and Benchmarking Report* (2013), p.8.
[28] See "Industry and Agriculture" on the website of the Guyra Tourism and Commerce Association.
[29] NSW TCorp, *Walcha Council: Financial Assessment, Sustainability and Benchmarking Report* (2012), p.9.
[30] Information provided by Walcha Council. See also "Business Directory" on the website of Walcha Council.
[31] See "National Economic Indicator Services (NSW)" on the website of .id.
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