



Government of **Western Australia**  
Department of **Regional Development**

**PEEL** Development  
Commission

# Peel:

a region in profile 2014



# Foreword

*Peel: a region in profile* was prepared by the Department of Regional Development in conjunction with the Peel Development Commission to provide a snapshot of the region's economy.

The Peel region is home to an abundance of mineral reserves, including bauxite, mineral sands and Australia's largest producing gold mine. The region is also a popular destination for tourist day trips from Perth.



The Royalties for Regions program is an important State Government initiative that will allocate more than \$1 billion for regional projects in 2014-15, including more than \$43 million in the Peel region. Since it began in 2008, Royalties for Regions has allocated \$4.2 billion to more than 3,500 projects across regional Western Australia.

Through programs like Royalties for Regions, the State Government is increasingly investing in infrastructure to grow the state, including implementing major economic, social and community development projects that arise from Regional Investment Blueprints.

This publication contains the latest information available on the economic development conditions of the Peel region and is one of a series of nine regional economic summary documents.

I invite you to read *Peel: a region in profile* and trust you will find it interesting and informative.

A stylized, handwritten signature in black ink, appearing to be 'Terry Redman'.

**Hon Terry Redman MLA**  
Minister for Regional Development



# Regional Development Commissions

The State's nine Regional Development Commissions were established by the Western Australian Parliament following the ratification 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.

For the purposes of achieving that role a commission is expected 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 of the public service of the State and the Commonwealth and other agencies, instrumentalities and statutory bodies of the State and the Commonwealth 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.





- Major Road
- Formed Road
- Railway
- Local Government Boundary
- Petroleum Pipeline
- Tracks
- Urban Centres and Localities
  - Population more than 5000
  - 500 - 5000
  - Less than 500
  - ✈ Airfield
  - ~ Rivers
  - ☪ Lake
  - 🌳 National Park
  - 🌲 State Forest
- Arts and Crafts
- Industry
- Racetrack
- Winery
- Important Resource Projects**
- Operating or Under Development shown in blue
- Proposed shown in red
- Under Care and Maintenance shown in purple
- ▲ Alumina refinery
- △ Bauxite
- ⊞ Brick/tile processing plant
- ⊞ Gold
- ⊞ Heavy mineral sands
- ⊞ Major power station
- ⊞ Processing plant

# PEEL REGION

## KEY FEATURES



Government of Western Australia  
Department of Regional Development



Government of Western Australia  
Department of Water

This map is a product of the Department of Water. Spatial datasets and data are provided as they are. The map was produced with the most recent data available. While the Department of Water has made all reasonable efforts to ensure the accuracy of this data, the department accepts no responsibility for any inaccuracies and persons relying on this data do so at their own risk.

**Dataset and Production Information**

Version: 2.0  
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Producer: Leigh Davis (DWD)  
Project: Peel Region  
Client: Regional Development and Land Use  
Date: 2013  
Copyright: 2013  
Scale: 1:100,000



DATA DICTIONARY		
THEME	SOURCE	DATE
Towns	LANDGATE/ABS	May 2013
Road Centrelines	LANDGATE	September 2012
Hydrography	LANDGATE	August 2009
Tenure	Department of Conservation	July 2013
Important Resource Projects	DMP - Modified from MINDEX Database	July 2013

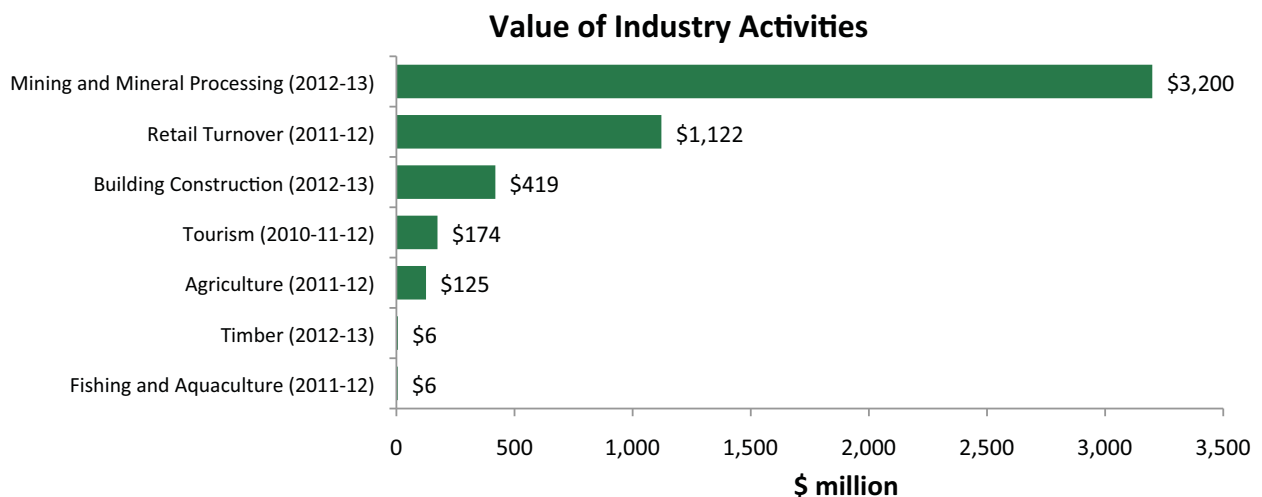
# Overview

The Peel region is located 75 kilometres south of Perth. It encompasses five local government areas including the City of Mandurah and the shires of Boddington, Murray, Serpentine-Jarrahdale and Waroona. Mandurah is the urban centre of the Peel providing a range of medical, educational, communications, commercial and administrative services.

The region is steeped in history, both Aboriginal and European. The quality and range of activities, accommodation and dining options is considerable. Peel's landscape is geographically diverse with urban, agricultural and horticultural land, a forested escarpment and 50 kilometres of coastline. The Peel is a popular daytrip destination from Perth and offers a variety of attractions including beautiful beaches and many inland attractions near Dwellingup and Serpentine.

The Peel's economy is strong and diverse. It is dominated by mineral processing; the area has large reserves of bauxite, gold and mineral sands and two alumina refineries, at Pinjarra and Wagerup. Gold mining is strongest at Boddington, which has Australia's largest producing gold mine. The region is complemented by stable manufacturing and construction service industries, agriculture, tourism and retail trade.

The State Government's Royalties for Regions program has contributed to numerous projects enhancing the region's economic, business and social development. The 2014-15 State Budget allocated \$43 million to the development of the region, including continued construction of education facilities and upgrades to community health and amenity infrastructure.



Source: Department of Regional Development.  
Note: Industry activity is an estimation of the gross value of production of key regional industries.



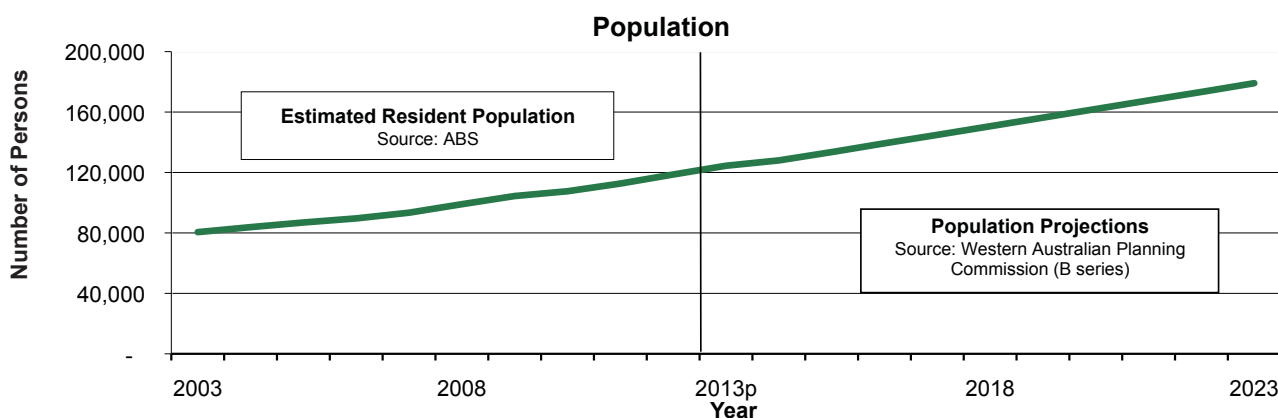
# Population

The estimated resident population of the Peel region was 124,500 in 2013, accounting for five per cent of Western Australia's population. The City of Mandurah is the regional business hub and is home to 80,700 people, equivalent to 65 per cent of the region's population.

Peel has a rapidly growing population, aided by proximity to metropolitan Perth, infrastructure and attractive lifestyle options.

Over the decade to June 2013, the population grew by 44,000 residents at an average rate of 4.5 per cent per year. The state average annual growth is 2.6 per cent over 10 years. The 2011 ABS census reported approximately 2,600 Aboriginal Australians lived in the Peel region.

In 2012, the Western Australia Planning Commission forecasted the population of the Peel would continue to increase to



Source: Australian Bureau of Statistics and WA Planning Commission.

Region/LGA	2003	2013	% Share 2013	AAGR 2003-2013 %	Aboriginal ERP 2011
<b>PEEL</b>	<b>80,527</b>	<b>124,463</b>	<b>100%</b>	<b>4.5</b>	<b>2%</b>
Boddington (S)	1,373	2,471	2%	6.1	4%
Mandurah (C)	51,860	80,683	65%	4.5	2%
Murray (S)	11,611	16,304	13%	3.5	3%
Serpentine-Jarrahdale (S)	12,200	21,162	17%	5.7	2%
Waroona (S)	3,483	3,843	3%	1.0	3%

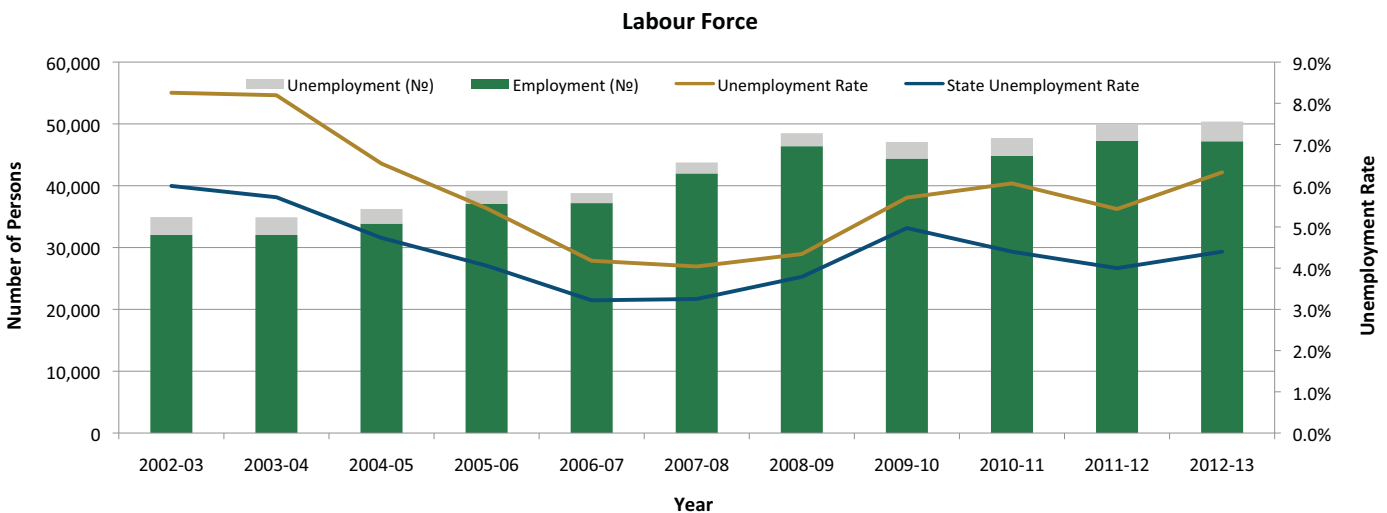
Source: Australian Bureau of Statistics. Note: AAGR = Average Annual Growth Rate.

approximately 179,000 by 2023. The projections are based on fertility, mortality, migration trends (both interstate and overseas), and known future economic developments, representing the best estimate of the future population size if historic trends continue.



# Labour force

Western Australia experienced a rise in employment levels over the last decade driven by population and industry growth, and international demand for raw material exports. The Peel recorded its highest level of employment at nearly 31,200 persons in 2011-12, and growth remained strong in 2012-13. Peel's unemployment rate



Source: Department of Employment with additional estimates by the Department of Regional Development.  
Note: Labour Force is an average of the financial year's quarterly data.

Industry of Employment	2011	2006
Construction	13.7%	13.6%
Manufacturing	11.6%	13.5%
Retail Trade	11.1%	12.4%
Health Care and Social Assistance	9.0%	8.4%
Mining	7.8%	5.2%
Education and Training	7.1%	6.4%
Accommodation and Food Services	6.1%	5.6%
Public Administration and Safety	5.0%	4.7%
Real Estate, Administrative and Support Services	5.0%	5.4%
Other Services	4.0%	3.7%
Professional, Scientific and Technical Services	4.0%	3.7%
Transport, Postal and Warehousing	3.9%	3.8%
Wholesale Trade	2.5%	2.7%
Agriculture, Forestry and Fishing	2.0%	3.2%
Financial and Insurance Services	1.5%	1.6%
Arts and Recreation Services	1.3%	1.3%
Electricity, Gas, Water and Waste Services	1.1%	1.0%
Inadequately described/not stated	2.4%	2.9%
Information Media and Telecommunications	0.8%	1.0%

Source: ABS 2011 and 2006 Census of Population and Housing; usual residence.

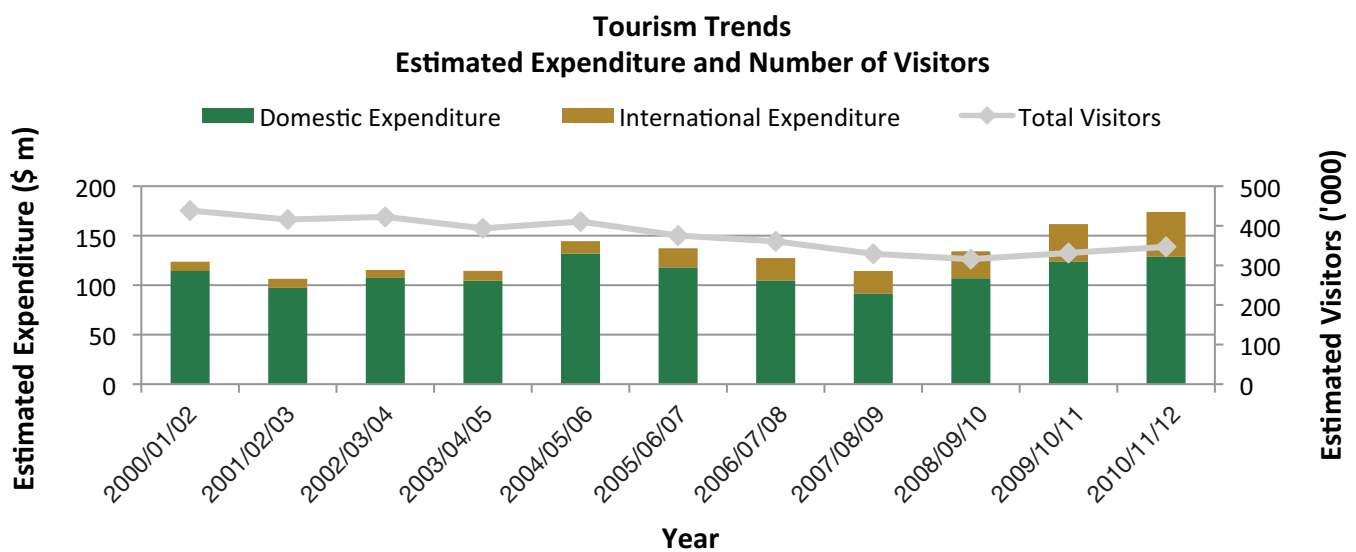
is consistently higher than the state trend, echoing population movement and reaching a low of four per cent in 2007-08. Labour market conditions moderated over the 12 months to 2012-13 with some softening of employment growth and an upward trend in regional and state unemployment rates.

According to the 2011 ABS census the mining workforce in the Peel increased by 2.6 per cent to 7.8 per cent from 2006-2011, boosted by operations at Boddington Gold Mine. The region's labour market increased across health, education and construction sectors to cater for population growth needs.

# Tourism

The Peel is a popular daytrip destination from Perth, with access improved by the Perth-Bunbury Highway. Inland attractions in the region include Serpentine National Park and historic Pinjarra, one of the oldest towns in Western Australia.

According to Tourism Western Australia, the industry attracted an average of 346,800 overnight visitors annually between 2010 to 2012. In the same period, turnover was estimated at \$174 million per annum. The strength of tourism is evidenced through the growth of international investment in recent years.



Source: Tourism Western Australia and Department of Regional Development.



Peel's pristine coastline offers many recreational activities including swimming, surfing, sailing, fishing and boating, adding to the region's appeal. Great camping and outdoor adventure opportunities in inland parts of the region are also popular.

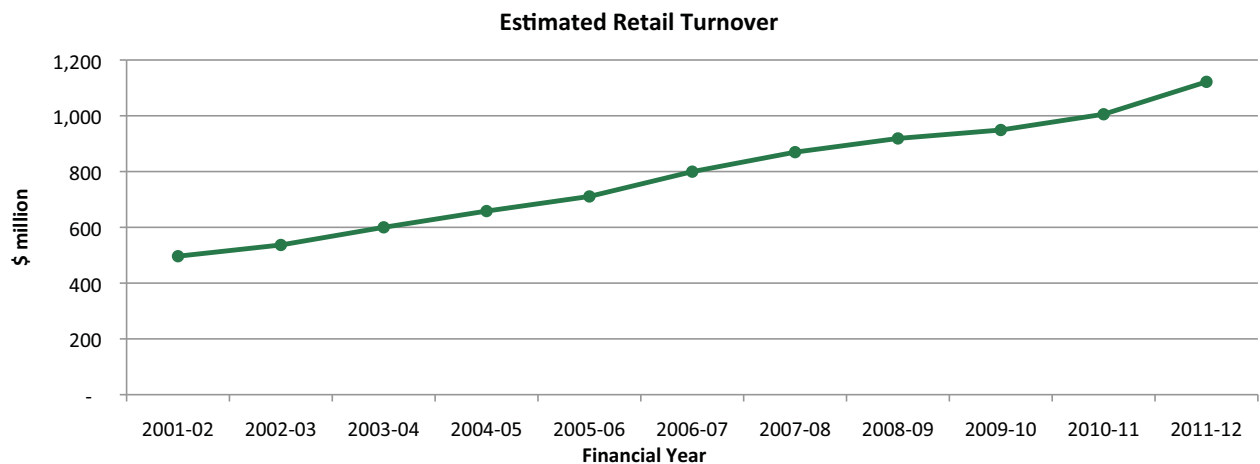
The Mandurah and Peel Tourism Organisation works in partnership with agencies, local governments, individual operators, community groups and consultants to further develop the region's tourism sector.



# Retail turnover

The retail sector is a large employer and an important contributor to the Peel's economy. The industry was estimated at \$496 million in 2001-02, increasing at an average 8.5 per cent per year over the last 10 years. In 2011-12, trade was valued at \$1.12 billion, accounting for 3.8 per cent of the state's turnover.

Mandurah is the central commercial hub for retail facilities, with large shopping centres, specialty outlets and community shops. Activity is supported by the Mandurah Chamber of Commerce and Industry and sustained population growth across the region.



Source: Based on ABS State Retail Turnover. Regional estimates by the Department of Regional Development.

# Mean taxable income

The mean taxable income for the Peel region was more than \$71,200 in 2010-11 representing an annual average growth rate of 7.2 per cent over 10 years. The increase is driven by growth in the labour force arising from greater employment levels, increased hourly wages and longer work hours.

Resources activity influenced wages in the mining, construction and wholesale trade industries in the Shire of Boddington.

	Median Weekly Personal Income 2011	Mean Taxable Income 2010-11
Boddington (S)	\$1,207	\$71,411
Mandurah (C)	\$494	\$78,018
Murray (S)	\$488	\$71,521
Serpentine-Jarrahdale (S)	\$666	\$69,681
Waroona (S)	\$498	\$71,175
<b>Western Australia</b>	<b>\$662</b>	<b>\$73,591</b>

Source: ABS 2011 Census of Population and Housing, Australian Taxation Office and Department of Regional Development (2010-11).

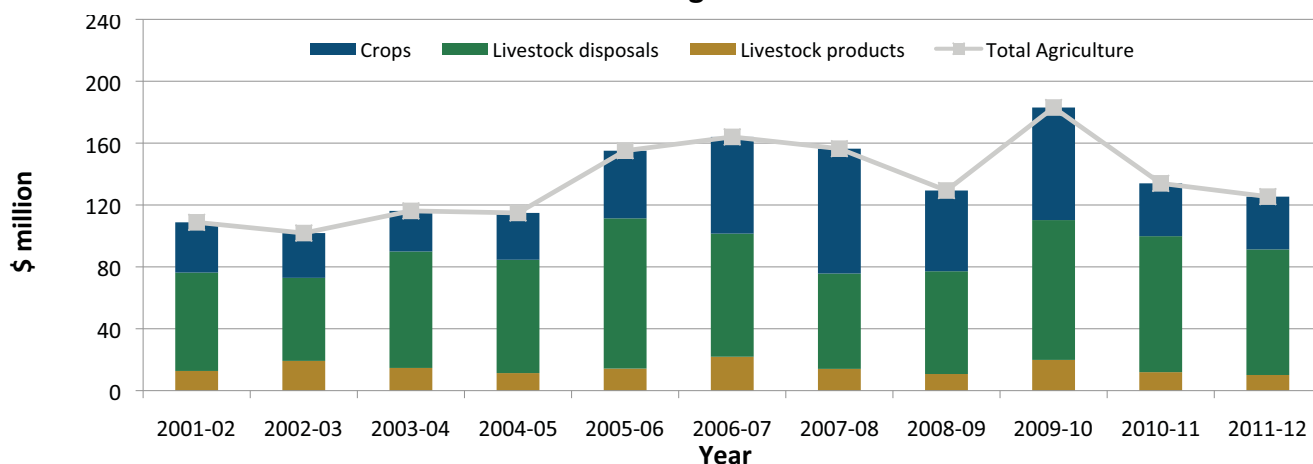
The City of Mandurah's large resident base had the highest average income at \$78,000 for 2010-11.

# Agriculture

Peel's agricultural economy was estimated at \$125 million in 2011-12. Livestock disposals accounted for 65 per cent of total value of agriculture, valued at \$81 million in 2011-12. The region has a substantial pig and poultry farming industry. The local pork industry has a number of advantages including high

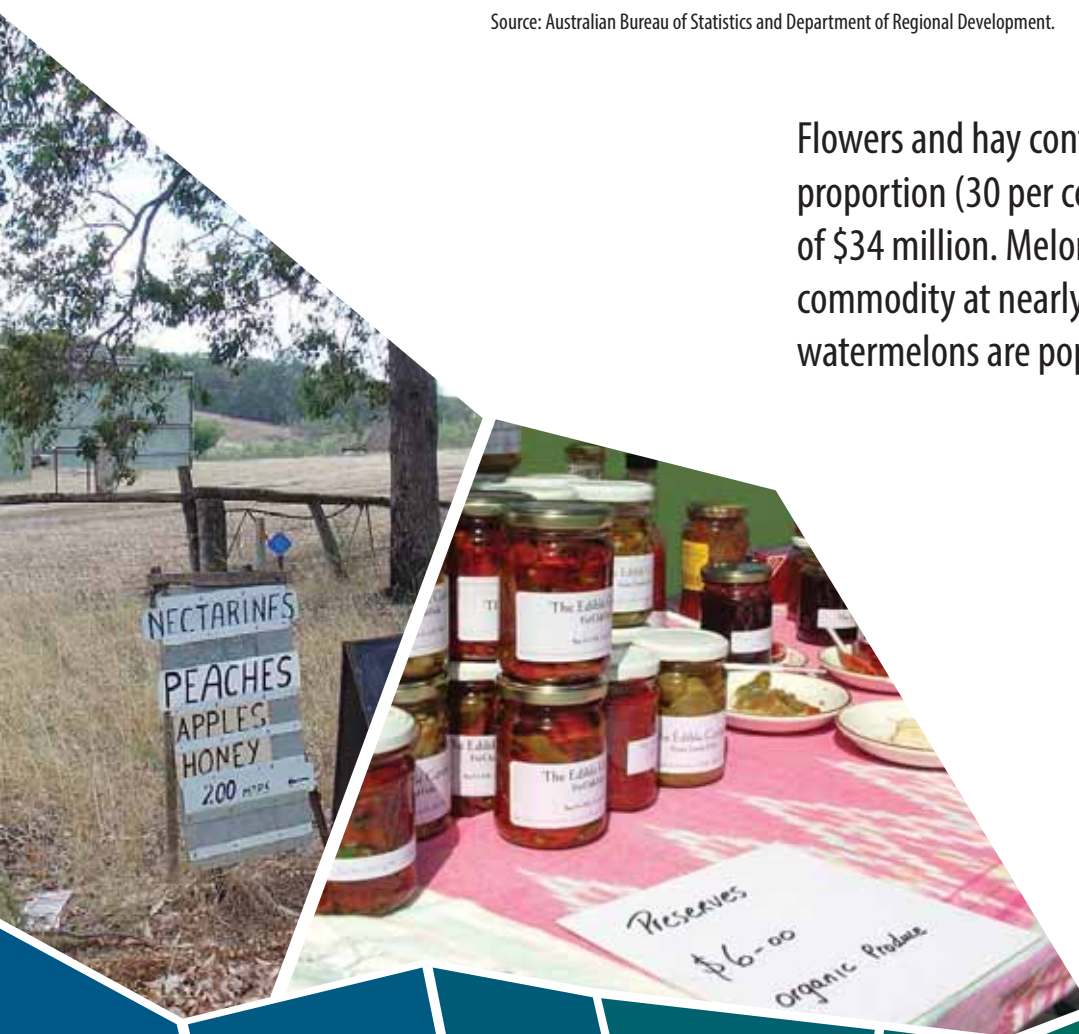
health status, environmental conditions and innovation in the production and marketing of quality pork cuts. The high consumer wealth in developing Asian nations presents opportunities to grow international markets in various agricultural sectors including meats, fruits and vegetables.

Value of Agriculture



Source: Australian Bureau of Statistics and Department of Regional Development.

Flowers and hay contributed a large proportion (30 per cent) to the total crop value of \$34 million. Melons were the highest gross commodity at nearly \$7 million. Seedless watermelons are popular on the domestic

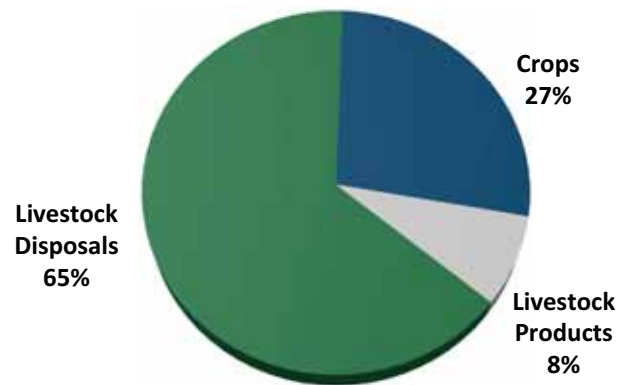




market, and a small proportion of rockmelons are exported to south-east Asia and New Zealand. Milk, wool and eggs are the livestock products produced.

Agricultural production experienced small periods of growth over the past decade, peaking in 2009-10. The value has subsequently returned to a level sustained earlier in the decade but innovation and new export markets position the industry for continued success.

**Agriculture Commodities 2011-12**



Source: Australian Bureau of Statistics.

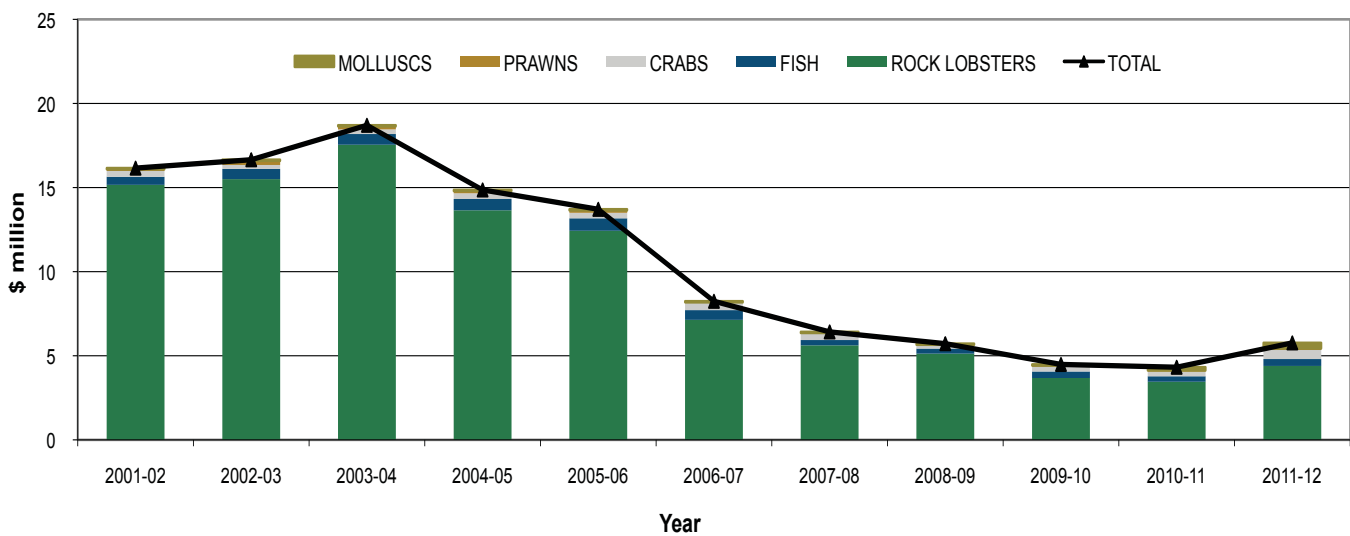


# Fishing

The Peel's commercial fishing industry was valued at \$5.7 million in 2011-12 on the strength of the rock lobster industry, which returned revenue of \$4.4 million. The region's fishing industry operates sustainably and is internationally recognised for research

practices and best management, ensuring industry longevity, however, production has declined since 2003-04. Commercial trawl, dive and pot fisheries are used for small quantities of fish, crabs, prawns, molluscs, abalone and octopus.

Fishing Catch Estimated Value Peel



Source: Department of Fisheries with further estimates by the Department of Regional Development.

Recreational estuarine fishing, beach fishing and boat fishing are very popular in the region. Crabbing is also a tradition, with locals casting nets from the jetties and scooping in the shallows for the blue swimmer variety.



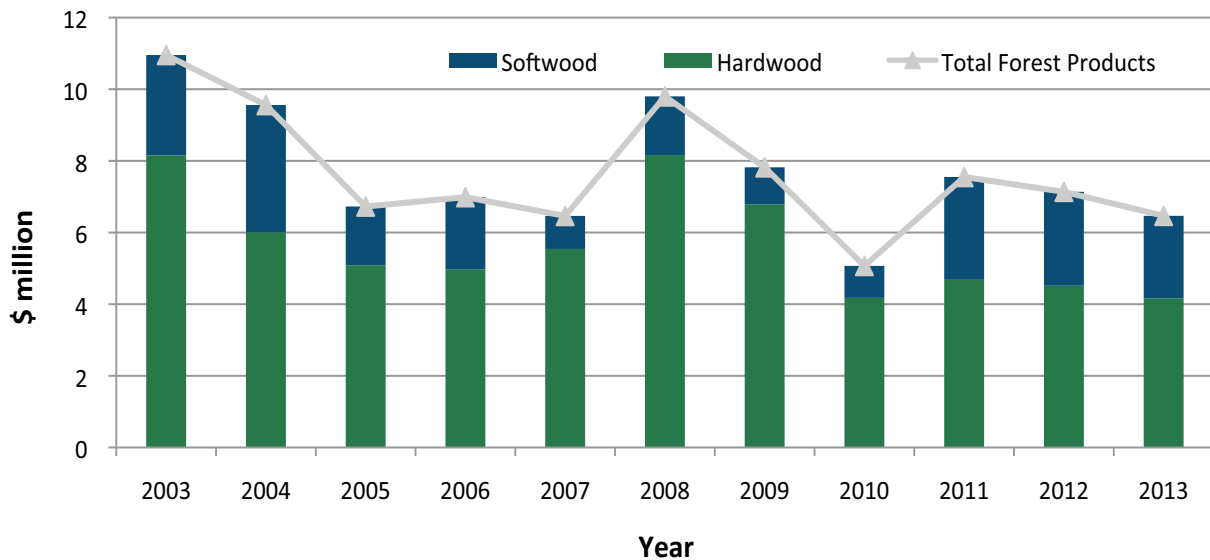
# Timber

State-owned forestry production for the Peel totalled 144,000 tonnes in 2013, valued at \$6.4 million. The Forest Products Commission engages in commercial forestry activities in State-owned native forests and plantations, delivering economic and social benefits to the region.

The Peel's production accounts for seven per cent of total State-owned forest production. The timber harvested from the Peel is primarily processed into high value products such as furniture, panelling, decking and structural products. Additionally, the timber residues from mining activities present opportunities for bio-fuel production and other bio-industrial enterprise.



Value of Forestry Production



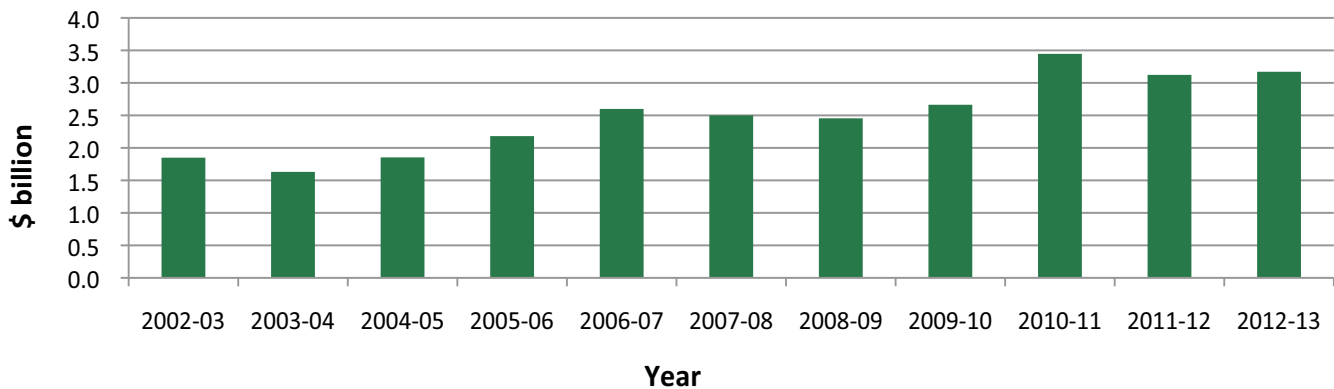
Source: Forest Products Commission.

# Mining and mineral processing

Western Australia's resources industry grew significantly over the past decade due to unprecedented overseas demand, which resulted in a mineral production and revenue increase from \$27.9 billion in 2002-03 to \$101.8 billion in 2012-13.

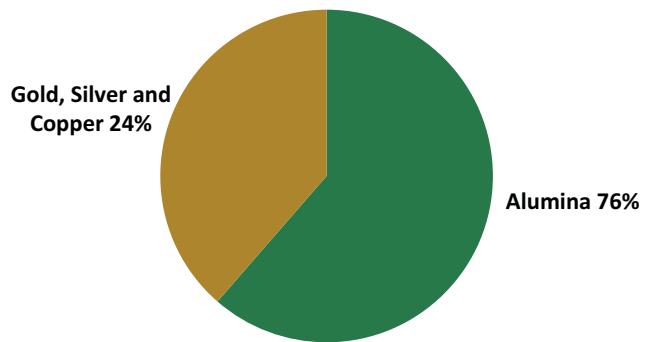
In 2012-13, the Peel's mineral industry was valued at \$3.2 billion. Alumina production accounted for almost \$2 billion or 62 per cent of the region's total mining production. The Peel currently produces all of the state's bauxite.

### Mineral Production



Source: Department of Mines and Petroleum with further estimates by the Department of Regional Development.

### Mining Commodities 2012-13 (Percentage Share)



Source: Department of Mines and Petroleum with further estimates by the Department of Regional Development.





The Huntly mine, located near Dwellingup, is the world's largest bauxite mine supplying bauxite ore to Alcoa's Pinjarra (Peel region) and Kwinana (Perth) refineries. Huntly bauxite production has doubled since 1990 and currently produces around 23 million tonnes of bauxite per year. Alcoa's Willowdale bauxite mine supplies the Wagerup refinery, both located in the Shire of Waroona. BHP Billiton mines bauxite in the Shire of Boddington, supplying its Worsley refinery in the Shire of Collie in the South West region.

In 2012-13, gold, copper and silver made up the remaining 38 per cent of mining production, totalling \$1.2 billion. Boddington's gold and copper mine is the largest in the country producing 724,000 oz. of gold and 30,390 tonnes of copper in the 12 months to December 2012.

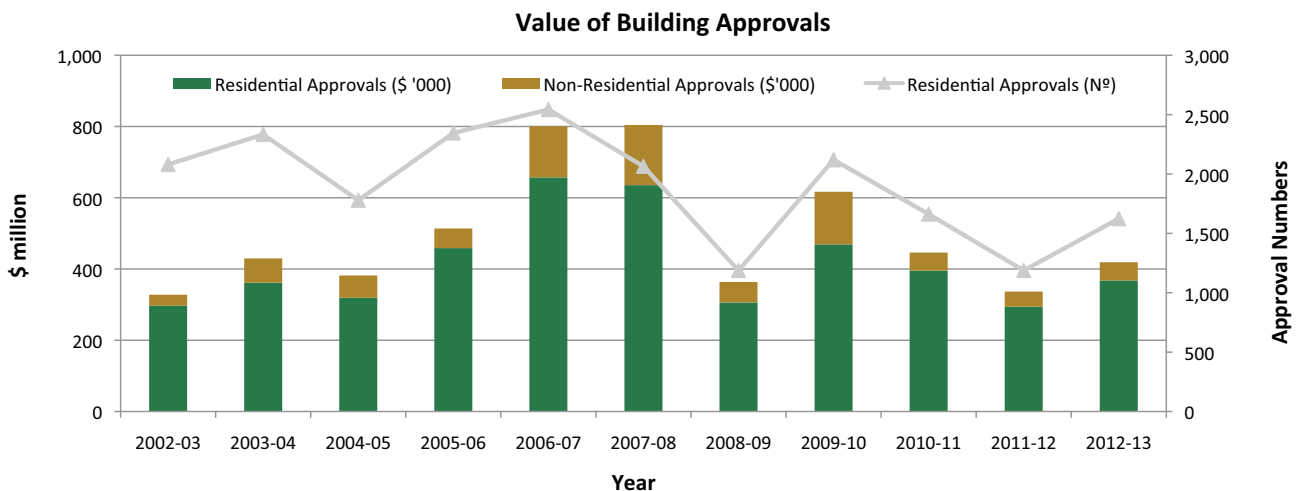
At the 2011 census, nearly eight per cent of regional employment was attributed to mining related activity.



# Building approvals

Building approval activity provides a strong insight into planned work and the housing construction likely to follow. This activity acts as a strong indicator in the construction industry. Compared to the rest of the nation, Western Australia remained robust over the decade to 2012-13 in construction value and approval numbers.

The total value of building approvals for the Peel was estimated at \$419 million in 2012-13, after fluctuating over the decade. There were approximately 1,600 residential buildings approved for construction, at a value of \$368 million.



Source: Australian Bureau of Statistics.

New building laws and a certified application process introduced in 2012 means the approval process is now more efficient and consistent across the state.

The value of non-residential construction was estimated at \$51 million in 2012-13.



# Project investment

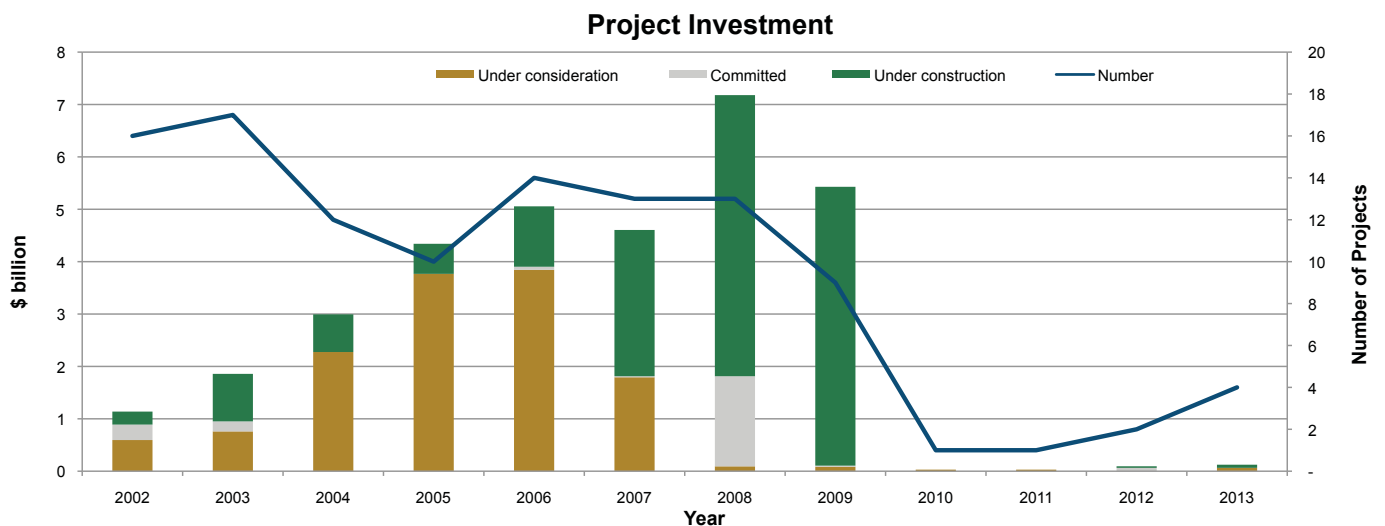
Project investment data is divided across three categories: under consideration, committed and under construction. Under consideration is where the project idea is being scoped for further development. Once the projects are approved they are committed, and under construction once building commences.

Over the decade to 2013, Western Australia's economy was largely fuelled by investment in the mining sector's construction phase. A large proportion of the Peel's project investment value earlier in the decade was a result of the recommissioned Boddington Gold Mine and construction of the Perth-Bunbury Highway. There has been little investment in the last four years however, with the main project being the construction of Byford Grove High School. Additionally, relevant



statutory authorities and shires have granted environmental, development and extractive industry licence approvals for commencement of the \$64 million Keysbrook project, which will mine rich mineral sands.

The Western Australian economy is positioned to embrace a broader investment profile beyond mining for transitional growth into the future.



Source: Deloitte Access Economics Investment Monitor and Department of Regional Development.  
 Note: The graph represents investment value for calendar year.



# Aboriginal Australians

According to the ABS 2011 census, Aboriginal Australians comprised 2,600 residents of the Peel, approximately 2.3 per cent of the total population.

A number of programs are in place to assist the social and economic development of Aboriginal people. A strong collaboration exists between government, industry, community and job providers to develop employment, education and training strategies. The Winjan Strength Through Skills program, was recognised by the 2007 Premier's Awards for its success in building community capacity and celebrating Aboriginal culture. The program provides opportunities to promote Aboriginal tourism in the region through a partnership between

Challenger Institute of Technology and Winjan Aboriginal Corporation.

The Gnaala Karla Booja Enterprise and Economic Development Agreement Steering Committee (GKB EEDA) organised their first employment forum in early 2013. There were 110 participants with 37 employers represented. The next stage of planning for the GKB EEDA steering committee is the Increasing Industry Engagement project.

There are a number of projects being implemented across the region to support strong partnerships between Aboriginal organisations, education and training institutions and industry. These projects are aimed at strengthening economic capacity and various enterprise opportunities for local Aboriginal communities including the redevelopment of the Murray Districts Aboriginal Association Centre in Pinjarra.



# Social and economic infrastructure

The Peel region is well serviced in terms of social and economic infrastructure. The region is integrated into the state's major energy and water supply systems – namely the South West Interconnected System and the Integrated Water Supply System. The Dampier to Bunbury natural gas pipeline traverses the region and provides competitively priced energy to industrial and domestic consumers. The region is developing significant non-climate dependent water sources to support the region's mining, industrial, agricultural and urban development.

The Peel has substantial stocks of housing, serviced residential land and conditionally approved residential land to meet housing demand. The Peel Development Commission is currently working closely with the Department of Planning to identify future precincts for agricultural production and rural industry development.

There is a strong regional road network supported by local roads in urban and rural areas. The public transport system comprises the Mandurah passenger rail service, the Australind passenger rail service on the south west railway line, and the Transperth passenger bus service operating in Mandurah and surrounds to Pinjarra. The freight rail service between Perth and Bunbury passes through the region. Operated by Westnet Rail, the service is crucial to the region's mining sector.

Waterways are an important part of the region's natural resource base. Substantial infrastructure has been developed to support recreational boating and commercial fishing. Likewise, extensive walking and cycle path infrastructure has been developed in the region to maximise the opportunity that the natural environment offers. The region is served by Murray Field Airport, a light aircraft aerodrome on Lakes Road in the Shire of Murray.

The region has three hospitals: Boddington Hospital, the Murray Hospital in Pinjarra and the Peel Health Campus in Mandurah, with the last providing both private and public services.

There are 30 government schools and 10 non-government schools in the Peel Region offering pre-primary, primary and secondary education services. The region is also serviced by the Peel Education Campus, which is a multi-partnered complex comprising Mandurah Senior College (secondary school), Challenger Institute of Technology and Murdoch University's Peel Campus.

Communications infrastructure in the Peel is well established. Parts of the region are already served by the National Broadband Network (NBN), and a data centre is to be established in Pinjarra. Key stakeholders in the region have formed iPeel to help develop the opportunities that will arise from the NBN's ultra-fast broadband.

# Living in the Peel

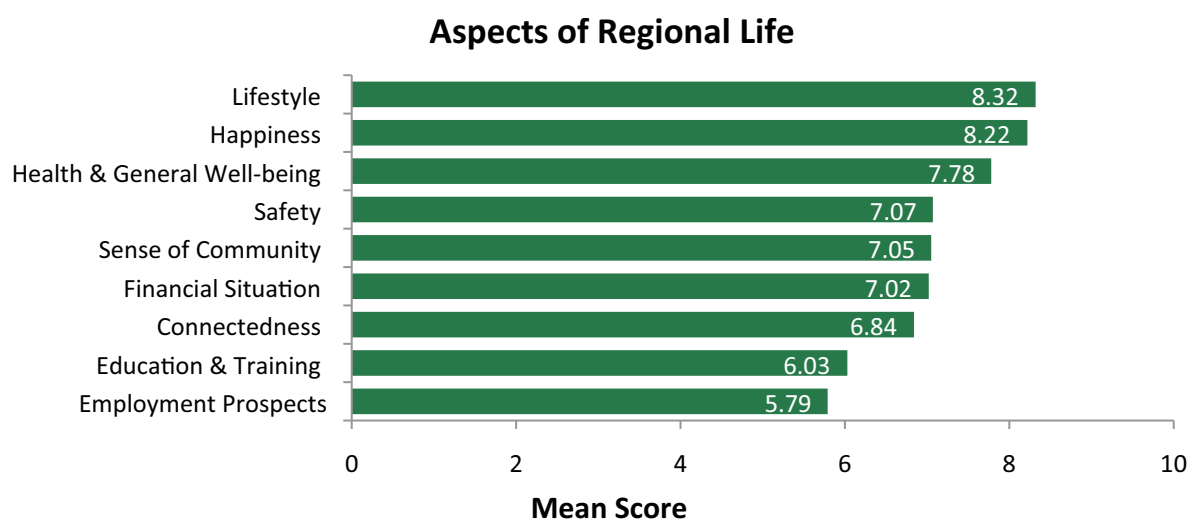
*Living in the Regions 2013* was a large-scale social research project conducted by the Department of Regional Development. The purpose of the survey was to ascertain what attracts people to the regions, understand the barriers of living in the regions, measure the quality of life in regional Western Australia, and most importantly use that information to inform and direct regional development initiatives into the future. The survey received more than 10,000 responses.

Respondents were asked to rate attitudes and participation according to nine categories, with a score of 10 representing the most positive and a score of one the least positive. Results confirmed the regions have a lot to offer local residents. The most positively rated aspects of regional life were safety and lifestyle, general well-being and happiness.

Specifically:

- the Peel was characterised by lifestyle, happiness and general well-being, the cleanliness of its environment, access to quality shopping, retail opportunities and high quality communications and internet access
- residents rated their ability to maintain relationships with family and friends as contributing to the intention to reside in the Peel long-term.

*Living in the Regions 2013* will assist government, the private sector and community partners to direct their efforts and investments on matters relevant to people living in regional Western Australia. A copy of *Living in the Regions 2013 State Report* is available for download at [www.drd.wa.gov.au](http://www.drd.wa.gov.au). In 2014, a *Living in the Regions: Peel Report* detailing all data from the survey will be available.



Source: Department of Regional Development - *Living in the Regions 2013 State Report*.



# Invest in the Peel

The Peel region is on a trajectory for rapid population growth of up to 188,400 by 2031. This growth will require, at a minimum, an additional 23,000 jobs to meet the region's employment self-sufficiency target of 80 per cent.

The Peel has many competitive features that will attract investment, including land availability, proximity to the Perth metropolitan area, proximity and access to domestic and export markets, a strong natural resource base, a skilled workforce and good supporting infrastructure.

Stage 1 of Peel's Regional Investment Blueprint recently undertaken by the Peel Development Commission found that extensive plans and strategies exist to address the short term needs of the region. The report highlighted the need to take a longer term view of the region's future economy however, and the investment priorities required to accommodate significant urban expansion.

Stage 2 of the blueprint will set a vision and aspirational goals for the medium to long term, including a set of growth and foundation strategies to drive economic activity and build regional capacity. Key areas that will be strengthened and promoted through the blueprint include small to medium enterprise growth, resources sector and associated technology services development, the expansion of agricultural production and agribusiness sectors, and the development and promotion of world class education and research capacity across the region.

A number of strategies and projects within the above key areas have already been identified and scoped and others are in the planning stage, including the concept of the development of a regional city to support population growth and to attract industry, enterprise and government investment. It is envisaged that many of these projects will be jointly funded through public and private partnerships and a mix of local, State and Commonwealth government funding arrangements.

## Further information

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

Peel Development Commission: (see back cover)

Tourism Western Australia: [www.tourism.wa.gov.au](http://www.tourism.wa.gov.au)

Department of Agriculture and Food: [www.agric.wa.gov.au](http://www.agric.wa.gov.au)

Department of Fisheries: [www.fisheries.wa.gov.au](http://www.fisheries.wa.gov.au)

Department of State Development: [www.dsd.wa.gov.au](http://www.dsd.wa.gov.au)

Department of Mines and Petroleum: [www.dmp.wa.gov.au](http://www.dmp.wa.gov.au)





# Contact us

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Facsimile: (08) 6552 1850  
Email: [info@drd.wa.gov.au](mailto:info@drd.wa.gov.au)  
Web: [www.drd.wa.gov.au](http://www.drd.wa.gov.au)

*All photos are courtesy of the Peel Development Commission.*

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